

Our guest expert, Darren Gatward from Royal Berkshire NHS Foundation Trust, is here to answer questions about his online expenses management solution. Darren purchased Software Europe's Expenses Health solution in Feb 2010 for 700 claimants.

Introducing our damsel in distress... Mrs Need, a Payroll Services Manager tasked with saving thousands of pounds for her trust.

How will she do it? Mrs Need says that everyone keeps talking about automating expenses online but doesn't know where to begin...



This week...

Automating employee expenses management!

Darren, I'm looking to save money and improve efficiencies across the trust and I'm told that an expenses solution could help do this, what savings have you made?

By implementing Expenses Health from Software Europe we have seen a reduction in spend and an increase in efficiencies. Last year we saw a **saving of £130k!** I've also freed up **25 hours** of resources within my department that can now be used elsewhere.

Wow they are compelling figures. How did you know which expenses solution to choose?

Our key criteria was; **ease of use**, and the bi-directional link to **ESR**.

Expenses Health is so intuitive and required very little training for our staff to use and claim expenses. Other systems that I saw required substantial training for everyone that needed to use it. Within the Expenses Health system there is so much help and support so the majority of our users just got on and did it themselves.

The bi-directional link into ESR from our payroll system was really important and the fact that it was already proven to work for other trusts was fundamental to my decision.

I need to provide proven benefits to my Head of Finance, how exactly did you realise the savings?

So far this has been through the **accuracy of mileage** and greater **scrutiny** of claims.

Claims now have to go through the proper processes; non authorised managers can no longer just sign-off anyone's expenses. Now we know that the person approving the claim has budgetary control so they have a greater interest in what is being claimed for.

The Expenses Health system flags expense items that are out of policy and the line manager can look at the detail and decide to accept or reject the claim.

The mileage is calculated using a unique mileage management address look-up feature. Mileage is accurately calculated and enforces adherence to policy rules. Home to base mileage deductions are also automatically calculated when needed!

How will the system be able to flag items – our policy is different from other trusts?

The system is so **intuitive** and **flexible**. Being able to **customise** the notes that come up for each expense item was really useful. We are now able to provide staff with simple guidance so they know what they should be claiming for.

Staff certainly understand our policy better now. We can't make staff read everything but at least we know we are pointing them in the right direction and getting the right information to them in the right place.

So if we purchase Expenses Health, will there be a lot of upheaval within the department? Will it take a long time to implement?

The software is an online solution so there is no need for servers to be installed at your trust, anyone can simply log on anywhere in the world with internet access. We were given a dedicated project team to manage our implementation. The process was very **slick** indeed and we rolled out exceptionally **quickly** without too much fuss. We signed the contract in the last week of February and went live with everyone using it by 1st April!

FACT FILE

- ✓ £130k savings
- ✓ 5 weeks to implement
- ✓ Saved 25 hours a week
- ✓ Policy compliance
- ✓ ESR bi-directional interface
- ✓ Smart phone app!

How can I use the data that is in the system to provide reports for my manager?

There is a reporting suite in Expenses Health which includes 103 standard reports. We are still in the early stages of using the reports but I get the information that I need, it's really not a problem. I am looking forward to learning more about the reports to help drive continuous savings for the trust.

Great! Anything else that I can tell my manager?

I am interested to see how the trust can make use of the new GreenLight workflow technology. This new tool replaces other paper forms from within the trust with an automated electronic way of submitting, authorising and reporting via online e-forms. This could potentially help the trust increase efficiency with the processing of 'Doctors extra duty hours' and provide more 'real-time' reporting on the cost of these additional hours to the trust.

Software Europe are also developing a mobile application for Expenses Health so claimants can record their expenses on the move and line managers will be able to 'check and pay' claims while away from their desk – this will be particularly useful for community based staff.

To hear more from other Expenses Health customers, log on to www.nhsexpenses.co.uk/customers