



## e-Expenses

Allocate Software, following a detailed review process, is an expenses supplier to the NHS ESR Programme. Allocate e-Expenses is the only solution to automatically cross reference expense claims with HealthRoster staff rosters in real time, improving claim accuracy whilst removing admin burden.

Our solution has been developed with our NHS customers to ensure it reduces admin for everyone and makes the most of existing information and systems. It is proven and cuts through the complexity of submitting and processing expenses claims making life easier for all. Automation of time consuming back office processes, effective control and management of staff expenses, and rapid visible reductions in operating costs, makes e-Expenses the essential expenses application for NHS Trusts.

### e-Expenses Key benefits

- Significantly reduces costs of processing claims
- Improves expense claims accuracy by interfacing with HealthRoster to allow cross checking of claims against the roster in real time;
- Accessible online via EOL (Employee Online) on desktop, tablet and mobile devices;
- Provides unique protection from fraud & error;
- Delivers a two-way data flow with ESR, saving time and ensuring accuracy of data;
- Ensures compliance with NHS specific requirements, including mileage triangulation and vehicle data (such as validity of registration, MOT and insurance)
- Provides intelligence for the understanding and planning of staff costs and claims patterns.
- Allocate Software is an expenses supplier to the NHS ESR Programme

### e-Expenses Background

Processing staff expenses claims is one of the most time-consuming and onerous tasks faced by healthcare organisations. Paper-based systems are complicated, admin heavy and prone to mistakes. At the same time, with complex rules and regulations, the potential for fraud, inadvertent or deliberate, is high.

Developed as a direct result of requests for help from our

NHS customers, the application has been designed to be easy to use for claimants and approvers, while dealing with the very complex and specific payment rules in the NHS.

e-Expenses is flexible and robust enough to be able to meet the unique and diverse needs of Acute, Primary, Community and Mental Health NHS Trusts.

With over a third of the workforce making expense claims, the e-Expenses application has an immediate impact on driving down expense processing costs.

"e-Expenses is a really valuable extension to the HealthRoster solution; the process is significantly streamlined, reducing the administrative burden while increasing the accuracy of reimbursements. We anticipate financial savings due to improved accuracy and time savings across our Payroll team. This application demonstrates our commitment to employing the latest technology while improving our quality of service, in line with our commitment to first class patient care."

Mark Casson, ESC Operations Manager,  
Blackpool Teaching Hospitals  
NHS Foundation Trust

### e-Expenses Capabilities

**Allocate e-Expenses is unique.** When combined with the functionality of HealthRoster v10, is the only solution that automatically cross-references data with the roster in real-time to check and verify all expense entries against NHS criteria and automates claim calculations. This unique security feature brings equally unique benefits:

- Delivers unique protection against fraudulent activities, checking that claims are not made during a period of sickness, for instance.
- Eliminates potential for manual errors and duplication.
- Simplifies implementation.
- Make users lives easier!

For Employees:

- o Single point of entry for all employee related activities, from requesting shifts and leave to submitting expense claims
- o Familiar interface for users already using Employee Online

For Managers:

- o Managers are able to review claims for approval via Employee Online as well, thus reinforcing the 'single point of entry' notion.

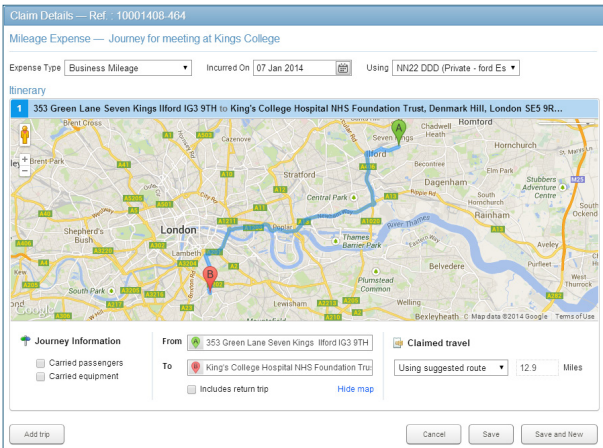
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e-Expenses the only integrated solution that delivers the most robust and efficient approach to managing staff expenses. Dramatically reducing the time and effort expended by staff and managers in entering and making expense claims, while eliminating avoidable costs, the application makes the process simpler, faster, more accurate and cheaper to manage.

The in-built 'rules engine' translates simple text entry into NHS specific code, and ensures compliance with policy by flagging potential violations.

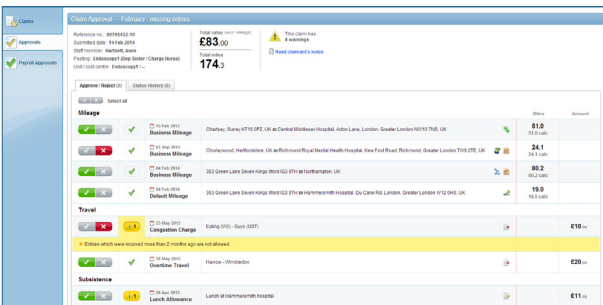
Features include:

- **Triangulation rules**, which manage the three elements of a journey, from starting point to destination and back. Rules can be applied to automatically calculate the appropriate reimbursement.
- **Uses Google Maps** to accurately calculate mileage and distances, for single and multi-stop trips.
- **Warnings** which flag up in real-time, to monitor mileage tolerances and ensure that payments are appropriate to distances travelled.



- **Complies** with all NHS-specific expense categories, such as vehicle checking and Duty of Care management, which monitors the vehicle used and ensures the appropriate mileage reimbursement rate – including MOT, insurance and registration.
- **Additional criteria** incorporates other key claim elements required by ESR, such as type of mileage - nature of business, type of car, number of passengers - to allow efficient processing and payment of claims.

It's fast to deploy and is available on Allocate Cloud making mobile access for all even easier and more cost effective.



## e-Expenses The Benefits

e-Expenses delivers the NHS with a wide range of benefits including:

- **Cost savings**
  - immediately minimises wastage caused by manual errors;
  - reduces payroll costs;
  - eliminates fraud when combined with HealthRoster.
- **Increased efficiency**
  - dramatically reduces the time spent by payroll departments processing claims and managing input into ESR;
  - significantly reduces the time and effort required for managers and staff to make claims;
  - improves speed and accuracy of reimbursements;
  - avoids duplication of data entry.
- **Operational insight**
  - delivers enhanced understanding of staff spend patterns, enabling more effective expenditure planning and forecasting;
  - gives approvers and managers full visibility through extensive web based reporting features and notifications.

In addition, the application delivers:

- Provides detailed reporting on compliance and person/unit spend;
- Robust ESR interfaces which give further assurance that the data is not only accurate, it also adheres to the tight security controls of NHS trusts;
- Ease of use and a familiar interface for staff, requiring little training or implementation time;
- Full access on-the-go via iPads and tablet devices.



The e-Expenses application is a key component of Allocate HealthRoster, the integrated solution for all rosters, timesheet, absence management and expenses.

## e-Expenses Next steps

For more information about e-Expenses, please contact your Allocate Account Manager or visit: [www.allocatesoftware.com/e-expenses](http://www.allocatesoftware.com/e-expenses)

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