

UR Budget

Highland Hospital Demo Days Meeting

August 2017





Agenda

- Introduction / Objectives
- Training Schedule and Curriculum
- ELearning course in Achieve
- Summary/Labor 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



Project Objectives

- Replace existing Internet Budgeting System (IBS) used by River Campus and Web Budget System used by UPMC and Highland Hospital with a single, unified application utilizing Axiom software
- The new UR Budget system is essential for improving the development of the total Consolidated University Budget
- Provide additional functionality to enable better transparency to budget data
- Enhanced reporting capabilities for users and management



Impact to Users

- User interface to change from web based to Excel based
- Budget development will be performed primarily within the UR Budget application versus shadow systems (i.e. Excel)
- Budget schedule will be similar to prior years
- Budget amounts will be spread to months rather than just a full year's budgeted amount



Impact Unique to Highland Users

- Continued use of Highland Hospital chart of accounts (departments and subaccounts) but within the same structure (column headings) as everyone else (URMC and academic schools)
 - An “HH” will be appended as a prefix to department and subaccounts
 - Department 600 = HH0600
 - Subaccount 4415345 = HH4415345



Highland Hospital Cross Reference

FY18 SUMMARY SHEET		
HH0741 - OPERATING ROOM		
CM124 - 124 Highland Hospital of Rochester and Subsidiaries		
L Acct	FAC	Description
		TOTAL REVENUE
		TOTAL EXPENSES
		TOTAL TRANSFERS
		NET
SUPPLIES		
60300	HH4415342	BREAST IMPLANTS
60300	HH4415343	BARIATRIC IMPLANTS
60300	HH4415344	HIP IMPLANTS
60300	HH4415345	KNEE IMPLANTS
60300	HH4415346	SHOULDER IMPLANTS
60300	HH4415347	BONE & TISSUE IMPLANTS
60300	HH4415348	MINOR & PODIATRY IMPLANTS
60300	HH4415349	SPINE IMPLANTS
60300	HH4415350	TRAUMA
60300	HH4415370	SYRINGES AND NEEDLES
60300	HH4415380	SUTURES
60300	HH4415385	DIVINCI SUPPLIES
60300	HH4415391	MED SURG SUPPLIES

Description	UR Financials	Highland
Budget Center	Financial Activity Object (FAO)	Department
	OP211475 – Cancer Center	HH0741 – Operating Room
Account	Financial Activity Category (FAC)	Sub Account
	SC47950 – Travel and Conference	HH4415345 – Knee Implants
Ledger Account	Ledger Account	Derived from Sub Account (via cross reference table)
	60300 = Medical Supplies	60300 = Medical Supplies



UR Budget – Summary Sheet

- Summary Sheet – 1 Per Department (FAO)

FY18 SUMMARY SHEET			View: Budget + Proj				
HH0741 - OPERATING ROOM					Proj		
CM124 - 124 Highland Hospital of Rochester and Subsidiaries					FY17		
L Acct	FAC	Description	Method	FY16 Actuals	FY17 YTD P6 Actuals	FY17 Rev. Budget	FY17 Prelim Proj
TOTAL REVENUE				(71,118,827)	0	0	0
TOTAL EXPENSES				37,250,790	0	36,521,763	0
TOTAL TRANSFERS				0	0	0	0
NET				(33,868,037)	0	36,521,763	0
SUPPLIES							
60300	HH4415342	BREAST IMPLANTS	Base + Changes	210,344	0	243,650	0
60300	HH4415343	BARIATRIC IMPLANTS	Base + Changes	15,532	0	2,700	0
60300	HH4415344	HIP IMPLANTS	Base + Changes	4,149,006	0	4,357,050	0
60300	HH4415345	KNEE IMPLANTS	Base + Changes	3,148,841	0	3,061,600	0
60300	HH4415346	SHOULDER IMPLANTS	Base + Changes	1,007,725	0	1,202,950	0
60300	HH4415347	BONE & TISSUE IMPLANTS	Base + Changes	1,863,491	0	1,205,150	0
60300	HH4415348	MINOR & PODIATRY IMPLANTS	Base + Changes	1,068,077	0	1,081,700	0
60300	HH4415349	SPINE IMPLANTS	Base + Changes	4,003,979	0	4,709,850	0
60300	HH4415350	TRAUMA	Base + Changes	264,363	0	112,850	0
60300	HH4415370	SYRINGES AND NEEDLES	Base + Changes	25,435	0	22,650	0
60300	HH4415380	SUTURES	Base + Changes	531,178	0	580,050	0
60300	HH4415385	DIVINCI SUPPLIES	Base + Changes	1,138,293	0	1,256,550	0
60300	HH4415391	MED SURG SUPPLIES	Base + Changes	10,331,984	0	10,360,600	0
60300	HH4415393	ENDOSCOPY N BILL SUPPLIES	Base + Changes	1,694,561	0	1,762,650	0
60300	HH4415410	OXYGEN & OTH MED GASES	Base + Changes	26,484	0	26,450	0
60300	HH4415430	IV SOLUTIONS	Base + Changes	118,923	0	124,550	0
60300	HH4415432	IV SETS & ACCESS BILLABLE	Base + Changes	31,708	0	37,900	0
60200	HH4415450	LAB REAGENTS & KITS	Base + Changes	434	0	750	0
60200	HH4415451	LAB QUALITY CONTROL	Base + Changes	1,184	0	900	0
60200	HH4415471	RADIOLOGY SUPPLIES	Base + Changes	(1,767)	0	2,000	0

