

## Business Process Improvement (BPI) Shared Service

### *Monthly Report for November 2016*

*Data as of 11/09/2016*

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

## 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:** Currently finalizing a proposal for the new approach. The new approach will include interviews of units on each campus to better understand their perspective and the various approaches and systems they use for their own access provisioning. It will also include data analysis and system analysis of current Unit Security Contact systems.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
12/2/13	6/30/17	G	G	G	G

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

**Sponsor(s):** Jami Painter, 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 complete. Issue identification and input from other stakeholders on the phase 2 processes is complete. The Facilitator has left the university, so we met with the sponsor and core team to determine the schedule for completing phase 2 and starting phase 3. We will begin phase 3 on Nov 30.

**ON HOLD:**

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
5/5/15	4/7/17	Y	G	R	G

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

**Sponsor(s):** G. William Knight, Dr. Susan Rowan, Dr. Michael Harner

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

**Status:** Presentation to Dean Stanford for phases II and III was completed on October 13, 2016, with approval to move forward on all actions. Phase IV is expected to wrap up on October 31, 2016, and stakeholders are being identified for the final project phase on Billing and Collections. Tentative kickoff will be on Monday, November 7, 2016.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
10/14/14	3/31/17	Y	G	R	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, Jami Painter

**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 final report has been submitted and presented to the project sponsors. Based on their feedback, action plans are being developed. Once complete, the project will be officially closed.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
4/30/15	11/30/16	Y	G	R	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:** Vendor creation processes are being analyzed as part of the Source-to-Pay project (PPMO-0065) and will be fed into this project once complete in mid-September. Once that is complete, team will re-assess what needs to be done and make plans for next steps.

**ON HOLD:**

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:** The technical representative presentation has been re-scheduled for November 17, 2016, where a simple pilot of each of the 4 selected workflow solution options will be illustrated. From there, the sponsors and team will select the best option.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
1/5/16	11/17/16	Y	G	R	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:** Future state analysis is underway and planning for implementation will take place in mid-November.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
3/14/16	11/18/16	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 phase for this project completed on September 23rd. Four processes were analyzed during the pilot resulting in 45 recommendations. Implementation for short-term recommendations will be considered in parallel with this project based on resource availability. Long-term recommendations will be fed into the RFP for the future Source-to-Pay system.

October-December 2016 processes are underway. The team is at week 4 of the 10-week cycle.

New cycle of 4 processes will be begin in January. Planning is underway.

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. Project sponsor and manager have changed. After initial discussions with the new project sponsor, we decided to delay the start of this project until early 2017. Follow-up meetings with the unit are currently ongoing with a goal of determining focus and approach.

**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. Sponsoring organization has experienced some changes that have impacted this project. Currently awaiting their feedback on next steps.

**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. The sponsor and a key resource on the proposed team have left the University. We are in the process of determining next steps with the unit.

**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. Project sponsorship is changing due to some organizational changes, but remaining sponsors fully support moving forward. Initial meetings to discuss scope have taken place and the team will be ready to kickoff the project after September.

**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. Expected to be kicked off in late September or early October.

**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. College of Dentistry has since considered outsourcing all or a portion of this project. We are awaiting their decision.

**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-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:** Completed developing the high-level process map. Additional sessions are needed to complete the review. Due to resource constraints, this work request will be extended.

**ON HOLD**

# Summary of Upcoming Work Requests

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## **WR-BPI-0038 StartMyResearch Project Processes Improvement [UA]**

**Sponsor(s):** Andrea J. Lavender

**Goal:** Facilitate lessons learned sessions with the StartMyResearch project management team to better align roles and responsibilities going forward.

**Status:** Currently working with project sponsor to determine timeline and overall approach.

## **WR-BPI-0039 AITS Security Procedures Process Analysis [UA]**

**Sponsor(s):** Nyle Bolliger

**Goal:** Develop an inventory of security-related request and provisioning processes within AITS. Document high-level current state maps for each and identify required participants for future detailed process mapping sessions.

**Status:** Currently determining resource needs and timeline. Expectation is to have this work complete by end of March 2017.