

UR Budget

Demo Days Meeting

August 2017



Chatting for Zoom Participants

For those joining the Zoom:

- 1) Please access the chat feature at the top of your screen
- 2) Please chat directly with **Libby Deibler** (She will then pose the questions on your behalf)
- 3) Select **Libby Deibler** in the drop down menu in the chat window (do not select “everyone”)





Agenda

- Training Schedule and Curriculum
- ELearning course now available via MyPath
- Change Readiness Assessment – August Results
- Provider Model demo
- Communications
- Next Steps



Activity	2016							2017							2018				
	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb - Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Design						HOL	HOL												
Build						HOL	HOL												
Test																			
Develop End User Training																			
Documentation																	HOL	HOL	
Change Management																	HOL	HOL	
End User Training																			
Release & Stabilization																			→

- Go-Live Date set for November 2017 for FY19 Budget

You
Are
Here

Go-Live
Nov. 1, 2017



User Identification and System Access

- Initial user list derived based on legacy budget system users
- By FAO, identify users that are responsible for budgeting or viewing specific FAO Summary/Labor plan files
- For Provider model, identify users that are responsible for budgeting or viewing specific Provider Groups
 - A Provider Group is all providers that are within a specialty or sub-specialty
 - For example, all providers that are in Dermatology
- Based on system access, training curriculum per individual user will be determine



Training Curriculum

- Every UR Budget user will be required to take:
 - On-line eLearning course for general navigation and key concepts
 - Summary and Labor Planning instructor led course
- In addition, if you are in the Medical Center or hospital, you will need to take (based on your role):
 - Provider Model Planning instructor led course
 - Business Improvement Planning (BIPs) instructor led course
- For finance users that currently input budget amendments in UR Financials:
 - Budget Amendment instructor led course



UR Budget Course Curriculum

Course Name	Course Description	Course Purpose
URB1: UR Budget - eLearning Basic Navigation	This online course is the pre-requisite to registering for the instructor-led training courses for the UR Budget system. It will explain general navigation within the system. Total course time is estimated at 25-30 minutes.	The purpose of this online course is to familiarize users with general logon instructions as well as how to navigate through the menu paths in the UR Budget application. The course will cover: (1) Logging on to UR Budget (2) Accessing budget plan files (3) Review functions on the UR Budget "main ribbon". Users must complete this online course prior to registering for any of the UR Budget instructor-led training courses. Users can retake this course at any time.
URB2: UR Budget - Summary/Labor Instructor-led Course	This instructor-led course will introduce users to the UR Budget Summary and Labor plan file features and functions. Total course time is 4 hours.	This instructor-led course will provide instruction to users on how to input their operating budgets into the UR Budget system. The Summary / Labor plan files is the main consolidation point for all budget information for a FAO. The Summary sheet in the plan file describes to users how to: (1) view actual data on a YTD basis (2) view current year's budget data (3) input changes to preliminary budget data for the next year and (4) analyze data coming from other sources within the UR Budget system. The Labor sheet lists all the employees that are assigned to the FAO and allows users to: (1) evaluate and make changes to the employees listed (2) analyze employee start and end months (3) make adjustments to employee budgeted salaries (4) transfer total salaries into the Summary sheet.
URB3: UR Budget - Provider Model Instructor-led Course	This instructor-led course will introduce users to the UR Budget Provider Model plan file features and functions. Total course time is 4 hours.	This instructor-led course will provide instruction to users on how to input Provider level budgets into the UR Budget system. The Provider Model is a new way to plan for Providers that generate professional patient care revenue and salary information. The Provider model transfers that information in total to the Summary / Labor plan files by FAO. The Provider Model training is specific to medical center and hospital users. The course will instruct users how to: (1) view actual data on a YTD basis (2) view current year's budget data (3) input Effort, Work RVUs, and incentives by provider to derive professional revenue and provider salaries (4) compare provider performance and compensation to industry specific benchmarks.
URB4: UR Budget - Business Improvement Plan (BIP) instructor-led Course	This instructor-led course will introduce users to the UR Budget Business Improvement Plan (BIP) plan file features and functions. Total course time is 2 hours.	This instructor-led course will provide users the instructions on how to create a Business Improvement Plan (or BIP). In addition, users will learn how to update key BIP information, milestones, and financial estimates for review by senior management.
URB5: UR Budget - Provider + BIP Instructor-led Course	This listing combines (2) instructor-led courses in one day. This instructor-led course will introduce users to the UR Budget Provider Model AND the Business Improvement Plan file features and functions. Total course time is 6 hours.	This instructor-led course combines both the Provider Model and BIP instructor-led course into 1 course. Content and material are the same as the two individual courses offered. The purpose of combining the course is for ease of course registration as well as to provide consistency in the timing of training delivery.
URB6: UR Budget - Budget Amendment Instructor-led Course	This instructor-led course will introduce users to the UR Budget Budget Amendments plan file features and functions. It is generally geared towards company finance office personnel. Total course time is 2 hours.	This instructor-led course is designed primarily for company finance office personnel. The course will discuss the transition of budget amendment processing from UR Financials into UR Budget system.



