

Allocate ER Tracker Case Study

Allocate ER Tracker delivers time savings for East Suffolk and North Essex NHS Trust

Background

East Suffolk and North Essex NHS Foundation Trust (ESNEFT) is the largest NHS organisation in the East of England. It was formed in 2018 through the merger of Colchester Hospital University NHS Foundation Trust and The Ipswich Hospital NHS Trust.

ESNEFT has around 10,000 staff providing services across its Colchester and Ipswich hospitals, local clinics and community services. The Trust has a key focus of supporting and developing staff as well as ensuring it drives the latest technology. This involves ensuring that services are made more accessible and making the most of the information available.

Reliance on spreadsheets for data entry

Prior to implementing Allocate ER Tracker, ESNEFT's Employee Relations (ER) team tracked and logged ER cases using spreadsheets, which meant the team had to manually input the data. This presented a number of challenges, including the corruption of files and errors during the filtering of data types. File sharing and collaborative document access also became a problem for the Trust, as multiple users weren't able to make live edits to cases without taking documents offline.

Lucy Owers, Employee Relations Officer at ESNEFT explains: "The biggest problem that the team encountered was that the Excel file often became corrupt resulting in loss of data. Using spreadsheets made it complicated to add information in different formats and particularly difficult when using mandatory fields. Fields were often left empty which made it hard to filter and segment data concerning a particular case. During the filtering process it only came up with half of the information, making the data unreliable with formatting issues. This meant we had to manually generate reports which was a complicated and inefficient process"

Efficient workflows

Tired with an inefficient and unreliable process, the Trust needed a bespoke case management system designed specifically for HR practitioners. Averaging at around 57 cases per month, it was essential that the new software could help to increase the efficiency of data entry and assist with the generation of reports.

The ER team at East Suffolk and North Essex NHS Foundation Trust uses the solution to record and manage the following case types: disciplinary, grievance, bullying and harassment and general enquiries around employee sickness. The solution is used by all of the team, including advisors, admin staff and managers within the department.

"To embrace the new solution, the employee relations team finalised all existing cases and transitioned to Allocate ER Tracker to record, track and manage caseloads going forward. Our employee relations team have full access to Allocate ER Tracker and our vision for 2021 is that all managers across the Trust will be using Allocate ER Tracker to ensure that the system is being used to its full potential.

Our most common case type is disciplinary, the length of time for completion varies from case to case. Allocate ER Tracker offers a fast track option which gives employees a six or 12-month warning to appeal therefore saving us time from going through the whole investigation process," explains Lucy.

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Lucy Owers,
Employee Relations Officer,
East Suffolk and North Essex NHS
Foundation Trust

Increasing the efficiency of the employee relations team

With the Trust's HR case management data now stored in the cloud, the ER department has been able to improve the quality and security of data stored on the system. The intuitive and easy to use functionality of Allocate ER Tracker means that the Trust can manage cases in real time and have greater visibility of the cases right across the organisation.

Emily Turner-Hennings, HR Officer at ESNEFT says: "The new system is easy to access as we can login remotely 24/7. Having all of the information in one place has also made a big difference for our senior advisors. It means that if a member of staff is out of the office they can view specific cases and access the necessary information to allow them to easily cover caseloads.

The email notification feature is beneficial to us as an organisation too. Allocate ER Tracker notifies users when they have been assigned to a case, this is effective because you can pick it up in real time and from a management perspective, shows a transparent view of which team member is assigned to each case. One of the biggest differences is no file corruption, this data can be backed up online through the cloud, it's smoother to access and a quicker, slicker process for us."

Increasing visibility and reporting of cases

ESNEFT is able to see greater transparency of cases right across the organisation through the dashboard and reporting suite in Allocate ER Tracker. The Trust can now quickly generate monthly reports and communicate this with the wider organisation as well as other departments.

Lucy concludes: "The dashboard enables us to view recent activity and have more options in filtering information, we can make these more targeted and search specifically by name. We can get a real understanding of what the team is dealing with and where they need support. We're able to easily run reports and circulate these with the rest of the team.

Cross department visibility enables us to access reports on each area of the business. It's a much better process of displaying data compared with the previous method which became complicated and unreliable."

Deploying Allocate ER Tracker across the Trust has helped to resolve any prior difficulties that the Employee Relations team encountered. Increasing the accuracy and the quality of case data which has helped add an extra layer of transparency right across the workforce.

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