

Capacity and Demand

Agenda

- Capacity and Demand Terms
- Common Work Types & Tasks
- Capturing Demand / ETCs
- Open Positions
- Maintaining OBS Structure and Demand
- Maintaining Capacity in Clarity
- Online Department and Team Capacity
- Automated Capacity and Demand Report
- Team Capacity and Demand Chart

Capacity

- Represents the number of resources (FTEs) available to work
 - TO - Open positions + On-boarded associates
 - FTEs – On-boarded associates

Demand

- Estimated work - ETCs

Common Work Types & Tasks

Service Manager Framework (SMF)

Administrative Overhead

- Captures time related to managing the day to day operations of Montefiore IT

Core

- Captures time directly related to supporting the day to day operations of the client (keeping the lights on)

Enhancements

- Captures time directly related to improvements made to the clients operations (applications, hardware etc.) and not included in projects
- Enhancements are < 150 hours total hours of work

Projects

- Captures time directly related to assignments on projects
- Projects are > 150 hours total hours of work or if < 150 hours and requires visibility

Forecast

- High-level Estimates

Type	Status	Name	Start	Finish	Requirement name	Estimate to Complete
Summary	Not started	Name of Project	3/9/2017	8/2/2017		
Phase	Not started	Resource Planning	3/9/2017	8/2/2017		
Task	Not started	Resource Planning	3/9/2017	8/2/2017	Forecast - Ancillary Services - Perioperative	1.00
					Forecast - Ancillary Services - Willow	1.00
					Forecast - Clinical Services - Orders & ED	1.00
					Forecast - Clinical Services - Amb Medical Specialty	1.00
					Forecast - Access & HIM - Patient Engagement	1.00

Level of Effort

- Estimates to implement the request

Type	Status	Name	Start	Finish	Requirement name	Estimate to Complete	Actual Usage
Summary	Not started	Name of Project	4/1/2021	6/28/2021			
Phase	Not started	Resource Planning	4/1/2021	6/28/2021			
Task	Not started	Resource Planning	4/1/2021	6/28/2021	Forecast - Ancillary Systems - Cardiovascular Nutrition Support		
					Forecast - Ancillary Systems - Rad Onc		
					Forecast - Ancillary Systems - Imaging Systems		
					Forecast - Ancillary Services - Beaker	10.00	
					Forecast - Ancillary Systems - Monte Radiant		
					Forecast - Clinical Services - Population Health & Care Management		
					Forecast - Care Management - Call Center		
					Forecast - Client Services - Deployment Services	200.00	

Monthly Open Positions

- Opens positions file received from HCM System
- Add new opens to Clarity
- Employment Type = Open
- Convert Opens to FTE, once associate is hired

Resource List

Filter: None ▾

Resource/Role Name

Resource/Role ID

OBS Unit

OBS Unit - Filter Mode

Unit only ▾

Is Role

All ▾

Text 1

Filter

Show All

Save Filter

Clear

Type

All ▾

Employment

Contractor
Contractor - Corporate
Employee
Open

Active

Yes ▾

Manager

Power Filter

[Build Power Filter]

<input type="checkbox"/>	Resource/Role▲	ID	Primary Role	Active	Email	Resource Type	Date of Hire	Date of Termination	Is Role	Job Title	Employment	Parent Role	Kronos ID	Open for Time Entry	Exclude from Capacity
<input type="checkbox"/>	Open, Position	50129986	Analyst		no-reply@moventus.com	Labor					Open				
<input type="checkbox"/>	Open, Position	50127345	Analyst		no-reply@moventus.com	Labor					Open				

Update Clarity's OBS based on HCM changes throughout the month

- Name Changes to Department and/or Team
- Reporting structure
- Resource transfers

Adjusts Forecast Demand after reorgs and staffing changes

- Estimates/ETCs needs to align with the reorg
 - Resources moved to another team
 - One Team has split across two other teams

Custom Portlet - Reporting Structure Object List

- Adjust Team Capacity based on changing work requirements
 - Maintain Capacity by SMF
 - Calculates Project Capacity

Total FTEs- (Admin + Core + Enhancement)
- Manual process using Actual Hours to guide Capacity
 - Timesheets need to be accurate at the SMF Level to set up the Capacities

Reporting Structure Object List

Filter: System Default ▾

Unit Level All ▾

Team / Department Name

Team Lead / Department Manager

Active Yes ▾

Link to Organization

Parent OBS Unit

Power Filter [Build Power Filter]

