

## Business Process Improvement (BPI) Shared Service

### *Monthly Report for July 2016*

*Data as of 07/29/2016*

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 Recently Completed Projects

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

**Sponsor(s):** James Davito, Kassaundra 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.

**Date Completed** 6/30/16

**Outcome:** Processes were developed and a mechanism for keeping them aligned with Illinois legislation has been put in place. Eligible claims were identified for the tax years 2012-2015 and communicated to University Payroll and Benefits for correction. University Police departments benefitted from a defined reimbursement process and improved medical leave tracking. They will now receive two-thirds reimbursement of benefits paid where they previously incurred full wage expense, and they now have visibility into the approval of medical leave requests.

# 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.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
12/2/13	12/30/16	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 2 process mapping is underway. Once HRIS processes have been mapped and issue identified, we will solicit input from other stakeholders.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
5/5/15	9/30/16	Y	G	R	G

## 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:** Due to significantly reduced attendance, the decision was made to temporarily postpone launching phase IV and have the core team focus on completing recommendations for phase II and III. Core team meeting frequency has increased and upon presentation of phase II and III to Dean Stanford, the team will advertise the project's accomplishments and secure a refreshed directive for engagement from the Dean. At that time, team will re-launch phase IV.

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

# Summary of Current Projects

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## 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 team has completed its review of each recommendation and is working on writing the final report and presentation for the sponsors. Once complete, the team will present their recommendations to the project sponsors and discuss next steps.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
4/30/15	7/25/16	G	G	G	G

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

**Sponsor(s):** Roger Vanhoy, 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:** Full team meeting was held in Urbana on 6/15 where the "To Be" state map was analyzed in detail and updated with corrections. Also, a list of "Need to Have" and "Nice to Have" items was compiled for the final process. The "To Be" map representing all three campuses and the requested items were then reviewed with technical representatives. Currently awaiting a response from the tech reps on which product they recommend and what of the requested items they can deliver.

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

# Summary of Current Projects

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## 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:** Several planning meetings have been held with Project Sponsor and Project Manager. The survey results of research faculty on the OPRS application process are being analyzed to assist in the creation of the project charter. The whole project kickoff meeting is scheduled for late August.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
3/14/16	10/31/16	G	G	G	G

## PPMO-0065 University Procurement Source-to-Pay Process Analysis and Improvement [UA,UIC,UIS,UIUC]

**Sponsor(s):** Mike Bass, Duane Elmore, Gloria Keeley

**Goal:** Analyze and improve University procurement source-to-pay procedures in support of an effort to identify and implement a streamlined source-to-pay IT solution.

**Status:** The pilot for this project has been officially kicked off and process team meetings will start July 5th and 6th. The pilot is expected to go through mid-September and will focus on 4 processes. The goal of the pilot is to improve the 4 processes, collect process and system requirements for the 4 processes in support of a future Source-to-Pay system, and test our approach.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
5/2/16	7/1/19	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. After initial discussions with the project sponsor, we will delay the start of this project until early 2017.

**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..

**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-0061 University of Illinois Foundation Annual Giving Process Improvement [UA]**

**Sponsor(s):** Julia Miller

**Goal:** Reduce the turnaround time for all communication data requests, providing departmental requestors with more timely data and allowing UIF Annual Giving to better accommodate emergency requests and staffing fluctuations.

**Status:** Project approved during the April 4, 2016 Business Process Advisory Group meeting.

**Requirements** Expected duration of 6 months with a BPI Facilitator (25%) and a BPI Analyst (10%). Expected involvement of team is 2-4 hours / week for the 6 month duration.

# Summary of Upcoming Approved Projects

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## **PPMO-0062 School of Public Health New Hire Procedures Process Improvement [UIC]**

**Sponsor(s):** Paul Brandt-Rauf, Lorraine Conroy, Jaclyn Finch

**Goal:** Decrease the amount of time it takes for new procedures, ensuring new employees are processed and on-boarded in a timely manner through streamlined best practices.

**Status:** Project approved during the April 4, 2016 Business Process Advisory Group meeting.

**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.

## **PPMO-0063 Illinois Abroad and Global Exchange Withdraw Process Improvement [UIUC]**

**Sponsor(s):** Bo White

**Goal:** Create one flexible process among the six study abroad offices that would allow for a transparent message to all stakeholders, create opportunities for process automation, and allow for accurate data collection.

**Status:** Project approved during the April 4, 2016 Business Process Advisory Group meeting.

**Requirements** Expected duration of 6 months with a BPI Facilitator (25%) and a BPI Analyst (10%). Expected involvement of team is 2-4 hours / week for the 6 month duration

## **PPMO-0064 College of Dentistry Patient Communications Process Improvement [UIC]**

**Sponsor(s):** Clark Stanford, Susan Rowan, Mike Harner

**Goal:** Improve patient communication processes and procedures, providing better access for new, existing, and emergency patients of the College of Dentistry Clinics.

**Status:** Project approved during the April 4, 2016 Business Process Advisory Group meeting.

**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-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 these roles have been 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-0035 College of Engineering Early Alert Process Analysis [UIUC]**

**Sponsor(s):** Roy Campbell

**Goal:** Assist the College of Engineering on the Urbana-Champaign campus assess the feasibility and process requirements for an early alert system in support of student success initiatives.

**Status:** Met with stakeholders and planning approach. Creating a proposal document to share. Will seek project sponsor approval before proceeding once approach has been finalized.

## **WR-BPI-0036 Managing Compensation for Human Research Subjects Analysis [UIC,UIUC]**

**Sponsor(s):** Anita Balgopal

**Goal:** Assist the Business Solutions & Support (BSS) unit within the Office of Business & Financial Services (OBFS) facilitate discussions between faculty, researchers, staff and representatives from OBFS and the Office for the Protection of Research Subjects (OPRS) on how human research subjects are compensated.

**Status:** Started initial planning discussions, targeting mid-July for focus groups. Sponsor has identified the people that should participate in the focus group sessions. Will be planning questions/script over the next month.



# Summary of Upcoming Work Requests

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## **WR-BPI-0037 University Payroll & Benefits Process Analysis [UA]**

**Sponsor(s):** Laura Barnett, Gloria Keeley

**Goal:** Facilitate high-level process mapping sessions focused on University Payroll & Benefits processes.

**Status:** Planning working sessions for July and August to identify core and supporting processes for University Payroll & Benefits.