



# ALLOCATE



Medical & Science  
Workforce Software



## Software + Allocate Cloud + Customer Success Team = **Results**

**HealthMedics-Optima combines Allocate's trusted medic software applications together with powerful services and delivers the whole solution over the internet via the AllocateCloud. You may have heard this combination of software, services and web delivery referred to as 'software-as-a-service' or SaaS.**

There has never been more focus on how the medical workforce is planned and deployed; the increasing locum pay bill, the junior doctors' contract, vanguards and service redesign mean it has never been more important to engage this important staff group.

We believe that with the right tools medics themselves can help solve many of the workforce deployment challenges. That is why we have created highly mobile solutions that help both the medic and the organisations they work with.

The result is a series of integrated applications that allows you to pinpoint the right workforce solution to each of your medical specialties based on their needs and the organisation's needs; that might be leave management and managing on calls for one area, rotas and mobile exception reporting for juniors, shift scheduling for another area, full locum shift booking for all or indeed activity management where appropriate.



## Effective consultant job planning

Facilitates job planning for consultants, and also for speciality doctors and associate specialists.

- Standardise job plans -ensures standard calculations of PAs and sessions
- Flexible enough to allow job plans to be correctly calculated for consultants and SAS doctors
- Caters for complex job plans spanning long periods of time and supports annualisation
- Flexible and transparent job planning
- Accommodates 'hot' activity arrangements such as surgeon of the week or physician of the day and the delivery impact on affected duties
- PA controls and powerful reports
- Activity calendar
- Reduce the admin associated with paper based job planning
- Integrated with Medic**OnDuty** and Activity**Manager**



**“Efficient job planning is becoming a priority for all Trusts in these financially challenging times. Increasingly we are using eJobPlan to review job plans in forensic detail to ensure the service is provided in the most appropriate and efficient way as possible. If we were using a paper based process the level of detail we are able to utilise at the push of a button simply wouldn't be available”**

Hinchingbrooke Health  
Care NHS Trust



## Junior doctor rotas

Create compliant junior doctor rotas which meet the requirements of the New Deal and 2016 junior doctors' contract at the same time as EWTD. eRota enables you to anticipate rule breaches and so avoid significant unexpected cost and safety impact that may arise from non-compliance.

- Simple 'Rota Convert' function that means new deal rotas can be converted to 2016 rules in an instant
- Accurate pay assessment for different rotas
- Identification of resources and hours available for service and training
- Supports mixed grade rotas to give accurate pay results
- Ability for doctors to record exceptions in real time through secure online accounts
- Ability for exceptions to be approved within medical staffing or escalated to the guardian of safe working
- Guardian of safe working dashboard
- Transition - simple transition from rotas to leave, on call management and junior doctor rostering in **MedicOnDuty**
- Facilitation for hospital at night rotas
- An expert support team able to advise on the building of efficient and workable rotas
- Peace of mind regarding compliance with the New Deal



**“eRota is a key tool for medical staffing management. It is comprehensive, easy to use and helps us build the most effective rotas to meet both our doctors and our organisational needs. Allocate's responsiveness to update the system to meet the 2016 contract changes makes me feel we are in safe hands”**

Brian Jones, Medical Staffing  
Lead, Lancashire Care NHS  
Foundation Trust

## Leave and on call management designed for doctors

A simple and engaging solution to manage medic availability, including leave, study and on call rotas. Fully mobile solution that is designed to benefit medics' working lives empowering them with information and control.

### The solution helps medics to:

- View their own and others' on call rotas
- Quickly record call outs
- Book leave and study quickly, and ensure leave is effectively managed
- Leave rules can ensure leave is well distributed, without undesirable leave spikes
- View and manage leave entitlement
- Record, manage and analyse sickness
- Integrate with iCal for better visibility with personal or family calendars



**“The medics leave planning process has demonstrated a 33% reduction in the number of steps required to complete a view of medic availability”**

Aintree University Hospital  
NHS Foundation Trust



## Manage who is working, when and where, including locums

MedicOnDuty helps create both simple and complex rosters, meeting the unique needs of the medic and science workforce. It integrates with rotas, job plans and service plans providing an effective way to help drive fairness and to ensure rules to safeguard patient safety and staff safety are adhered to, while ensuring the most productive results for a sustainable service.

