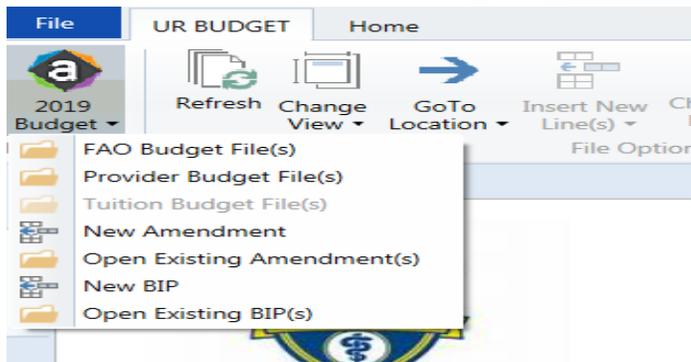


UR Budget Business Improvement Plan QRC

Accessing BIPs

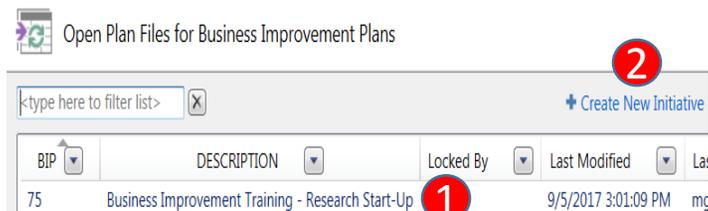
Open a new or existing BIP from the UR Budget navigation ribbon



BIP Selection Window

Selection Window will display all previously created BIPs

1. Double click BIP to Open
2. Select "Create New Initiative" to open blank BIP Template



Business Improvement Information Tab

1. Outline the BIP Narrative to explain the purpose and rationale
2. Using UR Financials FAO's/CC/CMs designate the primary parties involved
 - a) URF attributes are not an immediate requirement of creating a BIP



BUSINESS IMPROVEMENT PLAN PROJECT TEAM

CREATED BY	Mark Greisberger
Date Created	Wednesday, September 2
EXECUTIVE SPONSOR	Vicky Hines
CHAIR/LEAD	Dr. Lowenstein
FINANCE LEAD	Jill Hetterich
IMPLEMENTATION RESPONSIBILITY	Tim Heffer

3. The BIP Project team should include 1-2 individuals per role who represent the primary points of contact for the project.

4. The Green/Yellow/Red status allows the BIP Team to provide a high level overview of the project's health
5. The subsequent fields allow the BIP team to provide rationale into the status selected as well as communicate requests and obstacles

STATUS SUMMARY

STATUS	Yellow
RATIONALE FOR STATUS	Awaiting State /
OBSTACLES	Approved CON
REQUESTS	Capital; Increm
CONFIDENTIAL?	No

UR Budget Business Improvement Plan QRC

Adding/Editing BIP Milestones Tab

Milestones should illustrate the necessary steps that need to be completed along with the ideal date of completion. This is again a great communication tool for both the BIP Project team and any reviewers of the BIP

1. Easily add Milestones by **double clicking** “Add New Milestone”



2. Leverage the milestone description to provide insight into the required task
3. Milestone Dates should indicate the date a task is expected to be complete
4. Milestone Status should indicate how the task is performing relative to the Milestone Date.
Green/Yellow/Red indicates the status

MILESTONES BIP FY2018.097

BIP Training - Clinical Program Growth

[GoTo: Financials](#)

Milestone #	Milestone Description	Milestone Date	Milestone Status
1	Meet w/ Real Estate to determine appropriate regional location	10/1/16	Green
2	Work with Regional Development & URMFG Finance to develop Business Plan	2/28/17	Green
3	Finalize Architectural Design	3/31/17	Green

BIP Color Coding

Color	Meaning
Green	On-Track, No Issues
Yellow	Expected to Be on Track (slightly behind)
Red	Behind schedule; need support

When to add URF Attributes (i.e. FAO's)

- The BIP template will not require a user to add an FAO or Cost Center before allowing a user to “Save”
- In many scenarios, development of the business plan will precede request of new FAO's.
- A FAO(s) can be added at the beginning, end or any point between
- The only point at which a FAO(s) is required will be prior to approval and layering BIP financials into the budget

Divisional Finance Section (Info Tab)

- Section reserved for divisional finance input only
- User's will not need to input values in this section
- Approved for Budget will indicate if the business plan has been layered into FAO(s) for the budget year

UR Budget Business Improvement Plan QRC

BIP Labor Planning Tab

1. Add a Job code
2. Complete the applicable information in the Labor Planning Wizard

Note: Users can indicate the Start Year & Start Month for each FTE



3. Labor Planning will auto-fill a 5-yr planning period
4. Labor can begin Current Yr. (i.e. FY2018) or Y1 (i.e. FY2019)
5. Users can define W&S annual increase %'s
6. Benefits will calculate using the most recently approved University Benefit Rates

LABOR BIP #97
BIP Training - Clinical Program Growth
OP347057 - Finger Lakes Cardiol

