



# Driving efficiency by automating NHS finance processes

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# Driving efficiency by automating NHS finance processes.

# The **NGH Automation Accelerator:** RPA Centre of Excellence.

## What do we do?

As an **RPA (Robotic Process Automation) Centre of Excellence**, the NGH Automation Accelerator exists to drive and support intelligent automation adoption across the NHS.

We provide advice and guidance from our experts, and access to resources and content **free of charge across the NHS**, supported by our expert professional services.

## Who do we work with?

We work **within the NHS, for the NHS**. Across the UK, our team currently supports automation within:



**23+ NHS organisations nationwide**



**250+ GP Practices**

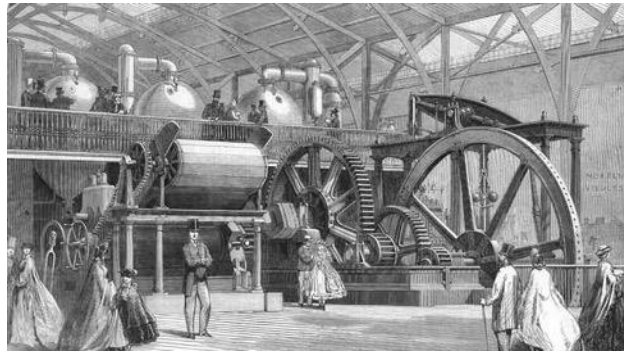
## What support do we offer?

Thanks to funding from **NHSx**, some trusts have had their automation adoption kickstarted, and we've built an online platform full of **free resources and events to help you start your journey**.

Alongside our NHS-wide free support, we offer our expert professional services to accelerate your process discovery and automation development at competitive rates.

# Transformation: the evolution of work.

Industry 1.0



## The industrial revolution.

Mechanisation + the use of water + steam power.

Industry 2.0



## Mass production.

Electrical power + human assembly lines.

Industry 3.0



## Computerisation.

Birth of the internet, automation + digitisation.

Industry 4.0



## Digital transformation.

Digital economy: connection, collection + sharing of data. Acceleration of AI + RPA.

The past.

Now + the future.



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Making tomorrow **better.**

*the* **STORY** *of* **WORK**

<https://www.youtube.com/watch?v=dJ9c2xq6mas>

**NHS**

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# Poll 1.

Where are you on **your automation journey?**

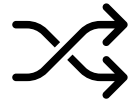


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# What is automation?



## Seamless **integration**

on top of your existing tools + applications



## Automation of **repetitive** routine tasks

including data extraction + data entry



## **Mimics** your use of applications

and interacts with the user interface



## **Exact** task programming

so your robot does exactly as you've instructed



As of June 2021, we've identified potential opportunities which are projected to repurpose **c.115,000 hours** via automations which are planned to go live throughout 2021: over the next 5 years, that's more than **half a million hours**

# Benefits of automation.



## Hard return on investment (ROI)

capacity repurposing, cost reduction, economies of scale, etc.



## Improved clinical outcomes + patient experience

increasing patient visibility of processes + quicker turnaround times



## Growth of NHS-wide knowledge + resources

increasing accuracy of your data + analysis



## Improved regulatory compliance

data is easily tracked, analysed, + audited



## Increased efficiency

maximising the productivity + capacity of your **existing** workforce



## Improved staff morale

by enhancing human value + reducing task inundation



## Improved data quality

human error removal, providing improved reporting + decision making



## On-demand scalability

with endless opportunity for improvement



# The logic: what to look for.

## Select processes that...



Require **improvement** / could be better  
*[like regular Master data file updates]*



Are **time consuming** or time critical  
*[like repetitive monthly reports + procedures]*



Are **high volume** and frequent  
*[like extracting, capturing + filing data]*

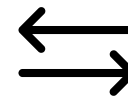


Are **logical** and rules based  
*[like matching up or alignment of data sets]*

## Identify where your team is...



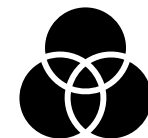
**Gathering data** from multiple sources / systems  
*[like capturing new starter information from their application]*