SUMMARY LABOR/ScratchPad/



UR Budget – Labor Sheet

- Labor Sheet – same plan file as Summary, new tab
- Contains individuals assigned to Department (FAO)

FY18 FAO Labor																	
TR000001 - Oncology CM040 - 040 School of Medicine and Dentistry																	
Prov File	Home Co	Staff Faculty	Hrly Sal	Assign. %	BUD Std Hrs	FTE	9 or Flag	Start 12 Mth	Stop 12 Mth	Rate Current Rate	Rate Incr. Month	Rate W&S Rate Incr.	Rate FY18 Rate	FY18 Sal Bgt.			
<i>Total Avg Increase >></i>											2.55%						
DETAILS BY FAC																	
SC57400 - Clerical																	
Ayesha Aller	Not Provider	CM040	Staff	H	100%	17.50	0.44	12	1		36.05	1	2.5%	36.95	33,626		
>> ADD NEW LINE (dbl click)																	
TOTAL / AVG						17.50	0.44				36.05			36.95	33,626		
SC57600 - Faculty Full Time Salaries																	
Tyrone Thigpen	No Data	-	Faculty	S	0%	0.00	0.00	12	0	0	0.00			0.00	0		
New Position	Not Provider	CM040	Faculty	S	100%	40.00	1.00	12	7					90,000.00	45,000		
>> ADD NEW LINE (dbl click)																	
TOTAL / AVG						40.00	0.50				0.00			90,000.00	45,000		
SC58100 - PAS Regular Salaries																	
Dortha Dillon	Not Provider	CM050	Staff	S	5%	40.00	0.05	12	1		200,000.00	1	3.0%	206,000.00	10,300		
Elissa Effler	Not Provider	CM090	Staff	S	100%	40.00	1.00	12	1		50,000.00	1	10.0%	55,000.00	55,000		
Wilton Whitesell	Not Provider	CM040	Staff	S	100%	40.00	1.00	12	1		50,000.00	1	2.5%	51,250.00	51,250		
Vacant Position	Not Provider	CM040	Staff	S	100%	40.00	1.00	12	3					42,000.00	35,000		
Lucas Luker	Not Provider	CM040	Staff	S	100%	40.00	1.00	12	7			1	2.5%	0.00	0		
>> ADD NEW LINE (dbl click)																	
TOTAL / AVG						200.00	2.88				100,000.00			88,562.50	151,550		
SC58400 - Time as Reported																	
Johnson Jandreau	Not Provider	CM040	Staff	H	100%	0.01	0.00	12	1		20.00	1	2.5%	20.50	11		
Manuel Matz	Not Provider	CM040	Staff	H	100%	0.01	0.00	12	1		20.00	1	2.5%	20.50	11		
>> ADD NEW LINE (dbl click)																	
TOTAL / AVG						0.02	0.00				20.00			20.50	21		
>> ADD NEW SECTION (dbl click)																	
(END)																	



User Identification and System Access

- Initial user list derived based on legacy budget system users
- Based on system access, training curriculum per individual user will be determine
- 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



UR Budget Course Curriculum

Course Name	Course Description	Course Purpose
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.
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.	<p>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.</p> <p>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.</p> <p>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.</p>



Training Schedule

- Training to occur approximately 1 month prior to users needing access
- Registration for all UR Budget training courses will be administered via Achieve. 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 estimated in late November-December 2017
- Instructor Led Training will be held at Highland Hospital in the library



Training Schedule

Date	Time
Monday, November 6th	8:00-Noon
Monday, November 6th	1:00-5:00
Tuesday, November 21st	8:00-Noon
Friday, December 1st	8:00-Noon
Friday, December 8th	8:00-Noon
Monday, December 11th (Still TBD)	8:00-Noon
Monday, December 11th (Still TBD)	1:00-5:00



ELearning Course

- Now available via Achieve
- You should have received 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



Summary / Labor Demo



Communication Events

- UR Budget Website
- Highland Hospital specific information
- Monthly Newsletters
- Additional Demo Days / User Group sessions will be scheduled generally each month
- Potential for “Hands On” sessions to be held in October to allow users to log on and view the system



Questions



