

## HealthRoster Case Study

### HR Oxleas

Impartial, fair, and helping deliver the very best in clinical care



Oxleas NHS FT introduce Allocate's HealthRoster to help managers roster staff more efficiently to cover service needs and enhance the patient experience.

#### Key Achievements

- Instantaneous access to staffing information
- Closer monitoring of budget & effectiveness
- Fairer shift allocation for staff
- Improved absence management
- More accurate data for payroll
- Streamlined admin tasks
- Enabled staff to spend more time tending to patient needs

Implementing e-rostering is a significant undertaking which requires not only implementing the software but also a review of the entire workforce management process if the solution is to achieve a true and lasting positive impact on the Trust.

#### Recognising a need to introduce HealthRoster

As a merged healthcare organisation providing mental health and community-based services the Trust is operating against a challenging and unpredictable backdrop, making it absolutely essential that the right cover, with the right skills is on hand at all times.

Oxleas NHS Foundation Trust recognised a need for a computerised e-rostering system to monitor and optimise its workforce, and to more effectively manage the nursing budget - which represents the largest proportion of the Trust's

expenditure. The Trust's 1,700-strong nursing workforce were historically deployed at ward/unit level by a manually driven paper based solution. The Trust introduced Allocate's HealthRoster to provide a more efficient way of managing staff through improved rostering, to objectively measure how and where staff are being utilised, and to identify where savings could be made through streamlining processes.

#### The solution

Danson Clinic was asked to pilot HealthRoster as part of the first wave of implementation last year and was the only mental health inpatient unit doing so at that time. Antony Hawkins, the Clinical Team Leader for Clinic shares his experience of implementing the solution giving a 'warts n all' account. Danson Clinic is a 17 bed rehabilitation clinic with a nursing staff of 29.

Antony is full of praise for the new solution. "It gives me information at the touch of a button that it would have taken hours to get in the past. For instance if a member of staff came to me asking for more weekend work adding that they think they are not getting enough weekend shifts (staff can earn more for weekend work) I can instantly show them how many weekend shifts they've worked and where they are in the weekend shift league table. It makes for a fairer roster system."

#### Bringing about change

However, initially, it wasn't all plain sailing as Antony explains; "The planned training was attended by me and my three trusted charge nurses.

The training was difficult as this change in the way we worked was second only to the implementation of RiO [our electronic patient records system] so the training manual felt a bit like fumbling in the dark. We did manage to achieve our objectives and set our clinic 'rules' and so were set to go."

### Streamlining the workforce management process

There are a number of benefits for managers that use this type of e-rostering. It can make it simpler to manage annual leave, sickness and absence. It provides effective use of staff within and across different sites and of course a reduction of administration time in organising rostering.

As far as employees are concerned it is easier to request annual leave and study days. It promotes the fair allocation of requests, leave, weekends and shifts and tracks the hours worked and time owed to each member of staff. It can provide more accurate information for processing in payroll departments.

Antony explains further; "I am now able to generate a four to eight week roster period in a matter of minutes - 120 of 'em - and am beginning to trust and rely on the benefits that the system can bring.

There are still 'issues' that I am becoming more able to understand and many relate to the specific needs of my clinic and how I can adapt the system and its rules to suit Danson."

### Enabling more informed decision making

Antony explains; "It is important to remember that each clinical area is different with different ways of working and different objectives and the quicker you can understand e-rostering and tailor it to meet the needs of your area the better. I am now able to access much information that is of great benefit when managing a clinical area with a number of clinical staff.

I can process reports relating to annual leave, sickness, time-owing, weekends, night duties, requests made and much, much more. I am also able to analyse a roster and focus on areas that are currently of vital importance including budget and effectiveness."

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*Antony Hawkins, Clinical Team Leader Oxleas NHS Foundation Trust*

**"HealthRoster has helped to deliver major savings for us just by enabling us to use our staff better"**

*Yvette Knight, Project Manager Oxleas NHS Foundation Trust*

### An integrated solution improving operations across the Trust

The system is also linked directly to temporary staffing so Antony is able to book and manage bank shifts with greater ease and efficiency. The plan for the Trust is also to link directly to payroll so the need for monthly returns and timesheets will be negated which will deliver further time and efficiency savings for Antony and team.

Antony sums up; "In short, the system has enabled me to become more efficient in managing my nursing staff and their roster needs and helped me deliver more effective and efficient clinical care."

### Helping to achieve real change at the Trust

Oxleas NHS FT have been using HealthRoster since July 2011. Since the initial implementation the Trust have continued with their roll out across the organisation and have significantly improved their workforce management processes as a result.

Yvette Knight, Project Manager of e-rostering adds; "HealthRoster has helped to deliver major savings for us just by enabling us to use our staff better. In addition, managers and operational staff feel that we have equipped them with a tool kit to enable them to carry out their roles more effectively. This has had a direct impact on patient care and we strive to continue bringing more positive operational changes to the Trust."