The University Health Network revamps an aging financial information system with a modern cloud experience.

"At UHN we strive to transform lives and communities through excellence in care, discovery, and learning to uphold our larger vision of a healthier world," said Christopher King, Senior Business Analyst, University Health Network.

The University Health Network (UHN) is Canada's largest public health research organization and a teaching hospital network located in Toronto, Ontario. The scope of research and complexity of clinical cases UHN manages has made it a national and international source for discovery, education, and patient care.

A vital aspect of the organizational research strategy is to leverage the power of digital tools to brings together larger support teams and their clients to optimize their interactions. "Our purpose and vision strongly aligns with our spirit of continuous quality improvement as well as our goal for global impact in health as a result of research innovation emerging from UHN," said King.

In an effort to better support its researchers, UHN developed and launched a new central financial information and communication hub on Salesforce to improve timely access to mission-critical operational information.

"Knowing that we are supporting the health sector and the important work being conducted by the almost 1,200 researchers is extremely rewarding," said Gert Wieland, Business Intelligence Manager at UHN.

Here's how they did it.

SUPPORTING RESEARCH INITIATIVES.

UHN wanted to give scientists more time to do science. "PIs and researchers are at the heart of what we do, but research is very complex by nature. It's constantly changing, and it's cutting edge in the way that there's always something new coming up," said Wieland.

The financial management and reporting obligations of research grants can be a full-time job in and of itself. Many financial processes require a significant exchange between Research Financial Services (RFS) and the research community. UHN research needed a platform to accommodate these complex workflows and approval processes to provide a centralized hub for reporting and collaboration.

UHN sought a user-intuitive, adaptable software solution to improve client-service capabilities and, most importantly, allow for automated read and write access via third-party ETL tools. UHN needed to be able to add existing data from source systems and design unique user interfaces to view and interact with it. Salesforce's "API first" principle allows the team to quickly build automated update processes to import and export data from and to other business applications.

This was a call-to-action for the team to modernize their financial systems so that they could adjust and pivot as research progressed. The team needed to:

- Capture numbers without manual data entry, manage contracts in an automated way, and overtime support more unique workflows as they might arise.

- Consolidate all the data into one, structured platform, build dedicated digital applications to support specific purposes, and alleviate the burden of clerical work that comes with funding the scientific process.

- Move away from manual, case-by-case efforts and instead be able to produce consistent, repeatable processes.

Key Takeaway

With a low-code, automated system the team would be able to navigate all the visual interfaces, configure custom applications, and increase the user experience all the while.

DESIGNING A SOLUTION THAT SUPPORTS THE MISSION.

UHN's research team launched a collaboration and reporting hub built on the Salesforce Service Cloud. It gives the team the tools to consolidate data, workflows, processes, and operations involved in managing the research business and the data collected in one central application.

Here's how it works.

CUSTOMER EXPERIENCE

The customer experience starts with the online community portal, built on <u>Experience Cloud.</u> The system was designed around various user personas and provides a custom user experience based on the user profile, e.g. PI, Delegate, Admin, Business Officer etc. Upon login, they are greeted with a customized dashboard and various navigation options. The research community can monitor their financial status at a glance and understand their overall financial metrics, like resources, burn rates, etc. Such information is invaluable to sustaining operations based on historical spending.