**Transferring data** from one system to another  
*[like setting up a new starter across multiple systems]*



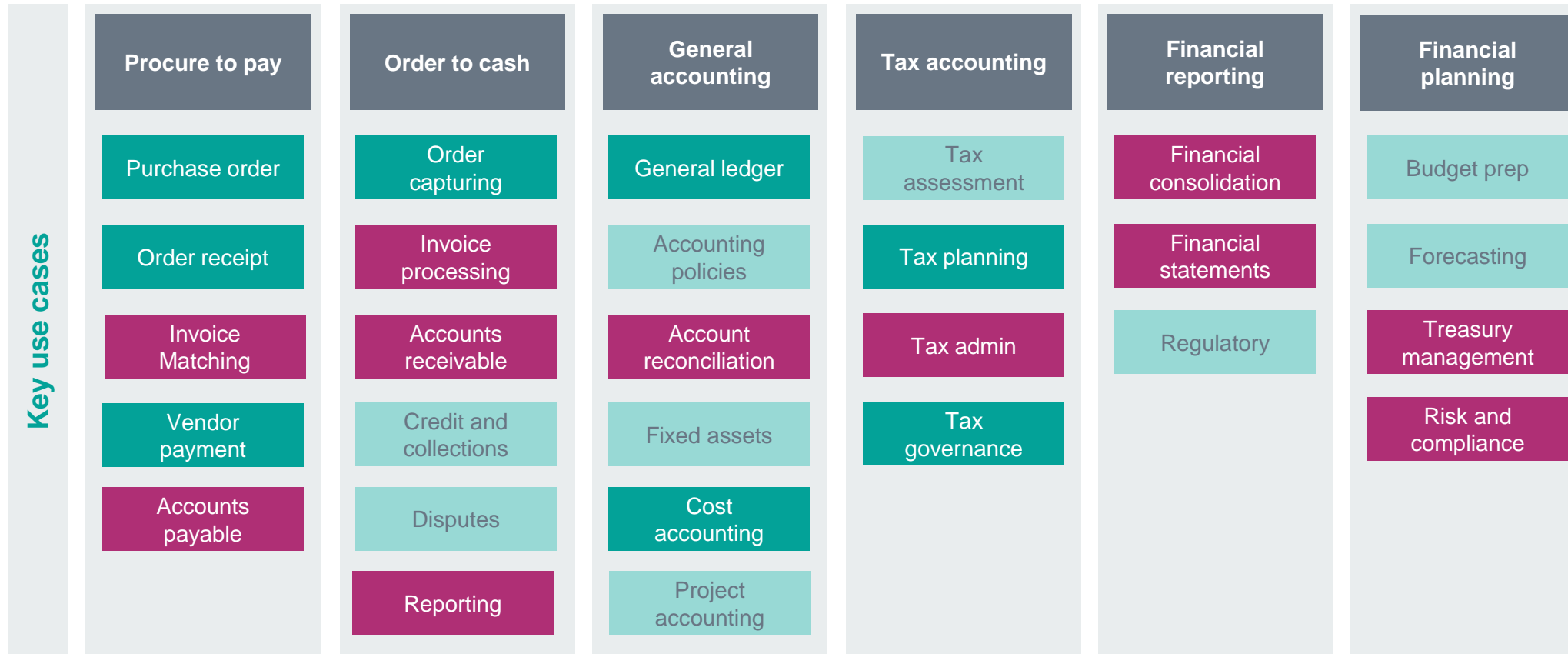
**Checking data consistency**  
*[like checking you've entered the correct data]*



