

Delivering healthcare finance transformation



Berkshire Healthcare NHS Foundation Trust

In partnership with



Berkshire Healthcare
NHS Foundation Trust

As part of a forward-thinking ‘cloud first’ healthcare strategy, Berkshire Healthcare NHS Foundation Trust has migrated its existing Unit4 Enterprise Resource Planning (ERP) platform to a smart Microsoft Azure Cloud – transforming efficiency, scalability, and useability.

Unit4 Financial Management in the cloud provides the trust with unified, shared, and timely financial management. Process automation, collaborative insights, and ease of use all contribute to a modern, agile finance strategy.

Key benefits include:

- Accelerated and streamlined PPE procurement during Covid-19 crisis
- Migration to cloud completed in just four months
- Automated AI-led invoice scanning is expected to save almost 70 hours manual processing annually

The digital revolution is transforming public services in the UK and around the world. A modern cloud-based architecture for the health and care service has dramatic potential to deliver better services, improve patient safety, reduce delays, and unlock new innovations.

Berkshire Healthcare NHS Foundation Trust is part of this public service digital transformation. The combined trust, which provides mental and community health services across Berkshire, has used a Unit4 ERP platform for 15 years, utilizing the Finance Management, Procurement, and Budget Management modules to deliver smart, connected finance.

In recent years, the trust had migrated from an on-premise Unit4 ERP platform to the NGD cloud. Berkshire Healthcare was one of the cloud pioneers in healthcare,” says Duncan Squires, Finance System Manager. Migration to the cloud offered the advantages of flexibility, efficiency, security, and adaptability in one, united platform.

Duncan and his team saw advantages in migrating the Unit4 workload to the Microsoft Azure Public Cloud computing platform. It offers the freedom and flexibility to build, manage, and deploy applications anywhere, using preferred languages, frameworks, and infrastructure to empower finance team collaboration and improve clinical and operational insights.

Industry

Healthcare

Location

Reading, UK

Size

Approx. 4,500 staff

Product

Unit4 Enterprise Resource Planning (ERP)

Challenges

An existing NGD cloud platform was being phased out, requiring a switch to modern cloud platform, with its advantages of efficiency, security, and adaptability, quickly and non-disruptively.

Key metrics



4 Months

Moved to Azure Cloud quickly and transparently



70 hours

Expected annual time savings from automated invoice scanning

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Duncan Squires

Finance System Manager, Berkshire NHS Trust

Azure Cloud migration in four months

The migration, coupled with an upgrade to Unit4 Milestone 7, was completed in just four months through collaboration with Unit4 partner Integra. Duncan said “The upgrade didn’t take as long as we expected.” The migration has reduced the time spent on manual routine work, making finance teams more productive, and offering an enhanced user experience. From the cloud perspective, Azure allows the flexibility to scale the platform as healthcare needs evolve.

The Unit4 ERP platform itself is transforming Berkshire Healthcare’s finance. Unit4 Financial Management provides single, shared, and complete insight into everyday core finance processes, such as accounts payable/receivable, assets, and more. Integrated Unit4 Procurement functionality, meanwhile, gives the trust complete visibility and control over the procure-to-pay process. Duncan and his team use this intelligent insight and automated workflow to streamline the procurement process and speed up purchase approvals.

Automation helps during a difficult time

The platform has proved invaluable, for example, during the Covid-19 pandemic when healthcare providers were rushing to purchase personal protection equipment (PPE) and other urgent medical supplies for staff and patients.

“Unit4 made the entire PPE purchasing cycle so easy during the pandemic,” says Duncan. “Staff simply entered

what they needed into Unit4 — for instance, 500 pairs of gloves or aprons. Workflow automatically secured authorization from the budget holder and issued a purchase order to the supplier. Once the goods were received, the supplier invoiced against that PO. The Covid-19 crisis was a difficult time for all of our staff, but by automating processes, Unit4 freed up staff time to devote to other tasks.”

Preferred office equipment suppliers can be accessed easily from the trust’s internal portal, automatically routing users to the correct provider’s site, where goods can be ordered. Seamless integration with Unit4 secures authorizations — within strict spending limits — and issues a purchase order and supplier payment. “This intuitive order management is really popular with staff. What could easily be a slow, manual process is quick, reliable, and rewarding for employees,” says Duncan.

Duncan is also certain that Unit4 is saving the trust time and money. “Unit4 saves us a ridiculous amount of time. For example, approximately 20 orders for healthcare supplies are made every day using the punch-out function. Manually, each order would take about 15 minutes. Now, they take five minutes. That’s two hours of time saved every day that we can channel back into healthcare provision,” Duncan explains.

Financial reporting is faster and more insightful, too. “Budget managers, heads of services, and other senior decision makers across the trust all rely on Unit4’s timely financial insights for decision-making. At the moment, we use the Excelerator module to extract the data from Unit4

and format the reports. In time, we are likely to move to Tableau visual analytics for reporting,” Duncan says.

The general feedback he receives from staff about Unit4 is universally positive as well. “Unit4 flexes to fit the users, so they are using a system designed around their needs – not vice-versa. Our staff really likes the intuitive interface, the workflow, and the automation. I also frequently hear comments like, ‘I didn’t know you could do that,’ so they are keen to learn more,” he says.

In time, Duncan and his team want to introduce artificial intelligence (AI) functionality to accelerate further the hands-free use. He says, “We want to deploy automated invoice scanning and checking. Right now, it takes about five minutes to process each invoice; AI-led scanning may cut that to as little one minute. Across 1,000 invoices, that’s almost 70 hours saved every year.”

