Automating the Process of Tracking the Submission of Financial Aid Applications

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1 Introduction & Background

As part of managing patients' cases with financial difficulties, Medical Social Workers' (MSW) will apply for suitable financial aid for the patients. One of the more commonly tapped on financial aid is a government fund called Medifund. MSWs will assess the patient's family's financial situation before proceeding to put up the Medifund application.

After putting up the Medifund application, there may be subsequent steps e.g. requiring supervisor's or HOD approval before the final submission of the application to the Admin staff for further processing to Business Office.

As part of MSW Department's Balance Scorecard, the turnaround time from the point that the application was created to the point that the application was submitted to the Admin staff is tracked.

2 Problem Statement & Motivation

The initial tracking process entails a total of 82 steps and uses Microsoft Excel as the main application to assist with the tracking. This initial process will extract applications that whose turnaround time is outside the threshold i.e. applications created for > 21 days and still not submitted to Admin staff. A report listing out the applications will be generated and sent to the MSWs.

After the report is generated and the MSWs start submitting their applications to the Admin staff, the Admin staff will need to engage in an additional 4 steps per application submitted.

The entire process was reviewed and it was noted that there was potential for a majority of steps to be reduced through VBA in Microsoft Excel, hence this project was initiated.

3 Methodology

The entire process was laid out from the first step till the last step. The steps in summary:
Initial: 82 steps
Follow-up: 4 steps per application

The steps were categorized according to the mode that they were engaged in. An example of a step in this process is the filtering for applications created in January 2017 (if the tracking is to be done for the month of January 2017) from a consolidated list of all applications created. The mode that this step was engaged in is Microsoft Excel.

It was thus found that 98.8% of the Initial and 100% of the Follow-up steps were in the mode of Microsoft Excel.

From the above categorization, the steps were slowly translated into VBA language.

4 Results

Before
Initial: 82 steps
Follow-up: 4 steps multiplied by No. of applications submitted
Estimated total time: 3 man-days

After
Initial: 9 steps
Follow-up: No. of applications submitted + 1 step
Estimated total time: ½ man-day

5 Conclusion

The automated process of preparing the monthly tracking system has resulted in great savings in terms of man hours as well as increased staff satisfaction due to the reduction of the amount of repetitive and mundane work, thus allowing staff to be freed up to focus on other areas of work.