ADMINISTRATIVE PROCESS IMPROVEMENT PROJECT

Paper Budget Revisions

The following document was reviewed and approved by the Project Team at a meeting held August 30, 2012.

"TO BE" PROCESS ENABLERS

This contains the key assumptions that are critical to enable the "To Be" process to become a reality. While the prime focus of this project is on Paper Budget Revisions, some assumptions may apply to other processes, including online budget revisions. The **preferred method** of budget revisions should be Banner Self-Service when applicable. Paper budget revisions should only be used to accommodate the following exceptions:

- Transfers between funds
- Permanent base budget
- Carry forward
- Revenue
- Transfers between orgs (if not authorized)
- Plant funds
- Projects
- Renewals &Replacements

POLICY AND PROCEDURES

1. In the spirit of achieving **Service Excellence**, we will strive to make the administrative processes as simple as possible, while adhering to best practices, policy and regulatory requirements.

2. All participants in a process, across the institution, will adhere to the relevant policies and to the agreed process steps, including published deadlines.

3. Participants in the process will respect the process and will trust it. Roles will be defined and people will follow the processes assigned to their role.

4. Incorrect or incomplete forms will be returned for prompt correction and resubmission.

5. Paper budget revisions that can be processed using Self-Service Banner online form will be returned to requestor to create the revision online using electronic approvals.

6. Access to create Banner Self-Service budget revisions across organizations will be granted with appropriate approval signatures on the Banner B&F access form.

7. It is the obligation of each person at the University to make full use of the resources, with an emphasis on training that is provided to help them perform better; it is also the obligation of each responsible official to ensure and support that they and their staff obtain appropriate training.

8. All levels of management will support these policies and will foster a culture of service excellence by their staff, both internally and between units.

9. The University will assess the improvements in any process at regular intervals to identify opportunities to further refine and improve the process, identify policy changes and continue the process improvement.

TECHNOLOGY

1. The process will be supported by using available technologies that include online form entry, document scanning, workflow based approvals that will help reduce errors through system controls, links to other systems and ease of use. The new paradigm is one that emphasizes electronic content/data over paper

2. Participants in the process will make optimal use of software to reduce the creation of paper based processes and will make every effort (including training) to exploit the functionality of the software