**Updating identical data** across multiple systems  
*[like setting up new starters in various NHS systems]*

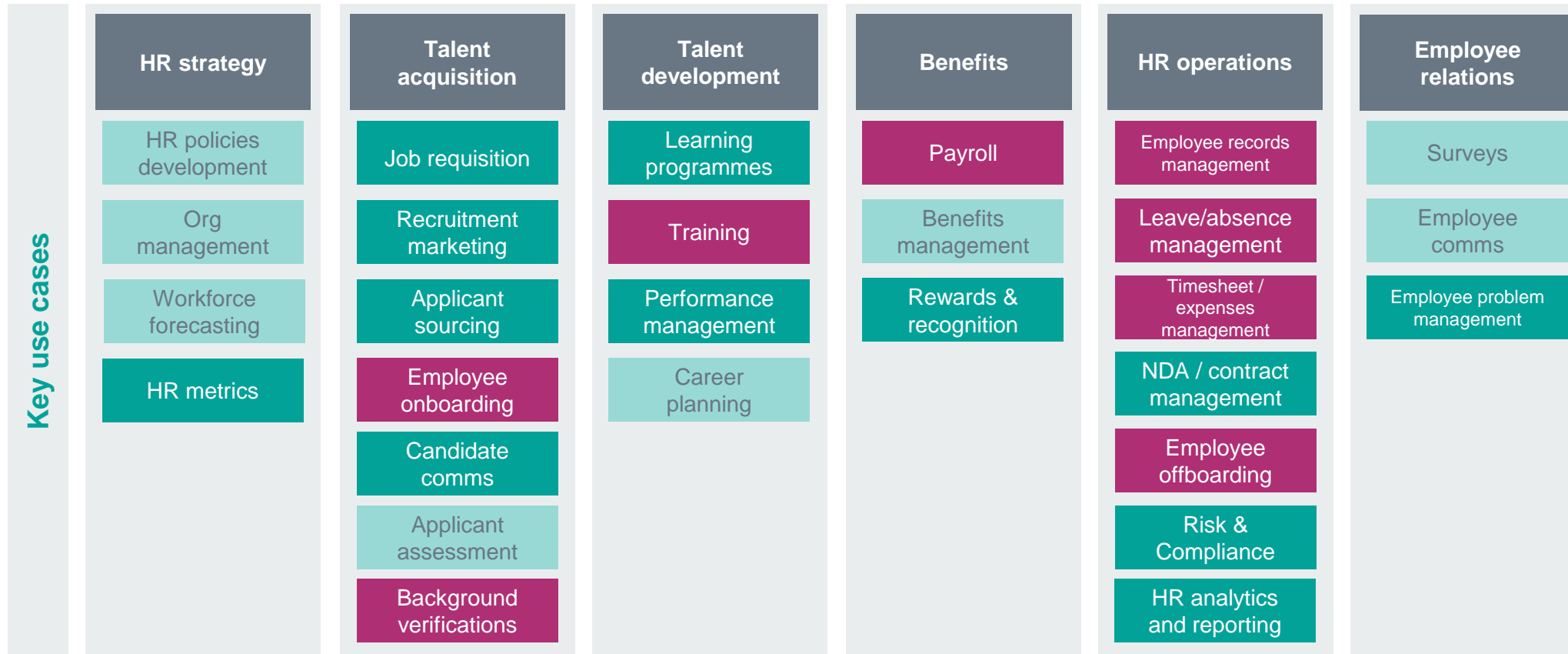
# Functional Adoption: Finance.

Below shows examples of different areas within Finance that have adopted automation (RPA). Each area has a different level of adoption. The areas of lower adoption are caused by the need for increased cognitive technologies and the complex nature of the process.



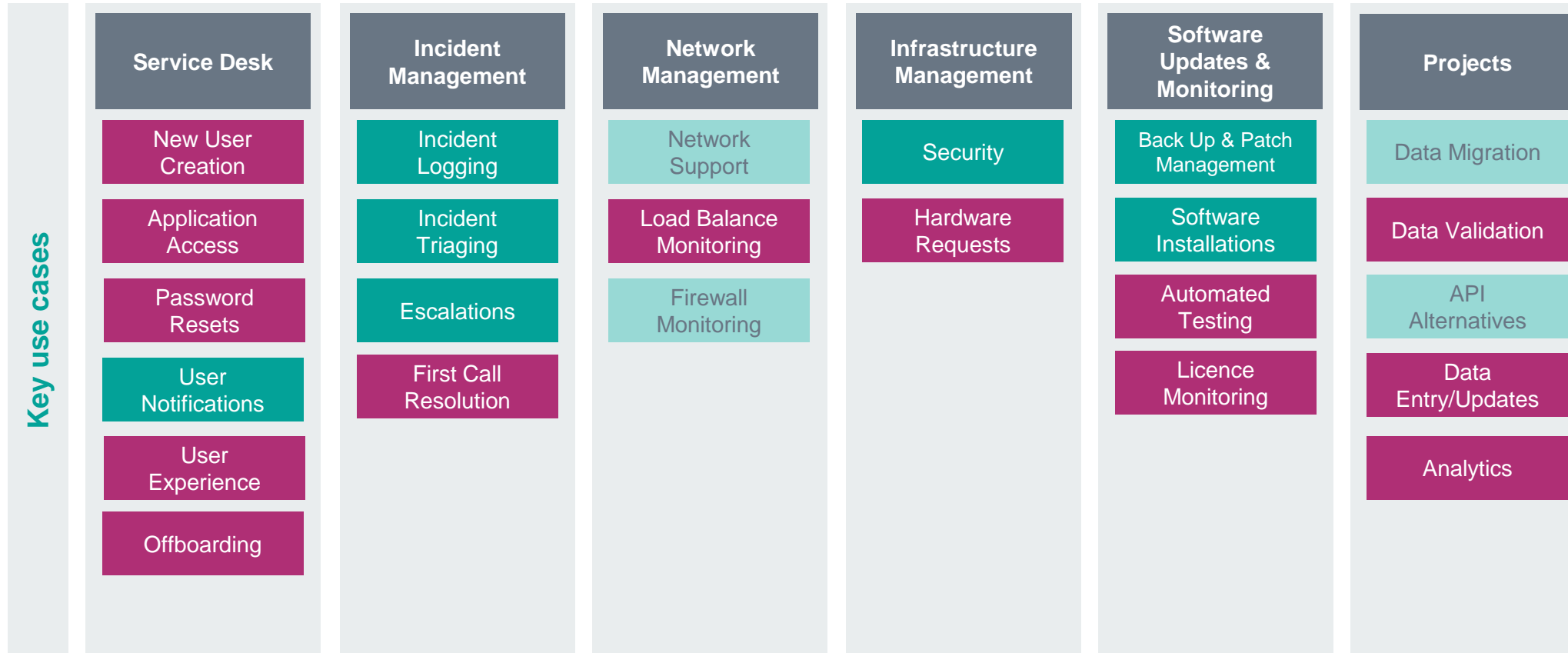
# Functional Adoption: Human Resources.

