

Allocate GreenLight Case Study

Allocate GreenLight delivers efficiency gains for Ambulance Trust

Background

The South Western Ambulance Service NHS Foundation Trust (SWAFT) is responsible for providing ambulance services across the South West of England. Serving around 5.5 million people, the Trust covers the counties of Devon, Dorset, Cornwall, Somerset, Wiltshire and Gloucestershire.

The expansive and predominantly rural area, means that the Trust employs over 5,000 clinical and operational staff. Including Paramedics, Ambulance Care Assistants, Emergency Care Practitioners and around 2,785 volunteers made up of first responders, doctors and drivers.

Being such a large organisation with many employee changes to process, the Trust was keen to improve efficiency and automate its most commonly used HR forms. To do so, SWAFT implemented Allocate GreenLight – an intuitive e-Form system designed specifically for the NHS.

Streamlining payroll and recruitment

The Trust uses Allocate GreenLight e-Forms for payroll and recruitment processes such as establishment control requests, change and termination forms.

Kate Thomas, HR Services Manager at South Western Ambulance Service NHS Foundation Trust comments: “The process of using Allocate GreenLight is very simple and allows the HR team to quickly approve establishment control forms when they are raised by line managers. This means we have a visible workflow that allows us to track and action new appointments, personal and workplace changes for staff. As well as stay on top of notifications for when employees leave the Trust.”

Having this level of visibility means the Trust is able to efficiently track the progress of forms. Allowing the HR team to act quickly when vacancies arise by starting the recruitment process and quickly getting the right staff in the right place.

Electronic Staff Record integration

The Trust's largest and greatest asset is its workforce and because of this, it's important that the electronic staff record (ESR) is kept up-to-date to allow for effective workforce planning.

A seamless integration between Allocate GreenLight and SWAFT's ESR enables information to automatically populate forms. This makes tasks such as change of details more accurate and efficient for the HR team.

Kate comments: “The ESR integration saves the HR team and administrators from spending significant hours manually entering data. Instead the forms auto populate with relevant information, streamlining the process, which ultimately allows HR team leaders to approve change and termination forms easily.”



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Kate Thomas,
HR Services Manager,
South Western Ambulance Service NHS
Foundation Trust

Establishing efficient HR and Finance workflows

With Allocate GreenLight in place, SWAFT's HR department can easily send approved establishment control forms to the finance department to action.

Kate explains: “We're able to communicate information quickly to the finance department as salary and termination forms are automatically routed to the payroll team to action and payments are adjusted in line with the most up-to-date information.”

By ensuring that the right teams, get the right information, when they need it, workflows and processes are improved. Armed with accurate information the finance department can amend payments accordingly and look to reduce instances of overpayments.

The e-Form system also includes notifications and alerts to help ease delays as well as providing visibility on what particular stage a form has reached. This helps to alleviate bottlenecks as employees don't have to spend lots of time on the phone calling between departments to find out what stage a particular form has reached. Instead they can easily see which department or even team member currently has ownership of the form.

Accurate payments

Through a fully automated workflow, Allocate GreenLight intelligently highlights duplicate forms and helps to avoid information going missing through lost paperwork. Having this clear visibility prevents the Trust from making additional payments and ensures all transactions such as additional hours are authorised.

Kate adds: "All additional hours come through our establishment control process first. Once the hours have been agreed at director level and with the finance department, the employee then simply submits a Change Form for a variation of contract.

The HR department is able to process Change Forms very quickly and easily with Allocate GreenLight and the system helps to eliminate overpayments as all the information is in one place. Staff are comfortable submitting forms and the process works for our HR and Finance teams."

With Allocate GreenLight in place, South Western Ambulance Service NHS Foundation Trust has been able to automate its most commonly used forms, increasing the accuracy and visibility of information. The HR team is able to quickly communicate information to the relevant departments in the Trust, ensuring that changes to salaries and terminations are automatically directed to the finance and payroll teams. This helps to reduce delays, avoid instances of overpayment and ultimately increase workforce efficiency.

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