

Selenity Expenses Case Study

Black Country Healthcare NHS Foundation Trust shaves 10 percent off its mileage expenses with Allocate



Background

As a major provider of mental health, learning disability and community healthcare services for people of all ages, Black Country Healthcare NHS Foundation Trust is responsible for delivering integrated care and support to people living in Dudley, Sandwell, Walsall and Wolverhampton. The Trust was formed in April 2020, with the merging of Black Country Partnership NHS Foundation Trust and Dudley and Walsall Mental Health Partnership NHS Trust.

Prior to the merger the finance department at Dudley and Walsall wanted to find a solution that would transform the existing paper-based expenses process. With an average of 250 to 300 claims per month they wanted to ease the administrative burden placed on the payroll team and improve policy compliance.

Expenses administration

Employees would have to submit claims, including mileage, on paper forms to the payroll team. This would involve listing all claims separately as well as entering their start and finish locations and calculating the mileage manually.

Craig Tunstall, Finance Systems Manager at Black Country Healthcare NHS Foundation Trust, explains: "This placed a considerable administration burden on the payroll team, who had to go through each claim individually and log the total mileage onto the payroll system for payment. Part of this process involved carrying out random checks, to verify the mileage and investigate those that appeared to be outside policy."

While the Trust's expense policy and guidelines were available online, employees wouldn't always remember to refer back to them and this meant the payroll team would need to adjust claims that sat outside of the policy. It proved to be a time-consuming process and the finance department wanted to improve the accuracy of claims, generate cost savings and ensure compliance.

Accurate and auditable expenses

Through the implementation of Selenity Expenses, a cloud-based expense management system, the Trust has been able to replicate its claiming process online. Giving colleagues an easy way to record and submit claims through their computer or on the go using the mobile app, anywhere at any time. This has also contributed to the Trust's long-term commitment to digitising operations and becoming paperless. Selenity Expenses is configured to mirror Black Country Healthcare's expense policy and intuitive features allow the Trust to easily enforce policy limits. Having the policy built into the system has also helped employees to familiarise themselves with spending limits.

The approval process has also been greatly simplified for the payroll team and a direct integration with the Trust's Electronic Staff Record (ESR) means that all employees data is readily available and easy to manage. A bi-directional interface provides the payroll team with a quick and seamless way to access expense payment information. As once claims are approved by the employee's line manager, the information is reflected through the interface into the ESR system and directly available to payroll.

Craig adds: "Spend is now accurate and auditable. Selenity Expenses has reduced what was a big administrative task for the payroll department and we've seen a reduction in admin costs. Payroll no longer has to chase for paper documents, as the online system gives an easy to follow audit trail that allows you to see what stage a claim is at and who it's sitting with."



"By eliminating manual mileage calculations and the variations that can come with this method, the Trust has been able to generate savings of approximately £50,000."

Craig Tunstall,
Finance Systems Manager,
Black Country Healthcare NHS Foundation Trust

Expenses bill reduced by 10 percent

Providing community-based services means the employees at Black Country Healthcare travel substantial distances every month. By logging mileage through Selenity Expenses, Black Country Healthcare has increased the accuracy of claims.

Now employees simply enter the journeys from postcode to postcode or use GPS capture via the Expenses Mobile app and the mileage is automatically calculated for them. Selenity Expenses also supports the NHS Agenda for Change and applies automatic home to base deductions and offers bespoke mileage features such as lease car, consultants' mileage and many others.

"With increased scrutiny and controls gained from Selenity Expenses over our previous system, we've generated a 10 percent reduction in the expenses bill purely from mileage claims alone. We've also seen further savings in the reduction of admin costs and we now have a robust and auditable system ensuring we are compliant and performing the necessary checks as an organisation," said Craig.

By eliminating manual mileage calculations and the variations that can come with this method, the Trust has been able to generate savings of approximately £50,000. Entering journeys into Selenity Expenses has made sure claims are accurate and do not need to be double checked by line managers, cutting out unwanted time and complexity from the expenses process.

15 percent increase in driver compliance

To compliment the newly digitised expenses process, Black Country Healthcare also went live with Allocate's Driver Compliance Pack. Previously, if employees wanted to start claiming mileage they would complete a form providing details of their insurance and driving licence. Evidence would then be sent to their line manager who would approve the form and send it to payroll in order to set up that vehicle on the system.

"We soon realised issues with this process, not only was it time-consuming and placed a burden on line managers but we needed to build in supplementary vehicle and licence checks, said Craig.

Integrating into Selenity Expenses, the Driver Compliance Pack provides a way for the Trust to collect and manage driver and vehicle documentation as well as carry out automatic checks against DVLA and DVSA data.

Craig comments: "The solution offers us compliance at every stage of the process and ensures that our drivers hold a valid licence, vehicle tax, MOT and the right insurance. There seemed to be a general misconception that employees only needed business insurance if they are carrying patients and this just isn't the case. Through the introduction of the pack we've been able to increase driver compliance by 15 percent and ensure that our business travel duty of care obligations are fully met."

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Final thoughts

Since the rollout of Selenity Expenses and the Driver Compliance Pack, Black Country Healthcare has seen lots of benefits. The Trust has been able to drastically reduce its expenses bill and the risk of overclaims. Standardising mileage calculations and ensuring that employees are reimbursed at the same rate for the distances they travel.

The ESR integration and digitation of existing processes has also removed the administration burden that was being placed on the finance department and payroll team – generating time and cost savings seen as a result.

With duty of care and driver compliance checks now recorded through Selenity Expenses, the finance team have an easy way to manage, record and verify important driver and vehicle documentation. This has led to an increase in driver compliance and given the Trust the peace of mind that all drivers are safe to carry out work-related journeys.