Below shows examples of different areas within HR that have adopted automation (RPA). Each area has a different level of adoption. The areas of lower adoption, are caused by the need for increased cognitive technologies and the complex nature of the process.



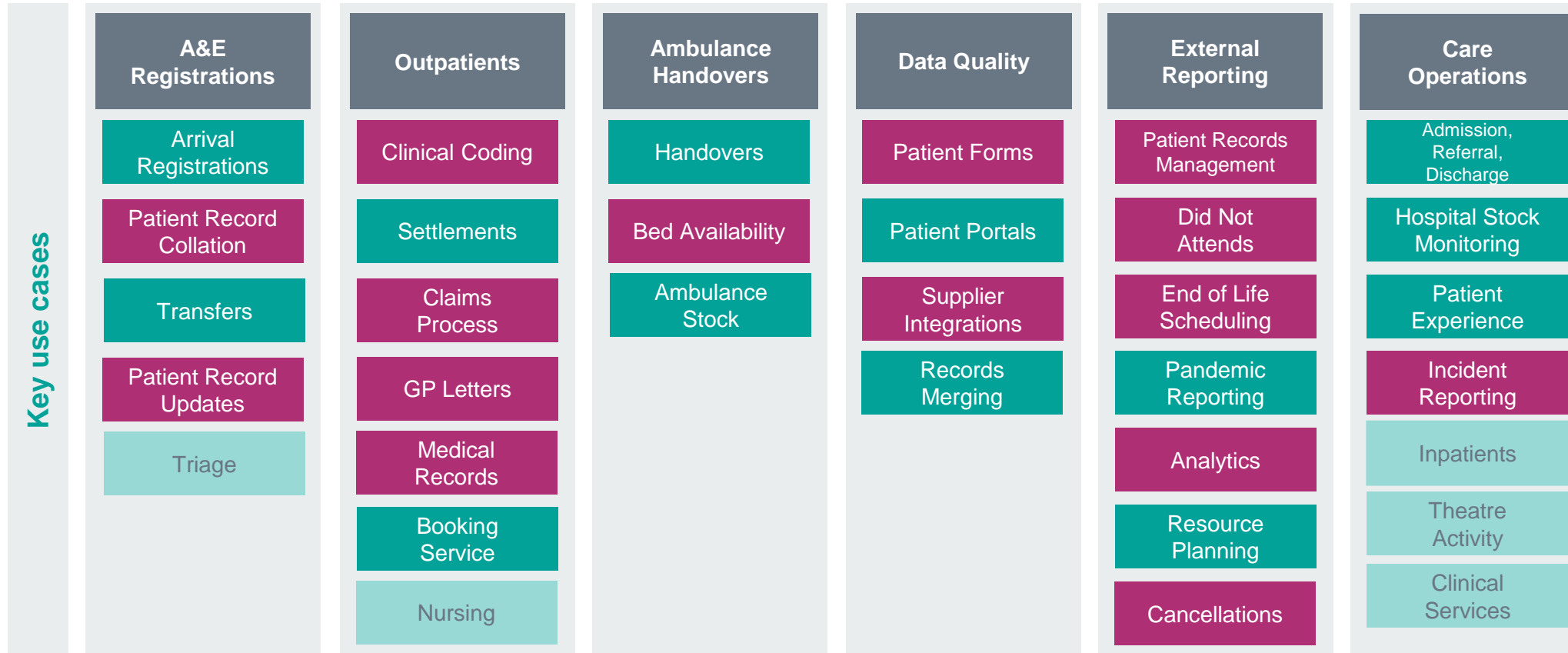
# Functional Adoption: IT Operations.

