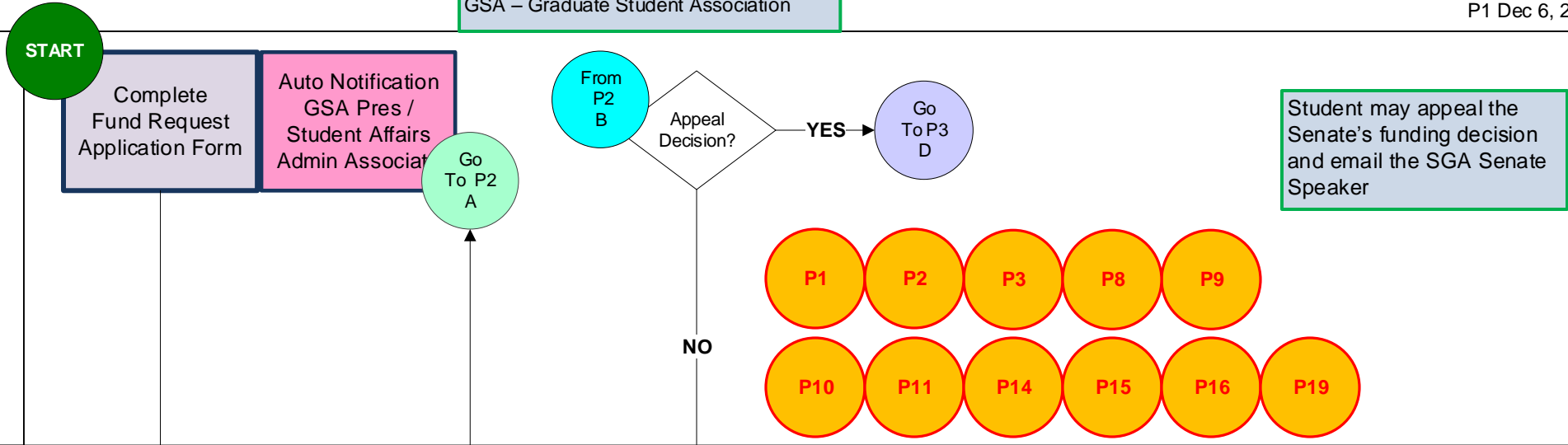


SGA Travel Funding for Graduate Students – ‘AS IS’ Fund Approval Process

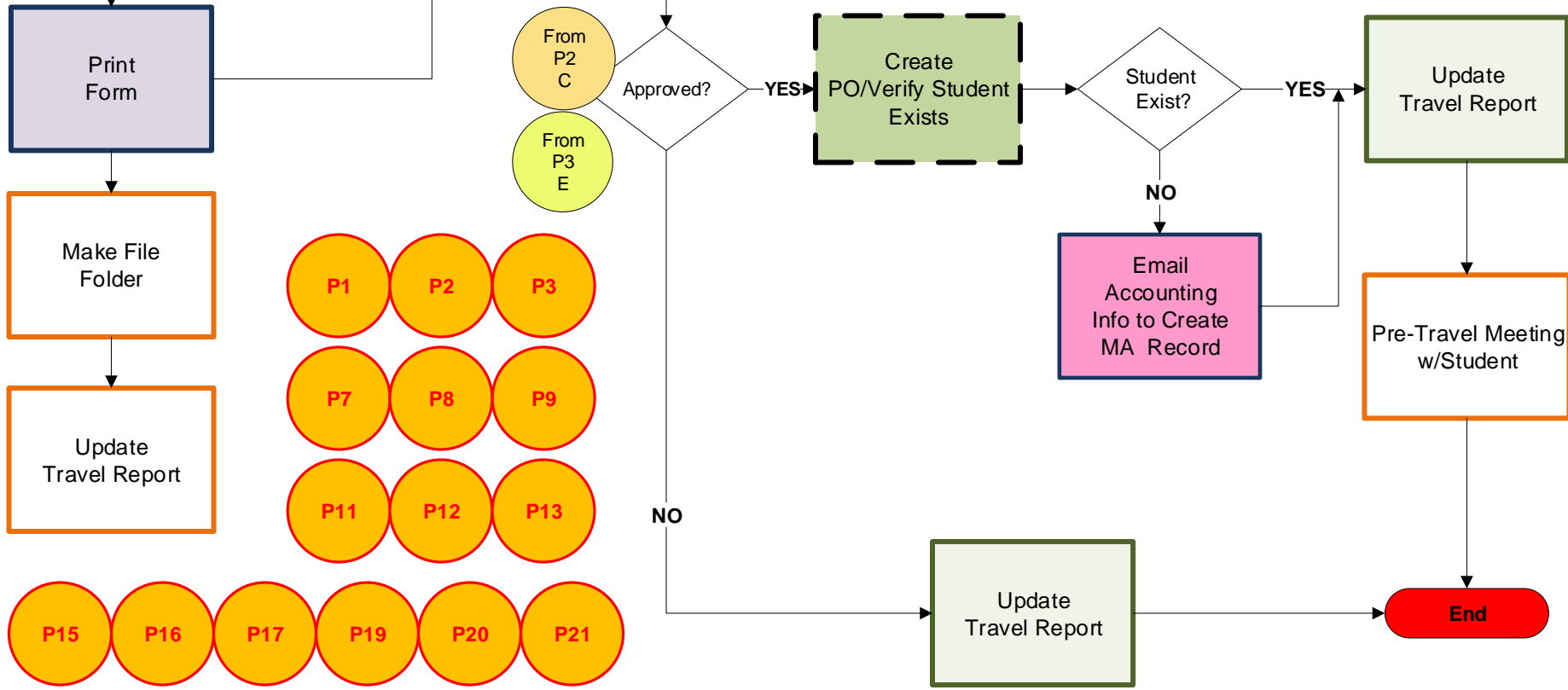
