

## Business Process Improvement (BPI) Shared Service

### *Monthly Report for February 2016*

*Data as of 02/12/2016*

This report intends to provide a summary of the progress and status of the projects that have been approved by the Business Process Advisory Group (BPAG). For questions and information about the BPI Shared Service or the process for submitting a project request, please visit <http://go.uillinois.edu/bpi>.

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# Summary of Current Projects

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## PPMO-0040 Unit Security Contact Request Process Improvement [UA,UIC,UIS,UIUC]

**Sponsor(s):** Gloria Keeley, Michael Hites

**Goal:** Reduce amount of time spent developing requests for access to administrative applications while ensuring appropriate access was requested.

**Status:** Finishing up the re-planning effort for this project, while coordinating a similar effort with smaller scope for AITS (WR-BPI-0033). Resulting improvements from that effort will be fed into this project. An approved project charter is expected in the next month.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
12/2/13	12/30/16	G	G	G	G

## PPMO-0042 AITS Change Request Submission and Preparation Process Improvement [UA]

**Sponsor(s):** Nyle Bolliger

**Goal:** Reduce the number of change requests deemed high-priority due to late submission, late approval, and insufficient preparation.

**Status:** The Process Improvement Facilitator and Process Owner gained acceptance of the solution action plan from the Project Sponsor. The Process Improvement Facilitator has begun transitioning the project to an AITS project manager to implement the solutions.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
1/6/14	4/25/16	G	G	G	G

## PPMO-0045 Banner HR Configuration Management Process Improvement [UA,UIC,UIS,UIUC]

**Sponsor(s):** Maureen Parks, Michael Hites

**Goal:** Develop a more efficient process for managing HR configurations in Banner while minimizing risk of adverse changes to Banner and downstream systems (e.g., Nessie, New Hire, HR Frontend, NOA, etc.).

**Status:** Phase 1 process mapping continues. 17 of the 18 processes have been mapped so far. Process Improvement Facilitator is looking to schedule meetings with other groups to begin reviewing select process maps.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
5/5/15	6/30/16	G	G	G	G

# Summary of Current Projects

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## PPMO-0048 College of Dentistry Point-of-Service Management Process [UIC]

**Sponsor(s):** G. William Knight, John Frizzell, Dr. Susan Rowan

**Goal:** Reduce patient accounts receivable by increasing its accuracy of claim submissions and collections from patients and insurance companies.

**Status:** Phase III - Patient Clinic Check-In working sessions have begun. Phase II recommendations/action plan are being developed with the core team. Phase I recommendations/action plan were presented to Dean Stanford and were approved.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
10/14/14	8/1/16	G	G	Y	G

## PPMO-0050 Employee Off-boarding Procedures Process Improvement [UA,UIC,UIS,UIUC]

**Sponsor(s):** Gloria Keeley, Patrick M. Patterson, Tony Kerber, Maureen Parks

**Goal:** Create an effective off-boarding process that terminates enterprise access and stops payroll in a timely manner following an employee's separation.

**Status:** The kick-off meeting was held on January 28th. The team is now in the process of collecting data, documenting current state processes, reviewing policies, documenting issues, and identifying individuals for focus group discussions on all three campuses and university administration.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
4/30/15	7/1/16	G	G	G	G

## PPMO-0052 Public Employee Disability & Benefits Acts Process Creation [UA,UIC,UIS,UIUC]

**Sponsor(s):** James Davito, Kassandra Hester

**Goal:** Design an efficient process to ensure University compliance with the Illinois Public Employee Disability Act and the Illinois Public Safety Employee Benefits Act.

**Status:** The team is working on the tasks and action items for the Public Employee Disability Act (PEDA) process and identifying adjustments for tax years 2012, 2013, and 2014. The sponsors have determined the scope of the Public Safety Employee Benefits Act (PSEBA) process. The team will move forward to define the business process workflow.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
3/30/15	4/30/16	G	G	G	G

# Summary of Current Projects

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## PPMO-0053 Faculty Interactions with Corporations Analysis [UA,UIUC]

**Sponsor(s):** Mark Nolan, David Richardson, Michael McClintick, Gloria Keeley

**Goal:** Develop a process and systems to more effectively track University interactions with corporations.

**Status:** Continued working sessions to analyze the data and better understand the processes for creating corporate records within University systems. Will continue small group sessions to discuss initial findings and develop overall goal of the project.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
7/1/15	12/30/16	G	G	G	G

## PPMO-0057 Annual Sabbatical Leave Process Improvement [UA,UIC,UIS,UIUC]

**Sponsor(s):** Sandy Jones, Jessica Mette, Natalie Taylor, DeeDee Williams, Angela Yudt

**Goal:** Streamline the annual Sabbatical Leave process for all three campuses of the University of Illinois, reducing lead time, providing quicker transmission and ease of access, and more expedient reporting and tracking.