Training Schedule

- Training to occur approximately 1 month prior to users needing access
- Registration for all UR Budget training courses will be administered via MyPath. An email will be sent to everyone that needs to register for a course
- The eLearning course must be complete before you can register for any of the Instructor Led Training (ILT) courses
- The Instructor Led Training courses will be open for registration based on when users will start using UR Budget system
 - October 2017: Benefits, Central Administration, HSD
 - November 2017: Academic Divisions, Facilities
 - Dec. 2017 – Jan. 2018: Medical Center and hospitals



Training Schedule **Preliminary**

Month	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM
September										
October	9									
		16						19		
			24					26		
	30	30		31						
November					8				10	
	13									
		20								
				28		29	30			
December		4	5	5		6	7			
				12	13	13	14	14	15	15
		18		19	20	20	21			
						27	28			
January				2	3	3	4		5	5
	8	8	9	9	10	10	11		12	12
	15	15			17					
			30	30	31					
Class	Legend	Hours	Classes							
Summary Labor		4	23							
Provider		4	6							
BIP		2	6							
Provider + BIP		6	9							
Budget Amendments		2	2							



Training Schedule – Per User

- Soon to be on the UR Budget website, required courses (and approximate timing) by user will be available
- Please register for Instructor-led Training classes as soon as you take the eLearning course
- Be considerate of attending classes you are registered for. Any make up classes will cost the university additional \$
- Any rescheduling can be done via MyPath
- Based on number of registered participants, some sessions may be cancelled or rescheduled for sparsely filled sessions



ELearning Course

- Soon to be available via [MyPath](#)
- You will an email requesting you to register and take the course
- Prerequisite for signing up for the Instructor-Led Training courses
- No certification required at the end of the course, however, the course must be completed before the Instructor-Led sessions will become available to you
- You can take the eLearning course as many times as you would like



Change Readiness Assessment – August Results

- Change Readiness Assessment distributed to 325 users. 64 responses (29% new respondents).
- Key themes:
 - Need to communicate who has been involved on the project (core team, testers, SIG, etc.)
 - Need more information as to what specific roles will be impacted
 - Need to understand the change in eParc (EPIC) project impact on Medical Center users
 - Need better understanding of what support resources will be available prior to go-live
- Some information currently available on website



Communication Events

- UR Budget Website
- Monthly Newsletters
- UR Budget “Demo Days”
- Email communications



Upcoming Events

- Schedule for upcoming Demo Days / User Group sessions
 - August 21st
 - 10:30-Noon, Class of '62 Auditorium in the Medical Center
 - September 28th
 - 3:30-5:00pm, Larry and Cindy Bloch A&A Center, Seminar Room
 - October 16th
 - 3:30-5:00pm, Class of '62 Auditorium in the Medical Center
 - November 13th
 - 3:30-5:00pm, Larry and Cindy Bloch A&A Center, Seminar Room
 - December 11th
 - 3:30-5:00pm, Class of '62 Auditorium in the Medical Center



Questions





Provider Model Demo

- Anyone not interested, please proceed to the nearest emergency exits. Note that the closest exit may be behind you. Thank you for your attention

