South Tees Hospitals NHS Foundation Trust is using e-rostering to put nursing time back into patient care

HealthRoster helps South Tees Hospitals NHS Foundation Trust deliver better quality and more productive rosters; freeing nurses from unnecessary roster administration

South Tees Hospitals NHS Foundation Trust is the largest hospital Trust in the Tees Valley. It runs the James Cook University Hospital in Middlesbrough and the Friarage Hospital in Northallerton. In 2011 it vertically integrated with community services in Hambleton and Richmondshire, Middlesbrough, Redcar and Cleveland. It has a workforce approaching 9,000 staff. The Trust uses HealthRoster to manage the planning and deployment of over 130 of its nursing units.

The challenges

Paper-based rostering presents a number of challenges to Trusts and South Tees is no exception. According to Anita Robinson, E-Rostering Implementation Lead, the challenges were:

- an unnecessary administrative burden that was having a detrimental impact on the team’s time to care;
- a reliance on complex manual processes that was making forward planning difficult (meeting demand against the backdrop of compliance requirements including the EWTD);
- a lack of visibility at ward level of issues impacting day-to-day nurse supply, such as leave and absence, was making workforce management slow and reactive – often resulting in an increased use of temporary staff;
- the unpredictability of individual staff preferences which was having an impact on staff availability;
- a difficulty in getting the skill mix on each ward to match the clinical needs of the patients on that ward.

"We were used to seeing dog-eared bits of paper and the process wasn’t very helpful in terms of the big picture," says Anita. In the end the catalyst for the move to e-rostering was a trust-wide initiative to become paperless. The team at South Tees had also seen HealthRoster successfully in use in other Trusts and this helped them feel confident that it was the right system to meet their needs.

Benefits of HealthRoster:

- greater transparency from ward level to divisional manager
- time is released for patient care
- better skill mix across each shift as and when needed
- nurses can view their own hours quickly with an online summary

The solution

The Trust embarked on a project to roll out HealthRoster and the introduction of the software provided an ideal opportunity to review the rostering processes. The Trust recognised that many of the tasks of rostering were effectively administrative and that with the introduction of HealthRoster these tasks could be better managed by a centralised team - this approach is known as centralised rostering.

The result is that Band 7 staff are no longer required to carry out administrative rostering tasks that were previously taking them away from patient care. The team at South Tees recognised this approach needed the buy-in and support of the nursing workforce; to achieve this the Trust focused on creating the correct working practices and rostering policies to ensure the provision of safe, efficient care while at the same time providing fair and transparent rosters for staff. Changes included a reduction in the number of different shifts that could be rostered.

Today HealthRoster is deployed in 136 areas, and the Trust’s target is that by December 2013 over 90 of these will have centralised rostering support.

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Support at Board level was a key factor in the success of the move to e-rostering. Prof Tricia Hart, who was Director of Nursing at that time was the project’s sponsor; driving the change at such a senior level helped ensure clinical colleagues were on board as well as colleagues in finance and HR.

The change programme was significant and Jo Hutchinson, senior nurse for E-rostering, says nurses were familiar with less structured flexible working. In addition, many ward managers had been in nursing for many years and some were not comfortable with using information technology.

The team set about winning hearts and minds which meant explaining the benefits in terms of not having to fill in record cards and timesheets, manage request books and TOIL records. The Trust also set up a training programme and a 9am to 5pm helpline facility, which is still running.

**Managing the change**

**The benefits**

From an organisational point of view there is greater transparency from ward level to divisional manager and the Trust’s management knows what is going on across all wards. Crucially HealthRoster has helped South Tees Hospitals NHS Foundation Trust to deliver benefits in both quality and productivity while provided better assurance around compliance and standards. Specific benefits include:

**Quality: Released time to care**
- Removed administrative burden associated with managing and creating paper rosters
- Releasing time to care by removing requirement to complete time sheets
- Automated matching and alerts to ensure each ward has the correct skill mix based on clinical needs of the patients on that ward.
- Reduction in the number of different shifts - based on clinical need
- Identification of staff preferences and restrictions which improves effective rostering and promotes happier staff

**Productivity: Improved efficiency**
- Reduction of unnecessary unsocial hours payments in some units
- Reduction of unnecessary additional duties which has led to a reduction in cost by sharing staff across the wards rather than over rostering on one ward
- Improved resource management practices including full utilisation of staff hours

**Assurance: Better compliance**
- System used as one version of the truth to provide records to support clinical governance
- System used to monitor and record training compliance providing evidence of meeting NHSLA requirements
- Amended shift start and finish time and revised breaks means EWTD compliance

“From a staff point of view, our employee online system means they can see their own hours quickly and know what leave has been taken and what still remains. This means they don’t have to bother the ward manager which in turn allows the manager time to complete more effective tasks.”

“At the moment we are rostering in over 130 units and this will increase as we introduce e-rostering to our community services. Effective rostering releases time back for patient care,” says Jo.

Additionally, from a skill mix perspective, the trust is able to ensure an even distribution of skills across each shift and where there is the need for example, in highly-skilled areas; skill mix can be adjusted accordingly.

Ward managers now use e-rostering to manage annual leave through online reports which show the percentage of staff on annual leave and so assist the managers in avoiding situations of either under or over staffing the ward.

**Next steps**

The next steps are to roll out centralised e-rostering to the community teams which means a further 40-60 units. The trust also intends to use the system to reduce the percentage of agency nurses.

At the moment requests for agency nurses from NHS Professionals are not centralised. “Looking back it has been quite a journey but the improvements we have seen throughout the Trust have made it all worthwhile” says Anita.

Front page photograph of e-Rostering team from left to right
Back row: Martin Blakey, Mandy Bruerton, Angie McReynolds, Julie Pennifold, Andy Leach
Front row: Carolyn Richardson, Jo Hutchinson, Dee Patel, Anita Robinson, Shaun McCarthy
Missing team member Emma Gaulter.

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