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BankStaff Case Study

Leeds & York Partnership NHS Foundation Trust

Through the implementation of a paperless bank with HealthRoster BankStaff, Leeds and York NHS Foundation Trust have increased staff satisfaction, saved administration time and decreased the amount of unfilled shifts as well as the percentage of shifts going out to agency.

Leeds and York Partnership NHS Foundation Trust provides specialist mental health and learning disability services to people within Leeds, York, Selby, Tadcaster, Easingwold and parts of North Yorkshire. As a trust, they work to improve mental health and wellbeing via a combination of inpatient and community services.

Since becoming Leeds Partnerships NHS Foundation Trust in August 2007, the organisation has changed and grown, merging with mental health and learning disability services in York in February 2012 to create Leeds & York Partnership NHS Foundation Trust and now employs approximately 4,000 members of staff.

The challenge

Prior to implementation of the HealthRoster BankStaff system in December 2010, the co-ordination of the trust's bank staff relied heavily on paper systems, and significant amounts of manual data input. The shifts had to be requested by phone and manually input onto the system, which was very time-consuming, particularly at times of high demand.

Because both wards and staff were calling the department in order to register their requests and availability for shifts, call volumes were frequently high and it was notoriously difficult to get through. This often resulted in high levels of frustration and staff dissatisfaction.

The decision-making process

Following the trust's implementation of Allocate HealthRoster in October 2009 and the success of the system at its one year review, they made the decision to take on Allocate's web-based co-ordination system for bank booking: BankStaff.

BankStaff integrates fully with Allocate HealthRoster, so that the systems communicate seamlessly with one another, and as such it was a logical replacement for the previous system.

Implementation

BankStaff was introduced in December 2010, and initially the e-Rostering team, all bank co-ordinators and staff who worked on switchboard were trained to use the system. Throughout 2011 and 2012, they continuously reviewed the system and several changes were made to how it was used in order to reflect service and staffing needs.

In 2011, all staff authorised to request bank staff via previous systems were trained on how to request shifts via Allocate HealthRoster or BankStaff depending on which system was being used by their unit. The result was that all clinical units could now request bank staff electronically and see when these shifts were filled and by whom.

This meant that the bank staffing department were now able to respond quickly and efficiently to bank staffing needs and the units themselves could be kept informed on the progress of their required shifts without having to contact the department.

The solution

Now, BankStaff is used by co-ordinators in the bank staffing department as a clear and informative way to view shifts that need to be filled, staff available to work and staff details. They are able to see at the click of a button any staff who have input their availability to work a certain shift who possess the correct skills and other requirements to do so.

Bankstaff is also used by many of the specialised supported living areas so that they can request shifts when they require them and view who will be attending their upcoming shifts – they can also directly book staff they use regularly which can be very useful in these areas where staff consistency is a key issue.

The introduction of Employee On Line has allowed bank employees to view their timesheets, input their availability for shifts and book available shifts from home. This allows for more employee flexibility as they do not worry about ringing the bank staffing office within working hours, which can be difficult especially when they are working unsocial hours.

The SMS function introduced in 2011 allows the bank co-ordinators to send out text messages offering shifts to any staff appearing as available for upcoming shifts, and also sends automatic confirmation and reminder texts to staff, reassuring them that they have booked their shift successfully and decreasing the likelihood of any no-shows while providing a detailed audit trail.

Another useful feature of BankStaff is that of auto-generated e-mails to agencies whereby shifts put out to agency by co-ordinators are sent through via e-mail, so that they have an immediate and accurate record of shifts that require cover and their reference numbers. It also has an out of hours feature whereby it sends shifts through to agency automatically when their start time is approaching, thus ensuring the shift will be filled but allowing the maximum time for it to be picked up by bank staff beforehand.

"No more bank paper timesheets for all clinical areas thanks to the introduction of an electronic system which is an important step towards the trust's goal of being paper-free and more environmentally friendly."

Outcomes/ Benefits

- Increased staff satisfaction – staff are able to book the shifts they want to even when the office is closed – they no longer have to be concerned with continuously calling the bank staffing office particularly when they should be resting between shifts.
- Staff being able to check their own timesheets means they are able to ensure they are finalised before the payroll is run as well as staff in the department – this means they are able to query unfinalised shifts and increase their likelihood of accurate payment and also saves administration time in the office.
- Percentage of shifts going out to agency has decreased – out of hours shifts previously went straight to agency, whereas the BankStaff system in conjunction with EOL has meant a greater number of these can now go to the bank staff, leading to significant savings for the wards and a greater level of staff consistency which is often better for patient care.
- Increasing numbers of agency staff applying to join the bank as employees – creating monetary savings for wards which can then be reinvested in patient care.
- Decrease in time spend in co-ordination and administration in the bank staffing department due to the reduction in data which has to be manually input.
- Unfilled duties and shifts without charge cover have halved – wards have increasingly had sufficient skilled staff as a result of a more efficient bank co-ordination system.
- No more bank paper timesheets for all clinical areas thanks to the introduction of an electronic system which is an important step towards the trust's goal of being paper-free and more environmentally friendly.

The future

- BankStaff is being rolled out to clinical units in York gained in the merger in February 2012. This will allow these units to request bank staff using the online booking system rather than having to call the department. It will also allow them to directly book the staff they like to use regularly, and view what bank staff they will have working on their ward at any given time. All of this will make it easier for them to engage in future planning and eventually the need for paper timesheets will also be negated for York bank staff as well as Leeds clinical areas.
- The trust has recently begun training the agencies they use regularly on using BankStaff in a limited capacity so they are able to book their own staff onto any shifts which have been put out to their agency. This will reduce administration time in the bank office, who currently have to manually input the information.

If you are interested to discuss any of the features and benefits that are mentioned on this case study, please contact **BankStaff@allocatesoftware.com**