NHSP: *Online*
Uploading Agency Rates
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1.0 Getting Started

The following guide has been created for you to be able to use NHSP: Online to upload your Agency’s charge rates and to be able to setup a ‘self billing’ contract with the trusts that you provide staff to via NHS Professionals.

To gain access to NHSP: Online you must access the NHS Professionals web site. You can access NHSP: Online from Internet Explorer (NHS Professionals does not support other browser types) and typing in the following address:

http://www.nhsprofessionals.nhs.uk

On this page click the ‘Login’ button
The NHSP:Online login page will appear

If you do not have a login to NHSP:Online that enables you to enter your agency rates you will need to request one from NHS Professionals. Email web.support@nhsprofessionals.nhs.uk and request an ‘Agency Rates Admin’ login stating your name, email address and full agency name.

Please note that if you have a login that enables you to add your staff and book requests you will need a separate login to add your agency rates.

Once you are logged in to NHSP:Online you will see the following:
NHSP: Online is split into three sections:

Section 1 is the menu.

The menu has all the options available for your login and will always remain on the left hand side of your browser. Each of these options will be covered within this user guide.

Section 2 is the area that you will focus on the most during your time in NHSP: Online. When you log in you will automatically be directed to a notifications page:
Section 2 will change whenever you are clicking on links from the menu or from any of the pages you see in section 2.

Section 3 is a static information bar. This will inform you who is logged in and your password expiry date. You can change your password at ANY time using the ‘Change Password’ option from the menu.

2.0 Notifications
When you log in to NHSP:Online you will be shown a list of notifications.

These will include options where a Rate has been queried or declined and you should click on the link provided to action these.
3.0 Downloading a Blank Template

One of the first things you will need to do is to download a blank agency rates template. This will allow you to enter your rates into NHSP:Online for each Trust you provide staff to through NHS Professionals.

There are different types of templates that you can download, each staff group will determine which template will be downloaded.

Click on the ‘Download a Template’ menu option.

Select a Staff Group:

Download  Cancel

Select a Staff Group: Admin & Clerical
Allied Health Prof
Doctors
Doctors SPCT
Executive
Health Care Scientists
Health Protection Scheme
Interim Nursing
Nursing & Midwifery
FSS
Support

Download  Cancel

Select the Staff Group you want to download a template for and click Download.
Once you have downloaded and opened the template your spreadsheet software will open and you will see the template ready to be filled out.

4.0 Filling out your rates template.

The template allows you to fill out all of the hourly rates, fees and total charges for any band that you will be providing via NHS Professionals.

To fill out this template you will need to first enter the contract information:

**Contract Name:** Generic Agency Trust Contract

**Region:** London

**VBL:** 0

**Contract Name:** is the description of the contract that you have with the Trust

**Region:** This is free text and can describe the area in which the rates apply

**VBL:** ‘Volume of Business Level’. Select one of the numbers from the drop down
Once you have entered this information you will need to enter the rates for each band in each sector. An example of how this may look is:

<table>
<thead>
<tr>
<th>Price Zone</th>
<th>Sector</th>
<th>Band</th>
<th>Shift</th>
<th>Hourly Rate</th>
<th>Agency Fee</th>
<th>Total Charge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic</td>
<td>Critical</td>
<td>5</td>
<td>Bank Holiday</td>
<td>£15.00</td>
<td>£3.00</td>
<td>£18.00</td>
</tr>
<tr>
<td>Basic</td>
<td>Critical</td>
<td>5</td>
<td>Days</td>
<td>£10.00</td>
<td>£3.00</td>
<td>£13.00</td>
</tr>
<tr>
<td>Basic</td>
<td>Critical</td>
<td>5</td>
<td>Nights</td>
<td>£12.00</td>
<td>£3.00</td>
<td>£15.00</td>
</tr>
<tr>
<td>Basic</td>
<td>Critical</td>
<td>5</td>
<td>Sunday</td>
<td>£15.00</td>
<td>£3.00</td>
<td>£18.00</td>
</tr>
</tbody>
</table>

**Heading**

- **Price Zone**: You can choose ‘Basic’, ‘Inner’, ‘Outer’ or ‘Fringe’. This is solely reserved for trusts in the London area. If the trust you are entering charge rates does not require this you should select ‘Basic’. Price Zone will automatically be applied when you flexible worker is booked into a location.

