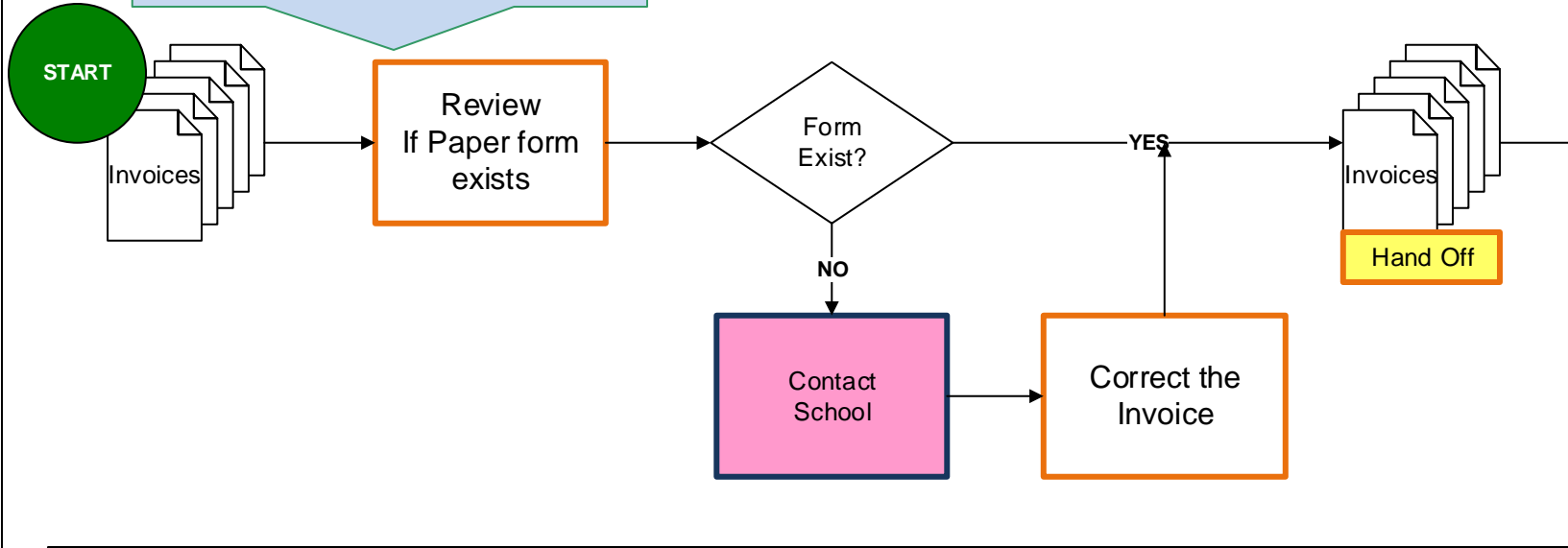


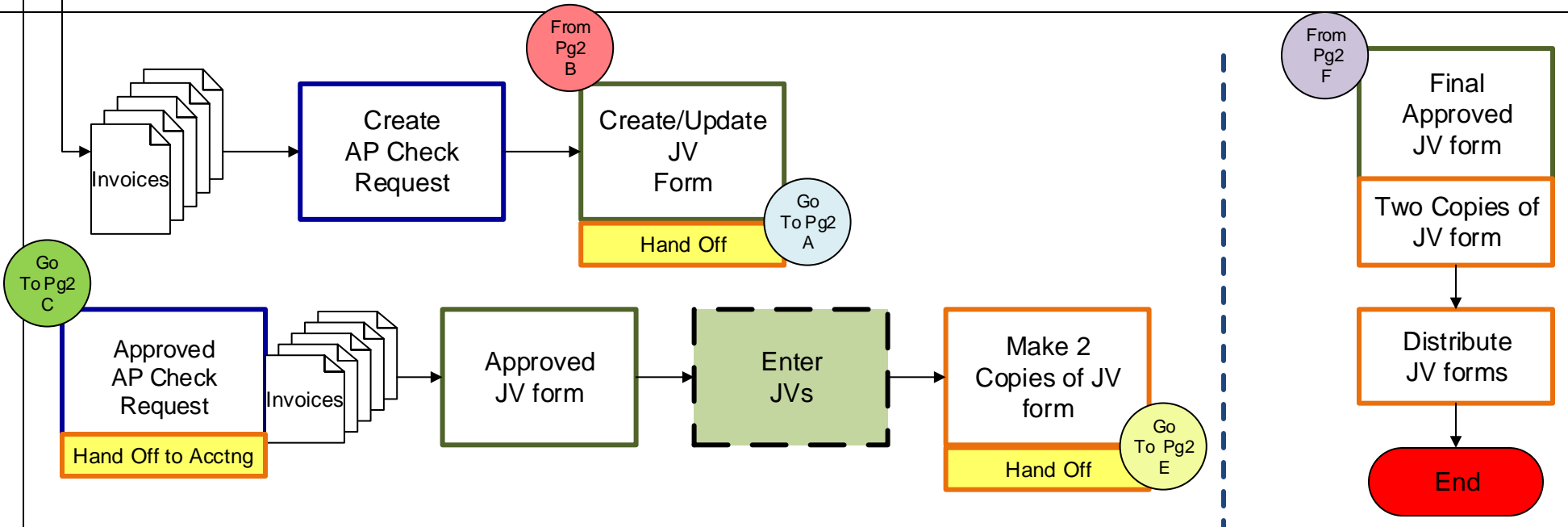
# Employee Educational Benefit – External Invoice Payment & Departmental Charges “AS IS”

