

Freedom of Information Request

Reference Number: [EPUT.FOI.21.2152](#)
Date Received: [25 August 2021](#)

Information Requested:

The information I am requesting is regarding the software contracts that the organisation uses, for the following fields.

- **Enterprise Resource Planning Software Solution (ERP):**
- **Primary Customer Relationship Management Solution (CRM):**
For example, Salesforce, Lagan CRM, Microsoft Dynamics; software of this nature.
- **Primary Human Resources (HR) and Payroll Software Solution:**
For example, iTrent, ResourceLink, HealthRoster; software of this nature.
- **The organisation's primary corporate Finance Software Solution:**
For example, Agresso, Integra, Sapphire Systems; software of this nature.

1. **Name of Supplier:** Can you please provide me with the software provider for each contract?

Human Resources (HR)

- The rostering and e-Expenses contracts are with Allocate Software
- Recruitment system is with Civica UK Limited

Finance

- OneAdvanced

2. **The brand of the software:** Can you please provide me with the actual name of the software. Please do not provide me with the supplier name again please provide me with the actual software name.

HR

- HealthRoster Optima and e-Expenses
- Trac Recruitment System

Finance

- eFinancials

3. **Description of the contract:** Can you please provide me with detailed information about this contract and please state if upgrade, maintenance and support is included. Please also list the software modules included in these contracts.

HR

The contract includes the software to roster all trust staff and to administer bank and agency staff.

The SafeCare system enables real time management of acuity based daily staffing.

The Trusts expenses are processed with the e-Expenses software and the RosterPerform benchmarking tool allows for performance analysis and monitoring.

The Trust is currently implementing rostering and job planning for medical staff

The contract with Allocate Software contains the following modules: HealthRoster, BankStaff, SafeCare, eRota, eJobPlan RosterPerform, e-Expenses and Employee Online and a full upgrade, and support service is included in the contract

The TRAC Recruitment System is used for managing the Trusts recruitment processes.

Finance

eFinancials is a system-managed service including software & support. Software modules include AP, AR, GL, Recurring Billing & Recurring Charges

4. **Number of Users/Licenses:** What is the total number of user/licenses for this contract?

HR

The contract is not based on a specific number of static licences for all trust staff and bank workers. The contract is based on the number of staff records actually used that is variable. However, an approximate number of staff is 5300 substantive staff and 4000 bank staff

Trac Recruitment System is a licence for the organisation based on the 5300 substantive staff and 4000 bank staff.

Finance

50 concurrent

5. **Annual Spend:** What is the annual average spend for each contract?

HR

Rostering for non-medical staff and e-Expenses are rolled up into one contract and the medical rostering contract is separate. The latest annual cost for non-medical rostering and e-Expenses is £249,400 and for medical rostering £73,428

Recruitment system is £14,400

Finance

Approx. £160,000 + VAT pa

6. **Contract Duration:** What is the duration of the contract please include any available extensions within the contract.

HR

The rostering and expenses contract was a consolidation/update of existing contracts following an organisational merge. The duration is as shown by the dates stated in Q8. The medical rostering contract has no specific extension period. It will be reviewed/renewed and detailed in Q9

Recruitment system is 12 months

Finance

5 years

7. **Contract Start Date:** What is the start date of this contract? Please include month and year of the contract. DD-MM-YY or MM-YY.

HR

Allocate rostering contract (non-medical) is 28 February 2019

Allocate rostering contract (medical) is 31 July 2020

Recruitment system contract is 8 January 2021

Finance

1st April 2019

8. **Contract Expiry:** What is the expiry date of this contract? Please include month and year of the contract. DD-MM-YY or MM-YY.

HR

Allocate rostering contract (non-medical) expires 28 October 2021

Allocate rostering contract (medical) expires 18 June 2023

Recruitment system contract expired on 7 January 2022

Finance

31st March 2024

9. **Contract Review Date:** What is the review date of this contract? Please include month and year of the contract. If this cannot be provided please provide me estimates of when the contract is likely to be reviewed. DD-MM-YY or MM-YY.

HR

No specific review date, Reviewed when it comes near to the end of the contract and it is decided if it is going to be renewed. The rostering is currently being reviewed/renewed and the medical contract will likely be reviewed at the end of 2022 or early 2023.

The contract for recruitment systems will be renewed around about six months from its expiry date to ascertain if it will be extended or tendering is required to ensure value

for money.

Finance

Estimated between April and August 2023

10. **Contact Details:** I require the full contact details of the person within the organisation responsible for this particular software contract (name, job title, email, contact number).

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