- **Sector**: You can choose ‘Mental Health,’ ‘Critical’, ‘General’, or ‘Midwifery’. Charge rates for the same band may vary between these sectors and you will need to enter the bands for all the sectors you provide.

- **Band**: This is Agenda for Change (AfC) band for a particular assignment.

- **Shift**: This defines the charge rates for particular types of day/shift that a flexible worker may be working. I.e. ‘Bank Holiday’, ‘Saturday’, ‘Sunday’, ‘Days’ or ‘Nights’. You will need to enter a charge rate for each of these types of shifts for each band.

- **Hourly Rate**: The hourly rate the flexible worker is paid before deductions.

- **Agency Fee**: The fee that your agency charge on top of the hourly rate.

- **Total Charge**: The total charge your agency charges. This may be more than the Hourly Rate + Agency Fee for any on costs that need to be included.

- **Rate**: You may also see an additional column entitled ‘Rate’. This column specifically relates to the Agency Worker Regulations that came into force in 2011. You can enter rates for both flexible workers that AWR regulations apply to. You will need to enter rates for both the ‘Basic’ and ‘AWR Enhancement’ for each assignment if you see this column

You will need to enter at least five rows for each band. For each five row cluster the ‘Pay Zone’, ‘Sector’ and band must be the same. If you have a band which is used across more than one sector or pay zones YOU MUST enter these as a separate five row cluster.

A correctly filled out template could look like this:
Once you have completed the template you will now be ready to upload your rates. You will need to save this template to your computer in preparation for the upload. Save it to a place that you can easily remember.

5.0 Uploading your completed rates template.

From the menu click on ‘Agency Rates’.

If you have any previous contracts they will be displayed in this list.

<table>
<thead>
<tr>
<th>Agency Rate Contracts</th>
<th>Contracts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Contract</td>
</tr>
</tbody>
</table>

Select the Trust and the Staff group that you wish to upload the rates for.

If you cannot select a staff group once you have selected a Trust, your agreement with the trust has not been properly created and you should contact the trust regarding this.

Once you have done this click ‘Next’.

If the Trust has approved the use of Personalised rates you will then be asked what type of contract you would like to upload. In this example ‘An agency rates contract’ will be selected. You can enter individual rates for individual users at a later time once they have been requested and approved.

If personalised rates have not been approved this will default to ‘An Agency Rate Contract’ and the this step will be skipped.

Click ‘Next’ once you have selected your item.
If you have chosen to upload a personalised rate contract for a Flexible Worker you will see the following page. If you chose ‘An Agency Rate Contract’ you will skip this page.

Enter the flexible worker’s name and then select the FW from the ‘Staff’ box

Enter the ‘Effective From’ date and if applicable the ‘End Date’

Click next.

Regardless of the type of contract you have entered you will not be asked to upload your rates

Click browse to locate your file

Click the browse button and locate the rates template that you have completed.
Select your file and click the 'Open' button.

Once you have selected your file and it is displayed in the box above click 'Next'

NHSP: Online will validate the file and ensure that you have entered all the information needed for you agency rates for the trust you have selected.

If you have missed any of the rates that NHSP: Online requires you will see a notification you can either agree to leave out the missing rates or continue with the current rate.

If you choose the 'Upload New Rate Card' you will need to correct the Template that you have filled out to include the rates in the message. Once you have completed the missing sections you can reattempt the upload.

If you have entered a Personalised Rates Contract you will be sent to the Agency Rates page and will see that your Personalised Rates Contract has been submitted, this will then need to be approved by the Trust.
Otherwise, once NHSP: *Online* has validated the completed template and allows you to proceed you will see the following page:

![Table of Mileage Rates](image)

You can review your rates using this table.

Click Next to continue the process.

