

OECC Status Update, December 22, 2011

1. OE Pre Award

Phase IB

- Due to staffing constraints, Phase IB will launch with two teams, Teams D and E, instead of three. There are no changes to the plans for Team D. However, for the Dept of Medicine, Team E will provide service to Dept of Medicine SFGH divisions, as well as Radiation Oncology, Emergency Medicine and the Osher Center for Integrative Medicine. The other divisions in the Dept of Medicine will join in Phase II. This will give RMS time to hire the staff for Team F which will serve the remaining Dept of Medicine divisions.
- The space for Team E at SFGH may not be ready by January 17th; if so, Team E will begin at Laurel Heights and then move to SFGH when the space is ready.
- The Phase IB teams have completed the first two weeks of their training. The final week of training will be in January prior to their go-live date on January 17th.

Recruitment

- The Team Manager, RSC and Associate RSC positions have been re-posted. We have recruited two new RSCs, and will be interviewing additional Team Manager, RSC and Associate RSC candidates in January.

Space

- We have identified space for all teams except for two teams we would like to locate at Mission Bay in Phase III.

2. OE HR and A/P

- **Funding:** Funding methodology (reapportionment as opposed to a recharge) approved by the Budget Office. Developing mechanism to collect and maintain NCAs from departments in order to handle reapportionment allocation according to departmental specifications. Resolving miscellaneous issues including how to handle billing where faculty's home department is different than the ORU to which they are assigned.
- **Recruitment:** Recruitment for unfilled positions coming to a close.
- **Space:** Laurel Heights – VPAA completed move into new space; Cluster A and E space ready for occupancy; Staff HR Specialty Center space reconfigured and move complete. Cluster A staff moves in January; Cluster E staff moves in March/April. MCB: space assigned to Clusters C and D; readiness activities on-going. Space for D may not be available until August therefore Cluster D staff may need to move into interim space until their permanent space is available.

- **Departmental Transition:** Critical path department transition and preparation activities for Cluster A departments are nearly complete. In January, the remaining final activities include provisioning appropriate access, transferring personnel files, and relaying final status on personnel activities “in process” to cluster staff prior to final Go Live.

Staff and Academic transition tools that include a Department Action Grid, Process Inventory and Summary of Roles, Pending Issues List, Detailed Process Maps, and Log for all issues that came up during the Department Transition Team (DTT) efforts have been posted on the OE website. These tools along with a customized work plan for each cluster will be used to support remaining departments as they go live.

- **Incident/Case Management:** Focus groups comprised of directors, functional owners/SMEs, training specialists and PMO analysts, completed detailed workflow and /hand-offs between clusters (generalists) and specialty centers (specialists) and documented the business rules and decision/escalation points associated with same. Outcomes have been built into staff and academic training modules that will be conducted in January, 2012.

Resource on loan from Medical Center to support the development of additional maps for priority topics such as Residents and Fellows, MSP Physicians, Visiting Scholars, Staff Volunteers and Renewals that were identified by stakeholders and SMEs in November.

- **Training:** Development complete for all January Go Live training. Curriculum addresses need to know information and highlights changes in processes and procedures for all activities related to the HR Taxonomy (Hire, Maintain, Pay, Develop, Separate) and the Academic Life Cycle (Recruit/Search, Appointment, Pay/Benefits/Outside Professional Activities, Merit/Appraisal/Promotion, Retirement/Emeritus/Recall) including use of associated technology (OL Personnel Transaction Form, MPM, BrassRing, etc.). Current curriculum is ten half-days of training with a staff and academic track.
- **Cluster A Go Live:** Cluster A staff transition to the new APHR organization on January 3. Staff human resources and academic personnel work and activities will transfer from Cluster A departments – Department of Anthropology, History and Social Medicine, Pediatrics, Psychiatry/LPPI, Neurology, Obstetrics and Gynecology, Family and Community Medicine – by January 23, 2012.
- **Go live Strategy for Clusters B-E:** Strategy developed and approved in concept by the Leadership Team. Individual meetings with Cluster Directors B, C, D and E completed to further refine strategy, affirm roles and responsibilities, estimate number of required department contacts and establish comprehensive communications to ensure departments understand the funding model, the SLAs, and the new technology and are prepared for their transition and Go Live. Final go live dates to be determined in January based on factors such as space, training and communications capacity, and environmental factors (e.g., payroll deadlines, renewals, etc.).
- **AP/HR Organization Readiness:** Conducted 3 hour all hands meeting in early December to welcome staff, explain what to expect throughout the transition and begin the change management process. Of special focus was how the APHR organization will support the strategic goals of UCSF. Launched naming contest to rename the new organization and “clusters.” Planning and execution begun to

provide business services to the new organization (e.g., procedures for processing orders, personnel file preparation and transfer, provisioning access to systems and space, ordering computers, supplies and getting space ready for occupancy, etc.). Completed requirements for an AHR web presence, hired Documents and Media Services to create the design; anticipate site up by end of January.

3. OE IT

- **E-mail:** All Campus e-mails have been migrated and Medical Center conversion is expected to be completed in January/February 2012.
- **Network:** Phase 2 of the wireless upgrade (and related wired) underway and expected to be completed by Q3- FY11/12 .
- **Help Desk:** Go-live for a single unified operations of SOM/ITS/MC scheduled on December 22, 2011. Remaining help desks to integrate by June 2012.
- **IT Procurement:** IT procurement specialists joined in November 2011. Admin computing standard configuration mandate approved by the CEC in November 2011. In process of developing communication plan.
- **Desktop Support and Data Center:** Workgroup recommendations have been presented to 10 key committees and communities. In process of analyzing the impact of the feedback. Presentation to CEC in January/February 2012.

4. OE Finance

- **Townhall** was held early December to present the OE Finance updated vision and roadmap; the attendance was heavy (standing room only) in Toland Hall, Parnassus
- **Priority projects** are well underway and an implementation structure to ensure tight integration across the efforts has been implemented. Structure jointly led by the four finance functional leaders Anja Paardekooper, Mounira Kenaani, John Ellis and Teresa Costantinidis
 - **Chart of Accounts** detailed design work is well underway. Department IT representatives being identified, with kick off meeting scheduled for January.
 - **PI Portfolio** on track for go-live with the pilot departments on January 23rd:
 - Change requests from UAT (reports and budget websheets) prioritized and priority ones implemented
 - System, regression and performance testing phases are complete
 - Data manager (automated ETL) upgrade and infrastructure migration complete

- PI data clean up received from pilot departments; EMF to process changes
- **Reporting Strategy** (functional, technical architecture and end user tools) currently being prepared; to be vetted with a range of stakeholders by end of January. Initial focus is financial and operational reports to both replace and enhance reporting with the new Chart of Accounts conversion in July 2013
- **Budgeting System** sandbox exercise completed with diverse campus representation:
 - Committee on Business Technology has provided the go ahead to present recommendations to IT Governance Executive Committee, scheduled for early January
 - Detailed workplan, team mobilization and related start-up activities are underway