



# SOM CONTINUOUS IMPROVEMENT WORKING GROUP

## Account Certification Process

May 18, 2023



# Working Group Members

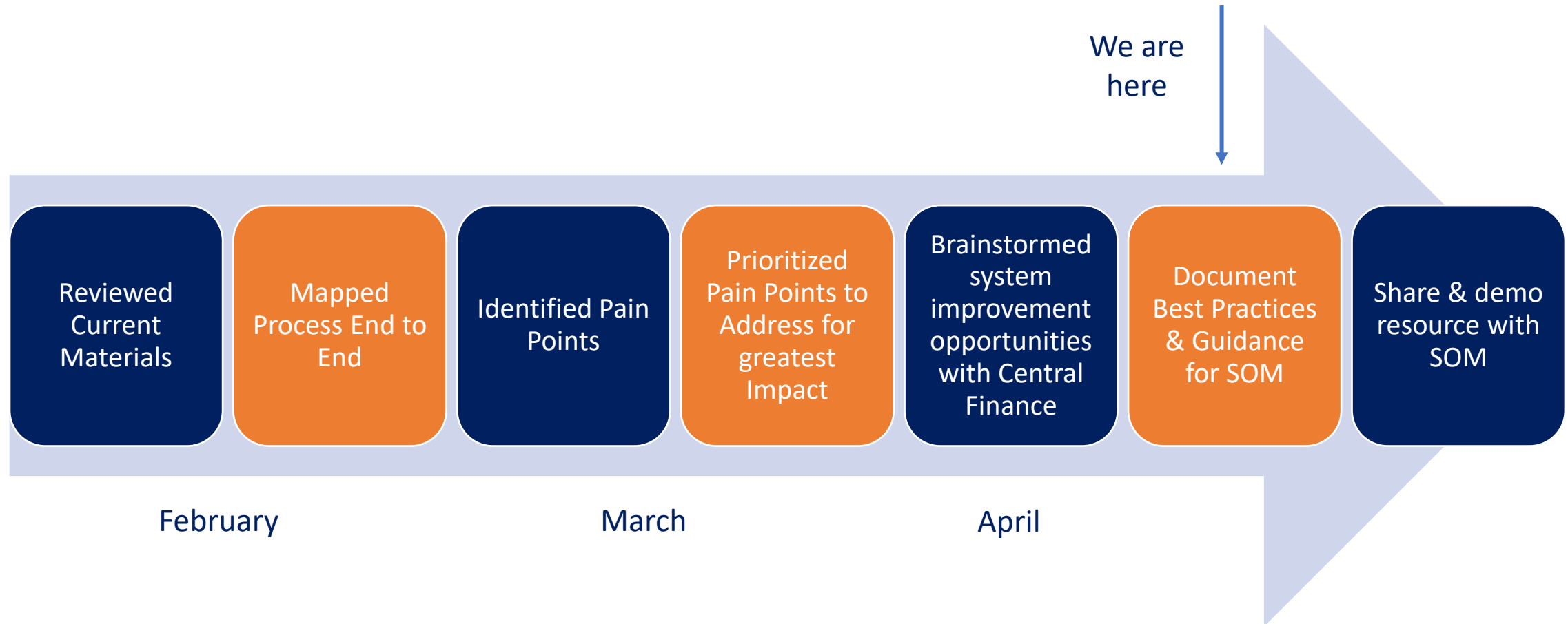
- Lead - Angela Knobloch, Senior Director, Change Enablement & Continuous Improvement, UVAFinance

## UVAFinance Support/Experts

Josh Breeden  
Derrick Carter  
Danielle Hancock

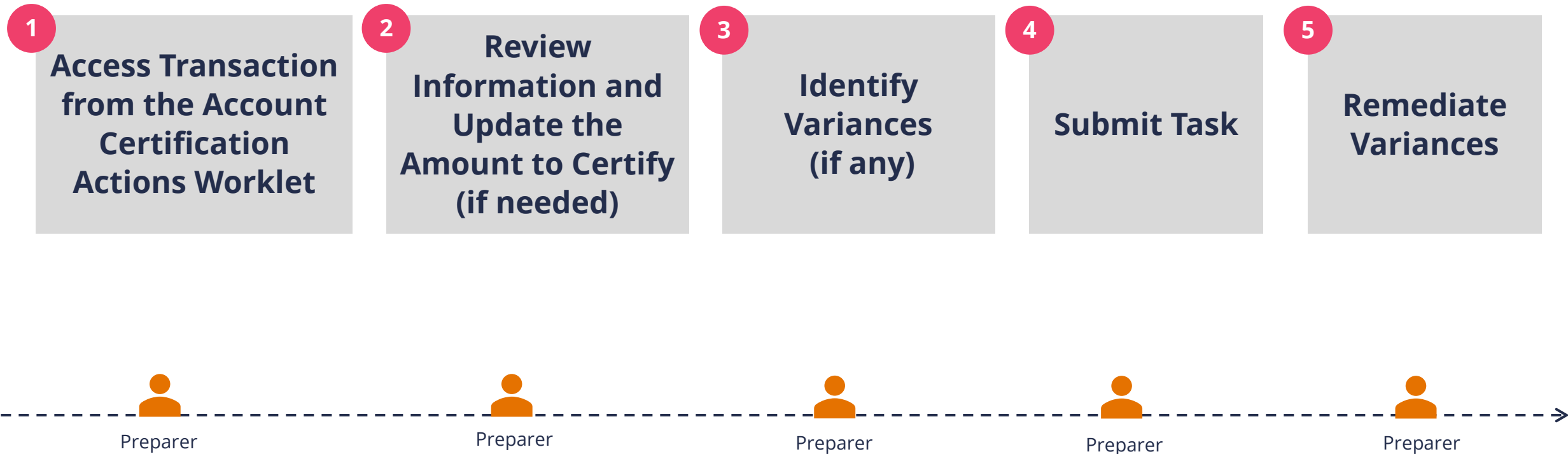
- Wendy Baker Preparer Approver , research
- Judy Grigg, Preparer (clinical, research, Admin)
- Tara Herring, approver, clinical, research, admin)  
Cardiology, Endo RHEM
- Kim Holman Approver, Admin, education
- Jolene Kidd, Approver, Admin, education
- Ewa Kubicka, Approver, Research (Internal Service Delivery)
- Cathy Pasternak, Preparer, Approver, Clinical, Research, Education, Administration
- Christina Porter, Preparer, education, admin
- Sandy Saxe Approver, research, administration
- Mary Leigh Thacker, Approver, Clinical, Research, Education, Admin

