

Patients' Monies Case Study

Customer interview

Ailsa Miller

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Cashiers Manager

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(part of the Northumberland
Tyne and Wear NHS
Foundation Trust Group)

Ailsa shares her experience
of the Harlequin Patients'
Monies system since going
live in 2012. With 10 user
licences, the software is used
within seven hospital sites.



Why did you need a new Patients' Monies system?

When we merged with South Tyneside & Wear, Newcastle, North Tyneside, and Northgate & Prudhoe Trusts, we became one of the biggest mental health and disability Trusts in the country - covering 2,200 square miles with a population of 1.4 million - serving both inpatients and community patients.

With seven main hospital sites looking after hundreds of Patients' Monies accounts (service users/clients) it was time to implement a more robust Patients' Monies system.

We had a combination of a paper system along with an old system that was no longer being developed.

What process did you follow?

We sent out a survey to find out what other organisations used. Harlequin kept popping up so we decided to investigate further.

Why did you choose Harlequin?

They have a well-established system that is reasonably priced with a good client list.

How does your organisation use Harlequin Patients' Monies?

Harlequin sits on a central server and is accessed by all seven sites by our cashiers - with the Patients' Monies Team being the hub for information. We have 10 licences.

We store all relevant details linked to our service users including addresses, appointees, capacity assessments, next of kin and financial accounts.

We use the database for recording every transaction. That is all income being received whether it is state pension, benefits, private pension or ad hoc monies. Expenditure items are posted and these can be cash withdrawals or larger items requiring a cheque to be produced.

Benefit details are imported and matched against our client records. Any apportionment of income is also auto created via the system.

Our statements to interested parties mirror what you would receive from the High Street and are produced in real time providing accurate values to patients, patients' representatives or ward staff. We also provide daily ward reports.

What are the key benefits that Harlequin Patients' Monies brings?

The system enables us to give patients information quickly and ensure that they can access their account details no matter where they are located within our Trust.

It gives patients the insight on how to manage their finances and this can prove invaluable in the road to recovery. Personal finance can be a very emotive subject and by using Harlequin we can produce individual statements which are easily understood and patients are able to see and set spending budgets. They are able to take these skills and run their own bank accounts in the community following discharge.

What three words best describe Harlequin?

Fantastic, user-friendly, approachable.

“ Harlequin deliver a well-established Patients' Monies system that is reasonably priced with a good client list. ”