Filter

Show All

Save Filter

Clear

<input type="checkbox"/>	Unit Level	Team / Department Name ▲	Parent OBS Unit	Exclude from Capacity	Capacity Exception	Admin Capacity	Core Capacity	Enhancement Capacity	Project Capacity
<input type="checkbox"/>	Team	Access, HIM & Cadence	ALL/MIT/Operations/Epic Member Rollout/Epic Rollout Clinicals			0.3	0.0	0.0	5.7
<input type="checkbox"/>	Team	Access, Rev Cycle & Reporting	ALL/MIT/Operations/Epic Member Rollout/Epic Rollout Clinicals			0.0	0.0	0.0	1
<input type="checkbox"/>	Team	Active Directory	ALL/MIT/Operations/Technology Services/Operations-TS			0.1	4.4	0.0	(0.5)
<input type="checkbox"/>	Department	Admin. Services Associates	ALL/MIT/Shared Services/Administrative Services	✓					0
<input type="checkbox"/>	Team	ADT Prelude Registration	ALL/MIT/Operations/Epic Patient Access & Revenue Cycle/Access & HIM			1.0	4.0	2.0	(3)
<input type="checkbox"/>	Department	Albert Einstein College of Medicine	ALL/Montefiore Medicine/Academic/College	✓					2

Custom Portlet – Snapshot of Department and Team Capacity

Snapshot Department Capacity

Organization Name ▲	Department Name	Department Manager	Reporting Month	Monthly Admin Capacity	Monthly Core Capacity	Monthly Enhancement Capacity	Monthly Project Capacity	Monthly Total Capacity	Employee Count	Open Approved Count	Consultant Count
Clinical Systems	Enterprise Tools and Processes		2020-05	0.7	15.3	4.8	(0.8)	20	19	1	1
Totals				0.7	15.3	4.8	(0.8)	20	19	1	1

Displaying 1 - 1 of 1

Snapshot Team Capacity

Organization Name ▲	Department Name	Department Manager	Team Name	Team Lead	Reporting Month	Monthly Admin Capacity	Monthly Core Capacity	Monthly Enhancement Capacity	Monthly Project Capacity	Monthly Total Capacity	Employee Count	Open Approved Count	Consultant Count
Clinical Systems	Enterprise Tools and Processes		Apple Product Support & Dev		2020-05	0.2	6	1.5	(0.7)	7	7	1	0
Clinical Systems	Enterprise Tools and Processes		PMO		2020-05	0.2	5	0.4	0.4	6	5	0	1
Clinical Systems	Enterprise Tools and Processes		Service Management Solutions		2020-05	0.2	3.7	1.5	(0.4)	5	5	0	0
Clinical Systems	Enterprise Tools and Processes		Web Development		2020-05	0.1	0.6	1.4	(0.1)	2	2	0	0
Totals						0.7	15.3	4.8	(0.8)	20	19	1	1

Displaying 1 - 4 of 4

- Maintain Team Capacity for Admin, Core, and Enhancement in Clarity
- Project Capacity is calculated by the Clarity system based on headcount
- Project Capacity can be calculated based on Employee, Consultants and Open Positions or any combination

