

Guide

The Business Case for Electronic Rostering and Rota Scheduling

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Improving the efficiency, accuracy and the handling of changes to your roster frees up more time to focus on delivering the best care to your service users.



Introduction

Assigning the right care worker to each service call is a task at the heart of every care agency. With such a common requirement, it's important to have the best possible processes in place to optimise your rostering.

Improving the efficiency, accuracy and the handling of changes to your roster frees up more time to focus on delivering the best care to your service users. These benefits are most commonly found through upgrading to an electronic rostering platform.

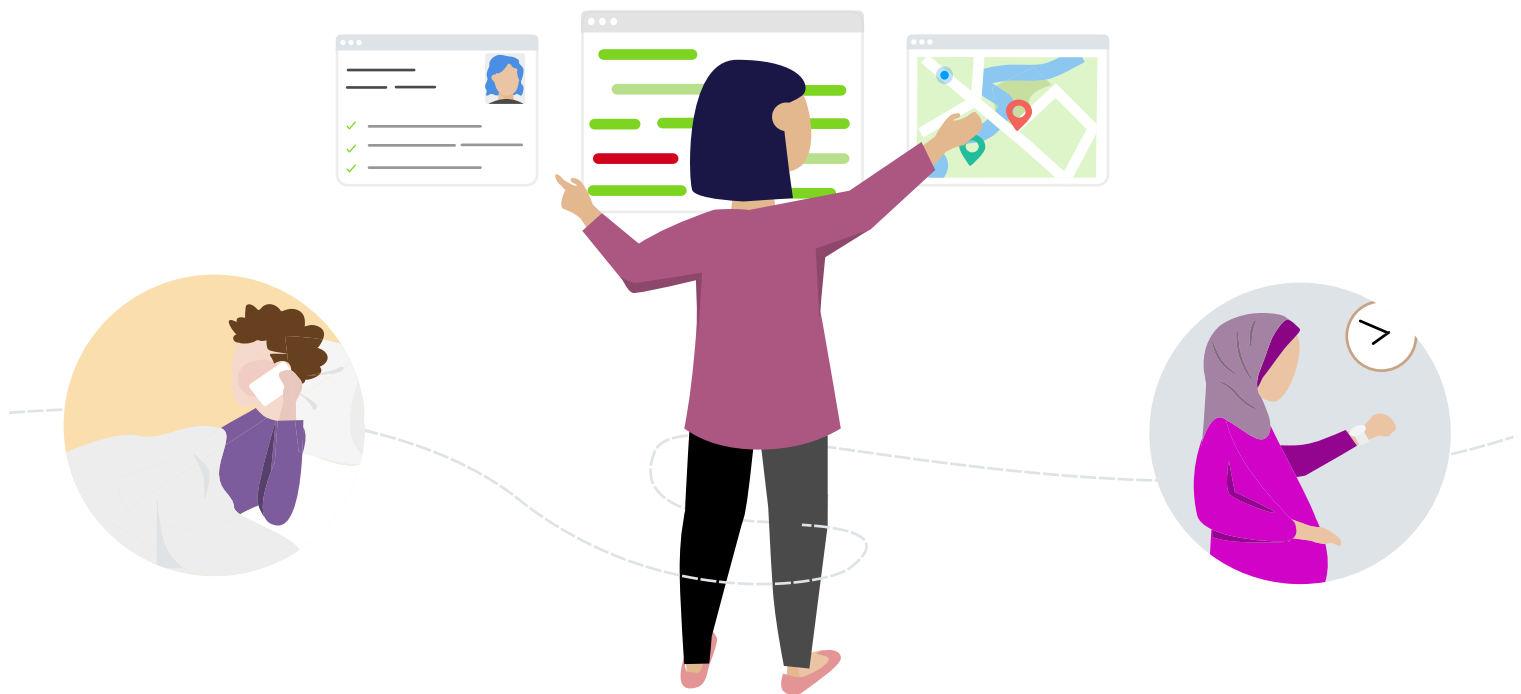
Time savings can often be in the range of 10 hours per week, per 1,000 hours of care delivered. For example, [County Care saved 35 hours per week](#) on rota scheduling after adopting an electronic solution (CarePlanner).

The user interface benefits of electronic rostering may appear to be the most obvious gain. However, it is the additional benefits, such as better matching of carer skills to service user needs, easy reporting and automated invoice production, which deliver benefits far beyond traditional paper or Excel-based rostering processes.

This paper outlines the steps to develop a solid business case for using electronic rostering and rota scheduling in your care agency.

