

ENTERPRISE STRATEGIES AND SOLUTIONS

Intranets

National Institute of Mental Health

Streamlines Its Processes and Teleworker Program

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The National Institute of Mental Health (NIMH) is the largest scientific organization in the world dedicated to research focused on the understanding, treatment, and prevention of mental disorders and the promotion of mental health. The mission of NIMH is to transform the understanding and treatment of mental illnesses through basic and clinical research, paving the way for prevention, recovery, and cure.

For the Institute to fulfill this vital public health mission, it must foster innovative thinking and ensure that a full array of novel scientific perspectives are used to further discovery in the evolving science of brain, behavior, and experience. In this way, breakthroughs in science can become

breakthroughs for all people with mental illnesses.

In support of its mission, NIMH generates research and promotes training to fulfill the objectives of 1) promoting discovery in the brain and behavioral sciences to fuel research on the causes of mental disorders; 2) charting mental illness trajectories to determine when, where, and how to intervene; 3) developing new and better interventions that incorporate the diverse needs and circumstances of people with mental illnesses; and 4) strengthening the public health impact of NIMH-supported research.

As CIO at NIMH, I am responsible for extramural IT infrastructures and IT services. My department of 36 supports 1,300 users across the Institute. One of our recent responsibilities has been to automate the Institute's workflow processes, including the forms, approvals, and documents associated with those business processes. Effectively handling the sheer number of forms and processes that keep a research organization moving efficiently can be difficult. As our organization has grown, tracking and managing these processes and workflows became an administrative challenge that needed to be addressed.

My department recognized that NIMH's manual process incorporated critical forms that traversed the organization from Division Management and Operations to Finance and Procurement. I also understood that there were multiple approvals required for each form and that automating and gaining control over the forms and workflow processes was a

priority and would result in our success going forward.

ESTABLISHING A TELEWORKING PILOT PROJECT

In line with the objectives stated above, NIMH (as is true of many other government and commercial organizations) has been looking at the federal mandate dictating broader use of a teleworker program. That program permits agencies to designate employees who may work at alternate work locations for all or part of the workweek in order to promote general work efficiencies.

As a result of the National Institutes of Health (NIH) Pilot Project on Teleworking, it was determined that a telework initiative could be deployed across NIH organizations, enabling individuals and their workgroups to continue to function outside the office with a minimum of disruption while maintaining functionality and productivity. Additionally, it was determined that teleworking would enable NIH mission-related work to continue during emergencies.

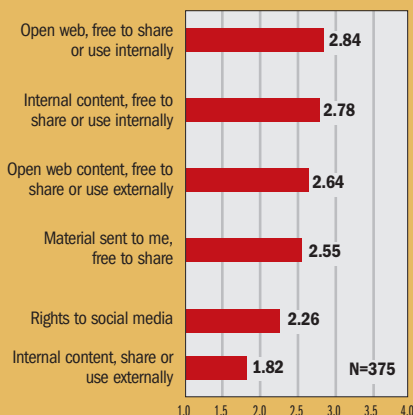
Structuring responsibilities so as to maintain work group integrity, communications, and contingency planning are considerations for telework agreements. Moreover, a successful telework program relies heavily on uniform information technology solutions and support. The business processes, forms, and workflows associated with this program was one of many that I contended with as I began to look at my greatest short-term needs.

Our goal was to designate employees who could work at alternate locations part of the workweek in order to promote general work efficiencies. What we have discovered is that, in some cases, telework has actually driven process improvements in workgroups and resulted in enhancing overall productivity. As mentioned, NIH also determined that having teleworking in place would enable its mission-related work to continue should an emergency arise.

After previous attempts to establish workflow processes that were not successful in delivering the capabilities and ROI that we required, I knew we needed to find a solution to control the various organizational processes we had going on. We recognized that the solution we selected needed to automate, streamline, and accelerate NIMH processes, including automating the teleworker appli-

Vital Stats

Employee Views on Content Reuse



Note: Respondents rated on a 1-4 scale of what they believed was acceptable.

Source: Copyright Policies and Practices, FreePint Ltd., March 2010

BP Logix eForm - Windows Internet Explorer

Telework Application - Appendix 1

* Application Status:
 New Renewal Provisional/Trial Emergency Telework

Telework Location Information: [Privacy Policy](#)

Both this section and Appendix 2 below ask telework applicants to provide their personal location and/or contact information. This information will only be used in the event of an urgent work-related need, or, in the case of Essential Employees, in the event of an emergency. This information is stored in a secure system that complies with privacy regulations.

* Phone Number Fax Number
Use format 999-999-9999

* Address1
 Address2

* City * State [Choose State] * Zip Code

Telework Information:

* 1 Telework Dates: Start Date: End Date:
NIMH policy requires employees to renew their telework agreements annually. In these fields, enter dates that reflect one full year, e.g. 7/11/07 to 7/10/08. You may request less than a year, for example, if you're asking to telework on a Provisional/Trial basis (see options under "Application Status" at the top), but not more than one year.

2 What job tasks will you perform when you are telecommuting?

3 How will you continue to provide optimal customer service while telecommuting (please identify your customers in answering this question)?

NIMH's teleworker application eForm created with BP Logix Process Director

cation process, which was lengthy and involved substantial review and oversight.

ADDRESSING AN ADMINISTRATIVE CHALLENGE

Faced with time constraints and the requirement to streamline and automate processes quickly, we identified the key features and capabilities NIMH required. Understanding the business processes associated with those workflows, my team then selected six companies that offered products we could evaluate, weight, and rank.