GSA – Graduate Student Association

P1 Dec 6, 2017

Graduate Student



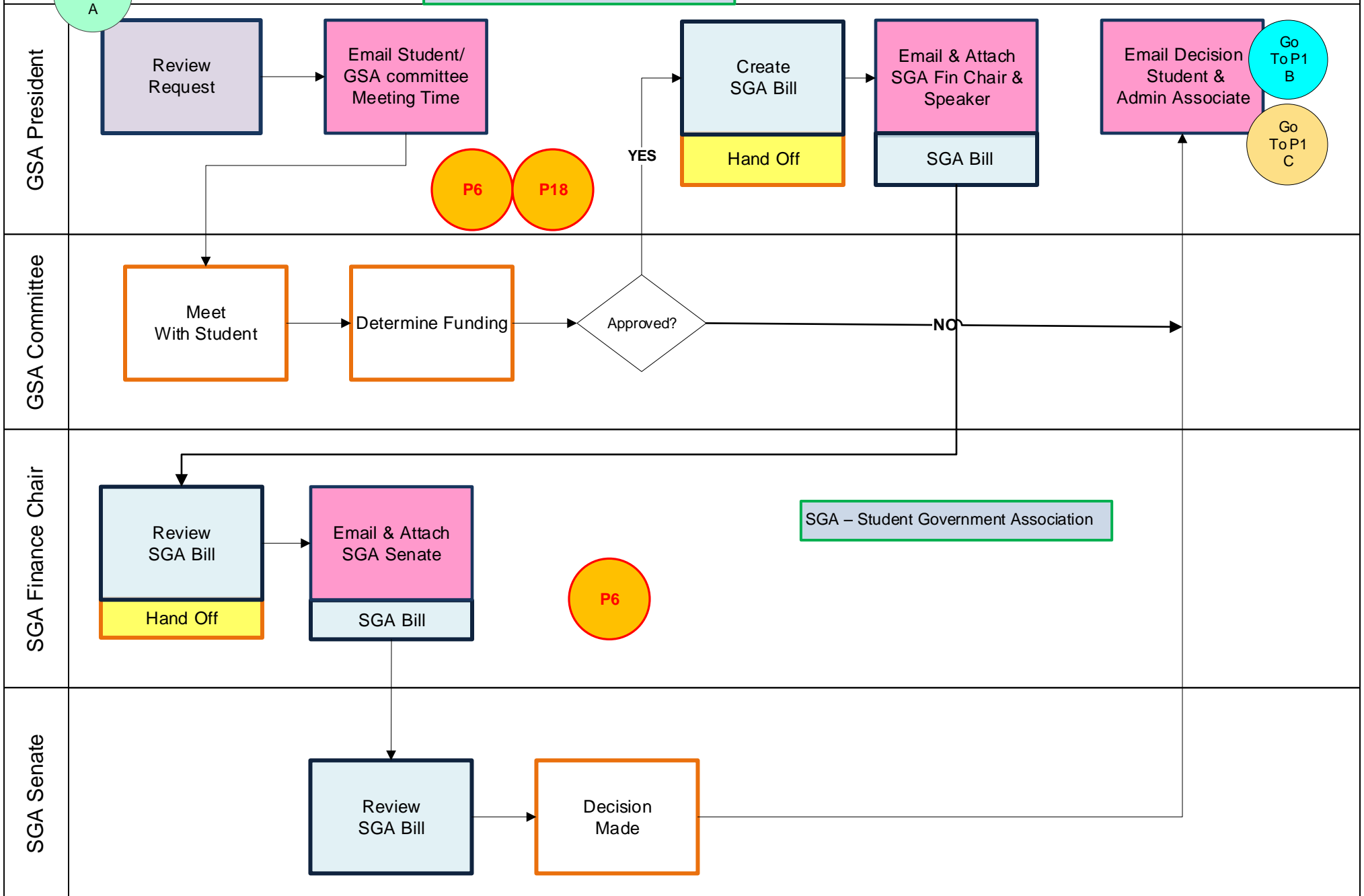
