Student Financial Appeals - “AS IS”

**Start**
- Complete Appeals Paper Form
- Print Work Order
- Follow Action Needed
- E-mail Supporting Documents

**Student**
- Fax or Walk Form to Bursar Office
- Hand Offs

**Office Associate**
- Review & Assign
- Enter into Database
- Hand Offs

**Coordinator/Supervisor**
- Review
- Excel Summary (Calculate credit if needed)
- Need more Information? YES
- E-mail Student & Supporting Departments

**Excel Summary**
- Attach Form
- Go To P2 B
- Hand Offs

**E-mail Student**
- Update Database With Decision
- Approved? YES
- Banner Student
- End

**Documents**

- P1
- P2
- P3
- P4
- P5
- P6
- P7
- P8
- P9
- P10
- P11
## Student Financial Appeals – “AS IS”

### Review Summary
- From P1 A
- From P1 B

### Attach
- Initial

### Return Packet
- Hand Offs
- Go To P1 B

### From P1 B
- P1
- P2
- P3
- P4
- P5
- P6
- P8
- P10
- P11
Note: On revisions some departments do not send form back to faculty for signature

Penultimate Semester: Contact faculty advisor for names of honors students

Rejected contracts may go to either rep for re-processing

Consider for Phase 2 implementation - Put on hold if waiting on Confirmation of final semester enrollment
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. Appeal form is paper.
   RCA: Paper form.

2. Unstable database and no updates can be made.
   RCA: Database is close to end-of-life cycle.

3. Paper forms have several handoffs.
   RCA: Process is not electronic.

4. Identifying location of appeals packet.
   RCA: Process is manual and there isn’t a tracking process in place.

5. Delay in processing the appeals.
   RCA: Student does not provide all necessary documents.

6. Student does not meet deadlines on initial submission.
   RCA: Student doesn’t research all requirements for filing an appeal and provide necessary documents.

7. Email notifications are manually created and submitted.
   RCA: Process is paper.

8. Student inability to check status of their appeal.
   RCA: Paper process.

   RCA: Process has not been defined and implemented.

10. Bursar staff uses their individual university email to send messages, would prefer capability to send from appeals@memphis.
    RCA: Haven’t investigated if there are options available to send emails from a LDAP group.

11. Student submits appeal later than one calendar year after semester in which fees are being disputed.
    RCA: Student does not read or follow BF Guide10245 and website information.
Analysis of the ‘AS IS’ process – p1

1. Are all roles essential? No – could eliminate the office associate role if electronic

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)? Weekly

5. What tasks consume the greatest amount of time? Coordinator/Supervisor decision making and calculating credit

6. Does all the task add value? No

7. What steps can be eliminated or automated?
   Manager’s review after coordinator/supervisor can be an option to add
   email notifications – automated
   Eliminate paper process
   Eliminate excel summary
   Automate credit calculations
   Automate review routings
   Capability to upload supporting documents
   Student capability to review status of process through portal

8. What steps should be added? Add 2nd appeal process for review and approval

9. Percentage of errors (corrected, contacted student for supporting documents, contact supporting departments for supporting information, etc.) 50%
Analysis of the ‘AS IS’ process – page 2

10. % FTE and/or estimate time takes for each key role in the process one key

Office Associate – 15 minute to log record and print form * 278 = 70 hours
Supervisor/Coordinator- 3 hours * 278 = 834 hours
Manager- 1 hour * 278 = 278 hours
Total hours: 1,182 hours (31.5 weeks)

Total forms processed 2014: 278 forms
Spring term: 139
Summer term: 44
Fall term: 95

Paper printing: 5,560 pages (278 appeals x 20 pages)
Packet estimates total pages = 20 (3 page appeal form, 1 excel summary paper, 10 printed Banner screens, 4 emails messages)

Possible savings:
11 reams paper & toner savings
278 File folders (each appeal has individual folder)