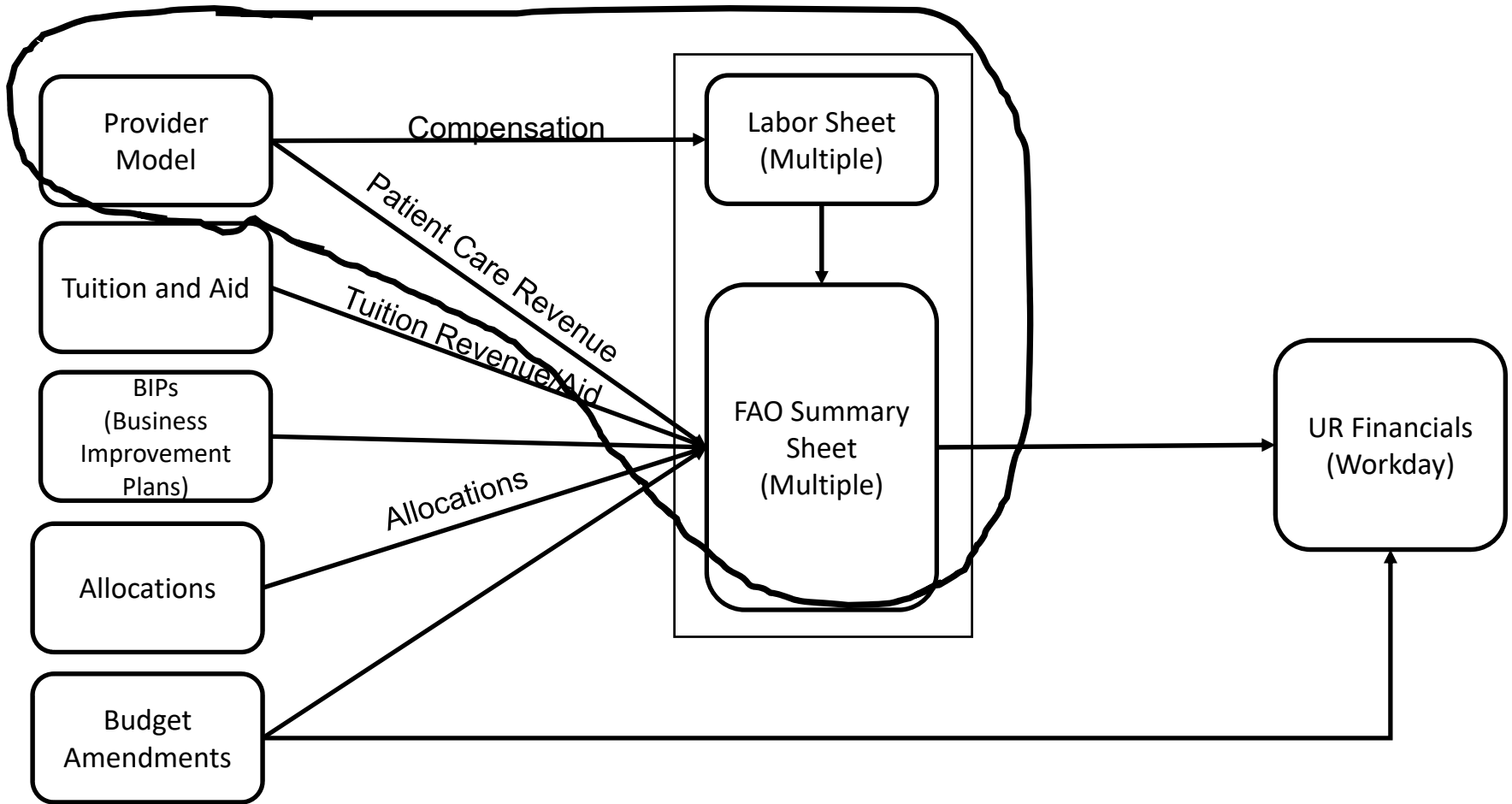


UR Budget - Component Overview

- Summary Sheet
- Labor Sheet
- Provider Model ← *Medical Center Only*
- Tuition
- BIPs (Business Improvement Plans)
- Allocations
- Budget Amendments



UR Budget Data Flow





What is the Provider Model?

- Global budgeting for SMD Faculty and APPs (Advance Practice Provider)
- Financial integration between SMD, MFG, SMH, and Highland Hospital
- Full transparency and increased budgeting accuracy, aligning FTEs to mission
- Aligning shadow practices by capturing data in the system
- Potential end-user benefits by reducing FAOs touched during budget cycle
- Improved benchmarking capabilities, including matching of revenue to expenses (incentives)



How is it different from how we budget today?

Process	Today	Future
Budgeting	<ul style="list-style-type: none"> At FAO level 	At Provider level for: <ul style="list-style-type: none"> Compensation across all FAOs within one file Ensure that all funding sources are included for compensation and that 100% of compensation has been accounted for across all FAOs and divisions
Statistical Information	<ul style="list-style-type: none"> Gathered via separate cumbersome processes 	<ul style="list-style-type: none"> Allows user to budget required statistics (wRVUs and Effort) within the model As well as hospital cases
Professional Fee Revenue	<ul style="list-style-type: none"> Calculated manually utilizing several worksheets 	<ul style="list-style-type: none"> Provider model will calculate Professional Revenue automatically once wRVUs are input
Benchmark data	<ul style="list-style-type: none"> Not included 	<ul style="list-style-type: none"> Includes salary and productivity benchmarks for comparison purposes

