Business Process Improvement (BPI) Shared Service

Monthly Report for January 2017

Data as of 01/17/2017

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

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.

Date Completed: 1/6/17

Outcome: Identified 9 short term recommendations, expected to result in a reduced amount of time taken to terminate enterprise access, and a reduction in the number of overpayments due to separation timeline issues. Team recommended the creation of an official University Policy, Guideline, or Standard Operating Procedures for the terminations of access to enterprise systems at the University of Illinois following the separations of an employee to guide the process. Recommended an automated process to trigger a termination request to be sent to the appropriate Unit Security Contract when the employee separation is applied in HRFE to begin the separation process. The planning began in November 2016, with implementation beginning January 2017 – July 2017.

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.

Date Completed: 1/2/17

Outcome: Identified 6 recommendations, expected to result in faster turnaround time for reviewing protocol applications by eliminating waste in the process and distribution of tasks to administrative staff. This will provide the staff reviewers with more time to focus on the Faculty and Researcher requests. Recommended the hiring of new administrative staff to assist with application tasks. Recommended a pilot program with two units from the department of Psychology to implement an electronic application process by March 2017.

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: Project team changes occurred and team is assessing next steps, working to finalize 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	12/31/17	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: Team had several working sessions in November and December to complete Phase 3. January will focus on all three Phase recommendations and putting them together in an action plan.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
5/5/15	2/10/17	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: Phase V - Processing Claims and Collections working sessions continue on until complete. Core team finalizing an action plan for Phase IV solutions and will do the same for Phase V upon its completion. Working with Finance to refresh progress metrics from baseline.

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

Summary of Current Projects

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: A recommendation for handling corporate records is being developed by a subset of the team and will be presented once complete.

ON HOLD

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
7/1/15	1/31/17	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 project was formally handed off to the Sabbatical team at the last meeting on 12.19.16, with their collective decision to pursue the digital workflow tool FormBuilder. In addition to BPI finalizing the Final Report, the Sabbatical team must analyze the levels of approval and recommend which to remove from the process. BPI will facilitate this session for project completion.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
1/5/16	1/31/17	Y	G	R	G

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

Sponsor(s): 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 planning discussions continue with an expected kickoff in January. Sponsors are reviewing Charter draft now for final approval.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
11/4/16	1/31/18	G	G	G	G

Summary of Current Projects

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: 11 processes complete as of 12/19/16.
Four processes begin the 10 week cycle the week of 1/9/17.

Project is on track.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
5/2/16	7/1/19	G	G	G	G

PPMO-0067 UIC Institutional Review Board Protocol Submission Process Improvement [UIC]

Sponsor(s): Mitra Dutta

Goal: Develop a process that is less burdensome and time consuming for active researchers (i.e., research faculty, graduate students, undergraduate students) attempting to get approval for minimal or low risk research (e.g., surveys, etc.) while ensuring sufficient
protections for the human subjects studied.

Status: Project planning will begin on 1/9/2017.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
1/9/17	9/29/17	G	G	G	G

PPMO-0068 Engineering IT Shared Services Accounting and Inventory Control [UIUC]

Sponsor(s): Jim Hurst

Goal: Reduce the amount of time spent on the annual budget cycle while developing process improvement facilitation and analyst roles within the College of Engineering.

Status: Project planning will begin in early January.

Start	Finish	Overall Status	Budget Status	Schedule Status	Barrier Status
1/9/17	9/29/17	G	G	G	G

Summary of Recently Withdrawn Projects

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.

Latest 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.

Reason for Withdrawal: The project sponsors have decided to withdraw this project. They engaged an external vendor to reformat their existing phone system. That engagement completed January 3, 2017.

Summary of Upcoming Approved Projects

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 Recently Completed Work Requests

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.

Date Completed   1/5/17

Outcome: Created high-level process map documenting the life cycle of an individual's experience with University Payroll & Benefits, including their supporting processes. This will be used to update the potential ERP proposal document started in 2015.

Summary of Upcoming Work Requests

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.

WR-BPI-0040 Illinois Fire Service Institute Process Analysis [UIUC]

Sponsor(s):   Janis Hooper

Goal: Perform a 5S activity to organize, standardize, and sustain a productive work environment for the Fire Institute Test Repository

Status: Project is waiting to be scheduled.