Invoices will be received from other TBR/UT systems for Staff Scholarship and Spouse/Dependent forms used for UofM tuition waivers

HR Benefits

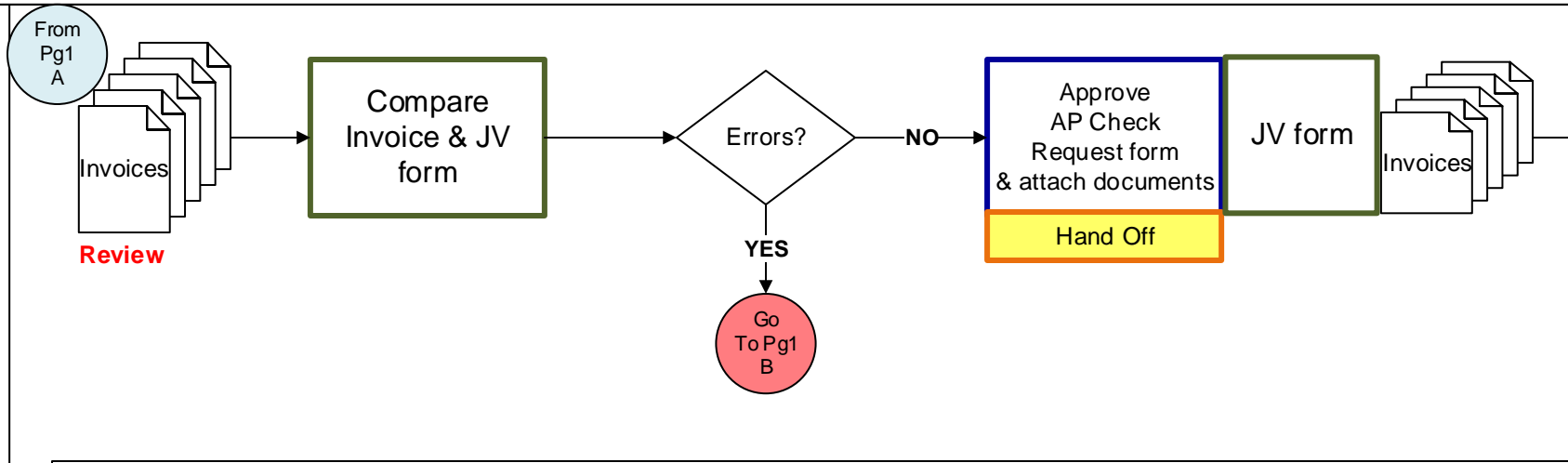


Bursar – Acct Clerk

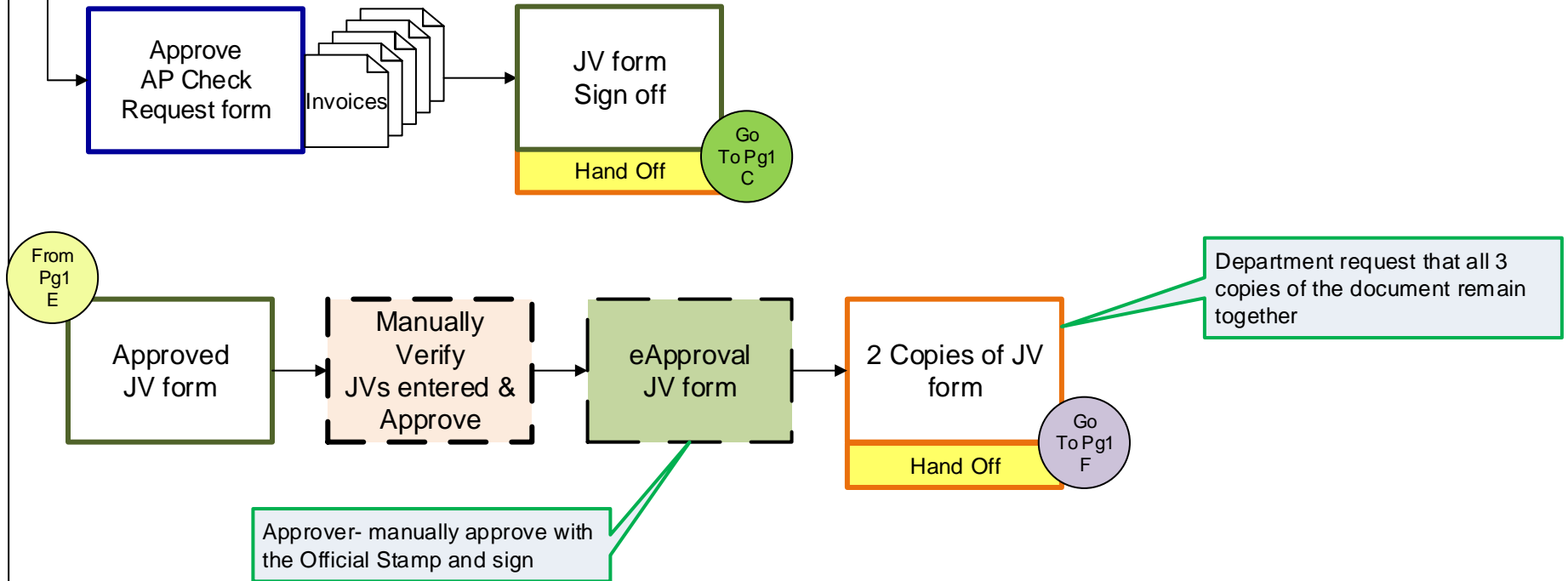


# Employee Educational Benefit – External Invoice Payment & Departmental Charges – “AS IS”

Bursar-Assistant Manager AR



Bursar Manager AR



## Analysis of the 'AS IS' process

1. Are all roles essential? **No – could eliminate Bursar Account Clerk, Bursar Asst Manager and Bursar Manager**
2. What is the number of hand-offs? **7**
3. Are any steps automated? **No**
4. What steps can be eliminated or automated? **Eliminate multiple reviews and approvals, create electronic process for the department charges**
5. What tasks consume the greatest amount of time? **Employee verification, determining waivers, manual process to create JV, creating reversal entries, approvals**
6. Does the task add value? **Can eliminate paper copies, having the multiple reviews and approvals, validating employees' work**
7. What steps should be added? **None**
8. Iterations (how many times is process repeated in a timeframe)? **Three times a year, fall, spring, summer**
9. Percentage of errors (forms returned, corrected, contacted person for corrections, etc.) **1%**

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

HR Benefits: receives estimated 47 invoices – verify the supporting documents match forms have in the hold folder, approve invoices, estimate 30 minutes \* 47 forms /60 = **23.5 hrs.**

Bursar Account Clerk: Create check request & JV 30 minutes \* 47 /60 = **23.5 hrs.**

enter JV in Banner 45 minutes \* 47 /60 = **37 hrs.**

Bursar Asst. Manager AR: Review & approve 10 minutes \* 47 /60 = **8 hrs.**

Bursar Manager AR: Review & approve 10 minutes \* 47 /60 = **8 hrs. |**

Approve JV in Banner, make copies 15 minutes \* 47 /60 = **12 hrs.**

**Total: 112 hours**

11. Metrics – identify measurable outcomes What do we expect to save (time, manual steps, paper, unnecessary reviews & approval. **Save time by eliminating manual review and creating the excel departmental charges and emailing the file to accounting**

# Legends

