

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

Allocate BankStaff

Quick Search

Requests Timesheets

Search Timesheets Outstanding Timesheets Submitted Timesheets

☆ Search Timesheets 0 Records

Unit Status: Active, Unit: , Booking Status: All, Date Type: Shift Date, Period: Prev Week, Fulfillment Type: Bank & Agency, Staff Group: , Registration Category: All, Grade Type Category: , Grade Type: , Grade: , Worker Status: Active, Person:

Request ID Staff Agency Year Date Unit Grade From To Break Start End Actual Break Hours Timesheet Reason Finalised Date Submitted Date 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

Requests

Timesheets

Search Timesheets

Outstanding Timesheets

Submitted Timesheets

☆ Search Timesheets

3 Records

Unit Status

Active

Fulfillment Type

Bank & Agency

Worker Status

Active

Unit

-

Staff Group

-

Person

-

Booking Status

All

Registration Category

All

Date Type

Shift Date

Grade Type Category

-

Period

Date

Grade Type

-

Date

09-Feb-2026

Grade

-

Clear

Search

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.

☆ Outstanding Timesheets

0 Records

Unit Status

Active

Worker Status

Active

Unit

GRI - Ward 11

Person

-

Date Type

Shift Date

Period

Date Range

From

30-Jan-2026

To

09-Feb-2026

Clear

Search

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:

Requests

Timesheets

Search Timesheets

Outstanding Timesheets

Submitted Timesheets

☆ Search Timesheets

3 Records

Unit Status

Active

Fulfillment Type

Bank & Agency

Worker Status

Active

Unit

-

Staff Group

-

Person

Wallace Kelly (x3412656)

Booking Status

All

Registration Category

All

Date Type

Shift Date

Grade Type Category

-

Period

Date Range

Grade Type

-

From

17-Nov-2025

Grade

-

To

09-Feb-2026

Clear

Search

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"/> 1225794221	Wallace Kelly		2025	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		
<input type="checkbox"/> 1125787197	Wallace Kelly		2025	19-Dec-2025	GGC CS (RH - K North (G72 AC 41))	Band 5 RN	07:00	19:30	60								
<input type="checkbox"/> 1225794598	Wallace Kelly		2026	09-Jan-2026	GRI - Acute Assessment Unit	Band 5 RN	07:45	20:00	60	07:45	20:00	60	11:15		19-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

☆ Outstanding Timesheets

Unit Status: Active Worker Status: Active

Unit: - Person: -

Date Type: Shift Date

Period: Prev Week

Request id Staff Agency Year Date Unit Grade From To Break Start End Actual Break Hours Timesheet R

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.

☆ Outstanding Timesheets

Unit Status: Active Worker Status: Active

Unit: GRI - Ward 11 Person: -

Date Type: Shift Date

Period: Date Range

From: 24-Nov-2025 To: 09-Feb-2026

Clear

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

☆ Outstanding Timesheets

Unit Status: Active Worker Status: Active

Unit: - Person: Wallace Kelly (jc341265b)

Date Type: Shift Date

Period: Date Range

From: 24-Nov-2025 To: 09-Feb-2026

Clear

Request id	Staff	Agency	Year	Date	Unit	Grade	From	To	Break	Start	End	Actual break	Hours	Timesheet Reason	Finalised date	Submitted date	Skill
1125774221	Wallace Kelly	2025	09-Dec-2025	GRI - Acute Assessment Unit	Band 5 RN	19:45	08:00	60									
1125787197	Wallace Kelly	2025	19-Dec-2025	GDC CS (RN - K North (072 AC 41)	Band 5 RN	07:00	19:30	60									

- Any unsigned timesheets will appear with a green box beside the shift reference number

1125777494

- Any finalised timesheets will show with an orange padlock beside the shift reference number

1225794538

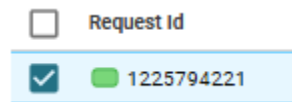
- Any shift that has been signed off any submitted to payroll will show with large orange padlock and a blue circle/dot

1025686923

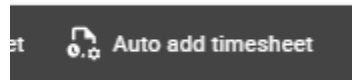
4 Finalise/Sign-Off Outstanding Timesheets

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.

