



RLDatix – Allocate Optima case study

How HCRG Care Group use Allocate Optima to overcome data duplication, improve payroll accuracy and save £800,000

Summary

HCRG Care Group is one of the UK's leading independent community health and care services providers. RLDatix helps healthcare organisations such as HCRG create multi-disciplinary rosters, measured across their entire lifecycle from budget setting, care planning, roster approval and delivery, against unique KPIs explicitly designed for healthcare environments. These KPIs are based on the safety, productivity, budget and fairness of the rosters and ensure the entire organisation is aware of the quality of rosters and where there is room for improvement.

By using Allocate Optima, the HCRG Care group overcame the employee challenge of reducing the manual duplication of data between Optima and its existing payroll system. As a result, 25,000 timesheets were removed, saving £800,000 annually. Improved absence management, such as holiday utilisation, also contributed to this saving. Furthermore, significant organisation benefits were realised, such as payroll accuracy increased by 5% and agency spend reduced by 5% by approving rosters on time. By deploying Allocate InstantPay alongside Optima, HCRG also improved staff financial wellbeing by allowing them to track and access their salary more flexibly. Over 20% of HCRG staff are registered with Allocate InstantPay. In January, 293 employees accessed their earned wages, which is 33% of enrolled employees and in 18 months, HCRG's workforce has saved £250k using Allocate InstantPay savings tool direct from wages.

**Payroll accuracy increased by 5%
and agency spend reduced by 5%
by approving rosters on time**

Challenges

HCRG started their journey with Allocate Optima in 2017. HCRG Care Group operates from around 500 locations across England and planned to roll out Optima in every site alongside its own payroll system.

- This initially created a challenge with dual entries as staff had to input the same information into two different platforms.
- Managers were also struggling to approve schedules in time, so staff needed to be given more notice of the days they were working.
- A further challenge arose from the need to have a joined-up approach which worked for both finance and HR. Paul Lundbeck, Director of People Services, says: "The finance team looks at people data and establishment data in a completely different way to the HR team."

Key to a successful rollout

Paul explains that the rollout started with a clear roadmap that constantly emphasised the value of rostering, while ensuring that the focus was on optimising rostering rather than reducing agency use. "We championed effective rostering rather than the rollout being about decreasing agency or deploying technology."

The team also re-engaged with the entire organisation from the executive team downwards. "They were told about the barriers to effective rostering and explained what we were doing about them," he says. There was also a focus on rostering rules from business unit heads to frontline staff, and consistent structures were introduced across HR and Finance. The aim was to make accessing information straightforward, such as viewing reporting so that managers could lead and embed successful rostering.

This data is vital in ensuring that services have adequate staff working to keep the public health service safe

Outcome

Following the successful deployment, 320 services are now rostering with AllocateOptima. Some of the main benefits of implementing Allocate Optima for HCRG include the following:

- Flexible Working & Effective and Safer Planning
- This has helped put more control in the hands of frontline staff. Employees can submit annual leave earlier than before; this has a positive knock-on effect because managers can view workforce gaps months in advance and then find the necessary staff to cover. Managers can also review analytics such as staff turnover; this data is vital in ensuring that services have adequate staff working to keep the public health service safe.
- Financial Control & Automation
 - 25,000 timesheets have been removed, meaning that payroll accuracy has improved by 5%, attributed to eliminating the dual entry. The financial wellbeing of staff has been improved with the introduction of Allocate InstantPay.

Finally, there are fewer queries concerning monthly pay because staff have enough time to review payslips, so there is less "payday anxiety" because staff - particularly shift workers - can see errors made, such as missed shifts.

“We release provisional payslips a lot earlier in the month than we used to. Initially, this was a little controversial because the payroll team didn't want to deal with pay queries while working on the next payroll. However, we have found that come payday; there are hardly any issues or problems with pay. People are much happier.”

Paul Lundbeck
People Services Director