Admin Associate



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

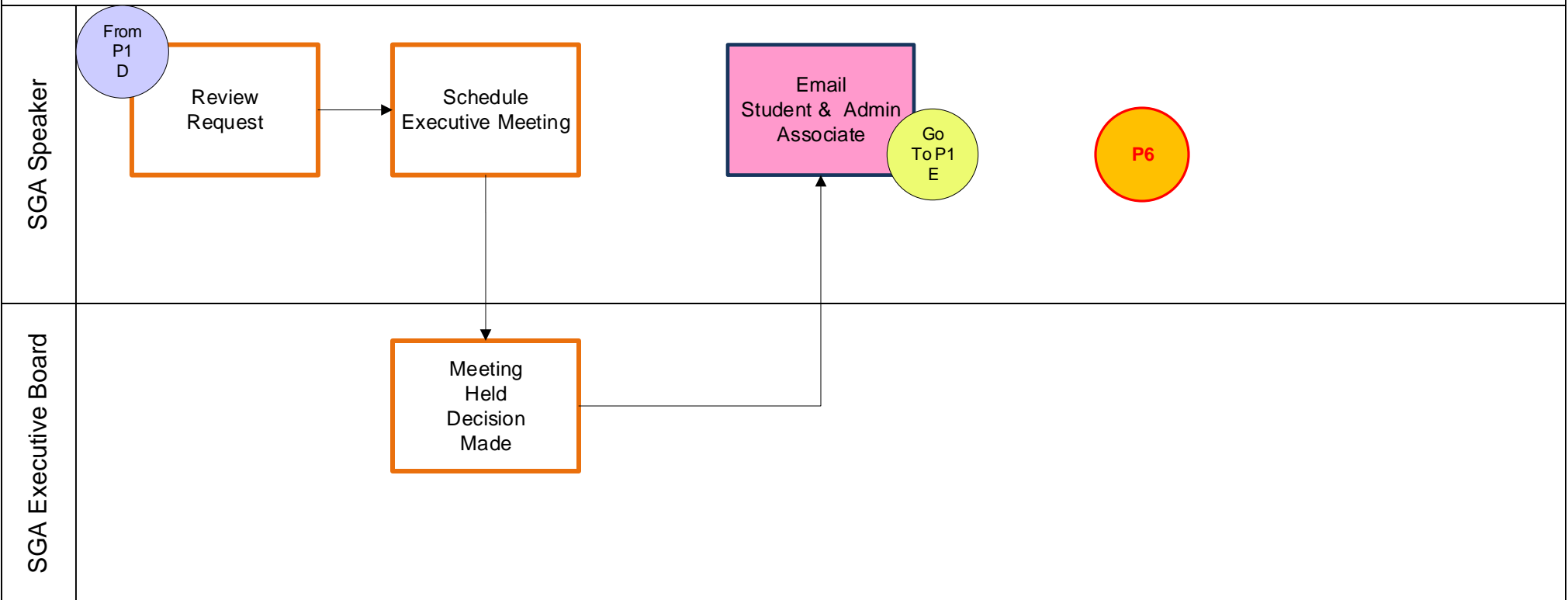
GSA – Graduate Student Association

