SGA Travel Funding for Graduate Students – ‘AS IS’ Fund Approval Process

Graduate Student

START

Complete Fund Request Application Form

Auto Notification GSA Pres / Student Affairs Admin Associate

Go To P2 B

Appeal Decision?

YES

Go To P3 D

P1 P2 P3 P8 P9

P10 P11 P14 P15 P16 P19

NO

P7 P8 P9

P11 P12 P13

P15 P16 P17 P19 P20 P21

Admin Associate

Print Form

Make File Folder

Update Travel Report

From P2 C

Approved?

YES

Create PO/Verify Student Exists

Student Exist?

YES

Update Travel Report

End

From P3 E

NO

Email Accounting Info to Create MA Record

Pre-Travel Meeting w/Student

GSA – Graduate Student Association

P1 Dec 6, 2017

Student may appeal the Senate’s funding decision and email the SGA Senate Speaker
SGA Travel Funding for Graduate Students – ‘AS IS’ Fund Approval Process

- **GSA President**
  - Review Request
  - Email Student/GSA committee Meeting Time
  - Meet With Student
  - Determine Funding

- **GSA Committee**
  - Review SGA Bill
  - Hand Off
  - Email & Attach SGA Senate
  - SGA Bill

- **SGA Finance Chair**
  - Email & Attach SGA Fin Chair & Speaker
  - SGA Bill

- **SGA Senate**
  - Review SGA Bill
  - Decision Made

- **Email Decision**
  - Student & Admin Associate

- **Flowchart Diagram**
  - P6
  - P18
  - P1
  - P1
  - P1

- **Decision Made**
  - YES
  - NO

- **SGA – Graduate Student Association**

**Notes**
- P2 Dec 6, 2017
- From P1 A
- Go To P1 B
- Go To P1 C
- SGA – Student Government Association
SGA Travel Funding for Graduate Students – ‘AS IS’ Fund Approval Process

From P1 D

Review Request

Schedule Executive Meeting

Meeting Held
Decision Made

Email Student & Admin Associate

Go To P1 E

P6

SGA Speaker

SGA Executive Board

Dec 6, 2017

Review Request

Schedule Executive Meeting

Meeting Held
Decision Made

Email Student & Admin Associate

Go To P1 E

P6

SGA Speaker

SGA Executive Board
SGA Travel Graduate Student – ‘AS IS’ Reimbursement

Admin Associate

- Post Travel Meeting w/Student
- Look up POs
- Create Travel Claim
  - Student signs
- Receipts
- Hand Off
- Multi Funded?
  - NO: Go To P5 F
  - YES: Walk Form around for Approval Signatures
  - Hand Off
- Make Copy
  - Place in Holding Folder
  - Travel Claim
- Update Delivery Log

Student

- Travel Claim
- Receipts
- Go To P5 H
- Travel Claim
- Hand Off
- Send to Acctng For Processing
- Reconcile Payment
- Move Claim From Hold Folder To Student Folder
- End
SGA Travel Graduate Student – ‘AS IS’ Reimbursement

From P4 H
Travel Claim
Receipts
Hand Off

3rd Party Support?

NO
Go To P4 I

YES
Travel Claim
Receipts
Hand Off

Go To P4 J

From P4 F
Travel Claim
Receipts
Hand Off

Go To P4 G

AVP Dean Stu Affairs

P4

P4

P5 Dec 6, 2017
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. Tiger Zone (Fund Request System) has form and process issues.
   
   **RCA:** System does not display student name on the dashboard summary page and is difficult to gather current information.

2. Required documents are not uploaded into the application form.
   
   **RCA:** Forms that are required for processing are not provided by the student upon submission.

3. Lack of ease to follow instructions for the student on the request and reimbursement process.
   
   **RCA:** Documentation that is provided is a procedure document that students do not read.

4. Claim form is paper and requires original signatures.
   
   **RCA:** There isn't an electronic process in place.

5. Handoffs of paper claim form can include up to eight handoffs.
   
   **RCA:** Process requires paper documents.

6. Manual emails have to be created for communication between committees and administrative staff.
   
   **RCA:** Part of the process is manual.

7. Time spent by administrative staff to research information.
   
   **RCA:** Inadequate or lack of information provided on the application form.

8. Application form allows for students to apply for funding for multiple trips when one form is required for each trip.
   
   **RCA:** Not clear that one form per trip should be submitted.

9. Timing of SGA President/Committee reviewing request can delay the process.
   
   **RCA:** Lack of timely meetings.

10. Student required to attend multiple meetings.
    
    **RCA:** Information may or may not be able to be combined.

11. Student lack of knowledge of the process from requesting, traveling and reimbursement.
    
    **RCA:** Student don’t always read thoroughly the materials provided and follow directions.

    
    **RCA:** System does not provide adequate information for tracking.
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.

13. Printing forms, filing forms and creating folders.
RCA: For ease of access to look up information.

14. Completing the ‘Fund Request Form’ is awkward for the students with many unnecessary steps.
RCA: Design of the form.

15. Tiger Zone form status are not updated during the process.
RCA: Not required during the process.

16. Amount approved is not updated on the form, manual communications are necessary to the student and administrative staff.
RCA: Need to review the form and the process.

17. Tiger Zone export function pulls all historical records.
RCA: Form status is not updated.

18. Billing form is paper form.
RCA: Electronic process does not exist.

19. Approval process timing takes too long.
RCA: SGA committee only meets monthly.

20. Lack of accountability with Grad School contact.
RCA: Current reporting structure.

21. SGA travel restrictions.
RCA: Travel regulations do not follow UofM travel policy.
Analysis of the ‘AS IS’ process

1. Are all roles essential? What roles could be considered to be eliminated? Senate review, eliminate appeal, bill creation process, executive board review

2. What is the number of hand-offs? 8-10

3. Are any steps automated? Submission of the request form in Tiger Zone

4. What steps can be eliminated? Pre and post meetings with students, multi funding tracking. Departments should create their own Pos and reimbursements

5. What steps could be automated? Travel reimbursement claim process

6. What tasks consume the greatest amount of time? Manual tracking, researching, creating logs and manual reports, gathering necessary documents

7. Does each task add value? Some steps are for convenience for tracking the process and pre-post meetings are to held to prevent issues

8. What steps/process should be added? None

9. Iterations (how many times is process repeated in a timeframe)? Weekly

10. Percentage of errors (forms returned, corrected, contacted person for corrections, etc.) 5%

11. % FTE and/or estimate time takes for each key role in the process. 50%

12. Metrics – identify measurable outcomes (time, manual steps, paper, manual communications, unnecessary reviews & approvals). Identify current time spent on task for roles: Estimated 150 forms are processed. Each form takes about

Admin Assoc.: Time spent researching, copying, filing, tracking, creating logs, creating reports, meetings, process claims, reconciling take estimated 800 hours annually. (1950 hours – 13 holidays – 14 vacations=1777/2)
Consider for Phase 2 implementation - Put on hold if waiting on Confirmation of final semester enrollment

Penultimate Semester: Contact faculty advisor for names of honors students

Use double connector when need to spawn off to 2 lanes simultaneously