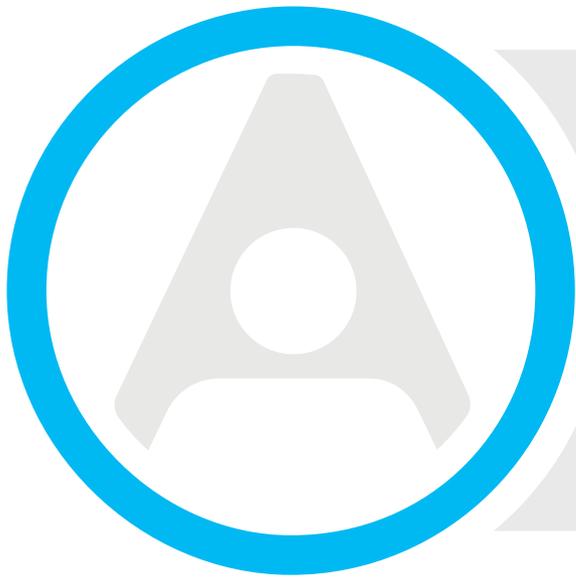# ALLOCATE

OPTIMA

Allocate
Rostering Solution
Optima

Rostering
for Healthcare

Your goal is to make sure your hospital stays on budget while delivering optimal level care for all patients. Our solution ensures you achieve both.

With the experience of supporting **over 1 million staff under roster**, together with **25 years' workforce management experience** in Australian healthcare, Allocate is enabling the delivery of safe and effective care at optimal cost, by helping organisations have the right people in the right place at the right time.

We deliver both **international experience and local expertise** to provide solutions that deliver benefits for all staff groups.

If, like many healthcare organisations, you're seeing staff costs rising, you may be looking for ways to reduce those costs without compromising patient care. In a perfect world, the same solution to rising staff costs could also help improve rostering so patients always had access to appropriately-trained professionals. This scenario is actually possible with the right approach.

Allocate's solution has been developed to specifically meet the needs of local providers. We work closely with our customers to provide comprehensive workforce management solution for all staff groups across the healthcare sector.

1,000,000+
Healthcare employees rostered globally every day

10+
Countries

800+
Clients

500+
Staff

Focused on workforce efficiency for improved patient outcomes

Our solution focuses on both improved rostering and payroll automation. Reducing manual processing through payroll provides an immediate return on your investment.

Manual processing takes time, contains human error and lacks the visibility into financial reporting required to accurately track against labour forecasts and budgets.

Building on this with better rostering practices identifies wasted expenditure and simultaneously optimises the delivery of care. Gaining visibility into rostering practices enables a clear audit of labour, highlighting areas of improvement such as agency spend, overtime and overstaffing and clearly aligns the correct skill mix to patient demand. In doing so, organisations not only identify their avoidable costs, they improve their delivery of care by ensuring their staff ratio and skill mix meets patient demand.

About Allocate Software:

Allocate Software is a leading international provider of workforce solutions, supporting the operational and administrative needs of healthcare professionals in all healthcare settings. Allocate is enabling the delivery of safe and effective care at optimal cost, by helping organisations have the right people in the right place at the right time. With over 800 clients and over a million healthcare workers rostered daily, Allocate serves the largest public and private sectors institutions around the world. We have +500 staff, presence in +10 countries and a team of more than 200 developers who are responsible that our products need customer needs. We set exceptionally high standards and deliver support and service that is world-class, building strong long-term relationships with our customers based on trust and commitment.

In Australia, Allocate's solutions roster more than 250,000 healthcare workers. Our customers include NSW Health, most of Victorian Public Health Services and Aged Care organisations. We achieved success in the market owing in great part to the Award Interpretation capability, able to automate payroll transaction processing for Australian industrial awards.

Delivering benefits for all staff groups

Nurses Goals

• Attend all their patient needs

• Spend less time in doing paperwork,

• View their rosters on their phone or computer

• Clock in and out on a seamless way

• Request leave easily and receive a timely response

• Be able to pick up any available extra shift on their ward.

Optima enables all of them. It objectively aligns nursing resources to the staffing requirements driven by residents and patients. The functionality replaces the existing paper-based processes across departments to enable smarter, safer, fairer and more efficient rostering of staff.

Roster Managers Goals

• Roster in a quick and efficient way

• Measure adequate care for patients in their ward

• Improve vacancy management and attendance

• Effectively manage staff leave request and shift preferences

• Real time roster costing

• Set up effective alerts in the system

Optima enables all of them. Allocate's solution provides comprehensive e-rostering functionality, a powerful vacancy management tool, the ability to set alerts to comply with employment law and contract agreements, cost your roster with real time award interpretation and provides SMS notifications.