Below shows examples of different areas within IT that have adopted automation (RPA). Each area has a different level of adoption. The areas of lower adoption, are caused by the need for increased cognitive technologies and the complex nature of the process



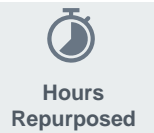
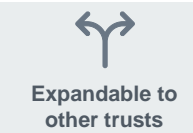
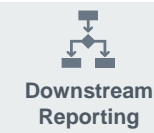
# Functional Adoption: Patient Care.

Below shows examples of different areas within Clinical that have adopted automation (RPA). Each area has a different level of adoption. The areas of lower adoption, are caused by the need for increased cognitive technologies and the complex nature of the process



# Our existing finance projects.

Key:



Automation overview.

Automation description.

Department +/-or function.

Highlight benefits.

AP Query Responses

Automation for supplying invoice statuses

- Finance
- Accounts Payable

 4500+

Covid starters into ESR Payroll

Automation to update HR provided personal payroll information (Bank details) on a spreadsheet for new Covid 19 Starters into the ESR Payroll

- Finance
- Payroll

 + *New Starters*

 100+

Increment Process T&D Side

This automation creates a report to inform Payroll who is due an increment that month

- Finance
- Payroll



 100+

Actioning Leavers Report

Automation to remove leavers from the system

- HR
- Finance



 100+

Sorting Payroll Mailbox Attachments

Automation of mailbox sorting for New, NOC and NOL forms to be filed accordingly for further action

- HR
- Payroll



 1500+

Invoice Downloads

Automation downloads invoices from system

- Account Management
- Finance



 500+

Matching to PO

Automation matches up who is billing and what the price is etc for purchase orders

- Finance
- Accounts Payable



 500+
































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# Finance automation ideas in progress.

Finance 	Finance 	Finance 	Finance  
AP Query Responses	Transformation of Activity and Financial Extracts	ESR Coding Corrections	AP Invoice Receipt & Approvals
Finance  	Finance 	Finance 	Finance  
Increment Process T&D Side	Payroll Report Input into GL	GRNi Transaction Holds	PO Matching
Finance  	Finance  	Finance 	Finance 
Invoice Processing	Mandated Income + Expenditure Returns	Incorrectly Coded Payroll Staff and Source Fix in ESR	AP Invoice Batching from Scanned Image
Finance  	Finance 	Finance  	Finance 
Lease Reconciliation	Staff List Distribution to Trust-Wide Managers	Running Closedown Validation Reports	Moving PDF Invoices to Sub-ledger Folder
Finance  	Finance 	Finance 	Finance  
Actioning Leavers Report	Raising Debtors' Requisitions	Data Validation	Debt Collection Referrals



## Poll 2.

What is/would be the main driver **for your automation programme?**



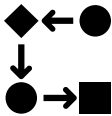


# Getting started: the process.



## 1. Identify your initial focus areas

such as IT (for tech support), Finance and HR (for cultural change support).



2. Do a **light touch review** of 5-10 processes and identify the expected ROI of automating these processes.



## 3. Do market engagement

and review at least 3 automation vendors (advice: look for a starter pack, 1 year).



## 4. Develop your business case

and include a light investment in business analysts, 1x senior RPA developer 1x junior developers and a PM.



## 5. Talk to other trusts that are using automation

to get a feel for the areas they have looked at. Work collaboratively to share learnings across the NHS.



## 6. Talk to your IT team

Make them aware of the business case and share information on the vendors you are looking at.



