



Assure Expenses Case Study

Cloud technology modernises expense claims

Background

South Western Ambulance Service NHS Foundation Trust (SWASFT) provides ambulance services to people in the South West of England. In February 2013 it acquired neighbouring Great Western Ambulance Service NHS Trust (GWAS). In its enlarged form covering seven counties, more than 4,000 staff have responsibility for the provision of ambulance services across an area of 10,000 square miles and a population of 5.3 million.

Claims burden

Up until 2013, SWASFT employees were using expense forms created using MS Excel to submit claims for mileage, subsistence and other items purchased during their duties. Once completed, those forms were printed for submission to a line manager for approval and ultimately onto payroll for payment. With staff spread across nearly 100 ambulance sites, it was a laborious process for all involved – staff, managers and payroll.

Staff generally submitted claims once at month-end. This gave managers around 1-2 days to review claims before approving for payment. Managers provided updates to keep staff informed of the approvals process.

Cloud deployment

In April 2013, SWASFT went live with Assure Expenses. The solution is the mostly widely used cloud technology in the NHS by 67% of the NHS workforce across Trusts, CCGs and CSUs.

"We wanted to start with a new expenses system in time for the new tax year," says Mark Noble, Financial Controller, SWASFT. "We first cleansed and updated the staff data held in the NHS Electronic Staff Record [ESR] before connecting with Assure Expenses. We knew the

bi-directional interface with ESR would remove any future need to duplicate data between both systems.

In terms of getting staff up and running, we started with those working in our HQ, managers and anyone using a lease car. Not all employees are registered with Assure Expenses, only when they start claiming expenses. Once enrolled on the system, most employees find it easy to use, however the Finance team attend courses for all new operational staff, providing face-to-face training and explaining the system and processes.

RLDatix assisted us with presentations and support materials. The finance team travelled to the main 30 ambulance stations out of a total of 100."

SWASFT currently has 800-1000 of its staff submitting claims monthly through the system.

Mark adds: "We're using Assure Expenses on a 3-year annual licence with costs calculated against the number of claims we submit monthly. We haven't really needed it yet, but the team at RLDatix provide support via a helpdesk and a 24-hour, 7-days per week emergency telephone number."

Staff now submit expense claims electronically at any time during the month for review by their line manager. The Expenses Mobile application allows employees to submit and track expense claims from their mobile phone and receipts can be quickly and easily uploaded through the camera – simplifying the approval process. Additionally, SWASFT has introduced scanners at each ambulance station so that paper receipts can be emailed to line managers for approval. However, in the more rural and remote stations members of staff put their receipts into a pre-paid envelope for posting.



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Mark Noble
Financial Controller,
South Western Ambulance Service NHS
Foundation Trust

Benefits

- With an electronic claims system, there is a reduction in paper moving around the organisation; approximately 800 paper claims [two pages of paper each claim] removed per month.
- Employees using the system have greater visibility into the status of claims because of Assure Expense's audit logs. Staff can access the expenses system and track progress of their claim themselves. They no longer need to spend time confirming if the claim was received, approved and sent for payment.
- Managers feel less pressure and have more time to review, reject or approve claims because staff can submit claims at any time during the month.
- Finance can now create reports within the system for managers to check, for example, reviewing outstanding expense claims after the 4th or 5th day of the month for approval. This replaces use of paper-based cheque requisition forms, which would need input from payroll, a cashier to raise the cheque and a manager to sign the cheque. With around 20 requests per month each taking approximately 5 hours to process, the new system is saving approximately 4-days per month in staff time.
- Equally, claims over 3-months old submitted for payment are automatically routed to the financial controller for approval, reducing burden on both managers and payroll.
- Following deployment, SWASFT has further customised Assure Expenses bringing continuous business benefits configuring it to remove the 'miscellaneous' option from the list of selected expenses items. With the removal of this common 'dumping ground', claims are submitted more accurately so that managers can review and manage spend appropriately.
- The reporting function enables SWASFT to better manage mileage claims. The payroll team can review individual use of personal cars, for example, and if necessary implement a local pool car to reduce costs.
- The system also creates more accurate mileage claims because it provides automated postcode-to-postcode routing. SWASFT estimates that if Assure Expenses more accurately calculates each return journey distance between ambulance stations by just 1 mile and, with a conservative estimate of staff making two journeys per month, x 800 claims x 56p mile, SWASFT is saving £1,072 saving per month.

- A bi-directional interface between Assure Expenses and the NHS ESR 'central data hub' helps maintain the accuracy of staff data in Assure Expenses – such as changes of details, work address, mileage and vehicle details. Staff changes made in ESR are reflected in Assure Expenses greatly reducing duplication of work. Equally, expenses payment information entered to Assure Expenses is replicated in ESR replacing a previously manual and time-consuming process.
- Claimants can also use Assure Expense's 'My Details' page to view their own details in NHS ESR to check for accuracy, improve data integrity and ensure accurate reimbursement.

Mobilising the workforce

Employees are also utilising the Assure Expenses Mobile app which allows them to record expenses on the move, use their phones camera functionality to scan receipts and check the Trust's expenses policy. For managers the app enables them to approve claims whilst out of the office which drives further efficiencies through the process. With employees regularly travelling across the South West, the Trust has also adopted the use of the journey validation feature. Using GPS facilities via the Expenses Mobile app the finance team is able to accurately calculate the distance travelled by staff.

Mark comments: “The mileage validation feature allows our employees to enter the multiple stops and locations which they have made throughout the day. This ensures an increased level of accuracy and means that claims are easily verifiable for managers.”



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Conclusion

SWASFT have not only removed 800 sheets of paper from their expense claims process each month, but have been able to save 4-days per month of staff time spent processing cheque requisition forms and keying data into NHS ESR, reduce their spend on mileage claims and increase their staff happiness because claims are processed quicker.