- See who is working and when, but also where
- Provide better visibility of both who is working and rota gaps
- Fully integrated with LocumOnDuty offering a complete view of the workforce
- Including tracking of the Working Time Directive and other contractual rules
- Monitoring of supervised sessions – for junior doctor training records
- Payroll processing – enables payment of premium rate activity and locum timesheets
- Supports swaps

**“HealthMedics gives us a platform to integrate leave management and on call rotas for our entire medical workforce. Using ActivityManager and the functionality available, we have greater visibility of potential gaps in our service so we can act on them sooner. We have also utilised notifications to inform our booking teams across the organisation of unavailability, preventing errors when allocating lists of patients to our consultants’ activity”**

Epsom & St Helier University  
Hospitals NHS Trust

Locum**OnDuty** helps you manage your Locums with tailored functionality specific to the Locum workflows. It simply builds on your existing Health**Suite** applications, including Bank**Staff**, meaning it can be implemented with minimum investment and time. The solution enables you to further minimise demand and reduce agency spend by integrating seamlessly with Medical rosters and collaborative banks.

- Locums can 'express an interest' in a duty as an alternative to 'direct book', allowing multiple locums to show they are interested in a duty
- Consultants or other service managers can review candidates on their mobile, including their documents and book their chosen worker
- Find suitably trained and experienced candidates using specialty, skills and document uploads such as CVs
- Book locums for long term placements by creating 'blocks' of duties or by posting them in substantive units
- Set ad-hoc pay rates (hourly or sessional) for duties and advertise these online to Locums. The rates can be sent to ESR as part of the pay file for easy payroll processing
- Locums can access available shifts, express interest, and book shifts via the 'Me' app making it readily available and extremely easy to use





## Effectively schedule clinical staff around clinical activity

The next step from MedicOnline and OnDuty, ActivityManager allows you to schedule any clinical activity (e.g. clinics, ward rounds or theatre sessions), assigning a lead for that activity (typically a consultant) and other supporting staff such as junior doctors, specialists, nurses, ODPs to ensure that particular clinical activity is delivered to the patient.

- View rosters based on the clinical activity and whether they are appropriately staffed
- Gives medics a view of not just when they are working – but on what and who is working with them
- Integrates with eJobPlan allowing the cross-reference of contracted versus delivered consultant activity
- Improves leave and absence by providing a view of which activity is impacted
- Manage the impact of cancelled activities on all assigned staff



**MedicAppraisal supports both doctors and appraisers in delivering compliant, efficient and effective appraisals as required for the revalidation process.**

It enables doctors to seamlessly capture and process their documents on one portal and provides access to those who need to review it.

- Integrates with the **eJobPlan** system
- Includes 360 degree feedback
- Secure web-based system using encrypted data
- No more laborious hard copy document retrieval
- Responsive to changing requirements
- Responsible Officer dashboard
- Offers doctors and trusts full transparency over their appraisal submissions
- Built around the RST's MAG model appraisal form
- Electronic sign-off of key appraisal outputs
- e-Portfolio structured in accordance with GMC recommendations
- Organises the review process for educational supervisors and produces annual reports for deaneries
- Greater visibility over reoccurring failures to deliver good practice
- Automatic workflow email reminders for appraisal deadlines and documentation



CloudStaff is software that enables organisations to share their bank and locum staff, creating regional banks. It acts as a third line of defence after good rostering and internal bank staff fulfilment allowing organisations to fill more shifts with known staff, reducing agency reliance and reduce back office admin at the same time.

