



Assure HRCASE Case Study

North West Boroughs Healthcare Trust undergoes digital transformation with Assure HRCASE

Situation

North West Boroughs Healthcare NHS Foundation Trust provides treatment, support and guidance for more than 3.5 million people living across Greater Manchester, Halton, Knowsley, Sefton, St Helens, Warrington and Wigan.

This includes community-based physical health services, as well as mental health and learning disability services. It is passionate about providing outstanding patient care that aligns with NHS England's 6 Cs – care, compassion, commitment, courage, communication and competence.

Covering such a broad area means that the Trust employs around 4,000 staff across a range of professions.

Digital transformation

As part of its digital transformation, North West Boroughs NHS Foundation Trust has been keen to ensure that corporate services fully support its changing organisational needs while maximising the use of technology and cross functional working.

It recognised that its workforce is its greatest resource and therefore developed a workforce strategy including core competencies, innovative workforce solutions strengthened by strong leadership to support the delivery of transformational service changes.

The HR department was at the forefront of these changes and made significant improvements to its process as part of the Trust's initial digital transformation efforts.

In 2015, the Trust invested in Assure HRCASE to replace its existing employee relations 'log' which comprised of seven shared Microsoft

Excel spreadsheets, supplemented by a series of Microsoft Word documents containing additional case information.

"Our previous system of recording employee relations cases was antiquated, difficult to maintain, and time consuming to use for report creation," explains Jason Brannan, assistant director of HR and OD Services at North West Boroughs Healthcare NHS Foundation Trust.

"We had to access our spreadsheets consecutively so we didn't create conflicting versions, but this created delays and so the data wasn't always up to date at the moment when it's needed. Sorting the data to present a different view was a challenge – the function was open to error and frequent manual corrections were needed. Creating our weekly report for the HR director involved the time consuming task of summarising all of the spreadsheets into a single concise document."

Case management

By utilising the Assure HRCASE cloud-based software, the Trust reduced the operational complexity of managing multiple employee cases and simplified case reporting.

Jason explains, "Having such a large quantity of employees means we found it necessary to implement a sophisticated human resource management tool. We're continually looking to improve our operations and initially deployed RLDatix's Assure HRCASE to help resolve issues around case management errors which improved the efficiency of the HR department."

Typically, the team are managing up to 64 employee cases such as appeals, formal disciplinarys and sickness at any one time.

The ability to risk assess the cases into urgent and non-urgent enquiries has enabled the team to target their responses and this provides further efficiencies in saving HR and management time and ultimately finding a solution for the employee."

Assure HRCASE has enabled the HR team to use the system to escalate any concerns regarding timescales at their weekly meeting.

Jason comments, "By closely managing any breaches in timelines, the HR operations team is able to take immediate action and as a result we have seen a reduction in the time taken progressing cases to formal disciplinary hearing by approximately 20 per cent."

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"Assure HRCASE is the first system we have seen which is designed specifically for the public sector and fully customisable to the requirements of the system."

Jason Brannan
Assistant Director of HR and OD Services,
North West Boroughs Healthcare NHS
Foundation Trust

Demonstrate the value of HR

Additionally, Assure HRCASE helps the team to meet deadlines. For instance; the Trust's policy is to resolve disciplinary enquires within 32 days. The system automatically sends email reminders of case progress and looming deadlines to the case handlers and allows all case documents and notes to be held centrally.

By tracking the time taken to deal with requests the Trust has also been able to demonstrate the effort required to validate information and deliver results. This has helped to reinforce the hard work of the HR department and also raise its profile within the organisation.

The software has given the team full visibility of the department's workload, which has allowed them to prioritise cases and ultimately streamline operations. These efficiency gains have reduced the length of cases and this in turn has reduced case costs.

The intuitive system also makes it easy for the HR team to manage and resolve long term sickness and absence cases, meaning that the Trust has a lower spend on temporary cover or over-stretched understaffed departments. This has increased the efficiency and positively raised the profile of the HR department. "By categorising and tracking cases, members of the HR team are easily able to search the system, allocate enquiries and view progress. This helps to keep a consistent narrative between all members of the HR team, as previous advice is logged and recorded," adds Jason.

Tracking cases

More recently, the Trust added the capability of the 'enquiry case type' management tool, part of the Assure HRCASE system. When its HR team has an initial enquiry, it can record any cases requiring follow up with the 'enquiry case type'. By logging these queries, the team are creating a case file, so that any subsequent calls or emails relating to the case are logged for future reference and tracking.

Jason explains, "Previously, we had only used Assure HRCASE to record and track high-level disciplinary and grievance case work. Now we can record any case requiring follow up, not just the formal cases. On an average day, we'll get up to 60 queries come into the HR team, so it is essential we have a transparent means of recording queries, which ensures the team are providing consistent and efficient case management. If it's not on the Assure HRCASE system; it is as if it hasn't happened."

In the past, a manager may have called in to log a complaint to one of the HR team and if the advice was not favourable, the manager may ring in again to speak to another advisor on the team to illicit a different response with a modified complaint. With Assure HRCASE and its enquiry case type, all the information is logged directly onto the system, so avoids any inconsistencies and ensures better tracking of cases.

Jason adds, "The system also allows us to protect the team from any unjustified complaints as any conversation or email is documented for future reference and reporting. We can glean important information from Assure HRCASE for reporting with our business partners at the different boroughs on the type and quantity of queries every month. It helps us to identify any misunderstanding in organisational processes, for example, staff not knowing where to find their payslips.

We can also use the time reporting codes in Assure HRCASE and enquiry case type to demonstrate to managers within the organisation the amount of time and hard work the HR team has devoted to each particular query. It has certainly helped to raise the profile of the HR team and the scope of our work. Within the Trust, it has also increased understanding of how the HR team operates and prioritises cases, which ultimately increases general satisfaction with our work."

Jason concludes, "HR's value needs to be seen as more than transactional services such as recruitment, records management and training. It should also contribute strategically and operationally to the Trust's overall performance. With this aim we needed to gather more granular information on the types of cases submitted, as well as being transparent and accountable for our responses.

NHS Trusts have to manage vast amounts of sensitive data and cloud technology is well positioned to transform manual paper-based processes into trackable online workflows. It's important that the HR and IT departments have a good relationship so that they can work together to develop best practices for the technology but also ease the adoption of new digital strategies moving forward."

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