



# Allocate HealthSuite

HealthRoster | SafeCare | HealthMedics | HealthAssure



**The UK & Ireland's most widely-used health & care e-rostering software; it helps ensure the right people are in the right place at the right time – for all staff types.**

- Helps ensure rosters are safe, efficient and fair
- Shows roster creators how their roster can be improved; and shows the wider organisation where the process is working well and which units need help
- Integrates with BankStaff and NHSsp to ensure temporary staffing is driven by roster gaps, and working practices are safe
- Quick and easy roster creation, including genuinely helpful autoroster
- Unrivalled absence & leave management
- eTimeclock modules for time & attendance
- Sends pay & absence data using well-established ESR and other payroll interfaces, reducing the admin burden and increasing accuracy

*"Across 10 wards, we could evidence savings averaging £60,000 per ward, but we have also improved patient care by using our restricted resources better and getting more from it"*

**Marcus Hassall, FD, Northern Lincolnshire and Goole NHS Foundation Trust**



**Compare staffing levels to the actual patient demand, transforming the daily staffing process to unlock productivity and safeguard safety.**

- Calculate required staffing from patient numbers, acuity & dependency – typically 3 times a day
- Site wide overview of required versus actual staffing, highlighting hotspots as well as areas that could help
- View staffing status across many dimensions including hours short/excess, missing skills, missing patient census, CHPPD and cost of shift
- Track attendance & sickness of rostered staff
- Redeploy staff safely with full visibility of skills and impact elsewhere, helping to avoid unnecessary agency use
- Request bank or agency cover if needed

*"We have moved to real time daily staffing using patient acuity, it is reviewed three times a day in staffing meetings. This combined with a rigorous focus on eRostering, the use of benchmarking data and targeted improvement is helping us use our staff resource more effectively"*

**Beverley Allingham, Deputy Director of Nursing Plymouth Hospitals NHS Trust**



## Fully integrated temporary staffing

**Automate the process of filling duties with the appropriately skilled staff; ensure there are no rules breakages, enabling your bank office to concentrate on filling the harder-to-fill/more expensive shifts reducing reliance on agency staff.**

- Streamline the bank booking process to improve fill rate and reduce agency spend
- Better engage with bank workers, with SMS broadcast of available duties, online direct booking of matching requests, and online availability recording
- Manages, checks and verifies agencies to monitor and improve costs
- Manages agency invoices to align payment to framework agreements
- Full integration with payroll to ensure bank staff are paid quickly and painlessly
- Fully integrated with HealthRoster, with bank request driven from roster gaps, and visibility of temp staff on all roster views
- Detailed management information to help run an efficient and effective bank



# EmployeeOnline

## Engage staff with powerful rota information and tools

**Engage and empower your workforce by placing key information about their work in their hand – via their smartphone or browser.**

### **Better inform your staff:**

- View their roster online, anywhere in the world
- View their own skills to ensure they are accurate
- View their leave entitlement and hours balances
- View payroll information

### **Engage your staff, empowering them to:**

- Make duty or day off requests
- Request annual leave, study leave and other leave
- Bank or locum staff can view and direct book matching bank duties, record their availability, and record their timesheet

*"Fill rate moved from 55% to as much as 90% since direct booking on EoL was switched on"*

**Nicola Myronko**  
**Clinical Lead – Workforce**  
**Derbyshire Community Health Services NHS**  
**Foundation Trust**



**Provides individuals and organisations with formal training and accreditation meaning organisations have confidence that they have teams with the right skills to unlock the incredible savings that better workforce planning and deployment offers.**

Our curriculum delivers knowledge in the software and the processes and context in which the software needs to work, whether that context is rostering best practice for ward managers, workforce planning, workforce performance management or governance and assurance processes. The Allocate Academy offers a number of levels of progression

- *Allocate Trained Professional (ATP)*
- *Allocate Certified Professional (ACP)*
- *Allocate Certified Specialist (ACS)*
- *Allocate Certified Expert (ACE) status.*

*"The accreditation gives my organisation confidence that I am experienced in using the software"*

**Eri Martin, ACP**  
**e-Rostering Manager, Dartford**  
**& Gravesham NHS Foundation Trust**



**Allocate-Insight provides benchmarks to highlight variation together with monthly managed reporting that includes insight and expertise to help organisations identify where variation is unwarranted.**

The reports and benchmarks are shared directly with board level stakeholders, including FDs, DoNs, MDs and HRDs and include expert narrative and insight from our workforce experts.