Payroll Goals

• Pay staff accurately and on time.

• Get rid of timesheets

• Automate award interpretation

• Visibility through a centralised system

Optima enables all of them. Our solution integrates with Human Resource and Payroll systems to provide seamless end to end workforce management process. Automates Award Interpretation supported by exceptions reporting; and eliminates timesheets.

Director of Nursing Goals

• Have the right skill mix in each ward

• Ensure the optimal level of nursing care across all wards

• Easily access data to make informed strategic decisions

Optima enables all of them. Allocate's e-rostering solution coordinates teams with the right skills at the right time to ensure the best patient outcomes while better managing staff costs. It includes demand based templates that track the staffing requirements of rostered areas.

Human Resources Goals

• Ensure smooth operation throughout the business

• Keep staff happy, engaged and productive

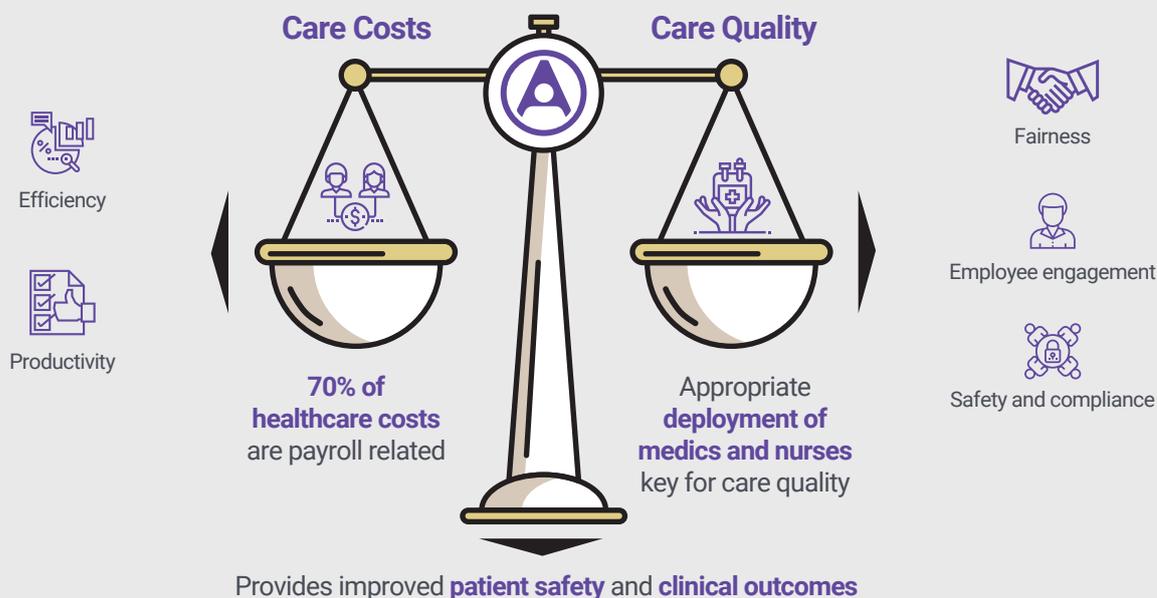• Remove errors of manual award interpretation

• Reporting

Optima enables all of them. Allocate's e-rostering solution is designed specifically to manage and monitor hours worked, as well as absence of all rostered staff. Its ease of use ensures all staff actually use and promote the system. Reporting functionality across the system allows the organisation to identify trends and tracking behaviours over time.
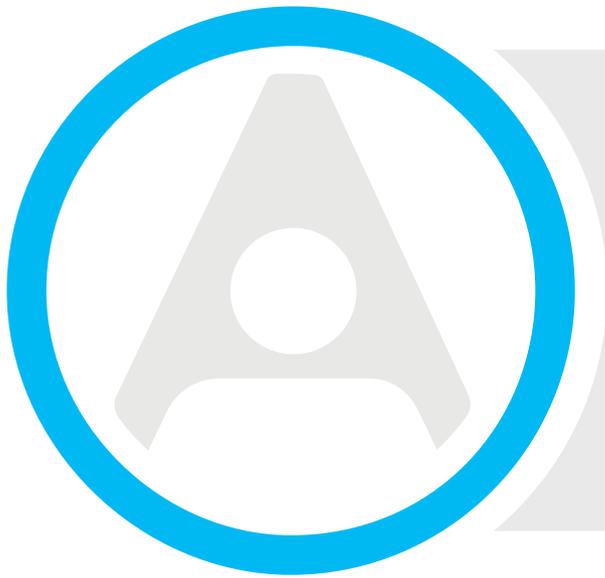
Finance Goals

• Reduce cost of labour

• Return of investment

• Receive real time reporting (budget vs actual)

Optima enables all of them. Allocate's solution automates all the process from rostering to award interpretation to payroll, by enabling greater visibility and reporting across the organisation. It reduces manual processing through payroll providing a quick return on your investment together with automation and improved visibility. Agency spend is reduced with the use of the integrated temporary staff management system that ensures skilled staff are deployed for vacant shifts. Accuracy of pay reduces the risk of having to do offline payments between cycles.

