

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 shows the 'Bank Staff Home / Timesheets Screen'. At the top, there's a navigation bar with 'Allocate BankStaff' and a 'Quick Search' bar. Below this, there are tabs for 'Requests' and 'Timesheets'. Under the 'Timesheets' tab, there are three sub-tabs: 'Search Timesheets', 'Outstanding Timesheets', and 'Submitted Timesheets'. The 'Search Timesheets' tab is selected. It features a search form with various filters: Unit Status (Active), Unit (dropdown), Booking Status (All), Date Type (Shift Date), Period (Prev Week), Fulfillment Type (dropdown), Bank & Agency (dropdown), Staff Group (dropdown), Registration Category (All), Grade Type Category (dropdown), Grade Type (dropdown), Grade (dropdown), Worker Status (Active), and Person (dropdown). Below the search form, there's a table 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. The table is currently empty.

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

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

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 (10443036)
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

Request id	Staff	Agency	Year	Date	Unit	Grade	From	To	Break	Start	End	Actual Break	Hours	Timesheet Reason	Finalised Date	Submitted Date	Skill
1225794221	Wallace Kelly	3025	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	3025	19-Dec-2025	GGC CS (RN - K North (GT2 AC 41)	Band 5 RN	07:00	19:30	60									
1225794598	Wallace Kelly	3026	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
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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		

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 (10443036)
Date Type	Shift Date		
Period	Date Range		
From	24-Nov-2025		
To	09-Feb-2026		

Request Id	Staff	Agency	Year	Date	Unit	Grade	From	To	Break	Start	End	Actual Break	Hours	Timesheet Reason	Finalised Date	Submitted Date	Skill
1225794221	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	GGC CS RMH - K North (G72 AC 41)	Band 5 RN	07:00	19:30	60								

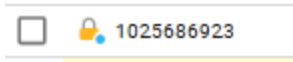
- Any unsigned timesheets will appear with a green box beside the shift reference number

 1125777494

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

 1225794538

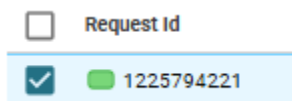
- Any shift that has been signed off any submitted to payroll will show with large orange padlock and a blue circle/dot



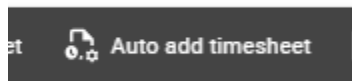
4 Finalise/Sign-Off Outstanding Timesheets

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.

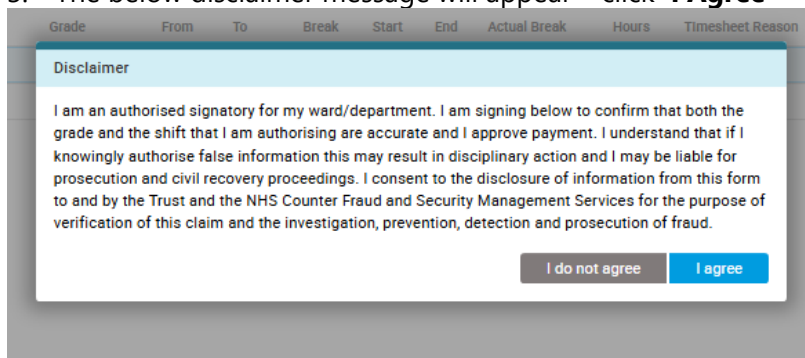
1. **Tick** the checkbox beside the request ID number



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.

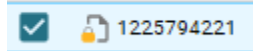
I do not agree I agree

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

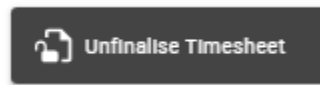
5 Amend or unfinalise a finalised timesheet

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



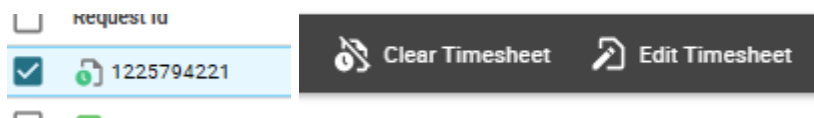
2. Select '**Unfinalise Timesheet**' from the banner at the bottom of the page



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

114 Records

Unit Status

Active

Worker Status

Active

Unit

GBI - Ward 11

Person

Period

Date Range

From

27-Oct-2025

To

13-Mar-2026

Request Id

Staff

Agency

Year

Date

Unit

Grade

From

To

Break

Start

End

Actual Break

Hours

Timesheet Reason

Finalised Date

Submitted Date

Skill

1023706176

Akinnuwumi Mufiat

2025

27-Oct-2025

GBI - Ward 11

Band 2 HCDW

19:15

07:00

60

19:15

07:00

60

10:45

31-Oct-2025

31-Oct-2025

1023706180

Kelly Mayley

2025

27-Oct-2025

GBI - Ward 11

Band 2 HCDW

19:15

02:00

20

19:15

02:00

20

06:25

31-Oct-2025

31-Oct-2025

1023705933

Chibalonza Angela

2025

28-Oct-2025

GBI - Ward 11

Band 5 RMN

19:15

07:30

60

19:15

07:30

60

11:15

31-Oct-2025

31-Oct-2025

1023705938

Muthiga Karen

2025

28-Oct-2025

GBI - Ward 11

Band 5 RMN

19:15

07:30

60

19:15

07:30

60

11:15

31-Oct-2025

31-Oct-2025

1023706173

Devine Samantha

2025

28-Oct-2025

GBI - Ward 11

Band 2 HCDW

19:15

07:00

60

19:15

07:00

60

10:45

31-Oct-2025

31-Oct-2025

1023706191

Shand Aimee

2025

28-Oct-2025

GBI - Ward 11

Band 2 HCDW

19:15

02:00

20

19:15

02:00

20

06:25

31-Oct-2025

31-Oct-2025

1023706469

Idowu Magisole

2025

28-Oct-2025

GBI - Ward 11

Band 5 RN

19:15

07:30

60

19:15

07:30

60

11:15

31-Oct-2025

31-Oct-2025