Allocate **Case Study**

Northeast Health Wangaratta

Northeast Health Wangaratta uses Allocate Software's rostering solution to manage workforce more efficiently, saving time and money.

Introduction

Northeast Health Wangaratta (NHW) is a Victorian healthcare service that manages payroll for 5 Health Services within of the Hume Rural Health Alliance (HRHA), a consortium comprising 19 public health services in the Hume region of rural Victoria with over 18,000 employees.

Challenge

NHW encompasses a workforce of more than 1,300 people covered by seven enterprise bargaining agreements (EBAs). This means different staff are paid varying hourly rates and must comply with a range of conditions with strict rules around rostering practices.

Rostering for healthcare carries unique challenges involving getting the right mix of skills and trained staff to meet patient acuity and other compliance requirements. At the same time, public health organisations are under pressure to keep costs down, as well as attract and retain highly-skilled staff.

NHW faced three key challenges. The first one was that manual, paper-based rostering processes made it difficult and time consuming to fill gaps in the roster. As with any manual process, errors were inevitable and could result in certain shifts not having the right mix of skills in place.

To fill last-minute gaps due to unplanned leave such as sick leave, nurse unit managers (NUMs) and/or ADONs sent global text messages to groups of nurses. This scattergun approach meant some nurses were contacted numerous times in a single day regarding shifts that needed to be filled, while others received messages regarding shifts they were not necessarily skilled to fill.

Avi Kumar, director, people and culture, NHW, said, *"Rostering for the healthcare industry is different from other industries in that getting the right numbers of staff in place with the correct mix of skills and abilities is absolutely crucial to ensure safe patient care.*

The organisation needed a solution that would make rostering simpler and less error-prone, freeing up NUMs to spend more time managing patient care."

The second challenge was that the manual processes often led to errors in payroll processing, which could cause employees to be over- or under-paid. This damaged staff morale and created a strain on the health service's budget.

Avi Kumar said, *"The paper-based process meant that people missed details on their timesheets like start and finish times, and break times. It also meant that NUMs and other department heads had to spend time tracking down timesheets. It was difficult and time consuming to send validated data to payroll to process payments."*

> " *It took a significant amount of time to rectify payment errors and these errors were bad for morale. It was essential to get a system in place to ensure everyone was paid accurately and correctly, on time, every time.* "

"Rostering for the healthcare industry... is crucial to ensure safe patient care"
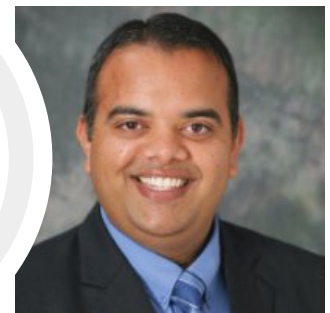
Avi Kumar, Director People & Culture

The third challenge they faced was an inability to respond quickly to leave requests and track trends around staff leave. Understanding patterns in leave such as sick leave lets managers put actions in place to minimise unplanned leave, so NHW needed a way to track leave beyond simple Excel spreadsheets.

Avi Kumar said, *"Understanding when staff are likely to take leave lets health services plan in advance to fill those gaps. Moreover, being able to identify suspicious sick leave, such as days off around public holidays, is important for identifying those staff members who may need some additional management. We didn't have that ability, which meant we were flying blind."*

Solution

With reporting and budgetary requirements getting tighter, CEOs of Health Services within the Hume agreed it was time to find a solution to these challenges. They ran an open tender process and chose Allocate's rostering solution.

Avi Kumar said, *"Allocate's solution is a one-stop shop. It lets us perform multiple functions around rostering and payroll, including providing insights from data that let us plan and respond better to changing situations.*

"The system needed to be incredibly easy to use so that we could ensure staff would accept it right away. The users of this system are geared towards patient care rather than IT systems, so an intuitive, user-friendly system was an absolute must. Allocate's system fit the bill by being so easy to use that training a new user takes hardly any time at all."

The Health Services within the Hume needed a solution that was industry-specific so it could easily cope with the unique demands of the healthcare industry.

Avi Kumar said, *"We needed a vendor that understood the health industry because there are a lot of shift patterns that not everyone can understand. We needed a solution based on the 'why' of the decisions that needed to be made. Allocate was the only vendor with an industry-specific solution that met these needs."*

Benefits

Following a relatively simple implementation process, the health services began seeing benefits almost immediately.

The first and most obvious benefit was validated information being sent to payroll. The validity of the data is now unquestioned, so staff are paid correctly every time and managers no longer spend time dealing with over- and under-payments. This has delivered a remarkable improvement in staff morale and engagement, as well as significant time and cost savings. Granted human error occur from time to time and it's an ongoing effort of continuous improvement to reduce any errors.

Avi Kumar said, *"We no longer have to chase information or ask people to confirm the data. That means far fewer errors, which has reduced the pressure on the payroll team dramatically. Previously we only looked after NHW payroll and now the team also provide payroll services to 4 other Health Services.*

"We can plan more precisely for shifts so we can rationalise the right number of people working at any one time; That allows resourcing efficiency while still letting teams deliver safe patient outcomes."

Filling gaps in the roster is easier with Allocate's SMS module, which lets NUMs send text messages to targeted groups or individuals based on the type of shift that needs to be filled. The staff member responds to the text directly, streamlining the shift replacement process.

Avi Kumar said, *"We have to keep track of how many times we've contacted staff to fill roster gaps. In the past, that happened on a piece of paper or an Excel spreadsheet. Now we will be able to track it automatically through Rosteron, along with fast reporting of who's been contacted and what their responses were."*

The system also allows us to extract data in real time to a Business Intelligence reporting tool such as Powerbudget and Finity from which we can interrogate trend reporting that was previously lacking. We can then identify trends around leave and shift preferences. This lets Managers introduce roster efficiency pathways.

Avi Kumar said, *"When an employee asks for time off, they want a response as soon as possible so they can plan their holiday. In the past, it could take upwards of three weeks for managers to be able to approve leave. Now, with the amount of data available, managers can provide an expedited response to leave requests, giving employees more time to plan their time off, and letting managers plan to fill those gaps in the roster. That responsiveness is key to improving and maintaining staff morale."*

Overall, implementing Allocate's rostering solution has delivered significant time and cost savings in addition to rationalising the rostering of resources.

Future Plans

Having seen the power and capability of Allocate's rostering solution, managers are now demanding more from the system. Users are working together to solve problems and discover new ways to get the most from the system.

Avi Kumar said, *"Managers who took on the system simply because it was mandated are now vocal supporters. They're requesting more training so they can use the system more effectively because they can see its potential.*

"The next phase is to bolster our ability to use the tool to create predictive reports to fill gaps even more effectively. For example, if the organisation needs 100 hours of service from a team, the system can help ensure that those 100 hours are delivered precisely: not 103 hours or 98 hours but the full 100 hours. This kind of precision delivers cost and efficiency benefits.

"We will continue pushing the Allocate's solution to gain even more efficiency. The system's ease of use makes this feasible. For example, I only use the system sporadically and it only takes me a matter of moments to find the information I need. Once a user has been shown how to use the system, it's like riding a bike; you never forget."