THE UNIVERSITY OF MEMPHIS®

Administrative Process Improvement Projects:
Status as of January 2015

COMPLETED PROJECTS Summer 2013 - Fall 2014

Travel for Shared Services Center – Recommendations – Began July 1, 2014 **Completed: December 2014**
- Scope: Review the 2014 TBR travel policy updates; identify the pains and issues with the current process. Identify and implement improvements for the traveler using the Shared Service Center.
- Outcomes:
    - Team recommends an electronic process to eliminate the current paper process.
    - Solutions are to develop an in house electronic form or purchase an existing software solution.
    - Software demos were reviewed in December with ConCur Solutions and Ellucian Banner Travel and Expense module.
    - After the demo the team recommends the evaluation of purchasing the Ellucian Banner Travel and Expense module.

Temporary Staff Appointments – Began May 20, 2014 **Completed December 2014**
- Scope: Review current policies, administrative processes and practices related to the recruitment and appointment of temporary employees. Include detail process mapping to design and implement an improved process, using the eContract/EPAF model. Create reports as needed, to meet the needs of end users departments, HR, and Shared Services. Update existing documentation/training materials and websites.
- Outcomes:
    - An improved paper form was created to meet the January 1st deadline for all temporary employees to receive new contracts beginning 2015.
    - WorkForum Temporary Applications forms went live January 2015.
    - Phase II is recommended to begin 2015 to incorporate an EPAF solution with Shared Service Center.

Part-Time Faculty – eContract to EPAFs – Began January 2014 **Completed: May 2014**
- Scope: Using the work of the 2011 Part-Time Faculty Appointment Team as a starting point, develop and implement an electronic appointment process for part-time faculty (Banner E-Class = PF) using the eContract/EPAF model. (Note that effective spring/early summer 2013, all EPAFs will be created by the Shared Services Center.) Create or modify existing reports, as needed, to meet the needs of end user departments, HR, and SSC. Create or modify documentation and training.
- Outcomes:
    - New eContract was created eliminating the paper process.
    - Shared Services will create all EPAFs for the departmental users, reducing errors.
    - ARGOS reports were created for the departmental users.
    - User's guide was created for the eContract process and how to process ARGOS reports.
    - Updated WorkForum application to add data needed that eliminated the current paper form.
    - Eliminated the entire paper packet creation process, saving time and reducing paper cost.
    - Training sessions were provide

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

GA eContract enhancement for RCM Budget Model – Began October 2013 **Completed: May 2014**
- Scope: In order to adopt Responsibility Center Management (RCM) Budgeting formula for fall 2015, the team met to identify the changes needed for the GA eContract and Banner EPAFs.
- Outcomes:
  - GA eContract was enhanced to separate Master and Doctoral students.
  - New Banner eClasses were created for ease of reporting GA student levels.
  - ARGOS reports were created for the departmental users.
  - Training materials were updated to reflect changes.
  - Training sessions were provided.

Pre-New Student Orientation – Began September 2013 **Completed: April 2014**
- Scope: Review the current pre-NSO Advising Activity; explore and test alternative methodologies, with a focus on improving advisor access to the information in order to improve the advising experience for the student. In addition, the team will determine whether other information might assist the orientation or student affairs areas as they work to continuously improve service to our students.
- **Outcomes:**
  - NSO reservation website was updated to include the Google doc questions. Information will now be stored in one system and easily accessible by advisors.
  - New NSO Dashboard report was created that will provide student information to the advisors in one single source.
  - Training materials were created and training sessions provided for Advisors.

Facilities Minor Renovations – Began August 20, 2013 **Completed: March 2014**
- Scope: Review current administrative processes and practices related to minor facilities renovations, to completion; Identify and implement 'Quick Hits' to standardize, streamline and improve process, maximizing the use of existing technology to the extent possible and improving coordination across units.
- Outcomes:
  - New Oversight Committee was formed that consist of the Assist. VP Campus Planning Design, Asst. VP Physical Plant and Director of Space Planning to review new projects, current projects and determine next steps.
  - New Website was created that centralized information for renovation projects.
  - New Policy addressing Facilities and Grounds Alterations and Improvements.
  - March 2014 the team decided to end the PIP project and work toward an ERP solution.

English Department Policy & Procedures – Began November 22, 2013 **Completed: January 2014**
- Scope: Conduct a systematic review of the Department's policy and procedure handbook; develop recommendations for possible revisions with the goal of increasing effectiveness and advancing the Department's goals.
- Outcomes:
  - Adopted electronic voting, eliminating the paper process and manual tabulation of votes by the admin.
  - Agreed to make accessible all voting counts to all department faculty and staff members.
  - Committee structure was increased to allow for an odd number of members.
  - Eliminated unnecessary committees.
  - Updated terminology.

