

# G2



## THE ROWEBOT

LEEDS TEACHING HOSPITALS NHS TRUST

NORTH EAST AND YORKSHIRE, ACUTE

With special thanks to this team of innovators for taking part in the pilot of this programme and contributing to its development.



FOR INFORMATION ON THE  
INNOVATION PROGRAMME  
[CLICK HERE](#)

# THE INNOVATORS

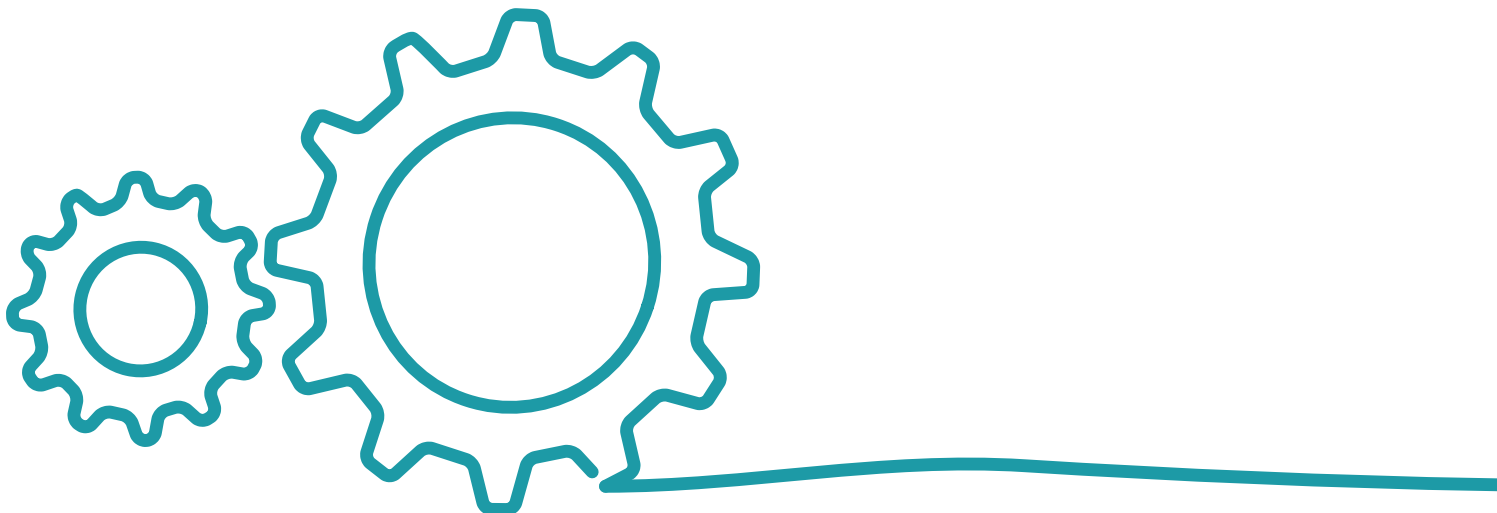
This innovation was led by the Trust's in-house accounts payable (AP) team. For further details contact Melanie Savory, head of financial transactions at Leeds Teaching Hospitals NHS Trust.

## THE PROBLEM

At the start of the pandemic, the AP team contacted suppliers to advise that invoices, where they were posted, must also be emailed to the AP generic mailbox. This was to ensure that the invoices would still get processed even if there wasn't an office presence. This resolved the original problem and was also environmentally friendly, but it created a new problem of an overloaded mailbox.

## THE CHALLENGE

How might we deal with the volume of invoices so that suppliers are paid in a timely manner and staff are not overloaded and feel they can still successfully complete their role when working from home?



# THE INNOVATION

We explored the option of using a robot to pick out specific invoice types. Invoices with a purchase order (PO) number were identified and sent to the 'web centre' supplied by our third party provider North East Patches (NEP) who maintain our finance system. NEP would scan and return them to us into the workbench within Oracle Cloud. Many of these invoices auto-match to the PO and are validated for payment without any human intervention. Any invoices which are not validated are dealt with by the AP team and processed as before.

The idea of a robot was scoped and designed by another NHS organisation working with us and IT, and over several months of getting the concept correct, combined with extensive testing, the robot went live in October 2021.

The robot now sends about 300 invoices a day, out of hours, to the web centre where a process is run to match and validate against the POs. The AP team then know what their workload is when they log on the next day. It has saved the internal and external teams many hours of manual work, which has allowed them time to deal with the value added emails and queries. It has helped increase Better payment practice code (BPPC) compliance and reduced supplier queries while being environmentally friendly and sustainable.

# THE LESSONS LEARNT

- **If we did this again, we wouldn't let the development and implementation of the robot take as long as it did. Because of the length of time taken, some AP processes had changed and therefore we needed to look at them again e.g. a reduction in the number of e-mails coming in due to other mechanisms being on place such as PEPPOL.**
- **The team designing the robot commented that they didn't want to be involved in a project that took too long to be delivered in the future.**
- **We didn't give up on the solution and remained positive as we could see the potential benefits, even though at times it felt like that it wouldn't go live due to testing or access.**
- **We only sent POs to the web centre three weeks each month due to working day one and limited time.**

## THE OUTPUTS

- A streamlined process.
- Improved supplier satisfaction.
- Improved BPPC performance.

