

Standard Operating Procedure (SOP)

Adding a New Bank Request – Ward Users

System: BankStaff

Audience: Ward & Service Users

Purpose: To provide a clear, step- by- step guide for creating a new bank request using the BankStaff system.

1 Access the System

1. Log in to **BankStaff** using your NHS credentials.
2. From the home screen, select **Requests**, then **Add Request**.

Bank Staff Home / Requests Screen

The screenshot displays the 'Bank Staff Home / Requests Screen'. At the top, there are tabs for 'Requests' and 'Timesheets'. Below these are sub-tabs for 'Requests Status' and 'Filled Requests'. The main content area is titled 'Requests Status' and features a filter panel with the following fields:

Unit Status	Active	Fulfillment Type	Bank & Agency	Allowed for Agency	-
Unit	-	Staff Group	-	Worker Type	Please select
Booking Status	Unfilled	Registration Category	All	Worker Status	Active
Date Type	Shift Date	Grade Type Category	-	Person	
Period	Next 7 Days	Grade Type	-		
Recently Added	<input type="checkbox"/> Newly Added (within past 48 Hours)	Grade	-		

At the top right of the filter panel, there is an '+ Add Request' button, '0 Records', and icons for PDF, X, and a menu. At the bottom right, there are 'Clear', 'Extract', and search buttons.

2 Create a New Request

The **Add Request** screen is divided into five sections to guide you through the process:

- **Where** – Select the ward/unit
- **When** – Choose date, shift type, and time
- **Booking Details** – Choose request reason
- **What** – Define the role and grade required
- **Who** – Optional direct booking of a named staff member

Complete each section to ensure the request is accurate

New Request Screen

Allocate BankStaff

Quick Search

Requests Timesheets

Requests Status Filled Requests

Add Request

Where

Unit * QEUH - ARU Pod 1

Unit Description QEUH - ARU Pod 1

When

Date * dd-mmm-yyyy

Shift Group * -

Shift * -

Duration * -

Block?

What

Grade Type * -

Grade * -

Secondary Grade & Type -

Secondary Grade -

Request Skills Please select

Unit Skills -

Who

Allow Agency Staff

3 Where - Select the Unit

1. Use the **Unit** drop-down menu to select the appropriate ward or unit.
2. The **Unit Description** will auto-populate once selected.

Where

Unit * QEUH - ARU Pod 1

Unit Description QEUH - ARU Pod 1

4 When - Date and Shift Details

Date & Time Fields

1. Enter the **Date** of the shift.
2. Confirm **Shift Group** (This will auto-populate)
3. Select the **Shift Type** (e.g. Day, Night, Twilight).
4. Adjust **start and end times** if they differ from the default shift type.

When

Date * 02-Feb-2026

Shift Group * QEUH - ARU Pod 1

Shift * Long Day (07:30 - 18:30)

Duration * 07:30 - 1930

Block?

Block Booking (Optional)

- Tick **Block?** to create multiple shifts with the same details.
- Enter the **final date** for the block booking.

Shift Group *	QEUH - ARU Pod 1	▼
Shift *	Long Day (07:30 - 18:30)	▼
Duration *	07:30 - 1930	🕒
Block?	<input checked="" type="checkbox"/>	
Until	28-Feb-2026	📅 Remove Days

Removing Undesired Days

If you do not want certain days included (e.g. weekends):

1. Select **Remove Days**.
2. Choose **Daily** or **Weekly pattern**.
3. Tick the days you want to exclude (e.g. Saturday and Sunday).
4. Click **OK** to confirm.

Remove Undesirable Days

Daily Pattern
 Weekly Pattern

Cancel Continue

Remove Days

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Cancel OK

5 Booking Details

1. Select the **Request Reason** (e.g. Vacancy).
2. The following fields are optional and can be left blank unless required:
 - Request Method
 - Bank Notes
 - Duty Notes
 - High Priority

3. **Gender** may be selected if a specific requirement applies.

Booking Details	
Request Reason *	Vacancy
Request Method *	Web
Bank Notes	<input type="text"/>
Duty Notes	<input type="text"/>
High Priority	<input type="checkbox"/>
Gender	Female

6. What – Role and Grade Details

1. Select the **Grade Type**.
2. Select the **Grade**.
3. Choose a **Secondary Grade & Type**, if applicable.
4. Select the required **Request Skill**.

Example: A request for a **Registered Band 5 Nurse** will show “Bank Nursing Services – Band 5 RN”.

What	
Grade Type *	BANK Nursing Services
Grade *	BANK Nursing Serv.B5
Secondary Grade & Type	RN
Secondary Grade	Band 5 RN
Request Skills	RN
Unit Skills	

7. Who – Direct Booking (Optional)

This section is **only required if you are directly-booking a named member of staff**.

1. Enter the staff member’s name and select them from the list.
2. Tick **Confirmed**.
3. Enter your name in **Confirmed By**.

If you are **not** direct booking, skip this section.

Who	
Allow Agency Staff	<input checked="" type="checkbox"/>
Preferred Staff	<input type="checkbox"/>
Person	Wallace Kelly (10443036) ×
Confirmed	<input checked="" type="checkbox"/>
Confirmed By	David Dougan

8. Saving the Request

1. Select **Save** to submit the request.
2. A confirmation message will appear once the request has been successfully added to the system.

Add Request

Request 0226794931 has been successfully added for QEUH - ARU Pod 1