University Process Improvement
Project Updates August 2021 – February 2022

SUMMARY:

Completed – 5 projects since August 2021
Active projects – 7
New Projects - 2
Future projects – 6

COMPLETED PROJECTS:

1. **Access Control – Lambuth Campus – August 2021**
   - Initial key inventory load for staff was completed in June. Faculty will complete their inventory in August.
   - Lambuth employees will begin using the system to request office/building keys/fobs in mid-August.
   - New feature will provide departmental billing.

2. **COVID-19 Communications (Completing August)**
   - Provost formed a team to draft communication plans and promotional materials to promote faculty, staff, and students to be vaccinated.
   - Signage placed throughout campus advertising on-campus clinics.
   - Promotional material provided for New Student Orientation.
   - COVID-19 website updates.
   - Parent communication encourages vaccinations among students.

3. **Graduate Transcript Submission**
   - Requested improvements to the vendor application to simplify the information that was presented
   - Review existing web pages for graduate admissions and developed a list of recommendations to provide clarity
     - Where official transcripts should be sent
     - Consolidated information into 3 categories – Accepted, New or Existing Student for ease of finding relevant information
   - Graduate school communicate to departments procedures if they receive official transcripts
   - Created Argos email burst to remind students their official transcript has not been received

4. **Student Job Postings – August 2021**
   - New website was created that lists jobs available and hiring information for students and departments.
   - Students are required to apply in Tigerlink (Handshake).
   - Standardized department job posting webform created to post jobs in Tigerlink (Handshake).
   - Policy SA8010 Student Employment was created and approved.
   - Incorporated Chartwells and Follett job postings.
   - Students benefit with a single point to look for campus jobs.

5. **Softdocs Etrieve Implementation**
   - Softdocs is a cost-efficient solution for departments needing electronic signatures and workflow.
   - Softdocs will replace current DocuSign forms.
   - Coordinate kick-off meeting with the Softdocs Project manager and department representatives.
   - Coordinate and attend all training sessions in November 2021.
   - Maintain initial DocuSign master list for conversions.

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ACTIVE PROJECTS:

1. **Access Control – Annual Audit & Non-Compliance Reporting**
   - Coordinate 2022 annual access inventory audit for faculty/staff with Business & Finance and IT staff.
   - Lambuth campus is included with the 2022 audit.
   - Maintain compliance with policy GE2009.
   - Continue to add new features that will improve the process and reporting.

2. **Chrome River**
   - Facilitating and engaged with the testing of the Chrome River system.
   - Removal of Direct Pay feature - complete.
     - Issuing payments with Banner.
     - Update Chrome River expense reports with paid information.
   - Testing of Encumbrances, Liquidations and Final Liquidations
     - Currently liquidations and final liquidations are not processing correctly.

3. **Dual Service Employee Agreements**
   - Project scope to review current undocumented process, document and publish procedures.
   - Designing a new website with FAQs and document procedures.
   - Review paper Dual Service Proposal form and update with Softdocs.

4. **Foundation Budget & Reconciliation Process**
   - Streamline the budget reconciliation process throughout the fiscal year (scholarship office, foundation office & colleges).
   - Allocate all scholarship funds during the academic year, as appropriate.
   - Document and train stakeholders on the tools available (Argos's dashboard) to assists in making decisions.
   - Create a Scholarship Management policy as it relates to the percentage donor funds spent for the academic year, as appropriate.

5. **Graduate Assistant eContract Redesign**
   - GA eContract system was originally developed in 2011.
   - Through the years several modifications and process changes have deemed the process would benefit from a complete redesign using new features from the Temp and Student eContract systems.
   - New design provides the ability to create multiple work assignments, to multiple departments and route for appropriate approvals.
   - Tuition is no longer linked to the assignment but can be charged to the appropriate grant or department.

6. **Labor/Salary Redistribution**
   - Implementing Banner Self-Service base-line Labor redistribution module for implementation.
   - Allow designated departmental staff to manage salary re-distributions with appropriate electronic approvals, eliminating routing of paper forms.
   - Process will reduce data entry errors and transactions by Grants Accounting and Financial Reporting staff.

7. **Softdocs Projects**
   - Cares Conditional Enrollment
     - Process review of current forms and reduced to one single form.
     - Eliminated unnecessary fields.
     - Integrate Banner data to reduce errors and provide time-sensitive data for decision-making.
     - Eliminate an estimated 1000 DocuSign submissions.

For additional information or to suggest a project, go to **http://www.memphis.edu/processimprovement/**

- Foundation/Advancement
  - Process review of four (4) DocuSign forms.
  - Department managers review the current form for updates before development begins.
  - Reduce forms into two forms.
  - Eliminate current word templates and train Development Directors to use Softdocs forms.

NEW PROJECTS:

1. Implementation of new Student & Temp position classifications – Pooled positions for student and temp employees to provide categories and salary ranges. May require updates to Banner and the eContract systems. Fall implementation

2. New Faculty Salary Splits process for HERD (Higher Educations Research Development) annual reporting to include non-restricted faculty salaries. Requires updates to Banner and Effort Certification system. Fall implementation.

FUTURE PLANNED PROJECTS FY23 (START DATES TO BE DETERMINED)

1. **Assets/Equipment Inventory (Project on Hold)**
   - Completed review of the current Banner workflow process, identified issues, mapped process flow, reviewed documentation, and training available. The process is cumbersome and doesn't match the policy.
   - Softdocs is being evaluated as a possible solution.

2. **Banner Effort Certification**
   - Evaluate Banner baseline Effort Certification process to replace the current in-house system. This process will allow faculty certification verification in Banner and in a timely manner.
   - Baseline module would replace the current in-house system developed by IT.
   - After evaluation, the team will determine if the system benefits the university.

3. **Banner Grants Billing module**
   - Evaluate Banner baseline Grant's billing module to replace the current paper process.
   - Streamline and enhance current procedures, eliminate manual approvals, manual invoicing and improve efficiencies.
   - After evaluation, the team will determine if the system benefits the university.

4. **Faculty Status Change (9-Month)**
   - Develop an electronic eContract with approval workflow and eliminating unnecessary processes and paper forms.
   - Enhance for improved error checking and validations, like the new Temporary eContract system.

5. **Leave Reporting tied to Payroll Process**
   - Process will improve leave overpayments when employees' leave balances are inadequate to cover payment and reduce the current labor-intense indebtedness process.
   - Project start depends on HR staff availability.

6. **Student Complaints**
   - Review current process for students to file complaints and develop a single point of entry.
   - Determine who will manage complaints.
   - Project scheduled to begin in March.