Automated Capacity and Demand Report

Clarity PPM

Home Administration Favorites

Library View Manage Create

Montefiore Capacity vs Demand Analysis Data refreshed 2020-06-24 at 15:25:47

Back

Capacity - Demand Analysis Report v3

		Overall Capacity							3 Month Project Demand (6/2020-8/2020)													
						Non Project Demand			Committed Projects							All Projects						
		TO	E	110% TO	110% E	Admin	Core	Enh	Capacity (110% TO)	Capacity (110% E)	Project Demand	Capacity (110% TO) vs. Demand	Capacity (110% E) vs. Demand	Capacity (110% TO) vs. Demand	Capacity (110% E) vs. Demand	Capacity (110% TO)	Capacity (110% E)	Project Demand	Capacity (110% TO) vs. Demand	Capacity (110% E) vs. Demand	Capacity (110% TO) vs. Demand	Capacity (110% E) vs. Demand
Org	Dept/Team	FTEs	FTEs	FTEs	FTEs	FTEs	FTEs	FTEs	FTEs	FTEs	FTEs	FTEs	%	FTEs	%	FTEs	FTEs	FTEs	FTEs	%	FTEs	%
Business and Financial Systems	Business Systems	18.0	18.0	19.8	19.8	2.4	9.4	2.1	5.9	5.9	5.8	0.1	0.8%	0.1	0.6%	5.9	5.9	5.9	0.0	0.1%	0.0	0.1%
	Kronos	5.0	5.0	5.5	5.5	0.4	3.1	0.8	1.4	1.4	0.3	1.1	19.2%	1.1	19.2%	1.4	1.4	0.4	1.0	17.8%	1.0	17.8%
	SAP	13.0	13.0	14.3	14.3	2.0	6.3	1.5	4.5	4.5	5.4	-0.9	-6.5%	-0.9	-6.5%	4.5	4.5	5.5	-1.0	-6.7%	-1.0	-6.7%
	Care Management	39.0	39.0	42.9	33.0	4.3	10.4	12.3	15.9	6.0	8.4	7.5	17.5%	-2.4	-7.3%	15.9	6.0	23.1	-7.2	-16.9%	-17.1	-61.9%
	Call Center	10.0	9.0	11.0	9.9	0.2	4.0	6.8	0.0	-1.1	3.6	-3.6	-32.7%	-4.7	-47.4%	0.0	-1.1	3.7	-3.7	-33.3%	-4.8	-48.1%
	Claims, Credentialing, and	6.0	6.0	6.6	6.6	1.4	1.1	1.4	2.7	2.7	1.1	1.6	24.4%	1.6	24.4%	2.7	2.7	3.0	-0.3	-4.4%	-0.3	-4.4%
	Healthy Planet	13.0	8.0	14.3	8.8	1.6	2.0	2.0	8.7	3.2	1.1	7.6	53%	2.1	23.6%	8.7	3.2	8.8	-0.1	-0.6%	-5.6	-54%
	Tapestry	6.0	4.0	6.6	4.4	0.8	1.0	2.0	2.6	0.6	0.9	1.9	28.8%	-0.3	-6.7%	2.6	0.6	5.6	-2.8	-42.8%	-5.0	-114.1%
	Technical Support	4.0	3.0	4.4	3.3	0.3	2.3	0.1	1.7	0.8	1.7	-0.0	-0.1%	-1.1	-33.5%	1.7	0.6	2.0	-0.3	-7.5%	-1.4	-43.3%
	Enterprise Resource Planning	0.0	0.0	0.0	0.0	0.5	0.0	0.0	-0.5	-0.5	0.0	-0.5	0.0%	-0.5	0.0%	-0.5	-0.5	0.0	-0.5	0.0%	-0.5	0.0%
	ERP	0.0	0.0	0.0	0.0	0.5	0.0	0.0	-0.5	-0.5	0.0	-0.5	0.0%	-0.5	0.0%	-0.5	-0.5	0.0	-0.5	0.0%	-0.5	0.0%
	Network Services	41.0	36.0	45.1	39.6	1.2	27.3	12.3	4.3	-1.2	4.9	-0.6	-1.3%	-6.1	-15.4%	4.3	-1.2	8.9	-4.6	-10.1%	-10.1	-25.4%
	Infrastructure Management	5.0	5.0	5.5	5.5	0.1	3.5	1.0	0.9	0.9	0.9	-0.0	-0.7%	-0.0	-0.7%	0.9	0.9	1.8	-0.9	-15.7%	-0.9	-15.7%
	Internet Engineering	6.0	6.0	6.6	6.6	0.1	4.0	2.0	0.5	0.5	0.9	-0.4	-5.5%	-0.4	-5.5%	0.5	0.5	1.2	-0.7	-11.1%	-0.7	-11.1%
	NCC	19.0	15.0	20.9	16.5	0.5	16.0	2.0	2.4	-2.0	1.2	1.2	5.6%	-3.2	-19.6%	2.4	-2.0	2.1	0.3	1.5%	-4.1	-24.7%
	Network Architecture	3.0	2.0	3.3	2.2	0.1	0.3	1.8	1.1	0.0	0.4	0.7	22.3%	-0.4	-16.5%	1.1	0.0	0.6	0.5	16%	-0.6	-26.1%