**Status:** Final draft of charter being approved by sponsors before February 12th. First UIC current-state mapping session is scheduled for February 17th with subsequent meetings scheduled. Will schedule UIS and UIUC sessions as soon as possible.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
1/5/16	7/29/16	G	G	G	G

# Summary of Upcoming Approved Projects

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## **PPMO-0054 The Graduate College Graduation Certification Process Improvement [UIUC]**

**Sponsor(s):** Allison McKinney

**Goal:** Streamline the Graduation Certification Process at the Graduate College, reducing the amount of time required by both Graduate Student Academic Services auditors and graduate department/program certifiers.

**Status:** Project approved during the September 23, 2015 Business Process Advisory Group meeting. Initial planning discussions have started and this project will likely start in February 2016. Allison McKinney has replaced Jodi Miller as Project Sponsor.

**Requirements:** Expected duration of 6 months with a BPI Facilitator (20%). Expected involvement of team is 1-2 hours/week for the 6 month duration.

## **PPMO-0055 Capital Project Planning and Reporting Process Improvement [UIUC]**

**Sponsor(s):** Helen Coleman, John Rossi, Matthew Tomaszewski

**Goal:** Develop a set of business processes that would guide the development of a tool for collecting, analyzing, and reporting on capital projects.

**Status:** Project approved during September 23, 2015 meeting of the Business Process Advisory Group. Initial planning discussions have started and project will likely start in January 2016.

**Requirements:** Expected duration of 6 months with a BPI Facilitator (20%) and a BPI Business Analyst (10%). Expected involvement of team is 1-2 hours/week for the 6 month duration.

## **PPMO-0058 OPRS Protocol Application Process Improvement [UIUC]**

**Sponsor(s):** Anita Balgopal

**Goal:** Increase office efficiency by improving customer service, decreasing turnaround time, and decreasing investigator burden.

**Status:** Project approved during December 9, 2015 meeting of the Business Process Advisory Group. Initial planning discussions will start in late Q3 FY16.

**Requirements:** Expected duration of 6 months with a BPI Facilitator (25%). Expected involvement of team is 2-4 hours/week for the 6 month duration.

# Summary of Current Work Requests

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## **WR-BPI-0029 Office of Governmental Relations CRM Analysis [UA]**

**Sponsor(s):** Jennifer Creasey

**Goal:** Assist the Office of Governmental Relations and the University of Illinois Foundation with analyzing and developing a process for maintaining contacts and relationships.

**Status:** Met with sponsor and collected information regarding desired process and data requirements. Currently preparing a document to summarize requirements, which will then be used to discuss next steps.

## **WR-BPI-0032 Athletics Ticket Reservation for Administration Process Analysis [UA]**

**Sponsor(s):** Michael Devocelle

**Goal:** Assist the Office of the President with analyzing their process for reserving athletic tickets for the Board of Trustees, Office of Government Relations, University of Illinois Foundation and the Alumni Association.

**Status:** Continued meeting with the President's Office and DIA to develop an accurate view of the process. Continued discussions on future state with the goal of developing a simplified process over the next month.

## **WR-BPI-0033 AITS Access Request and Review Process Analysis [UA]**

**Sponsor(s):** Michael Hites

**Goal:** Coordinate the analysis and improvement effort for the AITS Access Request and Review process. Results will be fed into PPMO-0040 Unit Security Contact Request Process Improvement project.

**Status:** Have worked with individual teams at AITS to define the standard roles needed. Once defined and agreed upon, team leads are instructed on how access should be requested and given a preview of how the annual review process will work. We will also be conducting working sessions with various managers within AITS to define the most appropriate individuals to serve in the USC role going forward.

## **WR-BPI-0034 Identity and Access Management Project Processes Improvement [UA,UIS,UIUC]**

**Sponsor(s):** Kelly Block

**Goal:** Facilitate lessons learned sessions with the Identity and Access Management teams from the first two go-live events, including representatives from UIS and UIUC.

**Status:** Solution action plan developed and transitioned to process owner. Follow up will occur in April, 2016.