

Streamlining occupational health

Reducing the time of health clearance

Northampton General Hospital is an acute NHS trust with approximately 4500 employees. It serves Northampton and the surrounding district and works closely with Kettering General Hospital and other healthcare providers in the vicinity.

The historic process for health clearances was a resource intensive process that impacted on both the occupational health (OH) and recruitment teams.

At 3pm everyday a member of the recruitment team walked to the OH building with the daily forms, and collect the previous days forms.

The OH team would manually log details of the forms received and returned. This process was replicated by the medical staffing team. There were often cases of lost/misplaced forms or misfiling.

What we did

The OH and recruitment teams reviewed the process and opted for a radical change. There was no need for a phased approach, so in March 2015 the OH team stopped producing paper fitness forms and the clearance was entered into the Electronic Staff Record (ESR) system. The OH team already had experience of using ESR so no

additional training was required. The steps to input the clearance onto ESR are simple,

Table 1—Historical Paper based process (Total 21 Steps)

Historical – old process which may take up to three weeks approx.

Dept/person	Number of steps in process
HR	9 steps
New Employee	2 steps
Manager	2 steps
OH	8 steps

so minimal training required for trusts who

Key challenges

Ensure the OH team have active working Smartcards, some team members hadn't used their smartcards and IT support was needed.

The historical use of paper forms within OH and HR meant a significant 'change' issue

Table 2—Current process (Total 17 Steps)

Current - which may take up to 2 weeks

Dept/person	Number of steps in process
HR	7 steps
New Employee	2 steps
Manager	2 steps
OH	6 steps

to work through of acceptance of electronic data.

Key outcomes

- Reduced timeline of the process for occupational health
- Reduction of paperwork
- Reduction of the recruitment process timeline
- Cost savings

Based on the total number of paper screenings completed during 2014/15 the potential costs/savings are:

- historical process (paper based) £7921
- New process (using ESR) - £6504
- a reduction of £1417 (18 per cent)

See tables one and two for the outline of steps taken.

Next steps

The trust implemented an electronic portal for health questionnaires which streamlines the process further.

The portal is in use:

1. HR start the form and assign it to the new employee.
2. Employee completes online form and saves.
3. The form arrives into the portal and OH screen it electronically.

4. The outcome of the screening is shown in a portal report so that HR have an audit trail from start to outcome.
5. Process can be as quick as 10 minutes if the portal field is being worked in by Oh at the time the questionnaire arrives.

This will give further estimated savings of £3993 (50 per cent reduction).

Following Northampton General Hospitals positive experience of this change to process all of the occupational health East Midlands Streamlining trusts are now moving towards the inputting of health clearances via ESR.

The group are also exploring the electronic process to transfer exposure prone procedures clearances, vaccination data

Table 3—Future process (Total 9 Steps)
Future – the process using OH software portal this should reduce the process to 1 – 2 days

Dept/person	Number of steps in process
HR	3 steps
New Employee	1steps
Manager	1 steps
Portal	Automatic
OH	4 steps

and blood test results between organisations to further stream-line the OH process.

“The new system has radically changed the way the recruitment process functions with regard to occupational health clearance. The correct fields are populated within ESR reducing the need for the HR Service Centre to input information. ESR tells us via workflow notification that the system has been updated.

The bi-directional information flow between ESR and NHS Jobs is now functional and the successful clearance is updated automatically with-in NHS Jobs. This has taken many steps out of the recruitment process and nothing gets lost in transit.”

Geraldine Harrison HR Service Centre Manager

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