Identify the need for electronic rostering

The first step in defining a business case is understanding the need. Different needs and challenges affect different aspects of the business. A well-written business case acquires buy-in and support from across the care agency.



Business pains

Every care agency is different, but a typical business case for electronic rostering may seek to address pains and challenges including time inefficiencies, care quality, ease of use and lack of insight. The following questions can help identify the needs and quantify the benefits.



Basic Rostering and Rota Scheduling

- How many calls are scheduled each month?
- How many carers are on the roster?
- How much time is spent scheduling each month?
- Are carer and/or service users' preferences, carer skills, location of call and carer and continuity of carer taken into account when scheduling calls? Is there a process for this, or is this managed by knowing each carer and service user?
- Do you currently group calls into runs – allowing a single carer to attend multiple appointments close to each other? Do you feel there are more opportunities to improve this type of efficient scheduling?
- How many calls are missed or attended late each month? Are you able to track this adequately?
- How much time is spent on producing and distributing rotas to each carer, each month?
- If your business grew, how well would your current rostering processes scale to support this?

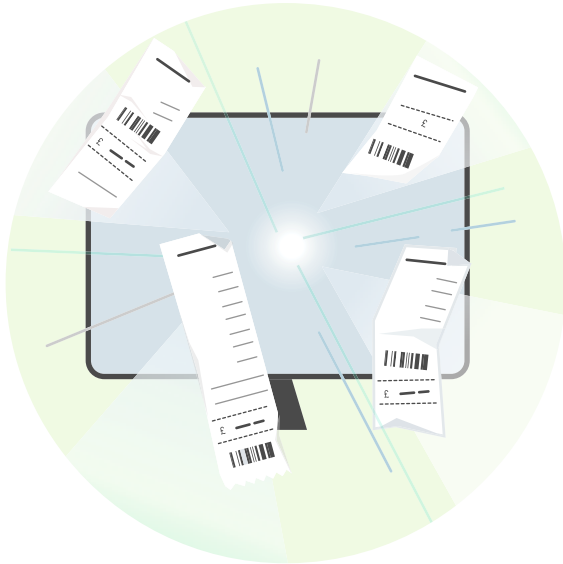
Handling Changes



- How much time is spent on rescheduling calls each month?
- What is the process for communicating changes to a rota? How frequently does this happen?
- If a single call is attended late, does this impact other calls for the same carer on the same day? Do you manually reschedule the later calls, or assign a new carer to these?
- How many calls need to be rescheduled due to inappropriate carer allocation (e.g. lack of required skills) each month?
- If a new call needs scheduling urgently, how do you find the best carer for this? If no carers are available, what is your process for asking if any carer would be interested in overtime or rescheduling to attend the new call?



Invoicing



- How many invoices do you send each month?
- How many of these are printed and posted? What is the cost per invoice for this?
- Do you ever have requests to send invoices electronically (e.g. by email)?
- Do your invoiced hours accurately reflect the business cost of hours worked (including travel) by carers?
- What percentage of invoices have inaccurate details on them, or result in queries about care given (often resulting in delayed payments)?
- Is cash flow ever an issue for your agency? Would reducing days sales outstanding (DSO) through improved invoicing processes be of a benefit?



Timesheets

- Do you currently process paper timesheets completed by carers? If so, how much time is spent doing this each month?
- Do you feel the current tracking of time at calls, time spent travelling, distance travelled and other recorded activities (e.g. training) are as accurate as possible?



