

## *Administrative Process Improvement Project*

### *Outcomes*

### *Employee Education Benefits*

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The Employee Education Benefits team analyzed all the processes that are involved with submission, validation, fee waiver calculations, billing and updating scholarship registration codes. This included a review of the Fee Waiver (formerly PC191), Staff Scholarship and Spouse/Dependent forms. TBR and UofM policies were reviewed for compliance and website documentation was updated. Below are the outcomes:

#### **Developed eForms:**

- Eliminated paper forms for Fee Waiver, Staff Scholarship and Spouse/Dependent forms
- Forms are automatically validated for current employees, eliminating the manual lookup by HR Benefits staff
- Automatically populates employee information and department index for spouse/dependent charges
- Automatically verifies state Eligibility Verification Entitlement Act (EVEA) for employee, spouse/dependents taking UofM courses
- Submission dates for Fee Waiver (formerly PC191) is controlled by system date
- Created new database for maintaining education benefit records
- Electronic signatures are captured for employees, managers and HR Benefits signatures
- Eliminated unnecessary manager's signatures. Managers are only required to approve the form if employee is taking a course during their regular work schedule
- Employee prints the forms, eliminating the waiting period for forms to be processed and returned
- Eliminates copying of forms and forms being lost
- Eliminates data entry errors
- Eliminates manual email communications to the employee during the process

#### **Bursar Administration Tool:**

- Functionality to enter paper forms received from UT/TBR system and other State agency employees and their dependents
- Functionality to create AR file for Banner update for tuition waivers, eliminates the manual data entry for each form
- Functionality to flag a record 'Delete' if form needs to be cancelled
- Automatically verifies state Eligibility Verification Entitlement Act (EVEA) for employee, spouse/dependents taking UofM courses from other state agencies
- Validates age eligibility for exemptions that have age requirements
- Automated Email notifications to communicate any issues incurred

#### **HR Benefits Administration Tool:**

- Functionality to enter paper forms for UofM Retirees and ROTC forms
- Functionality to flag a record 'Delete' if form needs to be cancelled
- Automatically verifies state Eligibility Verification Entitlement Act (EVEA) for employee, spouse/dependents taking UofM courses
- Validates age eligibility for exemptions that have age requirements

**Automated Process for the Accounts Receivable file created:**

- Designed a process to create the AR file with the calculated tuition amounts
- UC4 software used to create a process to update Banner Student records with tuition discount
- Eliminates manual calculation of tuition discounts by the HR Benefits office.
- Eliminates manual posting to the Student record tuition discount by the HR Benefits office.

**Registration Code Update:**

- Designed a process to update the scholarship registration codes prior to 14<sup>th</sup> day reporting
- Eliminates manual updates to the student records by the Bursar Office

**Updated forms for Retirees/ ROTC:**

- Simplified the forms for retirees and ROTC affiliates to complete

**Website Updates:**

- Documentation updated for the new process
- Updated to reflect policy
- Cosmetic updates for easier reading

**Portal Portlet:**

- Employee Education Benefit portlet accessible from the 'Employee' tab for employees access to forms submitted (available for current term only)

**Metrics: Total Time Savings 445 hours over 2 semesters**

- HR Benefits: UofM employees scholarship paper forms:
  - Fall 2015 estimated 450 paper forms and Spring 2016 383 paper forms
  - HR Benefits estimates 15 minutes to validate eligibility, calculate waiver and enter tuition waiver in Banner is about 15 minutes per form
    - New process eliminates HR Benefits from handling those forms a time savings of 208 hours over 2 semester of a staff member
  - No longer need to copy, file forms and pass forms to Bursar office
- Bursar Office: External paper forms from TBR/UT institutions and other state agencies:
  - Fall 2015 estimated 1,300 paper forms and Spring 2016 1,215 paper forms received
  - Bursar estimates 5 minutes per form to validate student is EVEA verified, dependent's age, registration dates.
    - New process Bursar office will enter the forms into the system and the system will perform the validations, a times savings of 209 hours over 2 semesters of a staff member
- TBR 14<sup>th</sup> day reporting requires registration codes for Fee Waivers (formerly PC191) be changed to conform to standardized reporting.
  - Fall Spring estimated 354 paper forms and Spring 2016 210 paper forms
  - Bursar estimates it takes 3 minutes per form
    - New process the manual entry has been eliminated by automating the Banner update using a script, a time savings of 28 hours over 2 semesters of a staff member
- Reduction in cost by eliminating copying of forms

**Future Recommendations :**

- Build an administrative tool for Shared Service Center
- External invoices will be processed by Shared Service Center – team to begin May 2016
- Build process to create the monthly JV file to charge employee's departments for external tuition discounts
- Implement Banner AR Billing Module for external invoicing