Process to update Department and Team after Re-Org

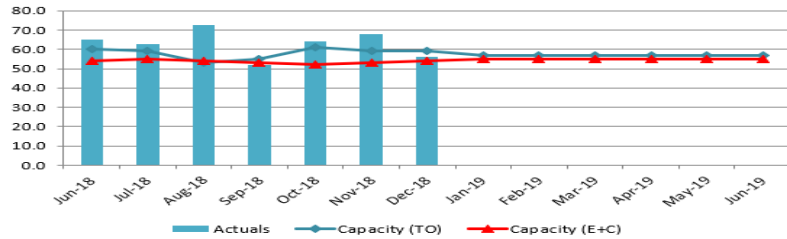
Report creation time is Hours instead of Days

Can rerun during the month for updated demand

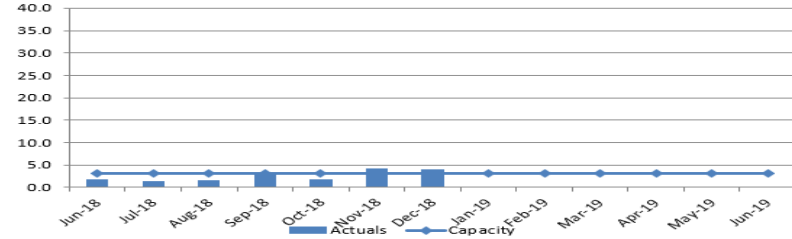
Open Positions in Clarity – Updated Monthly from HCM

Team Capacity and Demand Chart

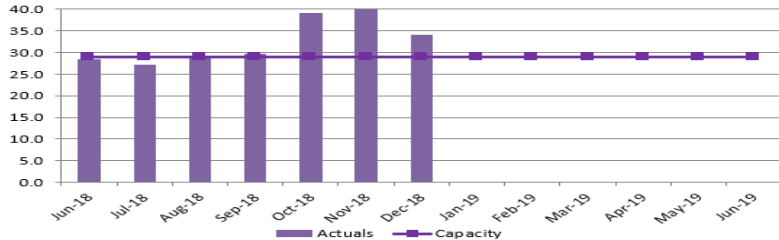
Total FTEs



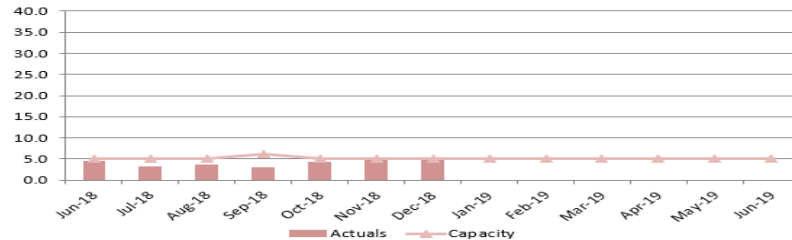
Administrative



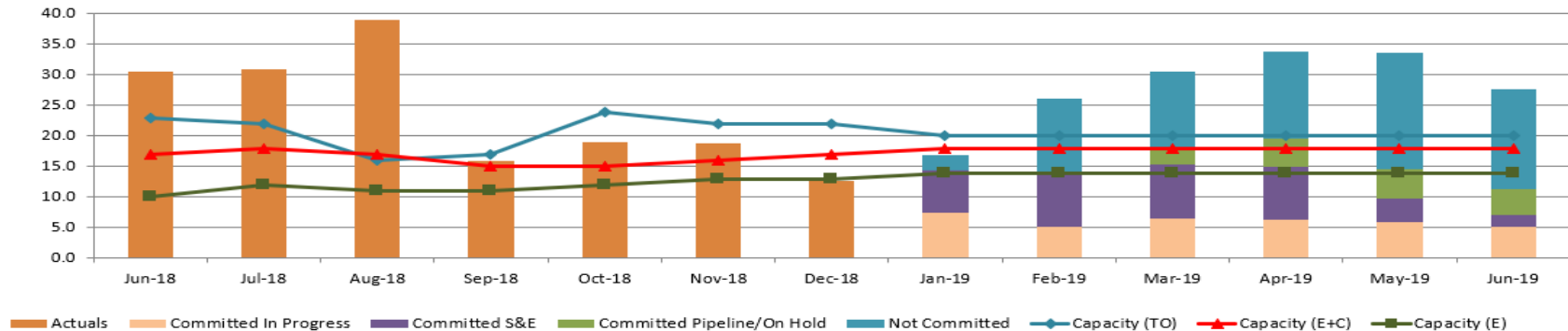
Core



Enhancements



Project



Questions