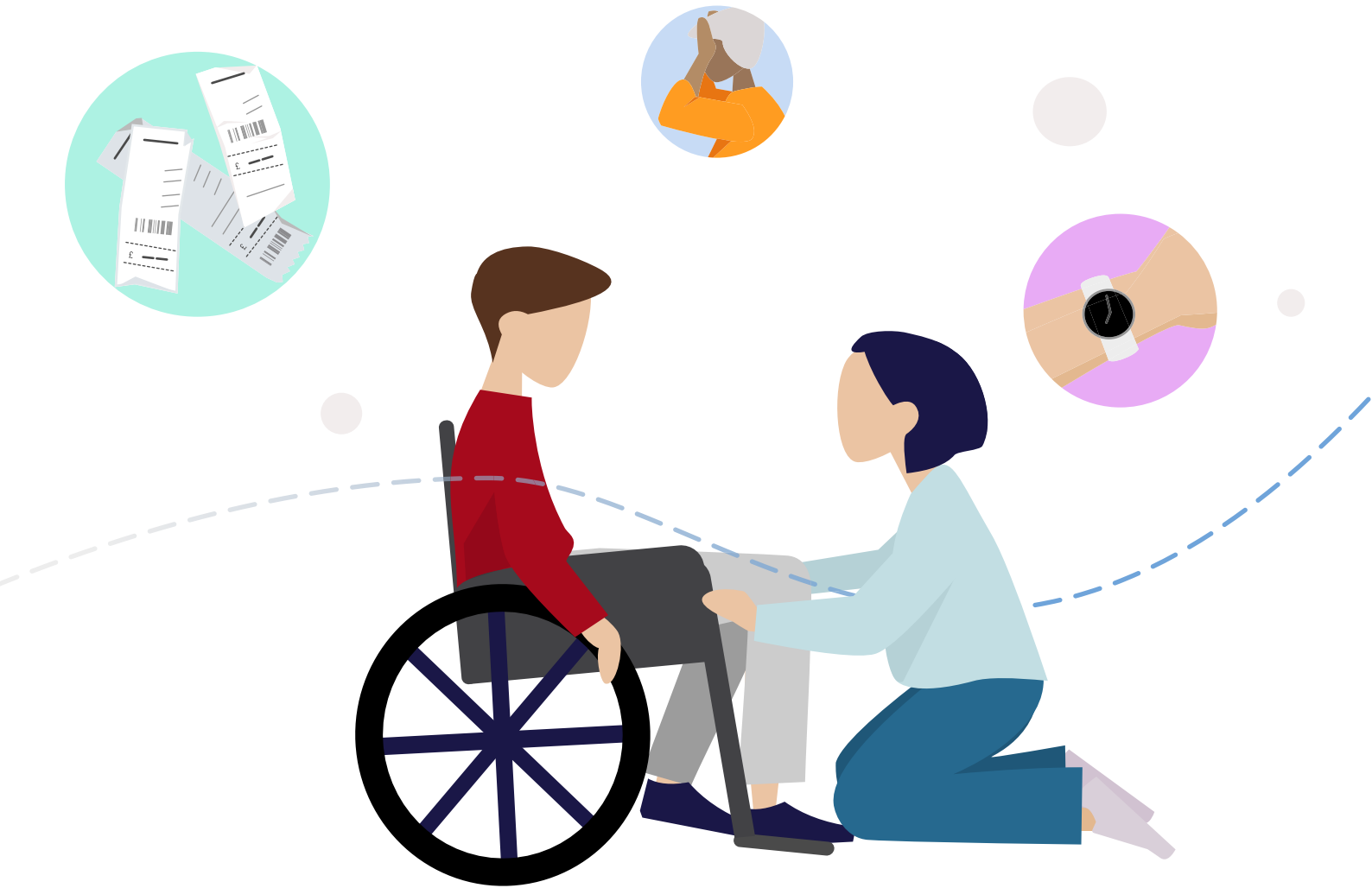
Reporting

- How much time do you spend each month on reporting?
- Are there more complex reports you would like to run, but do not have the luxury of time to do these?
- Do you feel able to identify where each carer is at any given time? Would you value this level of insight?
- How comfortable are you that you could provide CQC with historic information about call history and financial records if needed?



Supporting Care Workers

- Do your rotas provide carers with all the travel information they need to get from one call to another as efficiently as possible?
- Do you receive automatic reminders when carers have upcoming training requirements?
- Can you store training information and certificates against each carer's profile for easy access?
- Do your carers have preferences about the service users they visit and skills required for calls they are scheduled to complete?
- Do carers have easy and secure access to documents and care records relating to the service users they attend calls for?
- If a carer leaves your agency, how quickly and securely can they be locked out of the systems they have access to?
- Do you currently administer medications to service users based on paper medical administration records? Would using eMARs improve efficiency and accuracy of medication delivery by your carers?



Who is suffering these pains?

Asking the questions above will put you into contact with the administrators and carers who are closest to the pains and stand to gain the most from a solution to them. Consider the benefits from an operational level, empowering individuals to become more efficient and provide more value, and at a strategic level where they may affect the agency's long-term profitability and growth.

Understanding who benefits operationally will align to objectives of specific individuals within the business who can become valuable influencers or sponsors to drive the project forward.





Quantify and articulate the benefits

Articulate the impact of these pains at departmental and business-wide/strategic levels. Present the value of improving operational performance in terms of quality of care delivered, bottom-line savings and improved working conditions. Consider the impact of this on service users and their funders as

well as employee retention and morale.