### 5.1 Mileage Rates

If you pay mileage tick the box ‘Mileage Expenses Paid’. If you have mileage rates loaded into NHSP: *Online* you will see them appear:

![Mileage Allowance](image)

If your rates have not been loaded you can enter them here – refer to the ‘Loading Mileage Rates’ section of this document for more information on this.

Click Next
5.2 Day Definitions

Day definitions define when various charge periods start and finish. You can define when the rates for Bank Holidays, Sundays, Saturdays and Nights start and finish. The ‘Days’ day definition will be the default if none of the other rules apply.

<table>
<thead>
<tr>
<th>Split</th>
<th>Start</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank Holidays</td>
<td>Current Day</td>
<td>Next Day</td>
</tr>
<tr>
<td>Sunday</td>
<td>Current Day</td>
<td>Next Day</td>
</tr>
<tr>
<td>Saturday</td>
<td>Current Day</td>
<td>Next Day</td>
</tr>
<tr>
<td>Nights</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Days</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Standard NHS day definitions are detailed below

5.3 On Call and Sleep In Enhancements

If any requests that may be worked attract a Sleep In or On Call enhancement enter the percentage that the enhancement attracts

<table>
<thead>
<tr>
<th>On Call and Sleep In Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Call (% of normal rate):</td>
</tr>
<tr>
<td>Sleep In (% of normal rate):</td>
</tr>
</tbody>
</table>

If it is unlikely that you will be covering this kind of request you should enter 0 in these boxes.

Click ‘Next’
5.4 VAT Registration.
If your Agency is VAT registered you can enter the details of your registration.

Tick the ‘Is VAT registered’ tick box.

Once you have ticked this the following options appear

Enter your ‘Effective From’ Date

and your ‘Applicable to’ options from the drop down list
Enter all the detail as required from this page

These illustrations show the differences when you select the Framework type.

Further descriptions can be found in the next table.
<table>
<thead>
<tr>
<th>Heading</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective From</td>
<td>Enter the date you require the contract to start from</td>
</tr>
<tr>
<td>VBL</td>
<td>This option will be automatically entered from the template that you uploaded</td>
</tr>
<tr>
<td>Discount In Commission</td>
<td>You can enter an amount to discount your commission rate dependant on your VBL</td>
</tr>
<tr>
<td>Contact Name</td>
<td>This should be automatically filled out from your login details – you can change this information if required</td>
</tr>
<tr>
<td>Contact information</td>
<td>This should be filled out from your login details – you can change this if required</td>
</tr>
<tr>
<td>Framework</td>
<td>Select the option from the Framework list that relates to your contract with the trust. If you select the Non framework local agreement you will then need to select the options below ‘Framework management charge % or Framework Management Charge £.’</td>
</tr>
<tr>
<td>Framework Management Charge</td>
<td>If you select the Non Framework local agreement you will need to enter the Management charge (% or £) into this box. If you have selected a framework this information will be entered for you</td>
</tr>
</tbody>
</table>

Click ‘Finish’ once you have completed all the details in the Agency Rates – Summary Details.

This will notify the Trust nominated user that a new contract is waiting to be authorised.

You will be returned to the contract page:

<table>
<thead>
<tr>
<th>Agency Rate Contracts</th>
<th>Contracts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Custom</td>
</tr>
<tr>
<td></td>
<td>General Information</td>
</tr>
</tbody>
</table>

You can View or Delete the Unauthorised contract from this page.
6.0 Account Numbers

If you have an account number for individual trusts for billing purposes you can enter that from the menu option ‘Account Numbers’

Enter the details for the trust you want to setup an account number for:

Once you have entered the details click ‘Ok’ and this will save your account number. You will need to setup an account number for each Trust for each staff group.
7.0 Mileage Rates
You can enter your mileage rates into NHSP:Online for paying mileage rates to Flexible Workers where it is deemed necessary for the assignment they are fulfilling.
Click on the Mileage option from the menu.

You will need to enter the details here as required.

