UC San Diego

Integrated Procure-to-Pay Solutions

Payment Compass

Simplifying how people do business with UC San Diego.

Problem Statement:

Current payee registration processes were built around separate applications, resulting in duplicative and sometimes conflicting registration processes for the 9,000 new payees registering to do business with UC San Diego a year. Once registered, payees have little to no access to the status of their payments. A payee's typical recourse is to contact the department(s) they work with to ask for payment status information

Purpose:

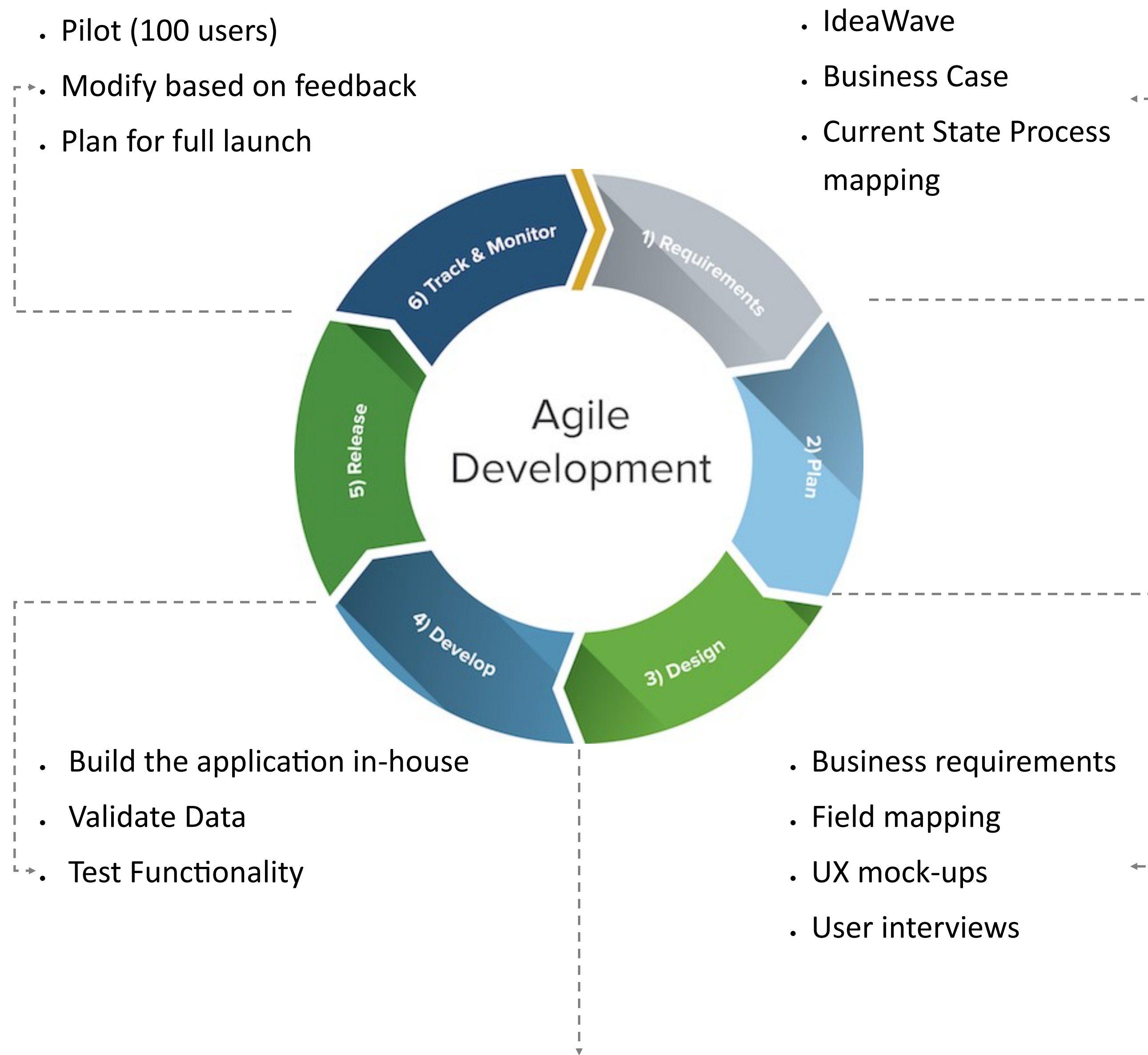To simplify how people do business with UC San Diego by:

1. Creating a single, consistent way to register to do business
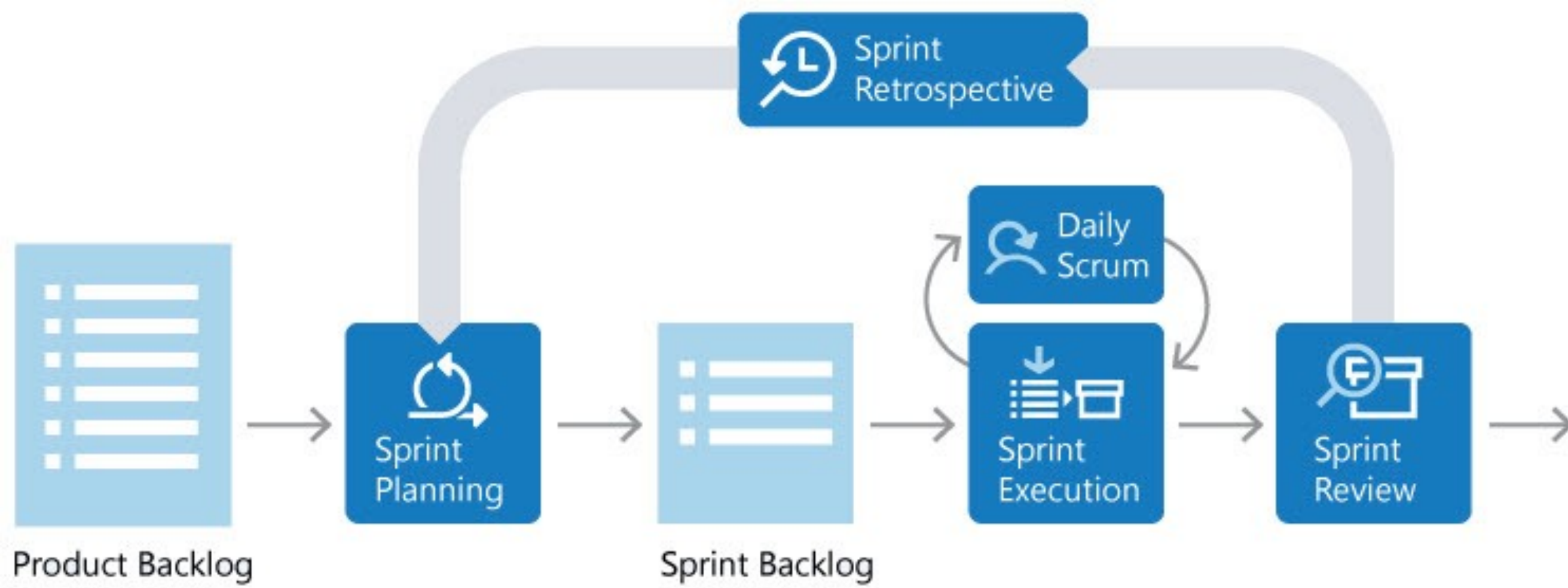2. Making information regarding payments transparent to payees and campus users alike.

Current

Disparate Registrations — Separate onboarding for each payment process

My Payments Events — MarketPlace

12,000 BFSupport cases last year re: payment status

Data Redundancy — Reliance on Checks

By application, different: Processes. Requirements. Sources of data. Terminology

165-205 New payees per week

SPOC — Identified Payee Onboarding as #1 improvement to IPPS

The Team:

Program Manager: Jenn Glassman

Product Owner: Nikki Giaquinta

Scrum Master: Chris Ranglas

Product Team: Erika Szewczyk, Martin Krolik, JJ Li Santhosh Selvaraj

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- Pilot (100 users)
- Modify based on feedback
- Plan for full launch

- IdeaWave
- Business Case
- Current State Process mapping

Agile Development

1) Requirements
2) Plan
3) Design
4) Develop
5) Release
6) Track & Monitor

- Build the application in-house
- Validate Data
- Test Functionality

- Business requirements
- Field mapping
- UX mock-ups
- User interviews

ADKAR

A
- Conduct an assessment (stakeholders)
- Pinpoint opportunities (by level of influence)

D
- Align change vision & strategy
- Clarify roles and prioritize action
- Establish Measurement (KPI's)

K
- Develop an Implementation Plan
- Develop a Communication Plan (schedule and track activities)

A
- Over Communicate (in-person, how-to documents, access to help, webinars, through leadership)
- Coach and Facilitate the results
- Identify and resolve gaps and

R
- Evaluate & closeout (hand off to process owners)

Key Methodology Used: SCRUM/

Sprint Retrospective

Product Backlog → Sprint Planning → Sprint Backlog → Sprint Execution → Daily Scrum → Sprint Review

Expected Results &

Time savings for Campus, IPPS, and Payees

Single registration process for all Payees

Reliable payee information

The IPPS culture

Collaborate — Recognize the power and strength of collective solutions

Be a selfless leader — Ensure personal and professional fulfillment amongst team members

Break barriers, build bridges — Connect administrative processes with the goals and objectives of our clients

Push the envelope — Honor curiosity and challenge norms

Encourage feedback — Ask, listen, and make improvements to serve clients, employees, and stakeholders

Demonstrate quantifiable value — Be innovative. Simplicity is elegance.

Communicate honestly — Promote trust in a productive and cohesive environment

Hire, maintain, and reward exceptional employees — Explore and challenge capabilities