This gives researchers templates and blueprints for managing a project, freeing up time and energy for them to focus on things like data collection and analysis instead of process and operations – i.e.: the mission-critical work vs. the clerical work that's often associated with it.
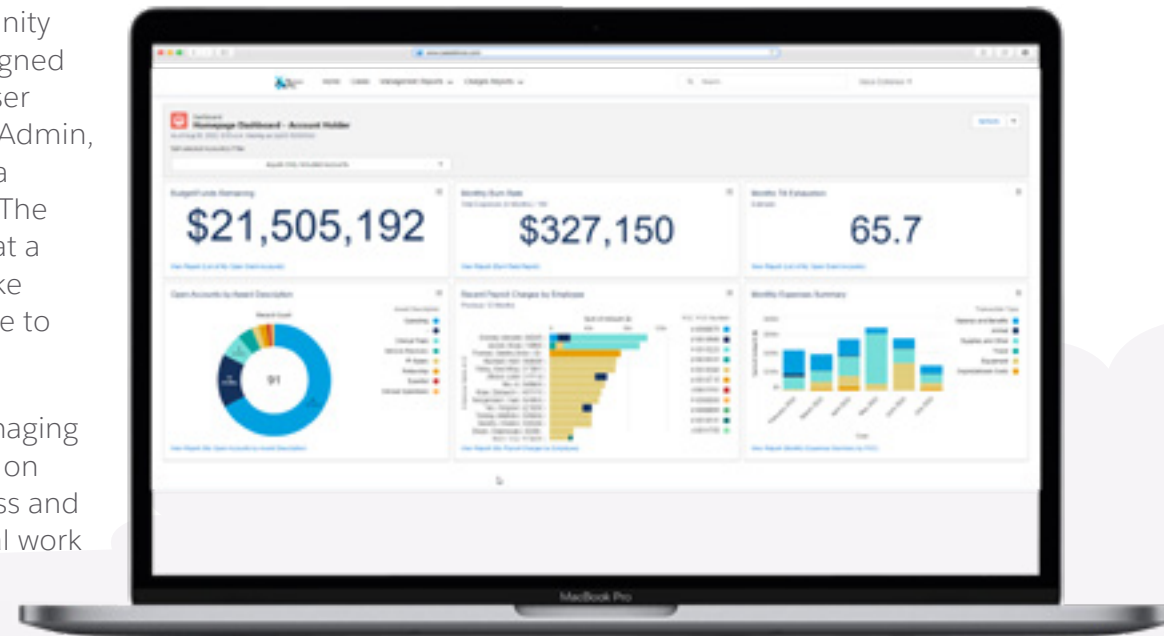

Figure 1: Homepage Dashboard

EMPLOYEE EXPERIENCE

As researchers conduct their work, their financial progress on a given project is stored on the back-end in Service Cloud. While PIs and their teams are busy doing their research, RSS staff work diligently to open new accounts, process transactions, and produce financial statements for research sponsors. Since the go-live date, all new account requests, budget amendments, and other vital administrative processes happen directly in the application using case management, which allows for greater workflow transparency and opportunities for process improvement.

Sandbox was added which gives the team a test environment for building out new features and functionality.

Figure 2: My Open Access Report

"This has allowed us to build a data model that reflects the business reality in a very visual way. We use that to cater reporting to the business without sacrificing program-specific configuration needs on the back end, which helps us maintain strong relationships with researchers, research institutes, cost centers, and staff analysts."

Gert Wieland
Business Intelligence Manager at University Health Network

REALIZING THE VALUE.

The University Health Network's Business Hub acts as a central node in a complex support structure enabling the research community to spend less time with their accounts administration and more time focusing on their research. The application provides a single source of truth, updated in near-real time, and a single point of collaboration for the main processes related to the financial administration of research grants. In other words, it provides access to the right information at the right time and place. Here are some noteworthy metrics from this work:

- 1500+ research community users activated

- 400+ research accounts opened via Business Hub

- 3 sizeable legacy MS Access databases sunset

The Salesforce platform empowered a small, agile development team - supported by the external Service Integrator "Industrious CRM" - to design, build, and ship a custom cloud application within 18 months - and receive rave reviews from key stakeholders like the research community and RSS staff. The architecture allowed for the accommodation of rapidly evolving business requirements and new use cases throughout the product cycle. The intuitive graphic user interfaces allowed for easy configuration by non-developers, and they were able to design a truly customized system that met their unique requirements. "Our customers are already seeing the value in the product; they appreciate having a modern interface that is visual, interactive, intuitive, and – most importantly – up to date," said Wieland.

BEST PRACTICES
from the University Health Network

Investing in a modern platform is just one of four best practices the research team demonstrates: **Download complete checklist**.

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