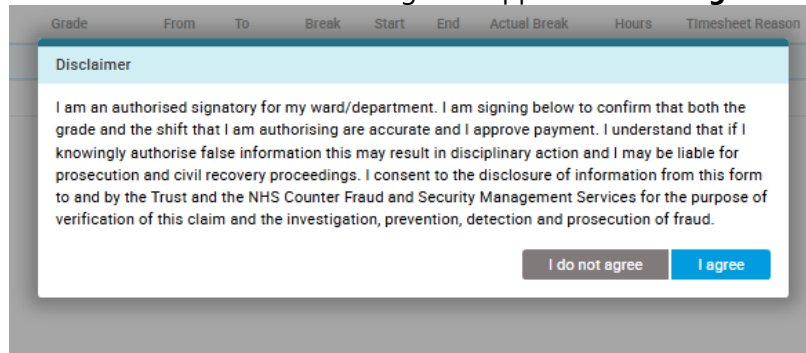
1. **Tick** the checkbox beside the request ID number



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?	<input checked="" type="checkbox"/>

Cancel
Save Changes

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

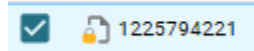
Grade	From	To	Break	Start	End	Actual Break	Hours	Timesheet Reason
<div> Disclaimer </div> <p> I am an authorised signatory for my ward/department. I am signing below to confirm that both the grade and the shift that I am authorising are accurate and I approve payment. I understand that if I knowingly 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. </p> <div> I do not agree I agree </div>								

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

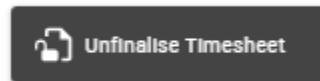
5 Amend or unfinalise a finalised timesheet

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



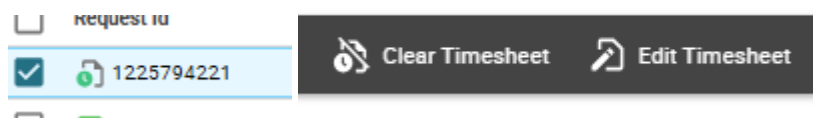
2. Select '**Unfinalise Timesheet**' from the banner at the bottom of the page



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

Search Timesheets

Outstanding Timesheets

Submitted Timesheets

Submitted Timesheets

114 Records

Unit Status

Active

Worker Status

Active

Unit

GBI - Ward 11

Person

Period

Date Range

From

27-Oct-2025

To

13-Mar-2026

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	Akinnuwumi Mufiat		2025	27-Oct-2025	GR - Ward 11	Band 2 HCSW	18:15	07:00	60	18:15	07:00	60	10:45		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/> 1023706180	Kelly Mayley		2025	27-Oct-2025	GR - Ward 11	Band 2 HCSW	18:15	02:00	20	18:15	02:00	20	06:25		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/> 10237059393	Chibazonza Angela		2025	28-Oct-2025	GR - Ward 11	Band 5 RMN	18:15	07:30	60	18:15	07:30	60	11:15		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/> 10237059358	Muthiga Karen		2025	28-Oct-2025	GR - Ward 11	Band 5 RMN	18:15	07:30	60	18:15	07:30	60	11:15		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/> 10237061773	Devine Samantha		2025	28-Oct-2025	GR - Ward 11	Band 2 HCSW	18:15	07:00	60	18:15	07:00	60	10:45		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/> 1023706191	Shand Aimee		2025	28-Oct-2025	GR - Ward 11	Band 2 HCSW	18:15	02:00	20	18:15	02:00	20	06:25		31-Oct-2025	31-Oct-2025	
<input type="checkbox"/> 1023706469	Idowu Magisole		2025	28-Oct-2025	GR - Ward 11	Band 5 RN	18:15	07:30	60	18:15	07:30	60	11:15		31-Oct-2025	31-Oct-2025	