University Process Improvement
Credit by Exam Outcomes

The Credit by Exam team met to develop a streamline process with a new online form including electronic approvals to replace the current undergraduate and graduate forms. Include an online payment option, eliminate the need for students to come to campus to process paper forms and travel between various offices on the main campus and south campus for signatures. Review any policies and webpages relating to the process.

Streamline Process by Eliminating:
- Paper forms.
- Signatures approvals for undergraduate advisor, undergraduate Dean and graduate student test examiner.
- Role of the department admin/associates.
- Paper copies and filing documents.
- Improved Student customer services no need to compete, print and walk form across campus.
- Only validate current student records that exist in Banner. No longer research records that pre-exist prior to Banner (2007). Saves looking up old records in Matrix (imaging system) or microfilm.
- Exception process for new students by updating requirements to include 'Academic Good Standing'.

Developed New Credit-by-Exam Form:
- Consolidated two paper forms, undergraduate and graduate.
- Streamlined and consolidated separate process for undergraduate and graduate students.
- Systematically validates student's eligibility.
- New online payment process, eliminating need for student to visit Bursar office.
- Reduce data entry errors by auto-populating student information.
- Amount due is systematically calculated, eliminating errors.
- Student payments are systematically updated to the Credit by Exam form with receipt number, amount and date, eliminating the need to login to Banner to review student records, option to print receipt.
- Automated (15) email notifications to chairs, advisors, departmental staff and students with instructions.
- System dashboard for administrators and approvers to review/track status and approve forms.
- Approval workflows captures e-signatures.
- Student payments are systematically updated to the Credit by Exam form with receipt number, amount and date, eliminating the need to login to Banner to review student records.
- Completed forms and status can be accessed through myMemphis portal.
- Availability to extend exam period.
- Completed forms systematically emailed to Admissions and Graduate Analyst to update student records with credit hours earned.
- New Argos report created for departmental offices.

Automated Banner A/R file creation:
- Records are automatically fed to Touchnet Marketplace eliminating need for data entry to the student accounts.

Website / Undergraduate Catalog Updates:
- Undergraduate catalog updated to remove verbiage relating to Dean signature.
- Registrar webpage updated to simply instructions.

Metrics: Estimated Time Savings: 466 hours

2016-2017 201 Credit by Exam forms completed (151 undergraduate 50 graduate)
- Student – **318 hours**
  - Online process eliminated need to walk paper form department to department.
- Bursar Cashier: **34 hours**
  - Eliminated from process. Payments paid online, eliminate processing payment and posting to student accounts.
- Registrar – **25 hours**
  - Lookup historical records prior to 2007.
  - Validate eligibility.
  - Copying & filing forms.
- Department Admin/Associates: **38 hours**
  - Eliminated from process.
- Under Graduate Advisor: **25 hours**
  - Signature no longer required.
  - Notified by automated notifications of student's intent.
- Graduate School Advisor: **4 hours saved**
  - Ease of validating student.
  - Ease of selecting appropriate signatures.
  - Forms systematically routed to appropriate offices.
- Chairs: **17 hours**
  - Ease of validating form.
  - Removed duplicate signature requirement for Graduate School Department Chair.
  - Forms systematically routed to appropriate offices.
- Graduate School Director of Studies: **4 hours**
  - Ease of validating form.
  - Forms Systematically routed to appropriate offices.
- Graduate School Test Examiners: **1 hour**
  - Signature no longer required.