University Process Improvement
Project Updates August – October 2020

SUMMARY:

Completed 4 projects since July 2020
Staff hours saved (125 annually)
Active projects - 5
Future projects - 7

COMPLETED PROJECTS:

1. **Academic Fall Preparedness Teams (July P094)**
   - Served as resource and provided administrative support for the following teams:
     - Remote Instruction
     - Risk Mitigation in On-Ground Instruction & Research Group
     - Student Success / Student Life

2. **New & Updated Forms relating to Travel/Advances/Reimbursements (August P095)**
   - Outcomes:
     - **Direct Deposit forms for Employees**
       - Updated the current DocuSign form to include Vendor banking information in order to create the Banner vendor record; reduces errors relating to Chrome River invoice processing. Form will route to Payroll and Accounts Payable for processing.
       - Created 'New Employee Direct Deposit' form that will route to Payroll and Accounts Payable for processing.
     - **Travel Advance Request** – New DocuSign forms created for student and faculty/staff that will allow the traveler to request funds prior to travel. Form will route for Controller approval. Faculty/Staff traveler can receive funds via their travel card up to 80% of the per diem allowance. Student can receive up to 100% travel advance.
     - **Travel Card Reimbursement** – New PDF form created to allow travelers to reimburse the University for travel advance overages and/or charges incurred that were not eligible for reimbursement per University policy.

3. **Chrome River Travel & Expense Software (August P096)**
   - Outcomes:
     - Completed software implementation, system configuration, rule codes and security
     - Designed new travel website
     - Created process and system training materials

4. **Student Non-Wage Payments – Scholarship/Stipend (October P097)**
   - Scope: Create a standardized process for department originators with a focus on eliminating Accounts Payable staff from the process. Currently requests are received by email, paper memo or excel document. These should be processed by Financial Aid rather than Accounting.
   - Outcomes:
     - Team created a standardized process by creating three new DocuSign forms for domestic, international, and cancellation
     - Eliminated Accounts Payable staff from receiving, researching and reviewing documents
     - Created a new hold code for the Tax Office to prevent payments to international students who have not provided the appropriate financial/tax documents.
     - Campus training was developed and posted on B&F forms webpage
   - **Estimated time savings 125 hours/academic year staff hours**

ACTIVE PROJECTS:

1. **Assets/Equipment Inventory**
   - Review current Banner workflow process, identify issues, map process flow, review documentation and training available. Process is cumbersome and doesn't match policy.
   - Per the Strata 2019 Finance report it was noted that Ellucian will decommission their support of the Banner Workflow product in the near future and replace it with their new Ellucian Workflow product.
   - Team recommended and received approval to design a new system that will be developed with University IT staff.

2. **Financial Aid Verification Process**
   - Review current university process for collecting student and parent information, creating a more efficient, streamlined process; improve form submission and use of DocuSign for redesign of the forms.

3. **Foreign Language Retroactive Credit**
   - Design a new Banner process that allows students to register for a 'Foreign Language Retro Credit' course via permit that's issued by their advisor.
   - Payments will be made through TouchNet.
   - Instructors will post credit earned to the student record once the student has passed the upper level course with a grade of 'C' or better.
   - Process will eliminate administrative staff processing paper forms, emails to the student, routing for departments signatures, Admissions staff posting credit hours.

4. **Labor/Salary Redistribution**
   - Review Banner Self-Service base-line Labor redistribution module for implementation. This will allow designated departmental staff to create salary re-distributions with appropriate electronic approvals, eliminating paper routing.
   - Distribute data entry across campus will reduce data entry transaction by Grants Accounting and Financial Reporting staff and reduce data entry errors.
   - Team has approved 'AS IS' mapping (current state) and reviewing system setup to begin testing.

5. **Review 2019 Strata Student Back-to-Basic Report**
   - Facilitate meetings with a small group representing Admissions, Financial Aid and Registrar offices to review the Strata reports to prioritize and determine which recommendations the team can implement.

NEW PROJECTS – FOR EXECUTIVE APPROVAL & PRIORITIZATION

1. **Banner Effort Certification**
   - Review Banner base-line Effort Certification process to replace the current in-house system. This process will allow certification verification in Banner and in a timelier manner.

2. **Banner Grants Billing module**
   - Review the Grants billing module to replace the current paper process. This will streamline and enhance current procedures, eliminate manual approvals and improve efficiencies.
   - Funding is requested for Strata Consultant to assist with implementation.

FUTURE PLANNED PROJECTS FY21 REVIEW FOR PRIORITIZATION:

1. **Access Control – Lambuth Campus – On Hold**
   - Enhance the Access Control System to collect and manage key inventory for the Lambuth faculty and staff. Include departmental billing, approval workflow and signatures, provide Lambuth Physical Plant ability to create unique key coding.
   - Waiting for Physical Plant decisions where/how keys can be made and purchase of equipment.

2. **Access Control – Annual Audit & Non-Compliance Report – Spring 2021**
   - Facilitate with Business Finance Reporting & System Initiatives and IT staff to coordinate the annual key inventory per policy GE2009. Reports will be electronically sent to Financial Managers with a list of employees who are out of compliance.

3. **Faculty Summer Comp eContract – Summer 2021**
   - Redesign Faculty Summer Comp eContracts for streamlining process, incorporate departmental signatures in the eContract and eliminate EPAF department signatures.

4. **Faculty 9-Month Reappointment – Spring 2021**
   - Develop an electronic eContract with approval workflow and eliminating unnecessary processes and paper forms.