Having quantified any care quality and financial pains, it should be possible to establish and present best/middle/worst improvements (over 1, 2 and 5 years) achievable through addressing these. These savings are crucial to

the evaluation of electronic rostering impact and payback timeframe.

Outline steps to address these pains through the benefits of electronic rostering. Prioritise your recommendations to achieve the most value with the least investment in time and cost.

ROI Calculations



Return on investment (ROI) calculations can be used to provide additional reassurance that the proposed solution is worth investing in. ROI calculations need to take into account the total savings over a period of time, dividing these by the total expenditure on the electronic rostering solution (and any associated costs) over the same period. The time it takes before the ROI becomes a positive figure is the payback timeframe.

Investing in an electronic rostering solution isn't purely about return on investment. Also consider softer metrics as part of the overall solution value, such as improved quality of care, improved team morale and staff retention. Financial metrics are important, but only part of the bigger picture.

Winning stakeholder buy-in

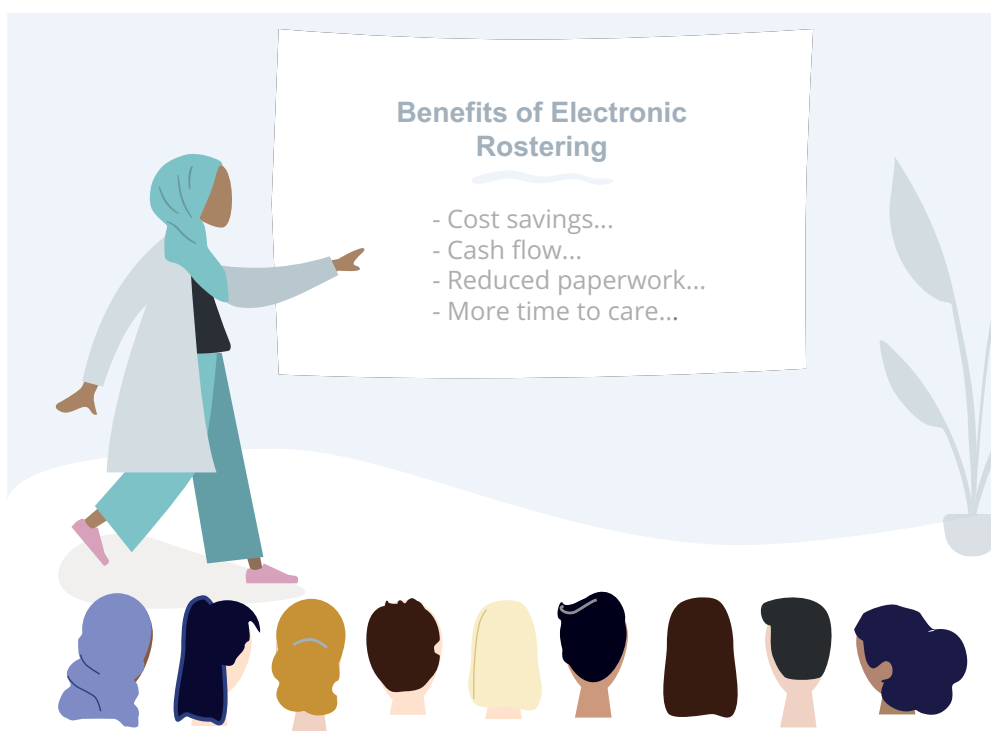
Explain the benefits of electronic rostering to key stakeholders and potential sponsors in the decision making process. Draw attention to the specific benefits of most interest to each individual and provide context to illustrate these in meaningful terms.

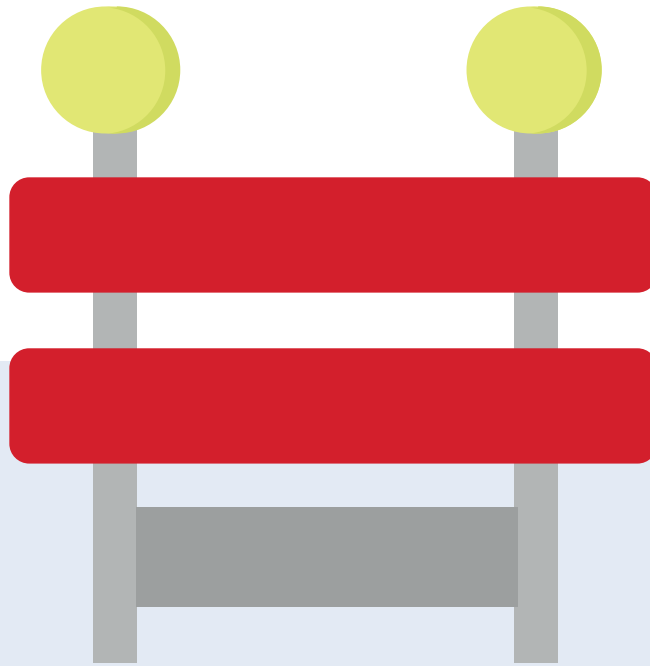
Focus on electronic rostering's capacity to make cost savings and reduce errors, as well as the ability to enhance reporting and accountability when presenting to a CEO, MD or business owner.