Allocate optimises healthcare outcomes at the heart of the cost-quality equation

Care Costs

Care Quality

Efficiency

Productivity

Fairness

Employee engagement

Safety and compliance

70% of healthcare costs are payroll related

Appropriate **deployment of medics and nurses** key for care quality

Provides improved **patient safety** and **clinical outcomes**

Optima

Allocate Rostering Solution includes:

Comprehensive Rostering

Optima provides comprehensive e-rostering functionality to enable you to construct and adjust your rosters with a wide range of tools. These include:

- Availability
- Split Shifts
- Time in lieu
- Overtime
- Recurring shift patterns
- Shift Swaps
- Requests
- And much more!

Vacancy Management

Optima includes powerful vacancy management. This allows you to search for available staff with the correct role/shift/availability to fill the vacancy. Intelligently automated SMS features allow you to send vacancies to selected staff and then have them automatically added to the roster. Vacancies can be auto generated when the system identifies gaps in the roster (based on your staffing requirements). A central vacancy list allows for the management of vacancies by a central team if so desired.

Optima facilitates simple and effective integration between the Roster and the Vacancy Management tool, enabling organisations to avoid the problems associated with managing separated systems, such as incomplete visibility, under- staffing, temporary staffing and time-consuming processes.

Alerts

Optima also ensures Hospitals and Health Services have visibility of contraventions in employment law and contract agreements by alerting roster managers to conflicts and out of policy rosters based on the pre-configured rules. It includes the following alerts:

1. **Maximum days allocated in a row**
   Warns when too many days in a row have been allocated to a staff member.

2. **Minimum hours between allocations**
   Warns for insufficient break between shifts

3. **Overtime allocation**
   Warns when overtime has occurred

4. **Employee Skill Expired**
   Warns when an employee has a skill that has expired.

5. **Leave Balance exceeded**
   Warns when leave is allocated to an employee and it exceeds the available balance.

Roster Costing

While many vendors provide comparison to budget data, Optima provides detailed costing information driven by accurate award interpretation in real time, giving managers unparalleled levels of information and allowing the management of rosters against the budget on a day-to-day basis. It covers area, role and roster costing to support better budgeting practices and assist in identifying avoidable costs. Moreover, the ability to deliver 100% accurate gross pay data results in lower costs for payroll systems.

SMS Notifications

Utilising SMS for rostering communications not only automates, but simplifies the process by distributing notifications to individuals, groups or your entire workforce. Doing so improves shift attendance rates and reduces the need to engage with external agencies for unfilled shifts. Vacant shift notifications can be sent via SMS to easily and quickly fill vacant shifts, last minute roster changes or manage an increase in patient demand. With our Solution, Allocate pre-configure the standard messaging configurations based on analysis of facilities that use our service, enabling better communication with rostered staff.

Award Automation and Exception Reporting

The Awards Rules Engine within the system provides comprehensive rules which automate the interpretation of awards/EBAs in real-time, enabling costs to be updated immediately when changes are made to the roster. Optima includes automation of EBA rules, supported with exceptions reporting.

This approach ensures customers are live quickly to benefit from the automation, whilst then identifying whether it's cost effective to automate the remaining low usage rules. Many customers choose to process a handful of award rules manually due to their rare occurrences.

Demand Based Templates

Optima includes demand templates that track the staffing requirements of rostered areas. Measuring both sufficient skills and staffing levels to the required demand, the system not only helps identify avoidable costs with overstaffing, it optimises the delivery of patient care by having the right people at the right place, at the right time.

Leave Management

Optima comes with impressive leave management capability to provide accurate, real time information on leave balances and requests, in turn improving transparency and compliance to leave policies and minimum staffing levels. The solution includes the following Leave Management capabilities:

• Requests

• Approval

• Leave balance viewable

• Leave requests via mobile devices

• Security driven access

• Leave approval delegation

Focusing on Payroll Integration

Our solution integrates with Human Resource and Payroll systems to provide a seamless end to end workforce management process. This enables you to strike a balance between delivering staffing productivity, managing costs, and assisting in improved patient outcomes. The system can interface to any payroll system; is enabled with bi directional payroll interfacing with specific versions of Health Care's most common payroll systems.