## 7. Complete at least 3 Process Design Documents

prior to building of automations, also known as PDDs.



## 8. Build your initial 3 automations

and get them live, working to support your team.



## 9. Review your ROI

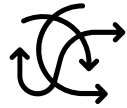
and see the real value of your live automations.



## 10. Look to expand your automation capabilities

now that you have proof that it works in your organisation.

# Common pitfalls to avoid.



## 1. Learning as you go

by not recruiting expert developers but attempting to do it yourself, on top of your day job.



## 2. Not engaging your IT department.

Automation needs the correct setup and infrastructure support.



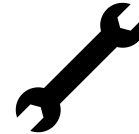
## 3. Not having business analysts

who form a crucial part of the process.



## 4. ROI misalignment

by focusing on a pain point rather than correlating with the areas of maximum impact and maximum benefit.



## 5. Lack of ongoing maintenance investment.

Your automations will require ongoing management and optimisation, as with any software.



## 6. Not completing a business case

which ultimately leads to a lack of accountability.



## 7. Not securing executive buy-in

leading to a lack of direction, support and/or funding.



## 8. Choosing to outsource everything.

You need to develop your own resource in-house.

# Blueprint on a page: our areas of expertise.



1. Building a business case for RPA



6. Business process discovery: **Envision + ideation**



2. Software procurement & **economies of scale**



7. Business process discovery: **Assessment**



3. Governance & **leadership**



8. Automation **build, test & delivery**



4. Building a **team**



9. Automation **optimisation & maintenance**



5. Change management & **impact**



10. Automation **change management**

# Accelerate your automation with Spark.

## Education.

When adopting new innovations, education is crucial to cultural change. Our expert team are developing a set of core tools, guidance and resources to support you and your team.

### What's included?

**Access to our online Community Hub platform, including:**

- **Access to Educational Resources:**
  - Intelligent automation best practice guides
  - On-demand webinars
  - Personal Development webinars + tools
- **A comprehensive Events calendar:**
  - Leadership Webinars
- **Case studies + success showcase:**
  - To help you + other teams demonstrate + share benefits across the wider NHS.

## Programme support.

Throughout your journey, our expert programme management team are here to support, advise and guide you, making sure that your project stays on track and that you're getting maximum benefit.

### What's included?

- **Quarterly Programme Reviews:**
  - Quarterly reports and insights from our Leadership Team to update on progress, showcase any recent benefits and optimise your automation capabilities
- **Initial CoE Health-check.**
  - If you've already got resource in place, we can offer best practice guidance to steer your growth
- **Dedicated support contact:**
  - Our team are here to help you

## Business planning.

Our team can support you with your business planning, wherever you are in your journey. As a Hub, we celebrate and encourage collaboration and knowledge sharing across our network, to maximise the benefits for the wider NHS.

### What's included?

- **Business Case Development:**
  - Guidance from our leadership to help you build a successful business case
- **Knowledge sharing across our network of trusts:**
  - Use-case studies and celebration of successes
  - Idea sharing to minimise time-spent and maximise economies of scale
  - Resourcing planning
  - Demand management

## Strategic workshops.

Our Strategic Workshops are designed to help you identify and communicate your objectives and priorities, and align your leadership team with the wider organisation.

### What's included?

- **Discovery Workshops:**
  - Identification of automation opportunities and support
  - Automation induction for your core project team
  - Generation of a prioritised ideas pipeline
- **Subject Matter Expert support in addition to the Community Hub:**
  - Coaching and advice from our expert team
  - Personal development workshops



# Access to our **Community Hub** – coming summer 2021.

Designed to support you through every step of your automation journey, our Community Hub is an accessible website filled with content to educate, engage + inspire you and your teams.

Sharing of knowledge + insights across the NHS.



Upskill with educational resources + built-in courses to support personal development.



