

Allocate ER Tracker Case Study

East Kent Hospitals cut annual HR case reporting time by 85%



Background

Serving a population of around 700,000 residents, East Kent Hospitals University NHS Foundation Trust (EKHUFT) is one of the largest acute Trusts in England and the third largest provider of urgent and emergency care in the country. With three major hospitals in Ashford, Canterbury and Margate, the Trust also provides outpatient and diagnostic support from its two community hospitals in Folkestone and Dover. The sheer size and scale of the services provided by East Kent Hospitals makes them one of the biggest employers in the South East.

With 8,000 members of staff, the Trust is committed to supporting employees and making the organisation a great place to work for its current and future workforce. The Human Resources (HR) department has a key role to play in meeting this strategic objective and as such, sought a dedicated employee relations case management system.

Managing employee relations cases

Before implementing Allocate ER Tracker the Trust's Employee Relations team logged HR cases using ticketing software that was also used by the IT department. As the system was primarily designed for IT service desks, the team often found it challenging to monitor cases. Largely, the team was lacking the level of case visibility and reporting capabilities that they desired.

Jamie Disney, Employee Relations Advisor at EKHUFT explains: "The previous system wasn't designed to track employee relations cases and deal with caseloads. The biggest difficulty the team would come up against was the storing of relevant documentation and keeping all the case files together.

The ticketing system also made case management tricky. Although it allowed us to assign and add staff to a case, it didn't provide the functionality to link similar cases together or easily log multiple cases under a single employee."

Faced with a process that didn't meet their needs, EKHUFT sought a dedicated case management system that was specifically designed for HR professionals. With an average of 40 – 50 cases per month, it was important to the Employee Relations team that the new software delivered efficient and intuitive workflows, with integrated letter and document capture and advanced reporting capabilities.

Efficient workflows and document capture

East Kent Hospitals went live with Allocate ER Tracker in April 2018 and the Trust is now using the software to record and manage the following case types: disciplinary, grievance, bullying and harassment, capability performance, capability ill-health, probation, organisational change and general advice queries.

Jamie said: "Built around our HR policies, Allocate ER Tracker is standardising the way we manage our cases. We've been able to tailor our workflows and create the visible stages and steps we need. Most importantly the system has given us a place to centrally and securely store all case documentation and attachments."



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East Kent Hospitals University NHS
Foundation Trust

Tracking the case timeline

Before the introduction of Allocate ER Tracker the team would have to check case files or use additional documents such as spreadsheets to track how long cases had been open for. Now the new software allows the team to easily see what cases they are working on and the stage each case is at.

"Allocate ER Tracker has made the team more consciously aware of how long cases have been open for. Case information is easily accessible and we now have the functionality to just click into a case to find out how long it has been running and when it was last updated. As well as how early the issue was resolved and whether it was informal or made formal," commented Jamie.

Additionally, Allocate ER Tracker is helping EKHUFT's Employee Relations team to monitor changes to employment such as suspension. Previously, the team would have to keep manual records detailing staff suspensions. The retrieval of that information could be lengthy and would often involve having to go back through paper case files and letter correspondence. Now using Allocate ER Tracker the team are able to easily manage the number of employees who are on suspension, key dates and timeframes – the software raises the visibility of this information as well as highlighting the financial implications to the Trust.

Creating custom reports and determining diversity

Annual reports are an important part of demonstrating the quality of services and providing an overview of each Trust's achievements and plans for the coming year. Previously, the Employee Relations team at EKHUFT found collating information for the annual report to be a time-consuming process, that involved downloading information from the ticketing software and analysing the data.

Since going live with Allocate ER Tracker the reporting process has been greatly simplified. Now using the software's built-in reporting capabilities, the Employee Relations team can run summary reports, defining the parameters of the search and generating a report instantly. The software has dramatically reduced the annual reporting process, transforming it from a two-week task into one that only takes a day or two.

Jamie comments: "We're able to easily analyse different aspects such as the number of cases we've seen, how long they have been open and identify common case types. Running reports on each individual care groups within the Trust to find out case type levels. In addition, we can also run independent reports based on the nine protected characteristics. This feature is especially valuable to the Trust's dedicated quality and diversity team and it's not something we've been able to do before."

Before using Allocate ER Tracker, EKHUFT hadn't been able to record protected characteristics within the ticketing system. This made reporting on disciplinary cases taken against employees of different sexual orientations, religions, races, ages or disabilities difficult as the information wasn't joined up. Now the Employee Relations team are able to include this information in activity reports, making the organisation more culturally aware.

Jamie concludes: "Allocate ER Tracker has not only helped the Trust to visualise employee relations data, it's also allowed us to identify trends and hone in on hot spots with the aim of resolving situations early on. The software provides us with full visibility of the teams caseloads, helping us to prioritise activity and ultimately adhere to the Trust's HR policy."

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