Allocate-Insight is helping drive improvement and unlock productivity savings by letting boards answer the following key questions

- *Are we rostering effectively?*
- *What's our opportunity for improvement?*
- *How do we compare?*
- *What can we do to improve?*

*"We use the data from e-Roster in our divisional performance and board packs. We are focusing on just a small set of metrics that help us answer the question; are we rostering effectively?"*

**Sam Foster, Chief Nurse**  
**Heart of England NHS Foundation Trust**



## Fully integrated with eRostering for accuracy

**The only eExpenses application that automatically cross-references data with the roster in real-time, increasing accuracy and delivering benefits.**

- Accessed via EmployeeOnline – simple and easy to engage your staff
- Dramatically reduces the time spent by payroll processing claims and managing expenses
- Interfaces with ESR, saving time and ensuring the accuracy of data
- No licence or usage recharge to NHS organisations when commissioned via the ESR Programme
- Reduces the operating costs associated with processing claims
- Improves expense claims accuracy, with automated mileage calculation (including triangulation rule consideration)
- Real time checking of expenses rules provides unique protection from fraud and inadvertent errors
- Powerful reporting provides business intelligence around expenses costs and claims patterns



*"Allocate's e-Expenses has really streamlined the whole expenses process, it's enabled consistency across the trust and we've seen many efficiency, accuracy and governance improvements... a massive improvement in adherence to policy rules... and we've seen financial savings"*

**Jason Mullarkey, Strategy & Improvement Project Manager  
Doncaster and Bassetlaw NHS Foundation Trust**



## Effective consultant job planning

**Facilitates job planning for consultants, and also for speciality doctors and associate specialists.**

- Standardise job plans - ensures standard calculations of PAs and sessions
- Flexible enough to allow job plans to be correctly calculated for consultants and SAS doctors
- Caters for complex job plans spanning long periods of time and supports annualisation
- Flexible and transparent job planning
- Accommodates 'hot' activity arrangements such as surgeon of the week or physician of the day and the delivery impact on affected duties
- PA controls and powerful reports
- Activity calendar
- Reduce the admin associated with paper based job planning
- Integrated with Medic OnDuty and ActivityManager

*"Efficient job planning is becoming a priority for all Trusts in these financially challenging times. Increasingly we are using eJobPlan to review job plans in forensic detail to ensure the service is provided in the most appropriate and efficient way as possible. If we were using a paper based process the level of detail we are able to utilise at the push of a button simply wouldn't be available"*

**Hinchingbrooke Health Care NHS Trust**



## Junior doctor rotas

Create compliant junior doctor rotas which meet the requirements of the New Deal and 2016 junior doctors contract at the same time as EWTD. eRota enables you to anticipate rules breaches and so avoid significant unexpected cost and safety impact that may arise from non-compliance.

- Simple 'Rota Convert' function that means new deal rotas can be converted to 2016 rules in an instant
- Accurate pay assessment for different rotas
- Identification of resources and hours available for service and training
- Supports mixed grade rotas to give accurate pay results
- Ability for doctors to record exceptions in real time through secure online accounts
- Ability for exceptions to be approved within medical staffing or escalated to the guardian of safe working
- Guardian of safe working dashboard
- Transition - simple transition from rotas to leave, on call management and junior doctor rostering in MedicOnDuty
- Facilitation for hospital at night rotas
- An expert support team able to advise on the building of efficient and workable rotas
- Peace of mind regarding compliance with the New Deal

*"eRota is a key tool for medical staffing management. It is comprehensive, easy to use and helps us build the most effective rotas to meet both our doctors and our organisational needs. Allocate's responsiveness to update the system to meet the 2016 contract changes makes me feel we are in safe hands"*

**Brian Jones, Medical Staffing Lead,  
Lancashire Care NHS Foundation Trust**

## Leave and on call management designed for doctors

A simple and engaging solution to manage medic availability, including leave, study and on call rotas. Fully mobile solution that is designed to benefit medics' working lives empowering them with information and control.

### The solution helps medics to:

- View their own and others' on call rotas
- Quickly record call outs
- Book leave and study quickly, and ensure leave is effectively managed
- Leave rules can ensure leave is well distributed, without undesirable leave spikes
- View and manage leave entitlement
- Record, manage and analyse sickness
- Integrate with iCal for better visibility with personal or family calendars

*"The medics leave planning process has demonstrated a 33% reduction in the number of steps required to complete a view of medic availability"*

Aintree University Hospital NHS Foundation Trust



## Manage who is working, when and where, including locums

MedicOnDuty helps create both simple and complex rosters, meeting the unique needs of the medic and science workforce. It integrates with rotas, job plans and service plans providing an effective way to help drive fairness and to ensure rules to safeguard patient safety and staff safety are adhered to, while ensuring the most productive results for a sustainable service.

