

TTP Roles & Responsibilities

CENTRAL SUPPORT ROLES

	Business Support Analyst	System Analyst	Capture Support
Purpose of Role	<ul style="list-style-type: none"> Provides user support Provides operational direction for business support roles 	<ul style="list-style-type: none"> Provides technical support (basic & advanced) within MedIT 	<ul style="list-style-type: none"> Creates & updates service provider profile information Synchronizes service provider profile information with Human Resource Management System and Financial Management Systems at UBC and the regional programs
Role Function	<ul style="list-style-type: none"> Addresses and troubleshoots user issues Provides user training Updates system information including the Activity List, Course Catalogue, and Financial Codes 	<ul style="list-style-type: none"> Provides technical expertise and addresses technical system issues 	<ul style="list-style-type: none"> Creates new service provider profiles and manages profile updates Synchronizes service provider information with Human Resource Management System (HRMS) and Financial Management Systems (FMS) at UBC and the regional programs
Responsibilities & Expectations	<ul style="list-style-type: none"> Primary TTP point of contact and liaison for departments and regional programs Investigates, coordinates and responds to help requests and system issues Interfaces with MedIT for technical and application support Supports and liaises with Governance Committee 	<ul style="list-style-type: none"> Manages issues escalated from Business Support Troubleshoots system glitches 	<ul style="list-style-type: none"> Manages and maintains service provider profiles and synchronization with relevant systems Responds and processes change requests Provides clarity and support to users on related policies and procedures

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	Business Support Analyst	System Analyst	Capture Support
Knowledge Requirements	<ul style="list-style-type: none"> • In-depth understanding of end to end process for tracking teaching and processing payments • Knowledge and understanding of relevant policies • Understanding of human resources and financial management systems • Understanding of related business processes and organizational culture • Advanced knowledge and understanding of system functionality 	<ul style="list-style-type: none"> • In-depth understanding of Entellitrak technical architecture 	<ul style="list-style-type: none"> • Knowledge and understanding of UBC HR policies & procedures, including policies regarding service provider eligibility, the faculty application processes, and the clinical faculty compensation terms • Knowledge of laws, policies and ethics governing private or confidential information • Understanding of human resources, financial and information management best practices • Subject matter expert on payment arrangements and eligibility; is aware of escalation process
Judgement / Consequence of Error	<ul style="list-style-type: none"> • Lack of attention to detail and a lack of understanding in updating reference data could result in additional work and/or substantial monetary loss to the faculty • Ineffective communication and bad judgment could result in negative impacts on the departments, regional sites and University image 	<ul style="list-style-type: none"> • Lack of attention to detail and a lack of understanding in updating reference data could result in additional work and/or substantial monetary loss to the faculty • Ineffective communication and bad judgment could result in negative impacts on the departments, regional sites and University image 	<ul style="list-style-type: none"> • Impact of error is high; lack of attention to detail and a lack of understanding in updating profiles could result in additional work and compromise data integrity • Errors could result in clinical faculty payment delays, errors and disputes, which could result in negative impacts on faculty relationships