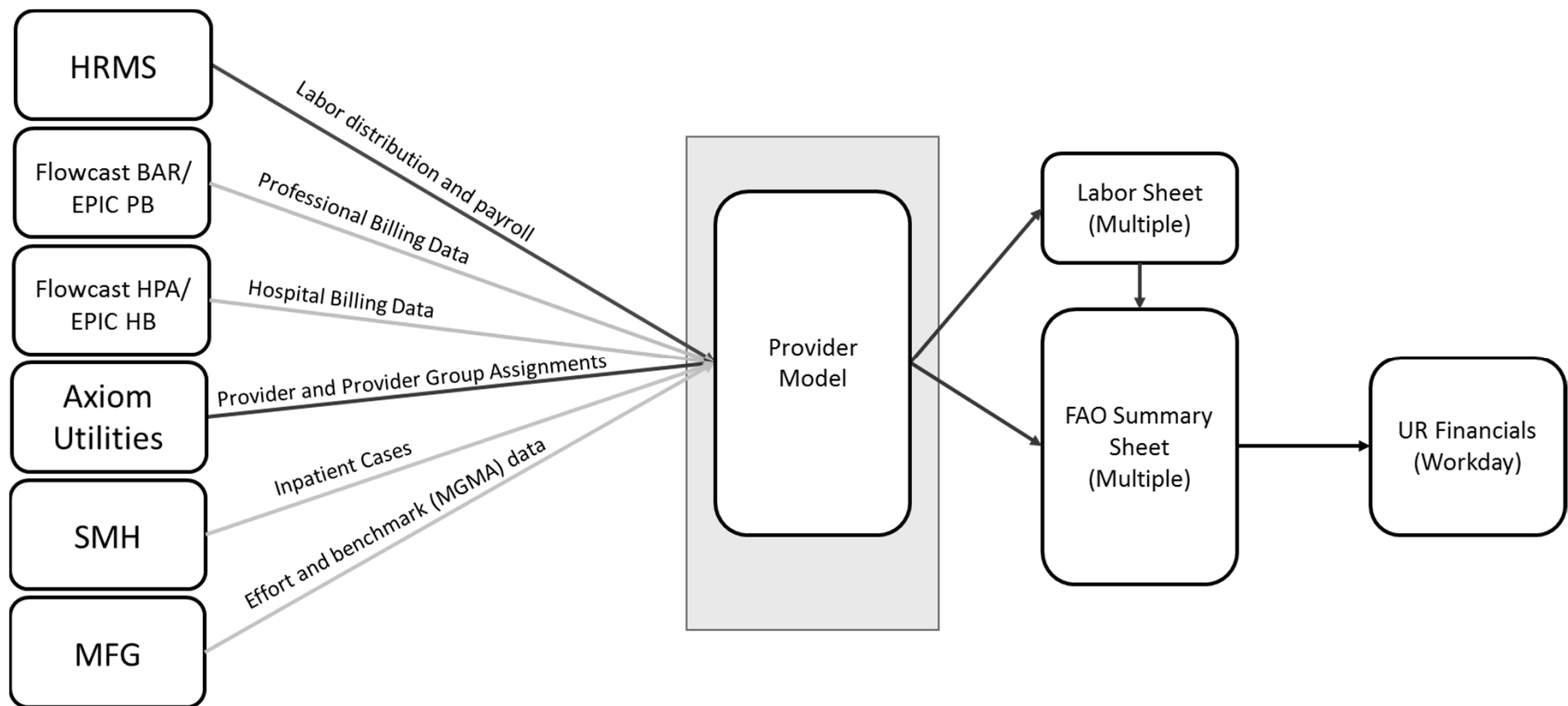


What are the data sources for the Provider model?

- HRMS Salary data including current pay distribution
- Billing data – Flowcast BAR and HPA, and EPIC PB and HB
- Inpatient Case Budget from SMH Finance
- Benchmark Tables – MGMA data



UR Budget - Provider Model Data Flow





What is the structure of Provider model?

- Data will be entered via different views
 - Effort (Clinical, Admin, Research, Academic, Contract/Other)
 - Pay Distribution by FAO and division
 - wRVU's and Revenue
 - View all* screen will show compensation and productivity as compared to benchmarks



Who will be entering data in the Provider model?

- The assigned Administrator or assigned Finance Manager will enter data into the Provider Model
- The assigned person will be entering data that crosses all divisions – SMD, SMH, MFG, SON, EIOH, and HSD



What is a Provider Group and how will they be determined?

- The provider group will encompass all of the providers for which you will plan compensation, effort, and wRVUs and Revenue if applicable.
- Providers are: Clinical Faculty, Researchers, and Advanced Practice Providers
- The Provider groups will be determined based on HRMS Division Department Home Department
- Modifications will be made if necessary
 - For example: If an executive level position is within an HRMS Division/Department, it will be moved to an new provider group
 - If it makes sense to break up the Group into smaller files, this will occur



Provider Model Demonstration

- We will demo the system but will not go into details as to how the calculations are made, or detailed system functionality
- Demo will NOT be a substitute for training



Questions