- See who is working and when, but also where
- Provide better visibility of both who is working and rota gaps
- Includes locum management system to manage locum and agency requests
- Including tracking of the Working Time Directive and other contractual rules
- Monitoring of supervised sessions – for junior doctor training records
- Payroll processing – enables payment of premium rate activity and locum timesheets
- Supports swaps



*"HealthMedics gives us a platform to integrate leave management and on call rotas for our entire medical workforce. Using ActivityManager and the functionality available, we have greater visibility of potential gaps in our service so we can act on them sooner. We have also utilised notifications to inform our booking teams across the organisation of unavailability, preventing errors when allocating lists of patients to our consultants' activity"*

Epsom & St Helier University Hospitals NHS Trust



# ActivityManager

## Effectively schedule clinical staff around clinical activity

The next step from MedicOnline and OnDuty, ActivityManager allows you to schedule any clinical activity (e.g. clinics, ward rounds or theatre sessions), assigning a lead for that activity (typically a consultant) and other supporting staff such as junior doctors, specialists, nurses, ODPs to ensure that particular clinical activity is delivered to the patient.

- View rosters based on the clinical activity and whether they are appropriately staffed
- Gives medics a view of not just when they are working – but on what and who is working with them
- Integrates with eJobPlan allowing the cross-reference of contracted versus delivered consultant activity
- Improves leave and absence by providing a view of which activity is impacted
- Manage the impact of cancelled activities on all assigned staff



## Governance and compliance software

**Manage, monitor, evidence and report on regulatory regimes, quality standards, compliance, quality plans, projects and risks. Containing ready-to-use applications for key national frameworks, including CQC, CAS & NICE. The system is easily cascaded across organisations providing engagement and board to ward assurance.**

- Provides insight and control of governance, risk & compliance
- Gives the board and senior managers confidence that they know the real-time status of quality and compliance across their organisation
- Simple to use, engaging the whole organisation
- Saves front-line staff time, releasing more time to care
- Visually engaging reports and dashboards making it easy to spot and manage areas requiring support and improvement

*"The CQCAssure system really helped in our preparations for inspection and enabled a wide range of staff to consider & self-assess their areas against the KLOE in advance. This provided invaluable preparation and also organisational insight"*

**Deborah Pullen,  
Compliance & Assurance Lead at  
Wrightington,  
Wigan and Leigh NHS Foundation Trust**



# About us

We are the leading provider of healthcare workforce deployment software. Our solutions are used by hundreds of health and care organisations across all sectors to deliver safe staffing and productivity savings.

Our software and service will help you deliver results, and your staff will love using it.

## Software + Allocate Cloud + Customer Success Team = Results

Our online solutions are delivered with a customer success service as standard. Different from traditional implementation and support our customers have a dedicated team that proactively monitor your product adoption, and advise and drive you to make the most of your investment.

What is more, we'll make sure you are **always operating with trained staff...** and of course because the service is delivered on the Cloud you'll **never need to worry about upgrades or hardware** because we have that covered too.

# What solutions do you have?

## HealthRoster (SaaS)

- ☐ HealthRoster
- ☐ SafeCare
- ☐ BankStaff
- ☐ Allocate Cloud
- ☐ Allocate Academy
- ☐ Allocate-Insight
- ☐ eExpenses
- ☐ NurseRevalidation
- ☐ RealTime PatientFlow

## HealthMedics

- ☐ eJobPlan
- ☐ eRota
- ☐ MedicOnline
- ☐ MedicOnDuty
- ☐ ActivityManager
- ☐ MedicAppraisal
- ☐ CQCAssure
- ☐ CASAssure
- ☐ NICEAssure
- ☐ ProjectAssure

## HealthAssure

## Contact us

-  [www.allocatesoftware.com](http://www.allocatesoftware.com)
-  [info@allocatesoftware.com](mailto:info@allocatesoftware.com)
-  +44 (0)20 7355 5555
-  1, Church Road,  
Richmond, TW9 2QE
-  @AllocatES

## Support

**HealthMedics:** 0844 417 9512  
**HealthRoster:** 0844 417 9510

**Learn from others:**  
[www.allocatestories.com](http://www.allocatestories.com)