Once you have entered the details here click submit to save your mileage rates. You can modify your mileage rates from this page at any time.
8.0 Rates for Assignment
You can check the rates against each individual assignment that has been setup within NHSP:Online by using the Rates for Assignment option from your menu.

![Image of Rates for Assignment]

Your rates for the selected trust and assignment will be displayed in the grid.

9.0 Maintain Continuous Service
To view the continuous service of your Flexible Workers click on the ‘Maintain Continuous Service’ menu option.

![Image of Maintain Continuous Service]

Click on the ‘Filter Settings’ Select button to show your filter settings.

Enter the name of the Flexible Worker you wish to check and if necessary select their name from the list below.

Click Filter.
NHSP: *Online* will now display the Continuous service for that FW. If none exists and you need to add any previous service they may have had within the Agency Worker Regulations click the green cross in the top right corner (most of this information will be automatically setup from NHSP: *Online*)

You will be shown the following

![Screen shot of the Maintain Continuous Service window](image)

Enter the Trust, Assignment and NHSP Work History Start Date. You will also need to notify how long the Prior Qualification work was held for in number of weeks.

Enter any comments as appropriate and click Ok.
Once you have clicked ‘Ok’ you will then be redirected to the Maintain Continuous Service page and the Status will be ‘Submitted’. This has been sent to the Trust to be authorised.

You will see that the ‘Prior Qualification Duration’ and ‘Prior Qualification Comments’ contain links that you can click on (in this case the Number 2 and the word ‘View’). Clicking on the ‘Prior Qualification Duration’ link will enable you to edit the number of weeks and the comments:

Edit as appropriate and then click ‘Ok’ to save the changes.

Clicking on the ‘View’ link under the ‘Prior Qualifications Comments’ will allow you to view the last comments:
10. Pause Periods
In certain circumstances the qualifying period for the AWR 12 week continuous work period can be ‘Paused’. These can be for reasons such as Maternity/Paternity leave and the duration that they can be paused for depends on the reason entered.

If a Flexible worker requires a pause period to be entered you can do this from the ‘Maintain Continuous Service’ menu option.

As before select the Flexible Worker using the filter options:

If the flexible worker has a period of continuous work that can be paused you will see the following:

PLEASE NOTE, this is an automated lookup – you cannot manually enter a period of work that can be paused

Notice that you can change the ‘Prior Qualification Duration’ amount as previous, but also notice there is an entry in the ‘Number of Pause Periods’ box – this is a clickable link for you to add a pause period.

Click the number (usually 0) in the ‘Number of Pause Periods’ box.

The following will be displayed:
Enter in the ‘Start Date’ of the pause period.

And then select the reason:

The ‘End Date’ and ‘Latest End Date’ will be automatically populated for you.
If you know the ‘End Date’ of the pause period for this flexible worker’s pause period, please enter it if it is less than the ‘Latest End Date’.

You will not be able to enter a pause period for a duration where a Flexible worker has bookings and you will not be able to select an ‘End Date’ later than the ‘Latest End Date’.

Once you have entered all the details you can click the ‘Ok’ button and you will be returned to the previous page:

Click the ‘Ok’ button – alternatively, if you need to modify or delete the entry you can select the appropriate links from the right hand side of the grid.

11.0 Requesting Personalised Rates

If your Flexible workers have individualised rates, you will first need to request individualised rates from the Trust. This will only be available where the Trust as informed NHS Professionals that they will allow this.

Click on the menu option ‘Requests’ under the ‘Personalised Rates’ menu option.

If none of the Trusts that you provide staff to have requested this option from NHS Professionals you will see the following message:

Otherwise you will see the following:
You can select any of the trusts you provide staff to that have indicated to NHS Professionals that they allow personalised rates, from the Trust drop down. You should then enter comments in the ‘Comments’ box and click Ok.

Once you have done this the request will be sent to the Trust for authorisation.

Once this has been authorised the status will read ‘Authorised’ and you will be able to upload personalised rates.

