

Standard Operating Procedure (SOP)

Signing Off Timesheets in Allocate Optima – Ward Users

System: BankStaff

Audience: Ward & Service Users

Purpose: To provide a clear, step- by- step guide for signing off timesheets using the BankStaff system.

1 Access the System

1. Log in to **BankStaff** using your NHS credentials.
2. From the home screen, select **Timesheets**, then one of the following options:
 - **Search Timesheets** - search both finalised and un-finalised timesheets/shifts
 - **Outstanding Timesheets** - search for un-finalised timesheets
 - **Submitted Timesheets** - search for timesheets submitted to payroll (these timesheets cannot be edited or amended)

Bank Staff Home / Timesheets Screen

The screenshot displays the 'Search Timesheets' interface in the BankStaff system. At the top, there is a navigation bar with 'Allocate BankStaff' on the left and a 'Quick Search' field on the right. Below this, there are tabs for 'Requests' and 'Timesheets', with 'Timesheets' being the active tab. Under the 'Timesheets' tab, there are three sub-tabs: 'Search Timesheets', 'Outstanding Timesheets', and 'Submitted Timesheets'. The 'Search Timesheets' sub-tab is selected. The main area contains a filter panel with the following options: Unit Status (Active), Unit (dropdown), Booking Status (All), Date Type (Shift Date), Period (Prev Week), Fulfillment Type (Bank & Agency), Staff Group (dropdown), Registration Category (All), Grade Type Category (dropdown), Grade Type (dropdown), and Grade (dropdown). Worker Status is set to Active and Person is a dropdown. There are 'Clear' and 'Search' buttons at the bottom right of the filter panel. Below the filter panel is a table header with columns: Request Id, Staff, Agency, Year, Date, Unit, Grade, From, To, Break, Start, End, Actual Break, Hours, Timesheet Reason, Finalised Date, Submitted Date, and Shift.

2 Check All Timesheets

The **Search Timesheets** page allows you to view all timesheets

Can filter by:

- Unit/Ward (will only show units/wards allocate under your user access account)
- Date Type/Period
- Person

To check all timesheets for a **ward/unit** for a certain date or set of dates – select the relevant **ward/unit** and date range from **'Date Type'** and **'Period'** and **'Search'**

Any timesheets for this ward/unit will appear below – if no results are returned this means there are no timesheets for this ward/unit for the selected period.

To check all timesheets for a **person/individual** for a certain date or set of dates – Leave **'Unit'** blank or select relevant unit/ward if required, select the relevant date range from **'Date Type'** and **'Period'** and **'Search'** and enter staff members name under **'Person'**

All timesheets for this staff member will now appear below:

Request id	Staff	Agency	Year	Date	Unit	Grade	From	To	Break	Start	End	Actual Break	Hours	Timesheet Reason	Finalised Date	Submitted Date	Skill
1125794221	Wallace Kelly	3023	09-Dec-2025		GRI - Acute Assessment Unit	Band 5 RN	19:45	08:00	60	19:45	08:00	60	11:15		09-Feb-2026		
1125787197	Wallace Kelly	3023	19-Dec-2025		GGC CS (RH - K North (GT2 AC 41)	Band 5 RN	07:00	19:30	60								
1125794538	Wallace Kelly	3026	03-Jan-2026		GRI - Acute Assessment Unit	Band 5 RN	07:45	20:00	60	07:45	20:00	60	11:15		15-Jan-2026		

3 Check Outstanding Timesheets

The **Outstanding Timesheets** page allows you to view unsigned/un-finalised shifts/timesheets

Can filter by:

- Unit/Ward (will only show units/wards allocate under your user access account)
- Date Type/Period

- Person

To check all unsigned timesheets for a **ward/unit** for a certain date or set of dates – select the relevant **ward/unit** and date range from **'Date Type'** and **'Period'** and **'Search'**

Any unsigned timesheets for this ward/unit will appear below – if no results are returned this means all timesheets have been finalised/signed off for this ward/unit for the selected period.

To check all timesheets for a **person/individual** for a certain date or set of dates – Leave **'Unit'** blank or select relevant unit/ward if required, select the relevant date range from **'Date Type'** and **'Period'** and **'Search'** and enter staff members name under **'Person'**

Any unsigned timesheets for this staff member will now appear below

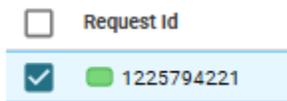
Request Id	Staff	Agency	Year	Date	Unit	Grade	From	To	Break	Start	End	Actual Break	Hours	Timesheet Reason	Finalised Date	Submitted Date	Skill
112577494	Wallace Kelly		2025	09-Dec-2025	GRI - Acute Assessment Unit	Band 5 RN	19.45	08.00	60								
112578197	Wallace Kelly		2025	19-Dec-2025	GDC CS IRM - K NORTH (G72 AC 41)	Band 5 RN	07.00	19.30	60								

- Any unsigned timesheets will appear with a green box beside the shift reference number
 112577494
- Any finalised timesheets will show with an orange padlock beside the shift reference number
 1225794538
- Any shift that has been signed off any submitted to payroll will show with large orange padlock and a blue circle/dot

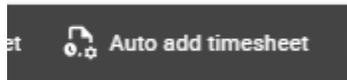
4 Finalise/Sign-Off Outstanding Timesheets

In the '**Outstanding Timesheet's**' page – (following relevant steps above to filter by ward/unit or staff member) – locate any shifts required to be signed off.

