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. Determine which Budget Revision Form to use
   RCA: Forms are not easily identifiable, unaware of training opportunities available, lack of accountability

2. Budget Revision form is paper
   RCA: Not all budget revisions types are set up to be processed in Banner Self Service

3. Current year reversal – understanding timing
   RCA: Training not be taken advantage of

4. Departments don’t know where the paper form is located during the process
   RCA: There isn’t a tracking system in place for campus users

5. Manual Signatures are acquired by walking form through process
   RCA: Aren’t using an online form to acquire electronic signatures, approvers aren’t available

6. Unaware of Financial Planning training sessions
   RCA: Communication to all levels missing, emails with links are not read, lack of accountability

7. People create paper budget revisions when they could use Banner Self-Service form process
   RCA: Accountability, training and limitations of Banner form to 5 transaction lines

8. Financial Planning tracking outstanding revisions that have been returned to the departments
   RCA: Manual process

9. Incomplete / Inaccurate Submissions
   RCA: Training and accountability

10. Financial planning admin makes copy of first page of revision before returning for corrections for tracking
    RCA: There isn’t an electronic form/database