

## A CASE FOR COST IMPROVEMENTS THAT IS WELL WORTH NOTING

In our latest annual survey of NHS Finance Professionals, over 90% of respondents cited **cost improvements** as their **key concern** in the coming year.

Casenote Digitisation has the potential to unlock **significant recurrent cash releasing savings** in addition to the associated clinical, technological and data security benefits. It is therefore highly likely that if you are a finance professional in the Acute sector your Trust will have already implemented, be considering, or should be considering, implementing Casenote Digitisation.



Casenotes allow health care providers to determine the patient's medical history and provide informed care. They serve as the central repository for planning patient care and documenting communication among patient and health care provider and professionals contributing to the patient's care.

Traditionally they can include admission notes, on-service notes, progress notes (SOAP notes), preoperative notes, operative notes, postoperative notes, procedure notes, delivery notes, postpartum notes, and discharge notes.

In addition, the individual medical record anonymised may serve as a document to educate medical students/resident physicians, to provide data for internal hospital auditing and quality assurance, and to provide data for medical research.

From past experience, we consider the following to be imperative to the delivery of a successful Casenote Digitisation Project:

### **General Project Requirements**

- There should be a Project working group set up and it is vital that the resources required are thought through properly, and approved beforehand:
  - It should be fully supported by the Trust Board
  - It should include a Project Lead, Tendering Manager, Finance Professional, Medical Records Manager, IT support, HR, Directorate/Divisional Managers and Clinicians.
  - It is important that the Project Lead, Tendering Manager, Finance Professional and IT support have the appropriate skills and experience to deliver what is a complex project and have enough time ringfenced to deliver effectively – **the Project Lead should be a dedicated resource**.
  - This resource will be required for a significant period of time right through the process from planning to tendering to evaluation to implementation to post implementation – the group should not be disbanded once the project is implemented as **benefits realisation is key** so the group needs to remain in place to ensure the savings/benefits are realised in line with the plan.

- There needs to be overall **clinical engagement** and buy-in into the project
- Trust staff should be engaged at an early stage in the process and updated regularly—a significant amount of the savings will be in **reduced staffing requirements** so this aspect needs to be handled carefully.



**assista consulting** is a financial consultancy operating across all regions of the UK. We specialise in helping public sector clients achieve best value for money with the resources they have available.

**NHS Finance Solutions**

### **Financial Project Requirements**

- Picking the **right finance lead** for the project with the **right skills** and experience is imperative, and it is vital to never underestimate the dedicated time they will need to deliver effectively. There are sometimes millions of pounds of savings at stake – do you really want to put some of this at risk for the sake of the cost of freeing up some capacity in the finance department?
- It is important that at the pre tender stage the finance lead sets out exactly what the financial requirements of a successful bidder are, and ensures that this is properly represented and weighted in the **overall scoring methodology** – remember there will be a number of people from other disciplines on the group who see their requirements as more important and will be vying for more weighting for their areas.
- It is important when asking for financial submissions from bidders that you are as **specific as possible** in your requirements – any ambiguity or generalisation can lead to different bidders interpreting things in different ways and you can end up comparing apples with oranges – time spent getting this right beforehand saves a lot of time in trying to unpick data and going back to bidders later in the process.
- At the tender evaluation stage it is important that you have a **robust audit trail** and thoroughly check your final scoring methods –remember that unsuccessful bidders will in most cases want to meet with you to explain why they were unsuccessful.
- In putting various iterations of the business case to the Trust Board you will definitely need a **robust planning model** that can stand intense scrutiny. It should be capable of spanning a number of years and include cashflows, I+E and Balance Sheet impacts, NPVs/IRRs, KPIs, sensitivities and significant workings around benefit realisations. It is almost certain that **standard models used for business cases will not be appropriate** for the evaluation of a Casenote Digitisation Project.

Assista consulting have experience in delivering the financial workstream of Casenote Digitisation Projects, including **tried and tested weighting systems**, financial tendering models and business planning models built specifically for Casenote Digitisation projects.

We can offer a **range of services** tailored to your particular needs around the project. This could be general support and advice, support at certain stages of the project, **modelling work using our range of models**, benchmarking work to test your results against other Trusts, right through to full financial support to the project.

If you'd like to discuss this further with us please don't hesitate to use our contact details below.

p.s. we'll undertake a free Materiality and Quality Score (MAQS) for the first five Trusts that sign up for our Casenotes Digitisation Support Service!



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