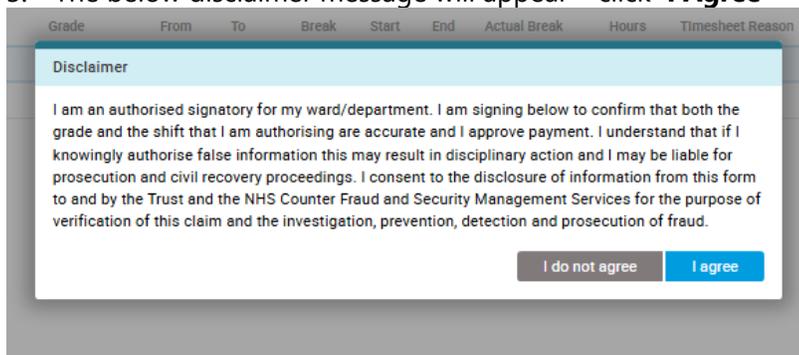
1. **Tick** the checkbox beside the request ID number



2. Select '**Auto Add Timesheet**' from the banner at the bottom of the page (only use this option where no changes need to be made to shift times/breaks etc



3. The below disclaimer message will appear – click '**I Agree**'



4. To sign off shifts with amended start/end/break time - Select '**Add Timesheet**' from the banner at the bottom of the page



5. Fill out the relevant dates for the timesheet – **Start/End and Break Time**, tick the **'Finalise Timesheet'** box and **Save Changes**

Enter Timesheets for selected Requests

Booked Hours

Start	19:45
End	08:00
Break	60

Actual Hours

Actual Start *	19:45
Actual End *	08:00
Actual Break (In mins.) *	60

Finalise Timesheet?

Cancel Save Changes

6. The below disclaimer message will appear – click **'I Agree'**

Grade From To Break Start End Actual Break Hours Timesheet Reason

Disclaimer

I am an authorised signatory for my ward/department. I am signing below to confirm that both the grade and the shift that I am authorising are accurate and I approve payment. I understand that if I knowingly authorise false information this may result in disciplinary action and I may be liable for prosecution and civil recovery proceedings. I consent to the disclosure of information from this form to and by the Trust and the NHS Counter Fraud and Security Management Services for the purpose of verification of this claim and the investigation, prevention, detection and prosecution of fraud.

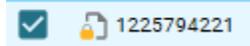
I do not agree I agree

7. The shift has now been signed off for payment and will no longer show under the **'Outstanding Timesheet'** page
-

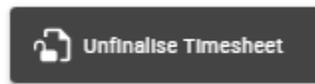
5 Amend or unfinalise a finalised timesheet

From **Search Timesheets** page (following relevant steps above to filter by ward/unit or staff member) – locate the timesheet that is required to be amended

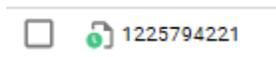
1. **Tick** the checkbox beside the request ID number



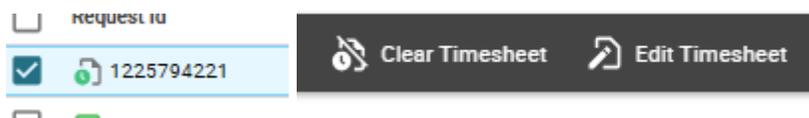
2. Select **'Unfinalise Timesheet'** from the banner at the bottom of the page



3. This will remove the submitted timesheet from the shift and the request will change to the below green clock symbol



4. **Tick** the checkbox and select **'Clear Timesheet'** or **'Edit Timesheet'** from banner at bottom



- **'Clear Timesheet'** – will remove the timesheet from the shift and the shift will need to be finalised/signed off again
- **'Edit Timesheet'** – will allow you to amend the timesheet that has already been submitted – eg to amend the start/end/break times

6 View/Check shifts submitted to payroll

In the **'Submitted Timesheets'** page – (following relevant steps above to filter by ward/unit or staff member) – locate any shifts that have been signed off and submitted to payroll

This will return results of any timesheets that have been submitted to payroll for the selected ward/unit or individual – these timesheets cannot be changed or amended as already submitted to payroll for payment.

Requests		Timesheets															
Submitted Timesheets		Submitted Timesheets															
Unit Status	Active	Worker Status	Active														
Unit	GRI - Ward 11	Person															
Period	Date Range																
From	27-Oct-2025																
To	13-Mar-2026																
114 Records																	
Clear																	
Request id	Staff	Agency	Year	Date	Unit	Grade	From	To	Break	Start	End	Actual Break	Hours	Timesheet Reason	Finalised Date	Submitted Date	Skill
<input type="checkbox"/>	1023706176	Akinwunmi Mufilat	2023	27-Oct-2025	GRI - Ward 11	BAND 2 HCSW	19:15	07:00	60	19:15	07:00	60	10:45		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/>	1023706180	Kelly Hejley	2025	27-Oct-2025	GRI - Ward 11	BAND 2 HCSW	19:15	02:00	20	19:15	02:00	20	06:25		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/>	1023705933	Chibazonza Angela	2025	28-Oct-2025	GRI - Ward 11	BAND 5 RMN	19:15	07:30	60	19:15	07:30	60	11:15		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/>	1023705938	Muthiga karen	2025	28-Oct-2025	GRI - Ward 11	BAND 5 RMN	19:15	07:30	60	19:15	07:30	60	11:15		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/>	1023706173	Devine Samantha	2025	28-Oct-2025	GRI - Ward 11	BAND 2 HCSW	19:15	07:00	60	19:15	07:00	60	10:45		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/>	1023706191	Strand Aimee	2025	28-Oct-2025	GRI - Ward 11	BAND 2 HCSW	19:15	02:00	20	19:15	02:00	20	06:25		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/>	1023706469	Idowu Mogisole	2025	28-Oct-2025	GRI - Ward 11	BAND 5 RN	19:15	07:30	60	19:15	07:30	60	11:15		31-Oct-2025	31-Oct-2025	