# Continuous Improvement Process



# Process Review & Mapping

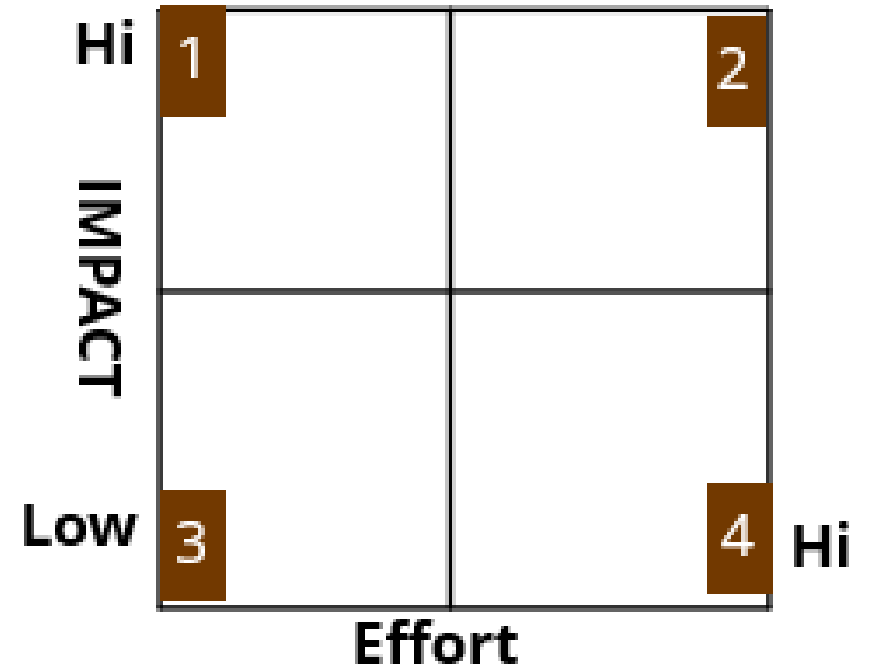
The Working Group collaborated to identify each step throughout the prepare and approver process – learning a great deal just from that discussion!



# Pain Points Identified & Prioritized for Impact

We identified over 50 pain points throughout end-to-end process then prioritized for action (sample below)

Guidance on what approver is confirming at submission	Need clear comments from preparer	Approver needs to see what's outstanding	When variance found, spend time email to prevent future errors
Not sure when to delegate tasks (vacation)	Memo info missing - copy & paste for approver	Steps repeated between prepares & approvers	No uniformity among ISP
Not easy to reassign certs when person is out of office	Preparer may not attach excel so go to other report	Routing confusing- preparers & approvers	Both (2/2) approvers need to approve
Certifying endowments dist. w/o backup	Hard to quickly prioritize where to start	Don't know who is up next before clicking submit	Anaplan variance comments rushed by 8 <sup>th</sup> of month



# Brainstormed & Created System Solutions

## System Items That were Unknown

- Internal Service Provider Information report
- “Remaining Process” feature on the process history tab
- “See in New Tab” navigation tip

## Improvements now in Production

- New dashboard report: Account Certifications Awaiting Me – Detailed
- Updated sort on Details for Account Certification report to sort by ledger account to match Account Certification layout.
- Enhanced prompts on existing report: Status of Account Certifications
- Account Certification Reassignment Request template in UBI QlikSense
- Adding attachment fields to the Details for Account Certification report
- Added month-end close steps to run MFS final time (minimizing reconciling differences on Projects)

## Updates on Finance Roadmap in Progress

- Activity stream functionality (*est 6/23*)
- Account Certification variance reporting

# Creating Guidance & Best Practices

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We documented the best practices throughout the process based on the new enhancements as well as a better understanding of Workday system limitations. Our SOM Account Certification guide outlines these steps in a simplified manner.



**NEXT STEP: OFFER INFORMATION SESSIONS FOR BROADER SOM AS WELL AS TARGETED MEETINGS WITH USERS**  
*(anticipated late June)*

# Takeaways

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## Takeaways from the SOM Continuous Improvement Working Group

*We've had a great group working to make Workday issues better!*

*It doesn't hurt to ask for what you need in a Workday or Qlik Sense report – you never know what might be possible.*

*Identifying standard work provides freedom rather than limitations.*

*All it takes is users and central collaborating to discover solutions.*

*It's necessary to first understand the user experience of the application, understand system limitations, and identify gap user training.*

*By working with the group and gathering pain points, the group was able to identify the major concerns.....and these are already being addressed!*

*I feel that collaboration was key. This team has met, if not exceeded its goals, in a professional, caring environment. It has been my pleasure to participate.*

*It's important to find support resources within the SOM, someone who might be able to direct you in the right direction.*