Employee Staff Scholarship – Staff Scholarship – AS IS

Review

Validate Employee FTE/Eligibility (must be employed 6 months)

Are they eligible? YES

Attending UofM? YES

Verify Registered (SFAREGF) & Grade for past 2 years

Success completion prior term(s)? NO

eMail employee

Approve

Make Copy of form

eMail Employee to come pick up form

Go To P3 C

Go To P3 D

YES

Calculate Tuition ONLY Waiver

Post Fee Waiver/Exemption (TSAEXPP)

Hand Off

From P1 B

Go To P1 F

Update Form

From P1 G

Go To P3 H

Class on form matches registration? YES

eMail employee for correct information

Go To P1 G

NO

Complete = not withdrawn, not dropped, passed course(s)
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Bursar-Acct Clerk

- Review

- From P2 H

Bursar-Asst Manager

- Hyperion Report Fee waivers

- Create Reversal entries

- Create JV for Accounting Attach Report Forward to Acctng.

- From P1 A
- From P2 C
- From P2 D
- From P2 E

- End

- From P1
- From P2
- From P3
- From P4
- From P5
- From P6
- From P8
- From P10
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. Process is paper
   RCA: No electronic form or electronic signature process

2. Paper forms lost, therefore process has to start from the beginning
   RCA: There isn’t a tracking process in place for departments to know the last office that had possession of form

3. Staff Scholarships, if used along with a PC191, should be submitted secondary per TBR policy. PC191 covers fees that Staff Scholarship does not
   RCA: Employees do not know or understand the rules

4. Course on Scholarship form does not match course registration. Benefit office contacts the employee and ask them to email clarifying the reason for the difference.
   RCA: Employee can change their decision between time form created and arrives in HR office

5. Revenue reversal process for TAFF, facilities (these are summarized on the account).
   RCA: There aren’t specific banner codes to easily charge these items, so it is a manual process to track, summarize and create JV

6. Out-of-state fee charges are identified after original process and posting of the waiver. Fee assessment is based on residence codes. All employees are exempt from out of state rates.
   RCA: Residence code is not identified when form is received in Benefits office

7. Obtaining several approval signatures
   RCA: Not all signatures deemed necessary, some are just a ‘stamp of approval’

8. Several handoff actions
   RCA: Paper process

9. Manual calculation of waivers using paper fee assessment document with tuition codes. Because fee assessments are not processed systematically until a later date
   RCA: TBR has not approved fall fees at time waivers are processed

10. EVEA residence verification
    RCA: State law requirement
Analysis of the ‘AS IS’ process

1. Are all roles essential? No – could eliminate the Chair if they are not taking a day class and Dean/AVP/Designee signatures

2. What is the number of hand-offs? 4

3. Are any steps automated? No

4. Iterations (how many times is process repeated in a timeframe)? Three times a year, fall, spring, summer

5. What tasks consume the greatest amount of time? Employee verification, determining waivers, manual process to create JV, creating reversal entries

6. Does the task add value? Need to determine the value of validating the class registered matches form

7. What steps can be eliminated or automated? Create electronic forms to route for signatures

8. What steps should be added? None

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