

SOP for Requesting a Bank Shift on Optima, SafeCare and BankStaff

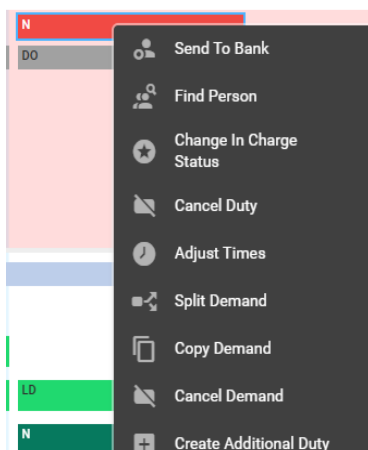
System: Optima, SafeCare and BankStaff

Audience: Optima and StaffBank Users

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

Optima

On your roster, **Right Click** on the shift within the demand which you require to send to Bank and select **Send to Bank**:



This will bring up the **Send to Bank** panel, as shown below:

Send To Bank

Selected Unit Fulfillment Duties (Sending 1/1 duties to Bank)						Additional Request Information (Applies to 1 highlighted duty)	
☒	Requires	Location	Shift	Date	Required G/GT/GTC	Bank Unit *	
☒	RN	-	Night	05/02/2026	RN	Training Bank	
						Request Reason *	
						Gender	
						Required Grade *	
						Fallback Grade	
						Cost Centre	
						Required Specialty	
						Fallback Specialty	
						Preferred Person	
						Nominate Preferred Person	***
						Bank Notes	
						Type a Note	

Cancel OK

Within this screen, the **Bank Unit** will be prepopulated as above, depending on the relevant Bank.

To ensure that all required staff will have visibility of this duty on Loop, the following columns require to be populated:

Bank Unit

Request Reason

Required Grade

Fallback Grade

Required Grade should always be input as: **Bank Nursing Serv. B5-9**

Fallback (Secondary) Grade should always be input as: **Band 5-9 RN, RM, RMN, RNLD**

Requester	Location	Shift	Date	Required S/GT/GTC
RN	-	Night	05/02/2026	RN
RN	-	Night	05/02/2026	RN

Additional Request Information (Applies to 1 highlighted duty)

Bank Unit *
Training Bank

Request Reason *

Additional Sessions

Gender

Required Grade *

BANK Nursing Serv.B5

Fallback Grade

Band 5 RN

Cost Centre

Required Specialty

Fallback Specialty

Preferred Person

Nominate Preferred Person

Bank Notes

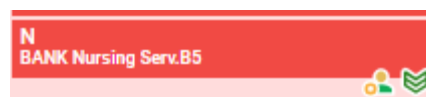
Type a Note

Cancel OK

If any additional requirements for the duty are needed, they can also be added in the above menu.

Once this has been populated, select **OK** at the bottom right-hand side of the page and this will submit the Bank shift.

This will place a Bank Fulfilment Duty in the demand, as below:



If you click on the duty and open the Temp Staff Requirement Details menu, details of the duty will be shown, as below:

Duty

Night (N)
Training Ward

RN

19:00 - 07:30 11hrs 30mins Rest Start (Duration) 00:00 (1hr)

Find Person
Reset To Unit Fulfilment
More

Summary **Audit Trail** **Temp Staff Requirement Details**

Booking Details

Request Reason Additional Sessions

Booking Reference 0126949977

Block ID Number

Candidate Confirmation Status Worker Unallocated

Approval Status Approved

Transmission Status Not Sent

Position Management Code

Specific Temp Staff Requirement

Required Gender

Required Specialty

Fallback Specialty

Required Grade BANK Nursing Serv.B5

Fallback Grade Band 5 RN

Payment Overrides

Pay Grade

Cost Centre

To send a shift to the bank via SafeCare scroll down to the unfilled duties at the bottom of the tab and select the shift.

UNFILLED DUTIES				
Requirement name	Adjusted time	Grade	Fulfillment type	Temp approved
HCSW		HCSW		>
HCSW		HCSW		>
RN		RN		>

Once this has opened use the send to bank option.

ACTIONS	
Find Person	>
Send to Bank	>

Following the same process as Optima select the required grade and fallback (secondary) grade as detailed below.

[< Back](#)
RN – Send To Bank

BANK INFORMATION

Resourcing unit	Training Bank ✓
Reason	Additional Sessions ✓
Request Reason Override	Select
Gender	Select
Required Grade	BANK Nursing Serv.B6 ✓
Fallback Grade	Band 6 RN ✓
Cost Centre	Select
Required Speciality	Select
Fallback Speciality	Select

Send

Users will then be able to see that this shift has been marked for bank.

Unfilled Duty: RN	
Requirement name	RN
Adjusted time	
Grade	RN
Fulfillment type	Bank
Activity	-
Location	-

BankStaff

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

Bank Staff Home / Requests Screen

Requests Status

Unit Status: Active

Unit: -

Booking Status: Unfilled

Date Type: Shift Date

Period: Next 7 Days

Recently Added: ☐ Newly Added (within past 48 Hours)

Fulfillment Type: Bank & Agency

Staff Group: -

Registration Category: All

Grade Type Category: -

Grade Type: -

Grade: -

Allowed for Agency: -

Worker Type: Please select

Worker Status: Active

Person: -

Buttons: Add Request, 0 Records, PDF, X, III, Clear, Extract, Search

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 Status

Filled Requests

Add Request

Where

Unit: QEUH - ARU Pod 1

Unit Description: QEUH - ARU Pod 1

When

Date: dd-mm-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?	☒
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

CancelContinue

Remove Days

☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☒ Saturday
☒ Sunday

CancelOK

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	
Duty Notes	
High Priority	☐
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. Choose a **Secondary Grade** (Fallback), if applicable
5. 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**.-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	☒	
Preferred Staff	☐	
Person	Wallace Kelly (je341265b)	✕
Confirmed	☒	
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