Start Mth	Rate Current Rate	Rate	Rate	Rate	Rate	Rate	Benefit Level	
		Y1 FY18	Y2 FY19	Y3 FY20	Y4 FY21	Y5 FY22		
4 Annual Increase >>								5
		0%	2%	2%	2%	2%		
4	130,000.00	0%	2%	2%	2%	2%	1	
4	220,000.00	0%	2%	2%	2%	2%	1	
4	180,000.00	0%	2%	2%	2%	2%	1	
5	30.00	0%	4%	4%	4%	2%	2	
6	85,000.00	0%	2%	2%	2%	2%	2	
7	13.25	0%	2%	2%	2%	2%	2	
7	65,000.00	0%	2%	2%	2%	2%	2	

Position Changes:

SC57610 - Faculty Part Time Salaries	J0027 - Clinical Professor
SC57600 - Faculty Full Time Salaries	J0003 - Assoc Professor
SC57610 - Faculty Part Time Salaries	J0033 - Clinical Sr Instructor
SC58000 - Registered Nurse	J7626 - Registered Nurse
SC57860 - Advanced Practice Provider	J8126 - Physician Asst
SC57400 - Clerical	J0464 - Outpatient Access Specialist
SC58100 - PAS Regular Salaries	J1252 - Administrator II

>> ADD NEW POSITION (dbl click)

Axiom Color Coding

Color	Meaning
White or Grey background	Non-Editable Cell
Yellow background	Editable Cell
Orange Text	Hyperlink/double click

Utilizing Comments & Attachments

- Comments & Attachments with Axiom are the best way to communicate with reviewers
- Easily outline assumptions used in developing the business plan
- Attachments allow a user to manage all documents supporting the business plan in one place!

	U	(2,073,586)
RVU's = 3750 per FY	0	(538,594)
RVU's = 3750 per FY	0	(538,594)
RVU's = 3750 per FY	0	(538,594)
RVU's = 3750 per FY	0	(457,805)
average wRVU =		0

Travel Domestic
5k per provider (annual conference)

>> Double Click to Add Detail

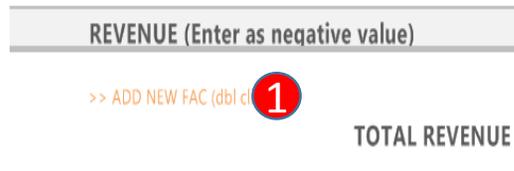
ic Manage Attachment(s)

UR Budget Business Improvement Plan QRC

BIP Financials Tab

Note: Based on the expected Start Date the Financials (and Labor) of each BIP will begin in either the Current Yr. or Yrs1-5

1. Add Revenue or Spend categories



2. Add Detail to provide specific insight into business plan assumptions
3. Utilize Excel functionality within cells to create formulas

L Act	FAC	Description	Budget Comments	Curr Year	Y1	Y2
TOTAL REVENUE				0	(2,108,586)	(4,306)
TOTAL EXPENSES				0	2,557,051	3,683
TOTAL TRANSFERS				0	0	
NET				0	448,465	(625)

L Act	FAC	Description	Budget Comments	Curr Year	Y1	Y2
43500	RC11200	Patient Revenues Net		0	(2,073,586)	(4,27)
		Provider #1	RVU's = 3750 per FY	0	(538,594)	(1,10)
		Provider #2	RVU's = 3750 per FY	0	(538,594)	(1,10)
		Provider #3	RVU's = 3750 per FY	0	(538,594)	(1,10)
		APP (billed @ 85% of Provider)	RVU's = 3750 per FY	0	(457,805)	(94)
		average wRVU = \$187.25		0	0	

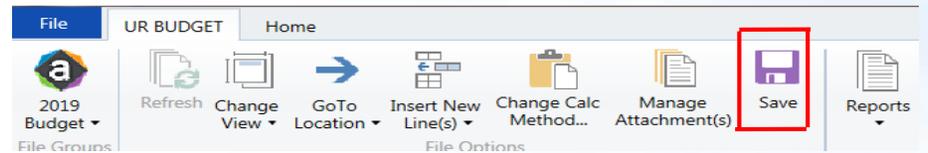
4. Ability to use Multiple FAO in a single BIP

ID	SC#	Description	FAO
65300	SC54325	Interdepartmental Transfers Company Assessment URMFG 3%	OP347057 - Finger Lakes
65300	SC54300	Interdepartmental Transfers Billing Assessment URMFG 6%	OP347057 - Finger Lakes
65300	SC54400	Interdepartmental Transfers Department Assessment Department 4%	OP347057 - Finger Lakes
65300	SC54325	Interdepartmental Transfers Company Assessment URMFG	OP015991 - Med Prac.-o
65300	SC54300	Interdepartmental Transfers Billing Assessment URMFG	OP015991 - Med Prac.-o
65300	SC54400	Interdepartmental Transfers Department Assessment Department	OP348360 - Golf

Note: this symbol ... double click to bring up selection wizard

Don't Forget to Save!!

- Reminder:** It is **best practice** to routinely **save** work as you utilize Axiom
- The Save feature is located in the UR Budget navigation ribbon



How to Properly Exit a BIP

- It is recommended to exit directly through the file using the "X" as depicted below