#### **Better for Trusts:**

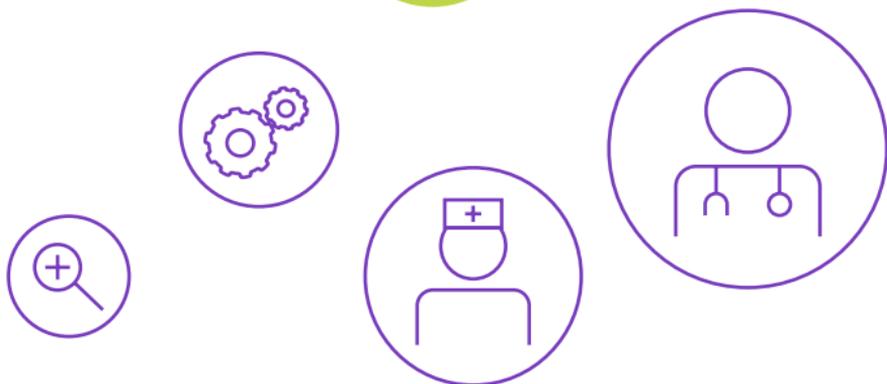
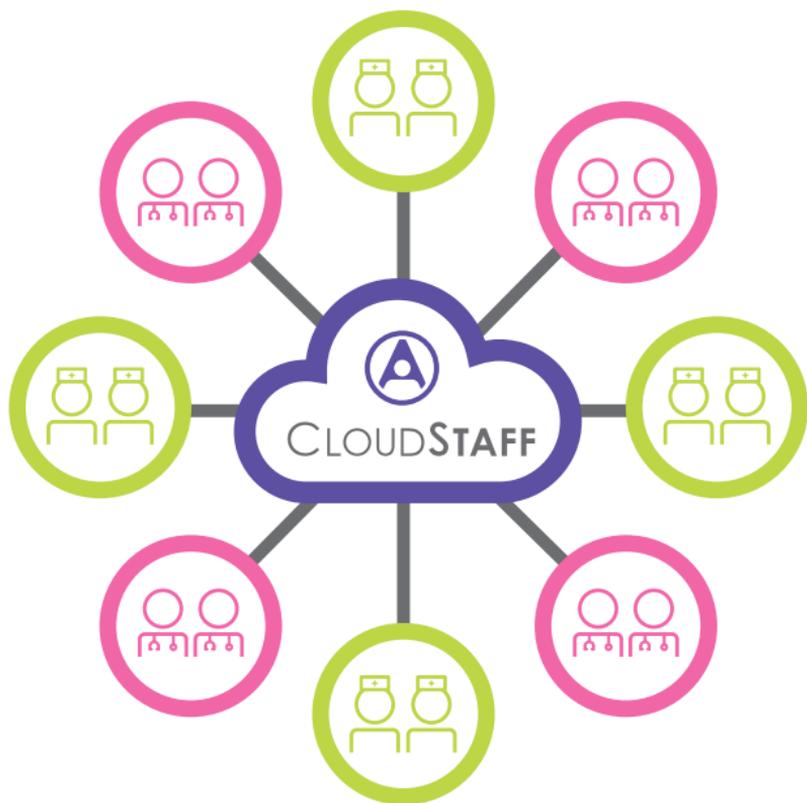
intelligent workflow and rules takes the hard work out of matching and booking the right staff to available shifts or duties. All organisations share staff creating a wider pool of available and known quality staff.

#### **Low risk:**

works with BankStaff and MedicOnDuty making the linking of available temporary staff across regions easier.

#### **Better for staff:**

engaging mobile experience for temporary workers. CloudStaff is flexible and increases the number of shifts available making working for the NHS regional bank more attractive than agency.



# Allocate Academy

## Training & accreditation for success

**Provides individuals and organisations with formal training and accreditation meaning organisations have confidence that they have teams with the right skills to unlock the incredible savings that better workforce planning and deployment offers.**

Our curriculum delivers knowledge in the software, the processes and context in which the software needs to work, whether that context is rostering best practice for ward managers, workforce planning, workforce performance management or governance and assurance processes. The Allocate Academy offers a number of levels of progression.

