Outside Scholarship – "AS IS"

Cashier

START → Receive Check/Docs → Receipt Check → Make 2 copies of Receipt, Check & Docs → [Copy of Check | Receipt | Supporting Documents] — Hand Off

Bursar Admin

Create Outside Scholarship Form Copy Support Docs
- Check Copy
- Receipt
- Supporting Documents
- Hand Off

Go To P2 A

P1 P3 P4 P7 P8

Outside Schlrshp
- Check Copy
- Receipt
- Supporting Documents

File Bursar Copies

Go To P2 B

Bursar Managere

Review Outside Scholarship
- Check Copy
- Receipt
- Supporting Documents

Validated Posted: Correct Student, Check amount & Check number

Correct? — YES → Return to Bursar Admin

NO → E-mail Student Aid Counselor Corrections

Return to Bursar Admin
- Outside Schlrshp
- Check Copy
- Receipt
- Supporting Documents
- Hand Off

P3 P4

Outside Scholarship – "AS IS"

Student Aid Counselor

From P1 A → **Review Outside Scholarship**

- Check Copy
- Receipt
- Supporting Documents

→ **Validate Eligibility Student Acct Correct** → **Athlete?**

Athlete? — YES → **Deliver To Fin Aid**
- Outside Schlrshp
- Check Copy
- Receipt
- Supporting Documents
- Hand Off → Go To P3 C

Athlete? — NO →

From P3 E → **Eligible?**

Eligible? — YES → **Awarded Max?**

Eligible? — NO → **Email Bursar Return Check**

Awarded Max? — YES → **Adjust Budget**

Awarded Max? — NO → **Enter award on RPAAWRD**

Adjust Budget → **Enter award on RPAAWRD** → **File Packet**

Email Bursar Return Check → **File Packet**

File Packet
- Outside Schlrshp
- Check Copy
- Receipt
- Supporting Documents

→ From P1 B → **End**

P3 P4
P9 P10
P11

Outside Scholarship – "AS IS"

Financial Aid Assoc. Dir

From P2 C

Outside Scholarship
- Check Copy
- Receipt
- Supporting Documents

Email Athletics Student Information

Validate Eligibility

Return Packet Indicate if Eligibile
- Outside Schlrshp
- Check Copy
- Receipt
- Supporting Documents
- Hand Off

Go To P2 E

P3 P4

P5

Asst. Dir. Compliance

Email Student Athletic Outside Schlrshp Form
- Athletics Outside Scholarship PDF
- Hand Off

From P4 E

Review Form

File Form

Email if Student Eligible for Award

P4 P6

Student

Send to Donor
- Hand Off

Go To P4 D

P1 P3 P4 P6

Outside Scholarship – "AS IS"

Donor

From P3 D

Complete Form

Hand Off

Go To P3 E

P2 P3 P4 P6

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. Students are not notified the award was denied
RCA: There isn't a notification process in place. Student wait and check their accounts.

2. Donors are not notified prior to receiving returned check the student was ineligible.
RCA: There isn't a notification process in place.

3. Process is paper.
RCA: There isn't an electronic process in place.

4. Many handoffs in the process, #
RCA: Paper forms requires walking forms to several departments throughout the process

5. Financial Aid is a place holder for athletic students paper work.
RCA: Always been done that way.

6. Athletic donor form is paper.
RCA: There isn't an electronic process in place.

7. Forms are copied and filed in binders, as departments want their own copies.
RCA: There isn't a central shared data repository.

8. Delay in returning funds to Donor due to required W9 forms needed.
RCA: W9 forms are not required when money received.

9. Ineligible forms and incorrect forms.
RCA: Forms are hand written.

10. Filing forms in binders, storing and archiving.
RCA: Need for historical retention.

11. Departmental notes need to be added to the form.
RCA: Documentation need Banner student account, name of donor and etc.

Analysis of the 'AS IS' process

1. Are all roles essential? What roles could be considered to be eliminated? Yes

2. What is the number of hand-offs? 7

3. Are any steps automated? No

4. What steps can be eliminated or automated? Eliminate Student Aid Counselor from processes relating to Athletic students. Convert scholarship form to an online electronic process with workflow for approvals.

5. What tasks consume the greatest amount of time? Validating eligibility and writing award information on the forms, and walking form between departments.

6. Does each task add value? Yes

7. What steps/process should be added? Notifications to student and donor when a scholarship cannot be awarded.

8. Iterations (how many times is process repeated in a timeframe)? Heaviest beginning of a semester, 10-15 weekly.

9. Percentage of errors (forms returned, corrected, contacted person for corrections, etc.) 2%

10. % FTE and/or estimate time takes for each key role in the process.
    Bursar – 5% combination of three positions (Cashier, Bursar Admin & Bursar Mgr.)
    Student Counselor – 5-10%
    Financial Aid Asst. Dir – 1% (only involved with athletic students)
    Athletic Assoc. Dir – 2%

Analysis of the 'AS IS' process

11. Metrics – identify measurable outcomes (time, manual steps, paper, manual communications, unnecessary reviews &
approvals). Identify current time spent on task for roles: 1086 forms academic year/50 are Athletic Students time= 743 hours
Bursar Admin – 15 min per form * 1086 = 272 hours
Bursar Manager – 5 min per form * 1086 = 91 hours
Student Counselor -   20 min per form * 1036 = 345 hours
Financial Aid Asst. Dir – 10 min per form * 50 =8 hours
Athletic Assoc. Dir – 25 minutes per form * 50 = 21 hours

Archive Yearly records = 6 hours will be saved due to records will be stored in DocuSign

Potential cost savings: purchase of binders, paper, eliminate 3 ply forms, time savings

Legends

START

E-mail Notifications

Manual Process

Outside Scholarship Form

Banner Student & Fin Aid

Athletics Outside Scholarship Form

Copy of Check

Receipt

Supporting Documents

Hand Off

Decisions

NO

Yes

Pains

Connectors

From Pg1 C

Go To Pg1 F

End

Consider for Phase 2 implementation - Put on hold if waiting on Confirmation of final semester enrollment

Penultimate Semester: Contact faculty advisor for names of honors students

Text

Information about process

Text box

text

Text Box

Text Box