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FINANCIAL ROLES

	Information Analyst	Payment Manager	Financial Authorizer
Purpose of Role	<ul style="list-style-type: none"> Validates financial details of payee information 	<ul style="list-style-type: none"> To be accountable for accurate payments to clinical faculty from the right account codes and project grants 	<ul style="list-style-type: none"> Determines whether financial reports are formally approved Accountable for release of funds and to maintain budgetary integrity
Role Function	<ul style="list-style-type: none"> Verifies payee information with the Canadian Revenue Agency (CRA) and validates payee profiles 	<ul style="list-style-type: none"> Reviews and finalizes payment instruction file(s) and submits approved file(s) for payment 	<ul style="list-style-type: none"> Reviews and approves the Financial Authorization Reports Flags budget variances in the Financial Authorization Reports
Responsibilities & Expectations	<ul style="list-style-type: none"> Validates payee information ensuring that the GST number and business number are correct and verified against CRA records Liaises with Capture Support to correct invalid records Runs reports on payee records as required 	<ul style="list-style-type: none"> Ensures accuracy of speed charts, project grants and account codes Undertakes financial reconciliations Liaises with UBC central finance, UNBC/UVIC Accounts Payable to ensure payments are processed 	<ul style="list-style-type: none"> Second signature for approval to pay (validates funds are available); based on assumptions of accuracy of service provider, activity, and event information which are earlier in the process; Not expected to do a validation of transaction detail Reviews and approves within defined payment periods Enquires into anomalies that exist in financial authorization report and instigates investigations
Knowledge Requirements	<ul style="list-style-type: none"> Knowledge of laws, policies and ethics governing private or confidential information Knowledge of business registration requirements with CRA Understanding of FMS and/or Banner 	<ul style="list-style-type: none"> Has an understanding of UBC financial management best practices, policies and procedures Has technical skills to be able to resolve financial related issues 	<ul style="list-style-type: none"> Recognizes signs of suspicious payment information, i.e., System Error, Human Error, Suspicion of fraudulent activity Has an understanding of UBC financial Management best practices, policies and procedures

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	Information Analyst	Payment Manager	Financial Authorizer
Judgement / Consequence of Error	<ul style="list-style-type: none"> • Errors in decision-making or ineffective communication may compromise payment and result in clinical faculty payment errors and disputes 	<ul style="list-style-type: none"> • Lack of attention to detail, provision of inaccurate information, and a lack of understanding would have impact on financial reporting and could result in incorrect payments • Clear judgment is required to address anomalies; direction should be sought in dealing with unusual instances outside of established procedures 	<ul style="list-style-type: none"> • Impact of error is high; errors in decision-making or ineffective communication may compromise payment and result in clinical faculty payment budget shortfalls



TRACKING TO VALIDATION ROLES

	Activity Tracker	Exception Approver	Activity Validator	Service Provider (Faculty Members)
Purpose of Role	<ul style="list-style-type: none"> Tracks activities ensuring correct service provider, activity and event information is captured and submitted 	<ul style="list-style-type: none"> Determines whether service provider exceptions are formally approved or denied 	<ul style="list-style-type: none"> Determines whether activity track information (activity, event, and service provider) is accurate and formally approved or denied 	<ul style="list-style-type: none"> Receives and reviews tracked information
Role Function	<ul style="list-style-type: none"> Creates new activity tracks using standardized activity, event information, and service providers Edits returned activity track(s) for remediation 	<ul style="list-style-type: none"> Approves, returns for remediation, or denies reason for exception on activity track(s) 	<ul style="list-style-type: none"> Validates, returns for remediation, or denies activity track(s) Reviews activity track(s) as flagged by a service provider and when necessary, escalates the issue or returns the activity track(s) for remediation 	<ul style="list-style-type: none"> Reviews quarterly statement and advises Activity Validator if remediation is required

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	Activity Tracker	Exception Approver	Activity Validator	Service Provider (Faculty Members)
Responsibilities & Expectations	<ul style="list-style-type: none"> Inputs accurate activity, event & service provider information Tracks all scheduled teaching sessions within designated tracking period Identifies missing service providers from TTP database and initiates request process to create a new profile Revises returned tracks as directed by Exception Approver and/or Activity Validator 	<ul style="list-style-type: none"> Ensures appropriate use of exception service provider; includes determining eligibility and may include verification of paperwork (e.g., contracts) Verifies & analyzes the reason for the exception to the compensation terms Completes review and approval within defined verification and authorization periods Escalates recurring exceptions that could be integrated into normal policies and procedures Ensures required updates to service provider profiles are communicated <p><u>Example:</u> <i>Exceptions relate to Service Providers only, e.g., a contract that normally includes compensation for teaching activities but, is modified for a region or division</i></p>	<ul style="list-style-type: none"> First signature for approval to pay; assumes accuracy of service provider payment information Reviews accuracy of track activity, event and service provider information Validates activity took place and services were received from service provider Validates service provider eligibility and adherence to scheduling guideline maximums Checks validity of track within business domain (i.e. it makes sense that this activity took place in this delivery period, provided by this service provider) Completes review and validation within defined verification and authorization periods Reviews contested tracks to determine escalation or remediation process and communicates with the service provider(s) <p><u>Example:</u> <i>Random checking of 20% of activities back to source</i></p>	<ul style="list-style-type: none"> Verifies accuracy of teaching activity and payment Responsible for appointment application and provision of payment arrangement information



