

## Allocate ER Tracker Case Study

# North Bristol NHS Trust empowers its line managers with Allocate ER Tracker.



### Background

A part of the local healthcare system, North Bristol NHS Trust provides high quality hospital treatment and community care to the residents of Bristol, South Gloucestershire and North Somerset.

The Trust employs just over 9,000 members of staff and has a growing and developing workforce, with a strong digital vision. As part of the newly launched People Strategy 2020 - 2025, the Trust set out a clear approach to the digitalisation and benefits realisation of its people systems and processes.

Ellen Hembrough, People Team Partner at North Bristol NHS Trust explained: "We wanted to empower our line managers with a digital HR case management system. One that would allow them to manage employee relations cases but also enable the People Team to harness real-time formal case data."

### Empowering line managers

Having met with the team at Allocate and seen first-hand the power and flexibility of the HR case management system, North Bristol began a phased roll out of Allocate ER Tracker to its various divisions.

North Bristol NHS Trust is one of the first to be using the system in this way. Enabling line managers and investigating officers to access Allocate ER Tracker so they can input and manage case information directly, rather than the system being led by the People Team.

Ellen said: "It's all about giving managers more control and ownership of the case management process. The People Team are still on hand to answer any questions but largely we're responsible for setting up users, defining access requirements and uploading information to make everything as easy as possible for users. This gives the People Team the capacity to be proactive, identify trends and work on driving innovation through the HR function, and across the wider organisation."

### Turning HR policies into manageable steps

The flexibility of Allocate ER Tracker means North Bristol NHS Trust has been able to tailor the solution to meet its needs and ensure that stages and steps reflect the organisation's HR policy.

"The workflow enables our managers to see the process right through from start to finish, it's clear and easy for them to follow as each step is set out. This also gives them the opportunity and resources they need to make the best decisions for the people they manage. But we've also built in support for when it's needed – integrating notifications that alert managers when it's advisable they seek help and advice from us."

The solution offers configurable workflows for each case type, allowing managers to assign stages, steps and timeframes. This helps to ensure consistency across each process and email alerts keep managers and investigating officers up to date with approaching deadlines, prompting them when steps require completion, are overdue or require additional advice.



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**Ellen Hembrough,  
People Team Partner,  
North Bristol NHS Trust**

### Capturing information securely and consistently

A cloud-based system, Allocate ER Tracker lets the Trust's managers record every case detail, in one place. Letters and email templates have also been built into the system, to help managers automatically populate written communications and free up time and resources from the People Team.

Whether it's managing the various stages or capturing correspondence such as email or phone conversations, everything associated with the case is grouped together. This helps North Bristol NHS Trust ensure compliance with information governance guidelines, as all information is securely stored in one central location.

## A focus on health and wellbeing

With a commitment to the health and wellbeing of its employees, the People Team at North Bristol NHS Trust have also designed the system so that each case type includes steps that prompt managers to check-in with employees from a health and wellbeing perspective. Not only are they reminded to carry out health and wellbeing checks but also given the information for support groups and mechanisms that can be offered to those in need.

Ellen explains: "It is important now more than ever for workplaces to be environments that support health and wellbeing. Incorporating these prompts into Allocate ER Tracker sets a standard for how we aim to put our employees at the heart of everything we do."

## Defined user permissions

With some cases more sensitive than others, the People Team is also able to define access to Allocate ER Tracker. This allows them to control what actions users are able to undertake based on the type of case they are working on.

"We worked closely with the People Partners in each of the Trust's divisions, understanding who needed access to the system. After a short pilot, we had some really positive feedback and even had managers approaching us, asking to be involved," said Ellen.

In some divisions, ward administrators at the Trust have access to the system so they can upload letters and supporting documentation for sickness or absence cases. However, there are case types such as employment tribunal that they cannot see for confidentially reasons.

## Training for success

The People Team has worked hard to ensure that the new system is as effective as possible. Help and support is available through a dedicated email address and the team has also produced resources to help managers, including a Toolkit featuring 'how to' videos. Training sessions are run every day and tailored around the needs of each division.

## Looking to the future

The Trust is currently using Allocate ER Tracker to manage sickness whether it be short or long term, absences, disciplinary, grievance, bullying and harassment, flexible working, redeployment, performance, employment tribunal, maintaining high professional standards and Trust Board appeals.

Ellen concludes: "The next phase of this project is to embed Allocate ER Tracker fully into our processes, making it an integral part of all managerial practices. As more users onboard with the system and we start to generate more employee relations data, we'll look to use the reporting capabilities in the system, allowing the People Team to analyse information that can help us to reduce case costs and even prevent cases from happening. For us it's important that we take a lesson learned from each case."

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