**“The accreditation gives my organisation confidence that I am experienced in using the software”**

Eri Martin,  
ACP e-Rostering Manager,  
Dartford & Gravesham  
NHS Foundation Trust



## Fully integrated with eRostering for accuracy

The only eExpenses application that automatically cross-references data with the roster in real-time, increasing accuracy and delivering benefits.

- Accessed via EmployeeOnline
- simple and easy to engage your staff
- Dramatically reduces the time spent by payroll processing claims and managing expenses
- Interfaces with ESR, saving time and ensuring the accuracy of data
- No licence or usage recharge to NHS organisations when commissioned via the ESR Programme
- Reduces the operating costs associated with processing claims
- Improves expense claims accuracy, with automated mileage calculation (including triangulation rule consideration)
- Real time checking of expenses rules provides unique protection from fraud and inadvertent errors
- Powerful reporting provides business intelligence around expenses costs and claims patterns



**“Allocate’s e-Expenses has really streamlined the whole expenses process, it’s enabled consistency across the trust and we’ve seen many efficiency, accuracy and governance improvements... a massive improvement in adherence to policy rules... and we’ve seen financial savings”**

Jason Mullarkey,  
Strategy & Improvement Project Manager  
Doncaster and Bassetlaw  
NHS Foundation Trust

**A unique staff engagement solution that uses event driven data from HealthRoster and HealthMedics to target intelligent, timely and effective staff communications and feedback. It improves response rates and provides a more reliable and relevant measure of staff views and experience.**

It flexibly enables organisations to be connected with staff at all times; empowering staff with information and listening to their views and experience.

Through Health**Roster**, Medic**Online**, Medic**OnDuty**, Locum**OnDuty** and Activity**Manager**, Staff**Engage** knows who is on every shift. Imagine a bank nurse or locum has just finished a duty; how powerful would it be to quickly ask them two or three questions about their experience just as they finish?

- Flexible and adaptable
- A scalable offering which allows you to launch an ad-hoc campaign with regular communication to a single ward, specific group or Trust wide
- Confidential and anonymous
- Secure financial incentives linked to Staff Feedback and Health & Wellbeing



## Governance and compliance software

Manage, monitor, evidence and report on regulatory regimes, quality standards, compliance, quality plans, projects and risks. Containing ready-to-use applications for key national frameworks, including CQC, CAS & NICE. The system is easily cascaded across organisations providing engagement and board to ward assurance.

- Provides insight and control over governance, risk & compliance
- Gives the board and senior managers confidence that they know the real-time status of quality and compliance across their organisation
- Simple to use, engaging the whole organisation
- Saves front-line staff time, releasing more time to care
- Visually engaging reports and dashboards making it easy to spot and manage areas requiring support and improvement



**“The CQCAssure system really helped in our preparations for inspection and enabled a wide range of staff to consider & self-assess their areas against the KLOE in advance. This provided invaluable preparation and also organisational insight”**

Deborah Pullen,  
Compliance & Assurance Lead  
at Wrightington, Wigan and Leigh  
NHS Foundation Trust

# What **solutions** do you have?



## HealthRoster Optima

- HealthRoster
- SafeCare
- BankStaff
- AllocateCloud
- AllocateAcademy
- EmployeeOnline
- RosterPerform
- eCommunity



## HealthAssureOptima

- CQCAssure
- NICEAssure
- CASAssure
- MyAssurance



## HealthMedics Optima

- eRota
- eJobPlan
- MedicOnline
- MedicOnDuty
- LocumOnDuty
- ActivityManager
- MedicAppraisal



- AllocateInsight
- CloudStaff
- StaffEngage
- eExpenses



- CareHub

## Contact us



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## Support

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[HealthRoster: 0844 417 9510](tel:08444179510)

Learn from others:

[www.allocatestories.co.uk](http://www.allocatestories.co.uk)