

New expenses policy enforcement and governance at Northumberland County Council



Background

Northumberland County Council is benefitting from more accurate staff mileage claims, easier expenses management, automated and more effective policy enforcement, and enhanced governance and approval powers, with the introduction of Assure Expenses' cloud service from Allocate. The service replaces use of an expenses module within the Council's back office IT system.

All of Northumberland County Council's approximate 3,000 HQ and remote office staff, plus a small number of firefighters and former NHS staff, can now access the service. It currently handles 1,500 claims each month – approximately 80 per cent are mileage related. By the summer of 2014, the service will be rolled-out to schools' employees – an additional 4,500 employees.

Policy Compliance

Using the service, Northumberland County Council can now more effectively enforce its expenses policy. Derek Brown, Transactions Manager, Northumberland County Council says:

"Our previous system did not link with our corporate policy leaving it open to interpretation. For example, for staff travelling from home to multiple remote sites and back to their usual place of work, removing the mileage between home and the usual place of work, from their claim, was confusing and difficult. It would lead to errors and overclaiming, identified as part of manual auditing processes. The new system calculates this automatically, creating more accurate claims and lowering our costs."

The new expenses service also enforces the Council's policy of reimbursing the shortest route – not necessarily the quickest – between start and destination postcodes of a journey.

Again, enforcement of the policy prevents overclaiming and reduces costs for the Council.

Derek adds: "The new service is much better, with the policy integrated to the system employees have clear visibility about what they can and can't claim for; we're eradicating claim errors at the point of submission and cutting costs by reducing over-claiming."

Governance

The service also enhances the Council's expenses governance powers. Managers now have much greater visibility of submitted claims, viewing specific claims and scanned copies of receipts. The claims can be approved real time or returned for clarification.

The system also supports managers by preventing over-claiming before it happens with a range of inbuilt claim limits. It can also flag duplicate claims, weekend claims, and inconsistent mileage claims to the same location.

Staff are notified automatically from the service, by email, of each step in the process. Previously, claims were handled with a self-approval process, with staff using the written corporate policies for guidance. In addition, line managers could review and check all claims at the end of the month.

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Easy Implementation

The introduction of Assure Expenses was managed within a very small timeframe. Data migration, such as staff details, reimbursement rates, and typical expenses items, from the previous system was handled by Allocate, along with customisation of the new service to match Northumberland County Council's corporate policy. Allocate provided on-site support and rapid, responsive telephone support.

Impact

- Cloud-based service will handle expense claims for 3,000 employees.
- Supports council, fire, former health staff and schools' employees.
- Enables small payroll team to administer 1,500 claims per month.
- Improves mileage claim accuracy.
- Enables strict expenses policy enforcement.
- Enhances governance and approval procedure.

"Enforcement of the policy prevents overclaiming and reduces costs for the Council."

Derek Brown,
Transactions Manager
Northumberland County Council