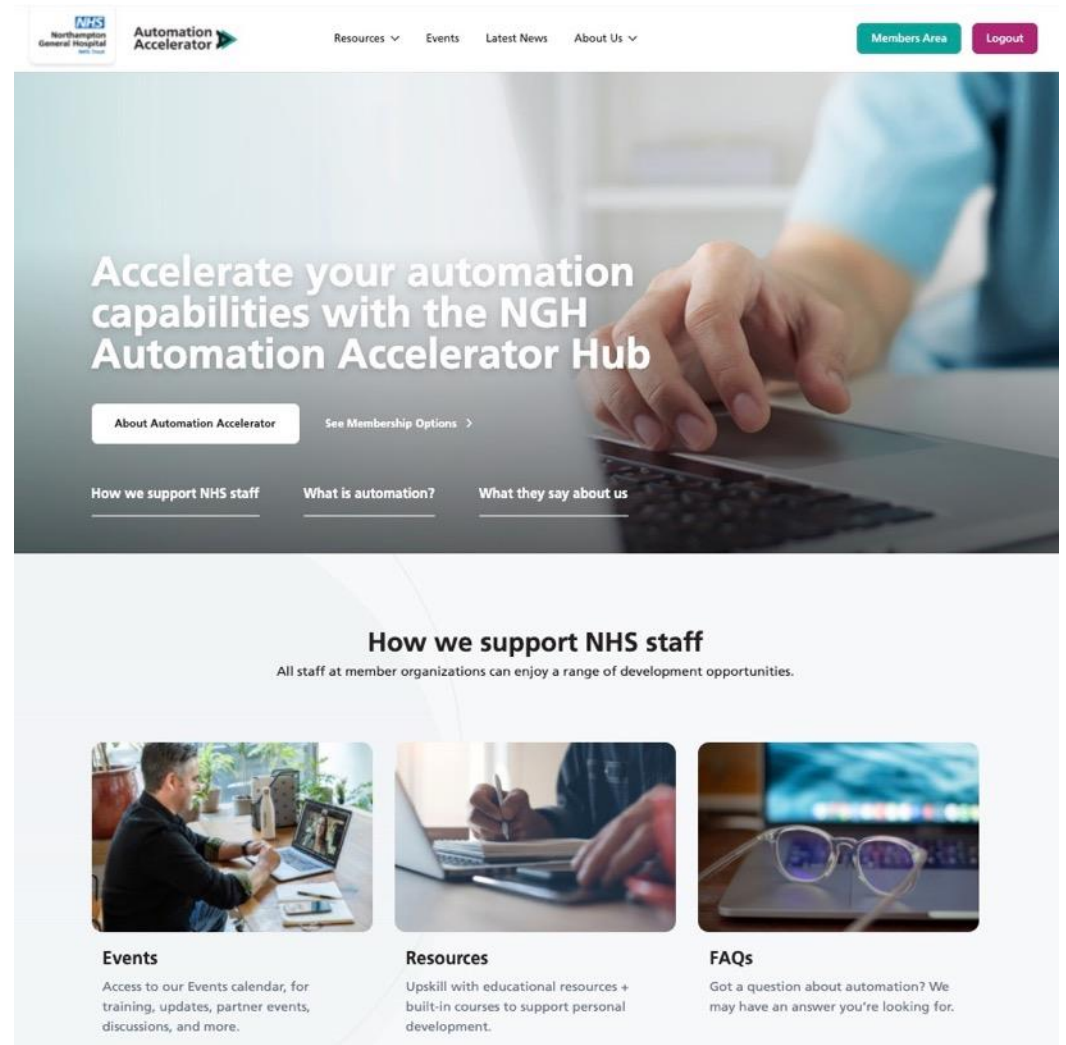
Celebrating automation successes across the NHS.



Access to our Events calendar, for training, updates, partner events, discussions, and more.



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# Envision workshops: agenda.

## When?

- Tuesday 13<sup>th</sup> July, 2pm
- Wednesday 14<sup>th</sup> July, 11am

## 1. Welcome.

### Setting the scene.

- A bit about us and why we're here.
- Future-proofing our NHS.

## Who's hosting?

- NGH Automation Accelerator
- UiPath

## 1. Educate.

### About Automation.

- What is automation?
- Why is it so valuable to us?
- What can we expect to happen, and what's the journey?

## Where?

- Microsoft Teams

## 1. Ideate.

### Ideation workshop.

- What are your aspirations for automation adoption?
- What opportunities are there for automation in your trust?

# Get in touch.

Discover more about accelerating your automation adoption.

Pop an email to Harry, our Automation Outreach & Engagement Manager.

[Harry.grout@nhs.net](mailto:Harry.grout@nhs.net)

Drop a message to Matt, UiPath's NHS RPA Expert.

[Matt.Hogarth@uipath.com](mailto:Matt.Hogarth@uipath.com)

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