If the Trust has queried this request you will find the page displays

You can Resubmit this request by clicking the Resubmit link and entering further information into the box. You should check here regularly to ensure that the request has been authorised or Queried and action appropriately.
12.0 Uploading Personalised Rates

Once the trust has agreed to personalised rates you can upload rates for Flexible workers that work at non standard rates. This can be achieved either by the standard ‘Agency Rates’ or the ‘Edit Agency Worker’ menu options.

This section will focus on the ‘Edit Agency Worker’ menu option as the ‘Agency Rates’ menu option has already been discussed within this manual.

The first thing to do to start uploading a Personalised Rate is to download a new template and fill that out for the individual requiring personalised rates.

This rates template is the same template discussed in section 2 and 3 of this document. Be sure when you are filling out this rate template that you only fill out the details for the individual Flexible Worker.

Once you have done this you can upload the rate card for authorisation. Click the ‘Edit Flexible Worker’ (or follow section four of this document).

The following page will be displayed:

Click the ‘Select Agency Worker’ button and enter the name of the individual you wish to upload rates for:

You should only use the ‘Surname like’ box to start with.

Click ‘Continue’ to search for that Flexible Worker.

Once matches have been found you will see the following
At the top of this page you will see two tabs ‘AWR Enhancement’ and ‘Personalised Rates’

Click on the ‘Personalised Rates’ tab.

Enter the detail and click next.

Enter the ‘Effective From’ and the ‘End Date’ if applicable.

The contact information should be automatically filled out for you.

Click Next
You will then be asked to select the file that contains the rates for this Flexible Worker:

![File selection interface]

Once you have browsed and selected the file click Next. You will then see the Personalised Rate

![Rate table]

The status will remain 'Unauthorised' until such point that the Trust authorise these rates. You can also View and Delete these rates prior to their authorisation.

### 13.0 Self Billing

Self-billing is a way of setting up a contract with the Trust that allows NHS Professionals to automatically generate and pay your invoices based on the details entered by the trust when they authorise your flexible workers' electronic timesheets.

#### 13.1 Agreements

Before setting up a self-billing agreement you must first:

- Ensure all rate cards are up to date and authorised for all assignment types supplied to the relevant trust
- Ensure the VAT status is correct
- Supply NHSP your VAT number
- Supply NSHP up to date contact details and invoicing address

Click on the ‘Agreements’ option under the menu sub heading ‘Self Billing’

The following page will be displayed

![Agreements interface]
Once you have clicked the green cross the following will be displayed

Select the trust from the drop down list, if you have entered a VAT number this will be displayed here. You will need to enter the Agreement Expiry Date, which should have been supplied by NHSP. Read the two warnings and tick the boxes to acknowledge that you agree with them.

Once you have done this you will need to add your signature, unless there is already a signature loaded onto NHSP: Online. You can do this by scanning your signature and saving this as a picture (.jpeg).

Click the ‘Add Signature’ button.

Click browse and locate your signature picture. Signature pictures must be .jpegs and cannot be larger than 30kb file size of 300*100 pixels. To check the dimensions are correct, right-click on you file, go to properties and click on the details tab. Look at the dimensions and make sure this is less than 300 x 100

Enter your name in the Signed By box
Click Submit to create the agreement.

This will notify the trust user that an agreement needs to be authorised. When the trust user authorises your agreement you will receive an email to notify you of such. From this point your self-billing agreement is in place and you must no longer issue any invoices yourself. You will also no longer have the option to preview or generate backing reports.

### 13.2 Invoice Reports

Using the ‘Invoice Reports’ from the menu option will show you any Invoices that NHS Professionals has produced on your behalf in line with the self-billing agreements.

Enter your filter settings and click ‘Filter’ and all your invoices will be displayed for the filter options you have entered.
Your backing report shows you the electronic timesheets that have caused the invoice to be raised.

The timesheet will include the booked hours and the actual hours. ‘Actual Hours’ are the hours that were paid for that invoice.

You can export your invoices and back reports to either a pdf document or to excel using the icons located in the top right of these reports:

Please note. You will only be allowed to book for Assignments where you have uploaded a charge rate. If further assignments are added that are not included within your original agreement you will need to setup another agreement or update your current agreement with these new rates.