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	Activity Tracker	Exception Approver	Activity Validator	Service Provider (Faculty Members)
Knowledge Requirements	<ul style="list-style-type: none"> • Has access to activity and event information to accurately track activities for correct service providers • Has list of exception service providers and reason for exception • Has an understanding of clinical faculty compensation terms 	<ul style="list-style-type: none"> • Has an understanding of clinical faculty compensation terms and understands allowed exceptions • Has an understanding of available resources to verify eligibility 	<ul style="list-style-type: none"> • Has an understanding of UGME (which courses, activities, and service providers are delivering the curriculum) • Has an understanding of clinical faculty compensation terms • Has list of exception service providers and reason for exception • Has an understanding of scheduling guideline maximums 	<ul style="list-style-type: none"> • Knowledge of teaching activities, payment arrangement and any exception teaching situations
Judgement / Consequence of Error	<ul style="list-style-type: none"> • Autonomous decision-making regarding track entry; unusual issues brought to supervisor's attention • Impact of error is considerable; though work is reviewed • Incorrect selection of service provider or teaching activity may cause delays in payment and significant effort to correct 	<ul style="list-style-type: none"> • Autonomous decision-making regarding approval of exception service provider; may consult with local resources to determine and validate eligibility • Impact of error is high; approving an exception service provider enables an individual to be paid/not paid • Errors in decision-making or ineffective communication may compromise payment outcome; unnecessary over expenditures in unit and loss of funds for exception service provider 	<ul style="list-style-type: none"> • Valuable last chance to ensure accuracy prior to release to service provider; autonomous decision-making regarding track approval • Impact of error is high; action at this stage determines payment outcome • Errors in decision-making or ineffective communication may compromise payment outcome; unnecessary over expenditures in unit and loss of funds for service provider 	<ul style="list-style-type: none"> • Errors identified outside of the review period will delay payment and cause retroactive adjustments outside the system resulting in increased administrative effort • Errors in ineffective communication could result in missed corrections and negatively impact the integrity of the data and result in unconsolidated tracking and payment records



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READ-ONLY ROLES		
	Read-Only (Restricted Read)	Read-Only (Enhanced)
Purpose of Role	<ul style="list-style-type: none"> Read-only access for general administrative staff 	<ul style="list-style-type: none"> Enhanced read-only access for administrative staff who require service providers' personal and/or payee information to perform their job duties
Role Function	<ul style="list-style-type: none"> Allows program staff to view activity track information housed in TTPS (Activity Track Search) 	<ul style="list-style-type: none"> Allows staff to view activity track information and service provider profiles and statements in the system (Activity Track Search, Statement Search & Person Search)
Responsibilities & Expectations	<ul style="list-style-type: none"> Respects privacy/confidentiality of personal information Only uses data in TTPS for relevant UBC-related tasks 	<ul style="list-style-type: none"> Respects privacy/confidentiality of personal information Only uses data in TTPS for relevant UBC-related tasks Flags potentially invalid or inconsistent profile information and reports to the appropriate department and/or Capture Support representative <p><i>Example:</i> Ensure that appointing department's mailing address on file for a service provider matches address listed in TTPS & FMS.</p>
Knowledge Requirements	<ul style="list-style-type: none"> Varies according to position 	<ul style="list-style-type: none"> Knowledge of laws, policies and ethics governing private or confidential information Appropriate knowledge to maintain consistency of personal data across local systems (e.g. HRMS, FMS, PGME records)
Judgement / Consequence of Error	<ul style="list-style-type: none"> Has access to teaching information for clinical faculty Clear judgement is required when accessing/using information available in TTPS 	<ul style="list-style-type: none"> Has access to teaching information for clinical faculty Clear judgement is required when accessing/using information available in TTPS