Selenity Expenses Case Study

City Health Care Partnership drives digital transformation with Selenity Expenses

Background

An independent and not-for-profit social enterprise, City Health Care Partnership CIC (CHCP) provides a wide range of health and care services across Hull, the East Riding of Yorkshire, Knowsley, Wigan and St Helens. From health visiting and palliative care to school nursing and rehabilitation, all of the services provided by CHCP are delivered in community settings to local people.

Covering such a wide geographic area employing just over 2,000 members of staff. With teams regularly travelling to homes, health centres and clinics, it was important that administrative tasks such as logging mileage and expenses claims could be carried out efficiently and accurately.

Lee Hickson, Information Systems Manager at CHCP explains that: "Very early on, we recognised that our paper-based processes weren't an efficient way to manage expense claims going forward. Not only did it present many challenges for employees and managers but with digitisation sweeping the healthcare sector, replacing manual practises also provided the opportunity to enhance reporting and drive efficiencies through data collection."

Reducing the administrative burden

In order to better understand cost drivers and streamline the expenses process, CHCP sought a digital expenses solution from Allocate. Rolled out in 2015, the system was customised to reflect CHCP's expense policy and also integrated with the organisations existing Electronic Staff Record (ESR). Only having one system to update was of huge benefit to CHCP's administrative staff, as it afforded them with greater efficiencies and time savings. With data being exchanged between ESR and Selenity Expenses, the team had piece of mind that any updates to employee information, such as change of address were being replicated across the board and information was always up-to-date. The implementation of Selenity Expenses also coincided with a number of other digital transformation initiatives being introduced throughout the organisation. Mobile working was a key part of CHCP's vision and the availability of the Expenses Mobile app supported the new flexible approach to working.

Delivering effective training

With much organisational-wide change taking place, the IT projects team at CHCP understood that training would be an important component when introducing and rolling out Selenity Expenses to the wider service teams.

Lee added: "For a successful and smooth transition to the new system, we knew that we'd have to manage staff expectations from the beginning to the end of the change process. Ensuring that users were fully informed, comfortable in what they were doing and understood how to claim for the right items and amounts. We developed an electronic training package, in addition to delivering face-to-face training with a handful of the clinical service teams. We recognised that the expenses system is intuitive to use in itself but claimants would also need guidance and a little bit of support to start with."

Developing an electronic training package that linked into the ESR meant that staff members could easily login to the learning portal and access training. The interactive nature of the materials engaged new users and reinforced CHCP's expenses policy – it transpired that claimants weren't always reading the static training documents that were being sent out. By championing the solution and marketing training packages to the service teams and other colleagues, CHCP found that the use of the Expenses Mobile app increased and more employees engaged and used the solution.

> "
> "Selenity Expenses has certainly raised the transparency of our procedures and reinforced the organisations expenses policy. Not only has it increased the accuracy of claims but also introduced an element of consistency."
>
> **Lee Hickson**,
> Information Systems Manager,
> City Health Care Partnership

Increased accuracy

By digitising the expenses process, CHCP has seen a reduction in their average mileage costs. The implementation of the system highlighted that the organisations expenses policy had been open to interpretation by employees, largely when claiming for business mileage.

Lee explains: "Having a system tailored to our needs has certainly raised the transparency of our procedures and reinforced the organisations expenses policy. Not only has it increased the accuracy of claims but also introduced an element of consistency. After the system went live we learnt that there had previously been variation in the methods used by employees to record journeys – with some using odometer readings and others calculating distance with online route planners."

Policy reminders and mileage verification in the form of GPS capture and postcode to postcode look ups, have helped to increase the consistency of mileage claims submitted by CHCP employees. For administrators these measures have meant claims are easier to review and approve and there is much less checking and chasing for additional information. The process has been greatly improved and ultimately, the new system has given CHCP the ability to look at how they deliver services and if there's a way they can improve them and make them more efficient.

Insightful reporting

Following the adoption of Selenity Expenses across the entire organisation, the Business & Information Management and Technology (BI&IMT) team were able to use the reporting function to drill down into the data and analyse trends.

"Having a digital system provides us with a level of transparency that we just didn't have before. As a team we can now carry out a large amount of reporting, the detailed information generated by the software gives us the ability to take that data and use it in a meaningful way. By capturing information in a central point, we're able to continually use real-time information as a tool to help transform our organisation. Not does it help to drive decision making but also allows us to challenge some of the behaviours we've picked up on – you just wouldn't get that from a paper form," comments Hickson.

By working closely with other departments and understanding the changing technological landscape, the IT projects team were able to implement a solution which matched the organisations current and future needs. Not only did Selenity Expenses support the organisations immediate plans to mobilise employees and introduce flexible working practices, it also allowed the BI&IMT team to harness data in order to drive transformation and decision making.

For instance, the BI&IMT team were able to use the system to identify patterns in the data and pass those insights onto operational managers. The transparency of the system has also helped the team to field inquiries and compare statistics, such as looking at how the average mileage claims compare from one service to another. Harnessing data in this way has enabled CHCP to provide effective value for money services, ensuring that the right people, are in the right places, doing the right things at the right time.

"

"As a team we can now carry out a large amount of reporting, the detailed information generated by the software gives us the ability to take that data and use it in a meaningful way."

Lee Hickson,
Information Systems Manager,
City Health Care Partnership

ALLOCATE

Tel : +44 (0)20 7355 5555

Email : info@allocatesoftware.com