Financial benefits such as improved cash flow, cost savings, automated timesheets and invoicing, as well as a financial dashboard for greater visibility will appeal to those in a financial role.

Discussing electronic rostering with your carers should focus on the ease of access to their rotas and call details, reduced paperwork and fairer pay for both travel and actual time worked.

Know what their reservations and concerns are likely to be and answer these clearly before they need to ask.





Roadblocks and Resource Considerations

The most common roadblocks to upgrading rostering processes internally are the upheaval and training time. To address these, it is important to select a solution which is as easy as possible to use, whilst offering as much functionality as you require. Systems like CarePlanner are highly customisable to provide a simple interface, via an app, to carers and varying degrees of admin control to different users in the office – from roster admins, to financial controllers to management reporting. Each user can then be trained on their own area of focus, reducing training requirements and associated time.

There will always be an investment in time to load carers, service users and associated information to the system. The larger the volume of this data, the longer this will take. However, this is a one-off investment in time. Once this setup is complete, admin time will be dramatically reduced moving forward.

Training is a requirement for any advanced use of an electronic rostering system. CarePlanner is designed to be so intuitive that it is usable from day one. However, we always provide free training calls to ensure administrators are able to get the most out of the system within days of starting.

Avoiding licensing lock-in

Many electronic rostering solutions are only available as annually licensed products. This level of commitment is a high risk for many care agencies. At CarePlanner, we believe our customers should stay with us because they want to; not because their license locks them in. You can find out more about our commitment to fair licensing [here](#).



Evaluate the market

Identifying and quantifying the need for electronic rostering and rota scheduling is relatively straightforward, but the benefits vary significantly depending on the type of solution you choose. It is important that you identify the differences between solutions and weigh these up against the needs of your agency.

Solution cost can be a big factor for many care agencies, so consider carefully how much each solution is likely to save you in terms of reduced administration time and improved efficiency in care delivery.

How a solution is licensed can have a big impact on cost. Concurrently licensed solutions, such as CarePlanner, enable multiple administrators to use the same system (via different login credentials) for the cost of one license. Length of license term should also be factored in, mitigating risks via pay-as-you-go licenses where possible.

Watch out for hidden extras! Scope your solution requirements with an eye to the future. If a provider talks about multiple different modules to offer different functionality, evaluate the total cost of these. Your solution should be able to scale up (or down) with your requirements without the need for extra bolt-on modules or the associated costs of these.

Read the reviews. Look for Google reviews, Trustpilot and even anecdotal reviews on social media platforms. Taking these into account, you will better gauge the longer term experience and value provided by different solutions.

Present the possible solutions, explaining relative merits and challenges of each. Propose the most appropriate solution for your business needs. Highlight the potential savings and capacity to support present and future requirements.



Going beyond the necessary

Explain added benefits of the proposed solution going beyond addressing current pains. For example, the ability to invoice at the touch of a button saves time but it also improves accuracy – as the invoice is automatically pulled together from your rostered calls and any tracking of time spent at these (or travelling associated with them).

Try to map the potential extras from any solution to high-level, strategic business benefits.

Setting expectations



Whilst there isn't a requirement to outline the deployment and integration process as part of the business case, it can pay to set expectations at this early stage. Electronic rostering undoubtedly saves time and money in the mid to long-term but requires an investment in time to set up.

The internal resources and systems/ processes impacted by the implementation process will vary significantly depending on your recommended solution. Working with a well-respected, established provider (with good customer reviews), who can provide suitable training, will ensure this process is as efficient and pain-free as possible.

Providing an indication of timings, costs, return on investment window and who the internal sponsors would be for the project, makes it easier to transition from business case to project kick-off.



> Next Steps

Creating and presenting a business case can take up valuable time. At CarePlanner we can work with you, to assist in this process, sharing knowledge and experience gained from years of successful electronic rostering deployments.

[Get in touch](#) and we'll help you ask the right questions, and present the most compelling facts, to develop a comprehensive business case and ROI model.