## THE OUTCOMES

Benefits have been realised throughout:

- the AP team
- financial management reporting as invoices are processed quicker and better. The impact is seen in KPIs such as BPPC which benefit the reputation of the trust with suppliers.

## THE QUICK WINS

- Waste is reduced by receiving emails rather than post.
- The timing of invoices going into the system is crucial. Staff log onto system on a morning and can see what they need to work on that day. If invoices kept coming into the system uncontrolled during the working day, it is not good for both processing and staff morale.
- Staff can see the number of invoices reducing during the day not increasing.
- Invoices drop in after they leave for the day and the processes starts again the next day.
- The number of invoices processed daily is crucial so that staff have a steady flow of invoices to work on and are not overwhelmed by the numbers they need to look at.
- We monitor the numbers that need to be processed against the number of staff available so we are always flexible with the numbers.
- We have also shown that the invoice date and timings help with the receipting process. If too early the goods have not arrived so instigate unwanted e-mails creating extra work for our colleagues.

# THE REVIEWERS SAID

**“THE SYSTEM ALLOWS GREATER PROCESSING OF INVOICES AND IS ENVIRONMENTALLY FRIENDLY. THE ROBOT SYSTEM WOULD PROBABLY NOT REQUIRE STAFF TO BE RETRAINED TO USE IT AND IT SLOTS INTO THEIR CURRENT WAY OF WORKING WITHOUT MUCH INTERFERENCE AND CHANGE.”**

**“WHILE BOTS ARE BEING IMPLEMENTED IN THE BI WORLD NHS FINANCE IS ONLY SLOWLY RECOGNISING THE POTENTIAL BENEFITS. THIS IS A REALLY GOOD EXAMPLE OF THE POSITIVE IMPACT FOR THE TEAM INVOLVED OF AUTOMATING A SIMPLE BUT POTENTIALLY OVERWHELMING REPETITIVE TASK, WITHOUT IT BEING TOO INTIMIDATING.”**

**“THIS INNOVATION IS A REFLECTION OF THE DEDICATION AND ENTHUSIASM OF THE TEAM. IT PROVIDES A REAL IMPROVEMENT IN FINANCIAL TRANSACTIONAL PROCESSES WHICH LEADS TO DIRECT BENEFITS FOR SUPPLIERS/ STAFF AND THE REPUTATION OF THE ORGANISATION.”**



# WHAT YOU CAN DO NOW

## SUBMIT INNOVATION

**If you recognise the problem stated and have implemented your own innovation** to overcome it please submit this innovation to the programme and give others more examples to learn from.

## REGISTER INTEREST

**If you recognise the problem stated and would like to know more details about this innovation in particular**, we will be hosting showcase and workshop sessions throughout the year, so all interested staff can gain ideas and inspiration from innovators in a manageable one-to-many format.

## SUBMIT PROBLEM

**If you have a problem but don't currently know of a solution to it**, then please submit it here and in 2022 the Forum intends to crowdsource solutions to problems that don't currently have known innovations.

## LEARN MORE

**If you would like to learn more about about the innovation programme** please click for more details.

## ENDORSEMENT DISCLAIMER

The Finance Innovation Forum's Innovation Programme asks NHS Finance peer reviewers whether the "Innovation overcomes, successfully addresses, or solves the problem identified". The programme does not endorse, recommend or provide any assurance of software used or mentioned in any of the published innovations. If you think a published innovation is being used to falsely validate a commercial product or company please contact [finance.innovation@nhs.net](mailto:finance.innovation@nhs.net)



## IN SEPTEMBER 2021 THE FORUM LAUNCHED...

- A national Innovation Programme for NHS Finance staff to submit their innovations for peer review. Successful innovations will be published and accessible to all on the One NHS Finance website
- A 'Software Skills For Finance Staff' event series taught by NHS Finance for NHS Finance including MS Excel, PowerBI, SQL etc.
- An 'Art of the Possible' briefing which explains two new technologies AI & Blockchain and discusses the opportunity for NHS Finance
- An Automation Group to review and improve the efficiency of existing national processes and returns

## WHAT YOU CAN DO NOW

- Submit your innovations for peer review
- Sign up to be an innovation peer reviewer
- Read Art of the Possible
- Sign up for Software Skills for Finance
- Register your interest in automation and all things innovative

### Innovation Programme



### Software Skills



### Automation sign up



### Be a peer reviewer



### Art of the Possible



## FURTHER INFORMATION

Website: [FinanceInnovation.nhs.uk](https://FinanceInnovation.nhs.uk)

Email: [FinanceInnovation@nhs.uk](mailto:FinanceInnovation@nhs.uk)

LinkedIn: [One NHS Finance](#)

Twitter: [@OneNHSFinance](#)



One NHS Finance brings together the Future-Focused Finance, National Finance Academy, and the Finance Innovation Forum programmes and networks to make sure that everyone working in NHS Finance has access to skills, knowledge, methods, and opportunities to influence and enhance patient services.



Identifying and developing innovative ways of working and new areas of improvement.