

University Process Improvement Completed Projects Update June 2018

Uniform Guidance – Micro-Purchases (P063)

- Scope - Review Uniform Guidance Procurement Standards for Micro-Purchases to determine if revised federal regulations require the University to bid purchases over \$3,500 down from the current University limit of \$10,000.
- Outcome – Investigation concluded that the revised regulations allowed Higher Education Institutions to keep bid threshold at \$10,000. No further action needed.

Banner Notifications Student Focus Group (P064)

- Scope – Identify and catalogue administrative process that require manual email communications to students, faculty, and staff and determine the appropriate solution to create an electronic process.
- Outcome – The team initially identified 68 opportunities for email communications and determined the most efficient way to communicate would be using the email burst capability of the Argos Reporting System. There are currently **about 45 bursts in production** with more in progress. Employees in Financial Aid, Bursar's Office, Registrar's Office, CITL, Graduate School, and Admissions utilize the bursts and have been trained to create the email bursts in house by our IT staff. A sampling of the bursts currently in production include:
 - Holds – Students are sent one of 24 customized messages to inform them what type of hold they have on their account and how address the issue.
 - Permits – Students are notified a permit has been issued and that they can now register for the class.
 - Dropping Last Class – Messages are sent to student, advisor, and stop out coach allowing University personnel to be proactive in retaining the student.

Student Government Association(SGA) Travel/Reimbursement (P065)

- Scope – Review the policies, practices, and administrative processes relating to student travel using SGA funding.
- Outcome – Process was reengineered for efficiency and simplified for both students and staff. Highlights include:
 - Streamlined approval process.
 - Updated student travel policy to mirror University Travel Policy.
 - Simplified student request for funding form.
 - Utilized DocuSign to route travel claim.
 - Engaged Shared Services to assist in the Travel PO and claim process.
 - Eliminated any travel responsibility from Dean of Students Administrative Assistant position allowing position to focus on departmental priorities.
 - **Estimated to save 1,180 hours of time yearly.**

Credit by Examination (P066)

- Scope – Review the process surrounding the Credit by Examine request procedure and forms.
- Outcome – Created a new process that eliminated the paper process. Highlights include:
 - Students no longer required to "walk" form across campus.
 - Developed new online form that pre-populates fields and systematically validates student eligibility.
 - Created a dashboard that allows staff to track status of forms.
 - Created online payment option for students.
 - **Estimated to save 403 hours of time yearly. Primary savings to student "walking" form through process.**

Outside Scholarships (P067)

- Scope – Review the process surrounding accepting & processing student scholarships from outside sources.
- Outcome – Created a new electronic process that eliminated the paper process. Highlights include:
 - Eliminated levels of review.
 - Eliminated 3-ply form.
 - Utilizes DocuSign to route form through process.
 - Created automatically generated emails to keep students informed throughout the process.
 - **Estimated to save 558 hours of time yearly along with eliminating paper records retention.**

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Staff Senate Election Process (P068)

- Scope – Review the manual intense process surrounding the Staff Senate Election process.
- Outcome – Created processes that uses technology to improve the process and simplify the process.
 - Argos report creates files for the nominee and ballot list.
 - Systematic process to update the 23 Staff Senate LDAP groups.
 - **Eliminated manual email processes to 1800+ employees by using updated LDAP groups.**
 - Developed a Procedures/Guideline.

Access Control Process Phase II – Key Inventory (P069)

- Scope – Continuation of project to standardize requests for Building Access and creating an electronic process.
- Outcome – Successfully completed creating a campus wide key inventory in May 2018. Over 1800 employees responded and staff is currently working on the process to contact those who did not respond. Moving to Phase III of the project which includes procedures to handle issuing vendor keys and managing master keys.

Campus Access Restrictions (P070)

- Scope – Determine best practices to notify all appropriate offices when a student's access to university resources need to be removed immediately.
- Outcome – Agreed to create Banner ID's for non-affiliated persons in Banner in order to place judicial holds.
 - Two new hold codes were created for expulsion and suspension status.
 - Maxient generates email notifications for Registrar, Admissions, IT Security and Academic Innovations in order to take necessary action.
 - Created a new campus policy.

Foundation Private Scholarships (P071)

- Scope – Review current procedures and practices related to setting up and budgeting scholarships funded through gifts to the University of Memphis Foundation.
- Outcome – Created electronic process using DocuSign for creating and routing for electronic approvals for Foundation Scholarships agreements.
 - Standardized templates and eliminated three paper forms.
 - Systematically route documents for internal processing.
 - Ability to track documents during the process.
 - **Eliminated 27 manual handoffs.**
 - Developed reports for departments to ensure students are benefitting from foundation funds available.
 - **Estimated time savings by using an electronic approval process is 5,000 hours of staff time.**