Dartmouth Medical School
Process Improvement

DMS Administrators Meeting
June 15, 2011

7/1/2011
Confidential
What has happened since our last meeting?

Key Points:

• Process Improvement has become overarching theme – not just looking at financial transactions, but service and how to make things better for DMS

• Changes at the College – transactions that must be done by DMS
  – Enter PAs into HRMS
  – Enter Timesheets into HRMS
  – Enter Business Expense Reimbursements & other A/P functions into Oracle

• All of the processes being reviewed have many steps; departments will be engaged to determine which steps of the process would be better served by a central function. It could be different for each department.

• In order to set requirements and ensure performance of duties, roles and responsibilities between central function and the departments, an outline of the services and working assumptions will be designed for each department.

  These **Service Level Agreements (SLAs)** will quantify and establish measurable expectations.
<table>
<thead>
<tr>
<th>Steering Committee</th>
<th>Working Group</th>
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<tbody>
<tr>
<td>Charlie Barlowe – Biochemistry</td>
<td>Aarron Clough - OSP</td>
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<tr>
<td>Joyce DeLeo – Pharmacology &amp; Toxicology</td>
<td>Cynthia Crutchfield – TDI</td>
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<td>Bill Green – Microbiology &amp; Immunology</td>
<td>Sally Dunham – Fiscal Office</td>
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<td>Mark Israel – NCCC</td>
<td>Christine Fitts – Psychiatry</td>
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<td>Adam Keller – TDI</td>
<td>Carrie Freitag – Medicine</td>
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<td>Sohail Mirza – Orthopedics</td>
<td>Jennifer Friend – Fiscal Office</td>
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<td>Charlie Mannix – COO of DMS (Chair)</td>
<td>Bob Gerlach – NCCC</td>
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<td>Tricia Spellman – AVP Finance/Finance Center Liaison</td>
<td>Jessica Havrda – Pharm/Tox</td>
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<td>Paul Greeley – Fiscal Office</td>
<td>Alan Joffrey – CFMed</td>
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<td>Sue Kaufman – Fiscal Office</td>
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<td>Kip Lindsay – Orthopedics</td>
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<td></td>
<td>Kathie Savage – Biochemistry</td>
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<td>Tricia Spellman</td>
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<td>James Nzukie – Presidential Fellow</td>
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<td>Paul Greeley (WG Lead)</td>
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Guiding Principles from Steering Committee

1. Provide support for faculty in a service oriented and nimble manner
2. Make accuracy and timeliness fundamental to a new process
3. Design operations to be efficient and scalable
4. Provide for professional development of staff
5. Match skills and training of staff to their responsibilities
6. Optimize technology and electronic processing, and provide access to it
7. Create and encourage accountability of operations
Working Group Tasks

- Identify processes and transactions to be reviewed
- Review transaction volume data gathered to date
- Examine processes and identify opportunities for improvement
- Define and map any new processes and/or process changes
- Develop detailed work plan, timeline and schedule for implementing process changes
- Develop a communications strategy
- Develop and execute operations plan
Examples of processes being evaluated

- Payroll transactions
- Business expense reimbursements
- Procurement/P-Cards
- Budgeting
- Financial reporting
- Accounting
- Internal charges
- External billing/revenue
- DORR