



Nurse, Midwives,
Support & Non Clinical
Workforce Software



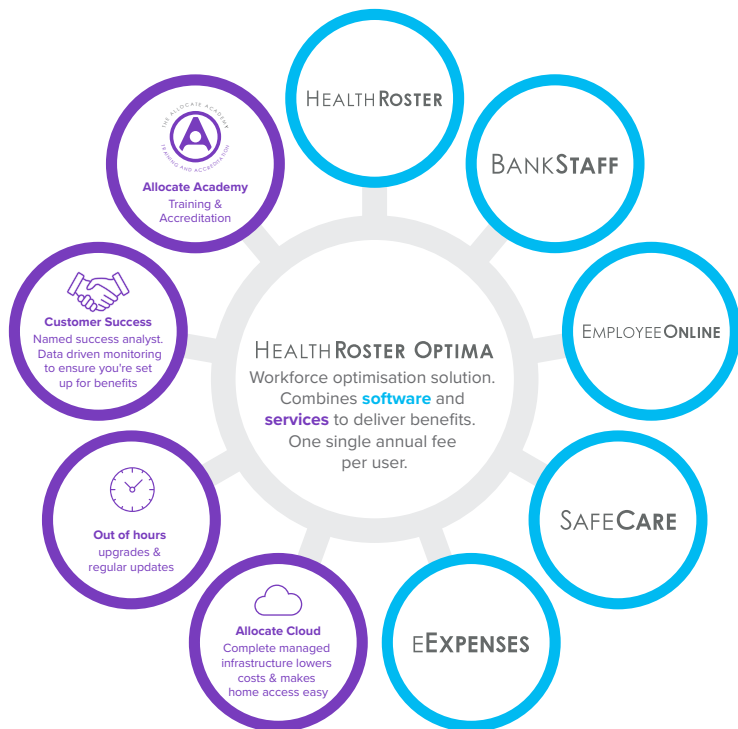


HealthRoster-Optima combines Allocate's trusted workforce software applications together with powerful services and delivers the whole solution over the internet via the AllocateCloud. You may have heard this combination of software, services and web delivery referred to as 'software-as-a-service' or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

HealthRoster-Optima offers you and your organisations a number of advantages:

- Reduces risk and makes achieving eRoosting success more likely
- Named customer success analyst – to drive adoption and provide coaching on how to get benefits sooner
- All your cloud needs – reducing costs and making home access a piece of cake
- More frequent product updates delivered automatically – including features only available to Optima customers
- Delivered via a simple all-inclusive per user pricing model providing control and total transparency
- Combine key software into a single package allowing you to have the complete end to end optimal solution – and with no more need for separate business cases
- Includes organisational accreditation via The Allocate Academy meaning the right staff are always professionally trained to the right standard
- Additionally, many organisations including NHS organisations benefit from VAT advantages when buying software as a service

Software + Allocate Cloud + Customer Success Team = Results



The UK & Ireland's most widely-used health & care e-rostering software; it helps ensure the right people are in the right place at the right time – for all staff types.

- Helps ensure rosters are safe, efficient and fair
- Shows roster creators how their roster can be improved; and shows the wider organisation where the process is working well and which units need help
- Integrates with BankStaff and NHS to ensure temporary staffing is driven by roster gaps, and working practices are safe
- Quick and easy roster creation, including genuinely helpful autoroster
- Unrivalled absence & leave management
- eTimeclock modules for time & attendance
- Sends pay & absence data using well-established ESR and other payroll interfaces, reducing the admin burden and increasing accuracy

“Across 10 wards, we could evidence savings averaging £60,000 per ward, but we have also improved patient care by using our restricted resources better and getting more from it”

Marcus Hassall, FD, Northern Lincolnshire and Goole NHS Foundation Trust



Acuity driven staffing

Compare staffing levels to the actual patient demand, transforming the daily staffing process to unlock productivity and safeguard safety.

- Calculate required staffing from patient numbers, acuity & dependency – typically 3 times a day
- Site wide overview of required versus actual staffing, highlighting hotspots as well as areas that could help
- View staffing status across many dimensions including hours short/excess, missing skills, missing patient census, CHPPD and cost of shift
- Track attendance & sickness of rostered staff
- Redeploy staff safely with full visibility of skills and impact elsewhere, helping to avoid unnecessary agency use
- Request bank or agency cover if needed

“We have moved to real time daily staffing using patient acuity, it is reviewed three times a day in staffing meetings. This combined with a rigorous focus on eRostering, the use of benchmarking data and targeted improvement is helping us use our staff resource more effectively”

Beverley Allingham,
Deputy Director of Nursing
Plymouth Hospitals
NHS Trust



Fully integrated temporary staffing

Automate the process of filling duties with the appropriately skilled staff; ensure there are no rule breakages, enabling your bank office to concentrate on filling the harder-to-fill/more expensive shifts, reducing reliance on agency staff.

