

## Visit Description

During the Business Process Review (BPR) visit RMS staff and the client will identify how client business process and RMS/Mercury functionality fit together. This assists the client in making informed decisions with regards to your data set-up and intended use of RMS and Mercury. The RMS staff member will demonstrate functionality and direct the conversation so that your current business practices are reviewed in detail.

## Attendees

This visit is designed for key housing staff who will be the primary administrative users. The project team (who is in charge of your assignments, accounting, applications, cancellations, IT (applications/development) etc.) should attend. They can pull in additional staff members who are deemed appropriate. We recommend a maximum of 5-7 people participate in this visit.

## Schedule

Each day will begin at 9am and end at 430pm. Lunch will be an hour and fifteen minutes, and there will be two fifteen-minute breaks. Below is an outline of topics for each day.

Day 1: Demonstration of functionality

Day 2: Application Process Review, Room and Plan Assignment Process Review

Day 3: Accounting and Accounting Data Set-Up Sheets

Day 4: Room and Plan Management, Correspondence History, Incidents and Flags, Rooms Data Set-Up Sheets

## Preparation for Visit

- Reserve a room for training
- Presenter workstation configured per instructions in System Architecture manual
- High resolution projector (1280x1024) or large screen television – ensure that staff sitting towards the rear of the room can read text on the screen.
- White board, smart board, or easel with newsprint.
- Tell your RMS trainer or project manager how many staff are attending training.
- Review and confirm proposed visit schedule – work with trainer to make any necessary adjustments.
- Review Business Process Review Agenda – we recommend having a meeting ahead of this visit to begin discussion of your business processes.