



From: Clay Woemmel, Assoc. Director Career Services
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To: Project Management Group
Re: Employee Educational Benefit Process Team

Basic Assumptions:

- Current process is paper form. Forms sometimes are lost between the employee, department signatures and HR Benefit office. Departments file paper forms.
- HR Benefit office receives all UofM employee education forms (PC191, Staff Scholarship and Spouse/Dependent) to validate and approve.
- HR Benefit office currently determines and calculates the student fee waivers from a fee table hosted on the Registrar website. They then post the tuition waiver to the Banner Student A/R record.
- Bursar office spends hours with the manual billing process.
- Bursar office has to manually create JV transactions that are sent to accounting to create charges for the tuition waivers and fees.
- Bursar office currently determines which class to apply specific scholarship to.

Synopsis of Changes:

- Create a new electronic waiver form that will validate employees' eligibility. If employee not eligible, the form cannot be created. Form will validate:
 - Employee FTE
 - Employee hire date
 - Dependent age for Spouse/Dependent form
 - Department manager approval required if classes taken during normal work hours
 - Display registered classes and time and allow employee to indicate which scholarship to apply to which course.
 - Use Banner tables, calculate the fee waivers
 - Forms can only be processed during timelines set by TBR.
 - Allow functionality to add a non-UofM employee record to the database for ease of creating tuition waiver records.
 - Eligibility Verification Entitlement Act (EVEA) will be added to form to enforce guidelines.

- Eliminate HR Benefits from reviewing PC191 forms. If the employee is eligible then the form will move forward in the process. These forms are automatic approvals if eligible.
- Implement Third party billing option to eliminate the current manual excel invoice process for non UofM employees.
- Use Evisions Form Fusion to create an invoice template.
- Use Dynamic Forms created a new Senior Citizen waiver form.
- Capabilities to create the JV record for accounting from the new database, eliminating manual process of entering the fee waivers into Excel.
- Added new status code for Staff/Scholarship and Spouse/Dependent for ease of identification and reporting.
- Create Banner A/R record for tuition waivers from the eWaiver database. Eliminates manual data entry, saves time and eliminates paper filing.

Reports Created:

- Argos dashboard report created for Bursar office to assist with validations of non UofM employees with educational fee waivers.
- Argos exception report for Benefits office to review between eWaiver record and A/R record to easily identify when classes are dropped.
- Argos report by scholarship types for HR Benefits.

Timeline:

- July for fall registrations.

Recommendations:

- HR will no longer review employee forms for onsite classes. Those will be validated by the system.
- HR will no longer calculate fee waivers; the new eWaiver form will have that functionality.
- Bursar will use the Banner third party billing process for outside agencies.