P2 Dec 6, 2017



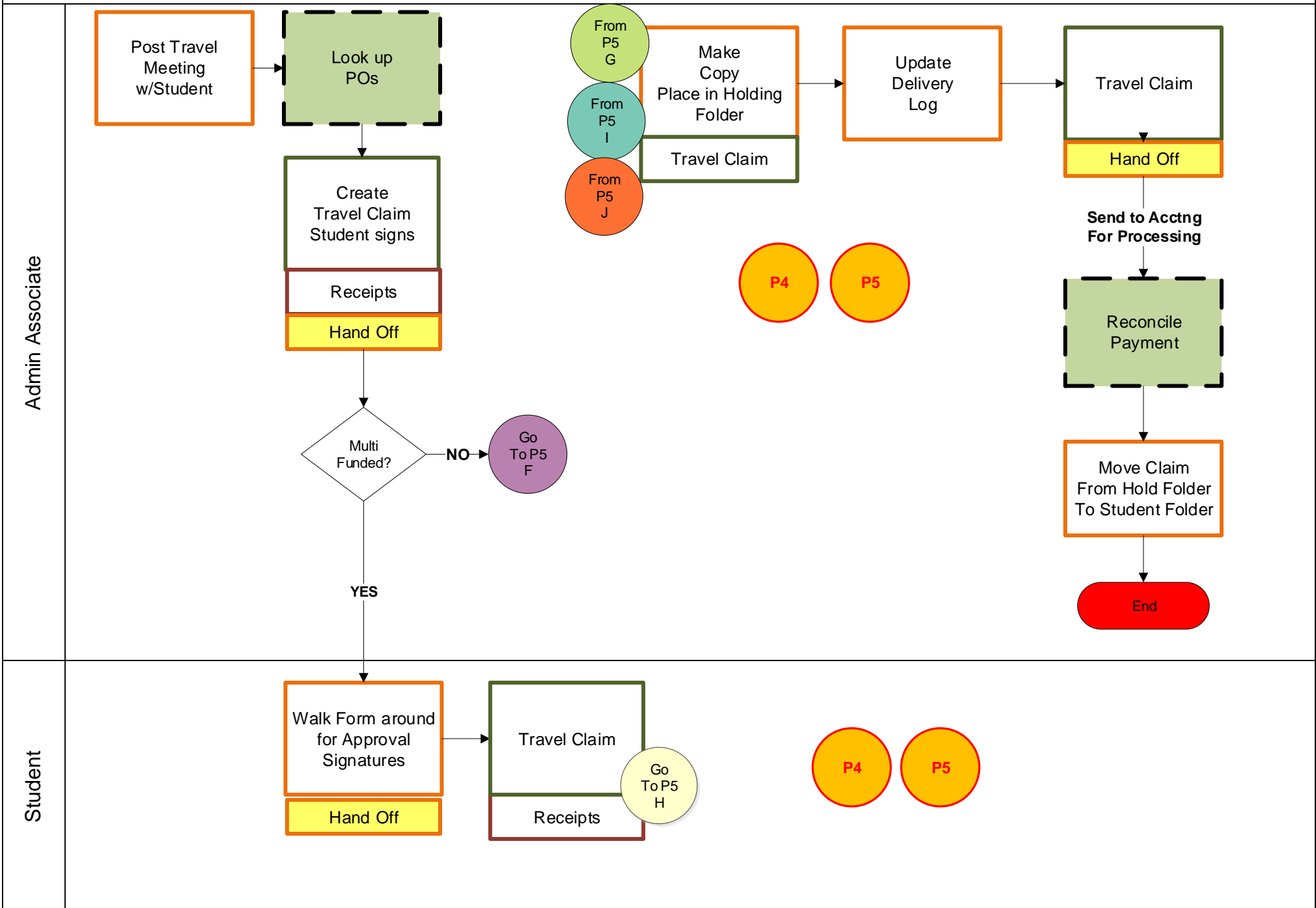
SGA Travel Funding for Graduate Students – ‘AS IS’ Fund Approval Process