- Streamline the bank booking process to improve fill rate and reduce agency spend
- Better engage with bank workers, with SMS broadcast of available duties, online direct booking of matching requests, and online availability recording
- Manages, checks and verifies agencies to monitor and improve costs
- Manages agency invoices to align payment to framework agreements cover if needed
- Full integration with payroll to ensure bank staff are paid quickly and painlessly
- Fully integrated with HealthRoster, with bank request driven from roster gaps, and visibility of temp staff on all roster views
- Detailed management information to help run an efficient and effective bank



Engage staff with powerful rota information and tools

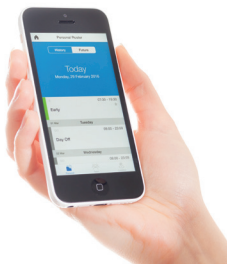
Engage and empower your workforce by placing key information about their work in their hand – via their smartphone or browser.

Better inform your staff:

- View their roster online, anywhere in the world
- View their own skills to ensure they are accurate
- View their leave entitlement and hours balances
- View payroll information

Engage your staff, empowering them to:

- Make duty or day off requests
- Request annual leave, study leave and other leave
- Bank or locum staff can view and direct book matching bank duties, record their availability, and record their timesheet



**“Fill rate moved
from 55% to as much
as 90% since direct
booking on EoL was
switched on”**

Nicola Myronko
Clinical Lead – Workforce
Derbyshire Community
Health Services 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
Derbyshire Community Health
Services NHS Foundation Trust

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

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:

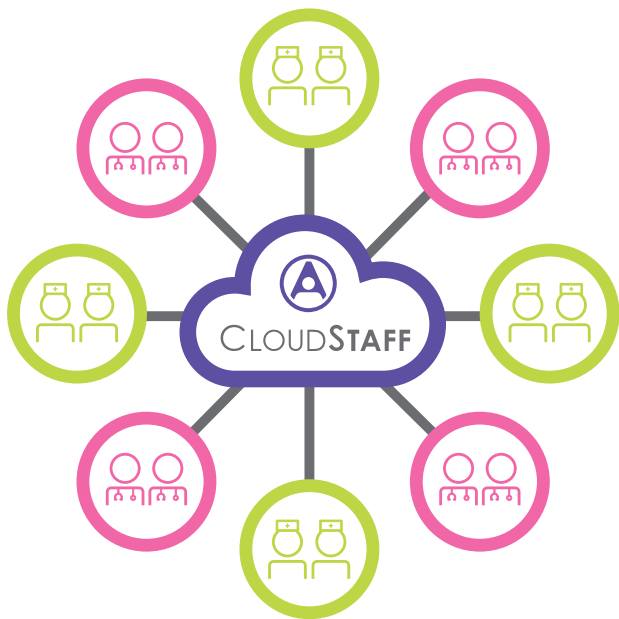
intelligent workflow and rules takes the hard work out of matching and booking the right staff to available shifts or duties. All organisations share staff creating a wider pool of available and known quality staff.

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.





Benchmarking & managed reporting

Allocate**Insight** provides benchmarks to highlight variation together with monthly managed reporting that includes insight and expertise to help organisations identify where variation is unwarranted.

The reports and benchmarks are shared directly with board level stakeholders, including FDs, DoNs, MDs and HRDs and include expert narrative and insight from our workforce experts. Allocate**Insight** is helping drive improvement and unlock productivity savings by letting boards answer the following key questions

- Are we rostering effectively?
- What's our opportunity for improvement?
- How do we compare?
- What can we do to improve?

“We use the data from e-Roster in our divisional performance and board packs. We are focusing on just a small set of metrics that help us answer the question; are we rostering effectively?”

Sam Foster, Chief Nurse
Heart of England
NHS Foundation Trust



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 of 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
- Introducing My Assurance: a new tool for use on tablets on the ward for audit, inspection, and accreditation. Fully integrates with HealthAssure to provide a complete assurance picture.



“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

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 **HealthRoster**, **MedicOnline**, **MedicOnDuty** and **ActivityManager**, **StaffEngage** 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?



Was there care left undone?

Did you feel safe on that shift?

Don't forget to get your flu jab



- A reliable and effective offering that is built to maximise existing intelligence in HealthRoster and HealthMedics.
- A powerful method of collecting valuable and regular information through the most popular form of communication – mobile devices.
- Scalable offering, you can launch an ad-hoc campaign, regular communication, to a single ward, specific group or Trust wide.
- Confidential and anonymous facilitating complete openness and interaction with the message that is being delivered.
- Flexible and adaptable to serve needs according to local conditions based on the context and challenges faced by the individual organisation.
- Helps secure financial incentives linked to Staff Feedback and Health & Wellbeing as well other healthcare initiatives.
- Seamless adoption and rollout for organisations, eliminating the need to source multiple solutions from multiple providers and the burden of administrative work around data sourcing and compiling.

What **solutions** do you have?



HealthRoster Optima

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



HealthMedics Optima

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



HealthAssureOptima

- ☐ CQCAssure
- ☐ NICEAssure
- ☐ CASAssure
- ☐ MyAssurance



- ☐ AllocateInsight
- ☐ CloudStaff
- ☐ StaffEngage



- ☐ CareHub



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