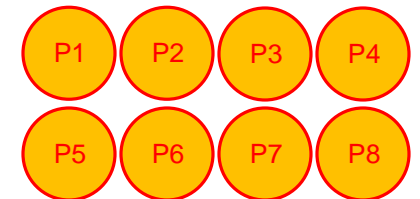
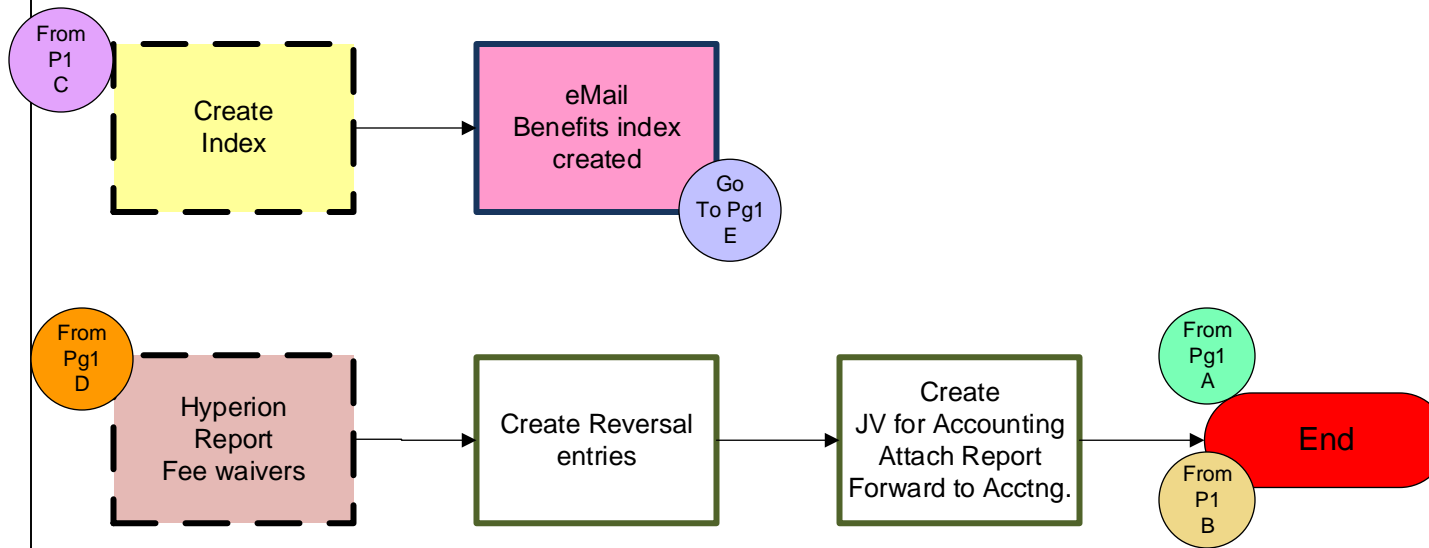


Bursar



Pains & Issues:

Please Read First:

The issues and pain points identified during the As Is Process Mapping workshop and the Analysis workshop are noted below. The Issue is numbered and its Root Cause Analysis is in red text, preceded by RCA prefix.

1. Process is paper

RCA: No electronic form or electronic signature process

2. Billing process time consuming

RCA: The way we interpret the way to business

3. Paper forms lost, therefore process has to start from the beginning

RCA: There isn't a tracking process in place for departments to know the last office that had possession of form

4. Index and exemption codes does not exist in Banner, delays the process

RCA: When new accounts are created, procedures do not require that an numbers be created in Banner

5. Revenue reversal process for TAFF, facilities (these are summarized on the account)

RCA: There aren't specific banner codes to easily charge these items, so it is a manual process to track, summarize and create JV

6. Out-of-state fee charges are identified after original process and posting of the waiver. Fee assessment is based on residence codes. All employees are exempt from out of state rates. Extra charges may show up on student account

RCA: Residence code is not identified when form is received in Benefits office

7. Departments are unaware of charges that will be charged to their accounts prior to JV entries are processed

RCA: Departmental approvals are not required

8. EVEA not verified (residence verification)

RCA: This is not currently verified prior to reaching the Bursar office therefore the process has to stop until the student has completed the process

Analysis of the 'AS IS' process

1. Are all roles essential? **Yes**
2. What is the number of hand-offs? **2**
3. Are any steps automated? **No**
4. Iterations (how many times is process repeated in a timeframe)? **Three times a year, spring, summer and fall semesters**
5. What tasks consume the greatest amount of time? **Creating the index and the creating reversal entries**
6. Does the task add value? **Yes**
7. What steps can be eliminated or automated? **Create electronic form with routing for signatures**
8. What steps should be added? **Possible addition that auxiliary departments are notified that account will have charges**
9. Percentage of errors (forms returned, corrected, contacted person for corrections, etc.) **5%**

Legends