P3 Dec 6, 2017



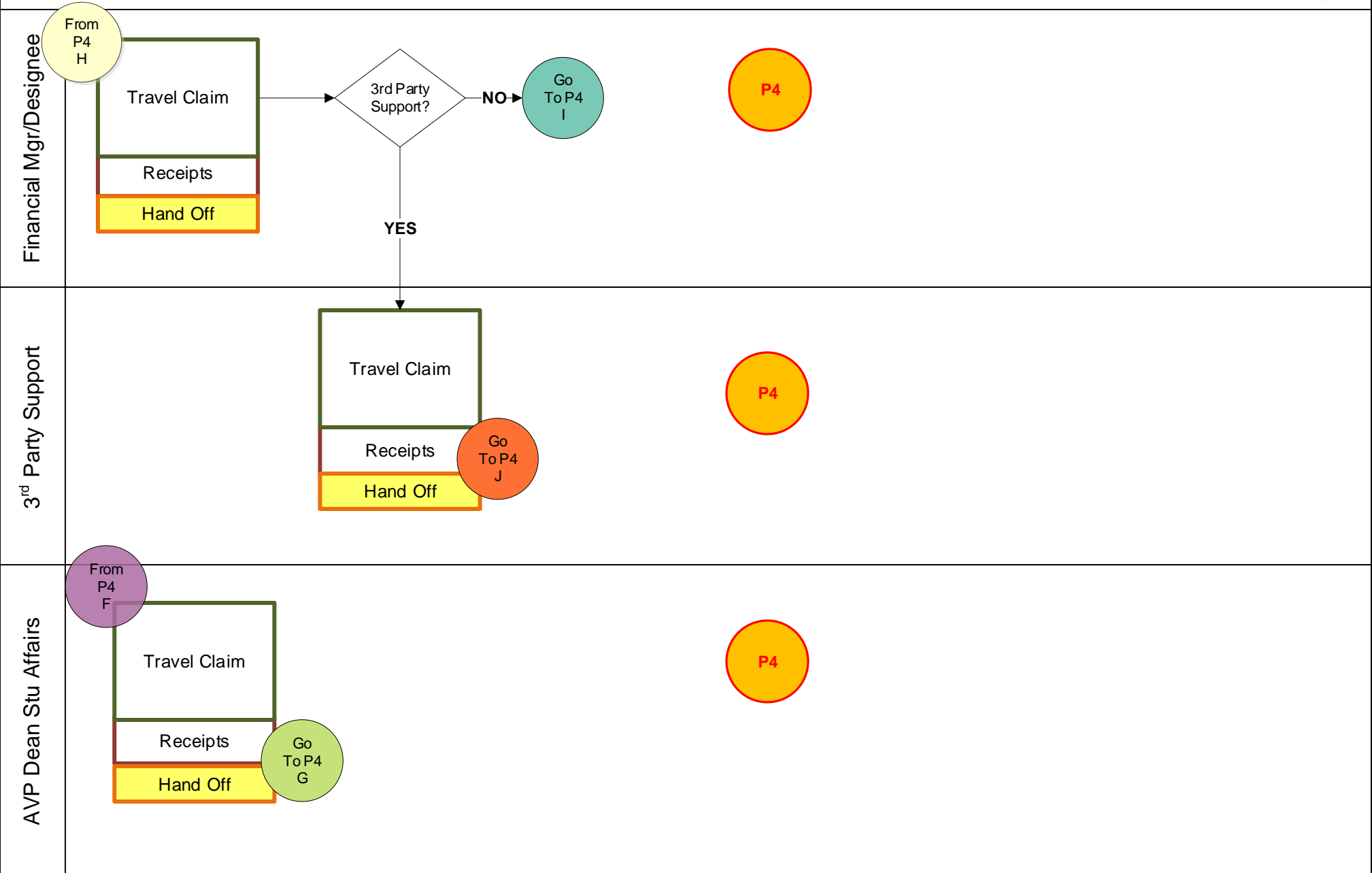
SGA Travel Graduate Student – 'AS IS' Reimbursement

P4 Dec 6, 2017



SGA Travel Graduate Student – 'AS IS' Reimbursement

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.

12. Manual tracking logs.

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 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)

Legends

START

