University Process Improvement
Completed Projects Update
March 2020

SUMMARY:

- Ten (10) projects completed since January 2019
- Student eContract system has a major impact on students
- Estimated student hours saved is 202
- Estimated staff hours saved is 3,000

COMPLETED:

1. **P-Card Program Review, Expansion of Usage** (P080)
   - Expand usage to create efficiencies and increase revenue stream.
   - Develop new training materials and guidelines.
   - Create DocuSign form created for P-Card applications with electronic approval routing.
   - Currently piloting US Bank Travel cards with select campus users.

2. **Strata Back to Basic – Banner Review**
   - Scope – Review current business processes, use of Banner to identify ways to relieve pain points and become more effective and efficient.
   - Outcome – Strata consultants held several onsite sessions for key functional areas to review departmental processes and discuss what baseline processes could eliminate current TBR modifications. Strata provided a detail report on actions needed to accomplish the goals set by the teams.

3. **Cayuse/Banner Integration Implemented** (P083)
   - Scope – Analyze and assess the related business processes and policies supporting sponsored research at the university, with a particular focus on the implementation and integration of the two main enterprise software systems (Cayuse and Banner). Improve operations by supporting the research mission.
   - Outcome –
     - Added new codes to Banner to improve functionality to support data integration form Cayuse.
     - Added new functionality to Cayuse and identified new data to load to Banner.
     - External consulting firm wrote the program integration to load Cayuse data to Banner.
     - Created new reports for departmental users.
     - Enhanced the Principle investigator experience in Cayuse.

   *Estimated to save **2,000 staff hours annually** by eliminating manual entries, based on 500 submissions.

4. **Review University Benefits and Processing** (P084)
   - Scope – Review information provided to new hires during new employee orientation, all benefit related processes and communications to improve clarity and ease of locating information. Objective to simplify information provided to new and current employees on state and university benefits.
   - Outcome –
     - Update benefit related web pages and updated verbiage relating to the usages and differences in benefits available.
     - Created Benefits flyer that is emailed to new employees, so they are aware of choices to be made during new employee orientation.

5. **Banner Non-Student Billing Module** (P085)
   - Scope – Review current practices and administrative processes relating to Non-student AR Billing.
   Review Banner's baseline Third-Party billing module as a solution to streamline, automate and eliminate paper and manual processes.
     - After a thorough system review and testing, it was determined to research other external products for non-student billing.

6. **Staff Senate Elections** (P086)
   - Scope - Assist staff senate president and election chair in preparing for annual elections with up to date employee list, email communications.
   - Outcome –
     - Updated process and procedure guidelines.
     - Automated update process to staff senate email clusters, eliminating manual updates.

7. **One-Time Pay Process for Student and Temporary Employees** (P087)
   - Scope - Review current processes for requesting and paying for exception pay. Currently there isn't a defined process for student 'one time pay' for additional services (ex: commencement, ushers, playing musical instrument at events)
   - Outcome -
     - Design a 'One Time Pay' process to be include with the Student and Temporary eContract system.
     - Eliminate paper request and process of overstating hours worked on the students' timesheet.

8. **Travel Policy Updates** (P088)
   - Scope – Review travel policy and update to eliminate verbiage relating to 'procedures', enhance the ability to use features included with 'Chrome River Travel & Expense' software implementation.

9. **Access Control Annual Audit** (P089)
   - Outcome –
     - Create software specification for the access control system and testing.
     - Provided oversight for the roll-out and communication.

10. **Student Appointment eContract** (P90)
    - Scope – Review current policies, practices and processes relating to Student Employment. Design and create an improved streamline process that eliminates paper, create an electronic form submission, and captures approvals.
    - Outcome -
      - Eliminated paper forms.
      - Included eligibility validations, using Banner data. Eliminating need to research Banner forms.
      - Included 'One time' pay processing.
      - Financial Aid only process Federal Work Study contracts.

    *Estimated to save **202 student hours, 1,000 staff hours annually**, based on 1,213 form submissions.

PROCESS IMPROVEMENT RESOURES WERE DECICATED TO THE FOLLOWING PROJECTS:

1. **DocuSign Forms Created:**
   - Accounts Payable and Payroll Direct Deposit forms.
   - Service License Agreement.

2. **Facilitate review of Outside Scholarship process**
   - Team met to review usages of DocuSign form. Decision to eliminate DocuSign.
   - New reports were created and usage of a NAS shared drive.