Academic Advising Website Review - Began May 2013 **Completed**: **September 2013**
- Scope: Review Advising website for content and web links. Simplify webpages for ease of use for advisors, faculty and students. Create FAQs for frequently ask questions that list issues and impact student registration.
- Outcomes:
    - Redesigned the webpage layout to organize, simplify and display information
    - Reviewed 18 webpages
    - Created 'categories' for ease of locating information
    - Added web links to valuable information for students and advisors
    - Evaluated and updated information
    - Coordinated efforts with 'Advising Packet' team to create the advisor 'Getting Started' category

Advisor Packet for Campus Advisors - Began July 2013 **Completed: September 2013**
- Scope: Create packet with necessary information needed for all advisors, new and current, to assist when advising students. Include Best Practices, Banner forms, UmDegree, Appointment Plus software and guidelines.
- Outcomes:
    - Created FAQs on how to use Banner forms
    - Created an Advisors Resource List
    - Developed Quick guide or UMdegree
    - FAQs for RODP
    - Created Student Resource Directory to easily locate their advisors

Advising Load & Effectiveness – Began April 29, 2013 **Completed: June 2013**
- Scope: Review advising responsibilities across campus, focusing on the effectiveness of our current advising system(s) and the corresponding accountability structure. Examine various advising strategies based on existing research, with a focus on the effectiveness of centralized vs. decentralized vs. hybrid models. Review research-based best practices for advising students; identify gaps, if any. Review available data on student satisfaction with advising (from existing surveys). **Implement 'quick hits' where possible**. Evaluate feasibility of changes to current advising system(s) and practices, and make recommendations regarding next steps. Recommendations need to be realistic given our current budget realities (i.e., no new positions).
- Outcomes:
    - Advisors assigned to student upon accepted admissions.
    - Advisor packets created to assist new advisors.
    - Advisor website was reviewed and improvements made for ease of use.
    - Script created that will remove advisor name associated to a student upon their graduation, eliminating manual data entry.

Graduate Assistant Reports Work Team – Began April 22, 2013 **Completed: June 2013**
- Scope: Finalizing reports needed for GA processing. Highest priority: reports needed by Graduate School, Bursar, and HR Records. Next priority: departmental reports.
- Outcomes:
    - Reports were created that assisted the graduate office and the departmental users' key information to evaluate eContracts and EPAFs.

Graduate Assistant Appointment for Shared Services – Began March 27, 2013 **Completed: June 2013**
- Scope: Utilizing the existing AS IS process map as a starting point, develop a TO BE in the pilot Shared Services center for the GA Appointment process. If warranted and in phases if needed, design and implement this new process, utilizing current University policy, existing technology and the online Shared Service Center 'ticket' system
- Outcomes:
    - Identified information and process that allows Shared Service Center staff to create an EPAF after departments created the eContract and student has accepted the terms.
    - Two pilot departments for Fall 2013 used the process: Psychology & Foreign Languages

ACTIVE PROJECTS

Employee Educational Benefit - Began July 9, 2014
- Scope: Review current policies, practices, and administrative processes relating to Employee Staff Scholarship fee discounts/waivers associated with the following: PC191, Staff Scholarship and Spouse/Dependent. Gather best practices from other institutions; identify quick hits to be implemented and   determine the feasibility of implementing an electronic approval process. Update existing websites if needed. Team has designed an electronic process using IT resource to create a eWaiver form to flow to HR and Bursar office. Determined that Student A/R records can be created with a batch process. Part of team   recommendations is to implement the A/R billing module to eliminate the manual invoicing process.

GA eContract Appointments - Began September 10, 2014
- Scope: Review the current GA eContract to incorporate enhancements that will allow department flexibility in the terms offered for fee waivers and stipend amounts. Determine if contract periods should be for a semester or for full academic year. Incorporate departmental signatures and conform to the new eContract format. GA EPAFs will be modified to comply with new process flow. Update existing documentation/training materials and Argos reports.

Faculty Summer Comp – Annual Review – Began January 5, 2015
- Scope: Summer Compensation team will evaluate e-Contract for changes needed to incorporate all Academic department approvals, re-activate pre-term (May), remove EPAF (Electronic Personnel Action Form) Academic departmental approvals, update Argos reports and update online section help for summer 2014.

TigerBuy Process – Began January 15, 2015
- Scope: Review the current TigerBuy process, perform risk assessment of the current procedures with an emphasis on separation of duties during the requesting, approval and receipting of orders. Review internal controls, the university signature policy and propose improvements to current controls or additions by April 1st.

Termination Users' Banner Access Review – Began January 23, 2015
- Scope: Review the current processes and make procedural changes to remove banner access for terminated users in a timely manner. Review policies and procedures and recommend changes where applicable based on risk assessment by April 1st.