





# Employee Staff Scholarships – Staff Scholarship – AS IS

Pg.3 Sept 4, 2014

Bursar-Acct Clerk

From  
P2  
H

Review

P1

Bursar-Asst. Manager

Hyperion  
Report  
Fee waivers

Create Reversal  
entries

Create  
JV for Accounting  
Attach Report  
Forward to Acctng.

From  
P1  
A

From  
P2  
D

End

From  
P2  
C

From  
P2  
E

P1

P2

P3

P4

P5

P6

P8

P10

## *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. 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

3. Staff Scholarships, if used along with a PC191, should be submitted secondary per TBR policy. PC191 covers fees that Staff Scholarship does not

RCA: Employees do not know or understand the rules

4. Course on Scholarship form does not match course registration. Benefit office contacts the employee and ask them to email clarifying the reason for the difference.

RCA: Employee can change their decision between time form created and arrives in HR office

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.

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

7. Obtaining several approval signatures

RCA: Not all signatures deemed necessary, some are just a 'stamp of approval'

8. Several handoff actions

RCA: Paper process

9. Manual calculation of waivers using paper fee assessment document with tuition codes. Because fee assessments are not processed systematically until a later date

RCA: TBR has not approved fall fees at time waivers are processed

10. EVEA residence verification

RCA: State law requirement

## Analysis of the 'AS IS' process

1. Are all roles essential? **No – could eliminate the Chair if they are not taking a day class and Dean/AVP/Designee signatures**
2. What is the number of hand-offs? **4**
3. Are any steps automated? **No**
4. Iterations (how many times is process repeated in a timeframe)? **Three times a year, fall, spring, summer**
5. What tasks consume the greatest amount of time? **Employee verification, determining waivers, manual process to create JV, creating reversal entries**
6. Does the task add value? **Need to determine the value of validating the class registered matches form**
7. What steps can be eliminated or automated? **Create electronic forms to route for signatures**
8. What steps should be added? **None**
9. Percentage of errors (forms returned, corrected, contacted person for corrections, etc.)

# Legends