Our IT team created a matrix of the capabilities, needs, and wants we required for our electronic forms and our workflow processes. Primary among them were functionality, simplicity, and price. After developing this matrix, we short-listed three companies and began a comparative analysis. My users were supportive of implementing a new solution; their primary request was that it be as intuitive as possible and reflect the way they currently worked. We wanted a product developed to address business requirements like ours—one that offered an intuitive interface that was not overly complex.

The new system selected had to help users gain a better understanding of where the forms and approvals were in the process, as the Institute needed for its users to be more accountable, particularly given the institution of the teleworker program.

In addition, I recognized that we needed a product that could interface with and handle our complex database lookups, conditional workflow branching, and the dynamic

nature of the workflows we have to produce. We also needed to find a solution that would integrate well with our other systems.

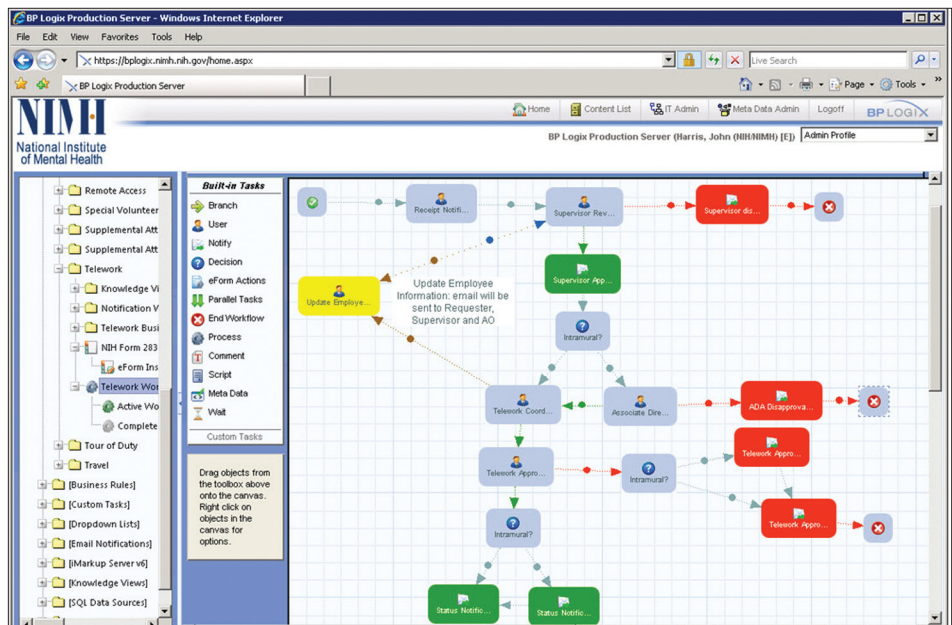
DEPLOYING THE RIGHT SOLUTION

Concluding the evaluation process, during which we looked at various products with a wide variety of capabilities, we decided that BP Logix Process Director offered what we needed in terms of workflow automation, electronic forms, and customization capabilities. The out-of-the-box, web-based software combines business process management (BPM) with project management and business intelligence, and it was the best fit for our

needs. The software tool, Process Director, enables NIMH users to define, automate, manage, and report on our business processes; it also moves those processes under the direct control of our users.

We engaged BP Logix to provide web-based training for our staff. The training, recommended in 3–4-hour segments over a period of several days, enabled our team to ramp up quickly. We found that the graphical user interface, configuration and Visual Studio capabilities, and the graphical rules and condition builder make the product highly usable for nontechnical users. Within 2 months of acquiring Process Director, the IT team deployed an initial set of workflows and database connectors that integrated with our back-end systems. Included in these initial workflows were teleworker authorization and remote access forms, travel requests, waiver process/security exception requests, budgetary funds request, and IT purchase requests.

Besides the immediate gains in efficiency, the Process Timeline technology, which is built into Process Director, also helps our users take preemptive action: Since they can see, at a glance, how long a process (and every activity within that process) is likely to take, changes can be made, when needed, on running processes. Combined with traditional flowchart-based workflows, this technology is providing us with powerful, business-friendly solutions for controlling our key processes and helping us make better business decisions.



This flowchart represents the workflow defined for this process, including the conditional processing that occurs with this type of a request.

Process Director has changed the way we run our Institute and telework program. The BP Logix solution enables teleworking at NIMH by managing the vast amount of information online that must be submitted and tracked for hundreds of employees. Process Director helped us to create our teleworker application eForms, it helps us to manage the multistep process that the request goes through, and it tracks all the required steps and approvals that must occur before the telework application is approved. We can see the workflow defined for this process, that also shows the conditional processing that occurs with this type of a request.

We are also benefitting from the Ajax-enabled eForms to dynamically control what is displayed to the user and the type of validation that will occur. This provides a more

user-friendly experience, walking a user through the entry of information. This is also helpful for approvers who are presented only with the information they need to make a decision at that stage in the process. The graphical Business Rules Builder helps us to define policy decisions from the processes separately, allowing the assignment of users and the conditional routing to be defined outside the process.

Not only did I discover that my expectations for our new eForms System were met, the time-to-completion for various workflows and forms, which had previously taken days and weeks, now take hours and days. We immediately saw productivity gains, and the resulting ROI was encouraging. The telework application program has been fully automated; what used to be a lengthy

process is now streamlined and highly efficient. With the increased accountability and reporting that Process Director provides, our review and oversight processes are painless compared to the unwieldy processes we had before. In the future, we believe we can expand upon these successes by further integrating Process Director into our process automation efforts. ■

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