

# University Process Improvement Project Updates April 2021– July 2021

## SUMMARY:

Completed - 3 projects since April 2021  
Staff Time Savings: 50 hours  
Active projects - 6  
Future projects – 6  
New Submissions - 1

## COMPLETED PROJECTS:

### 1. Access Control Annual Audit (Keys, Fobs, Card) - May 2021

- In compliance with policy GE2009 coordinated the annual audit process.
- Added a new feature allowing Financial Managers ability to acknowledge faculty/staff audits in the system.
- Reports developed for internal audit for auditing purposes.
- 1,452 faculty and staff completed the audit

### 2. Graduate Scholarship eContract– June 2021

- Created new electronic Departmental Scholarship agreement for providing scholarship funding to assist graduate students.
- System validates student's eligibility to receive scholarship funding.
- Design and developed processes to systematically load the award and departmental charges to Banner.
- Eliminated manual data entry of the Scholarship and University Student Business Services staff.
- Staff time savings: 50 annually

### 3. Research Participants Payments – Spring 2022

- Three potential platforms were considered for review (Vincent, US Bank, DaVinci).
- Review relevant policies and ability to pay participants with gift cards.
- US Bank provided the best software solution that will meet the university needs.
- Cody Behles will contact the Controller to move forward with an agreement with US Bank.

## ACTIVE PROJECTS:

### 1. Access Control – Lambuth Campus (Completing August 2021)

- Initial key inventory load for staff was completed in June. Faculty will complete their inventory in August.
- Lambuth employees will begin using the system to request office/building keys/fobs mid-August.
- New feature will provide departmental billing.

### 2. Assets/Equipment Inventory

- Completed review of current Banner workflow process, identified issues, mapped process flow, reviewed documentation and training available. Process is cumbersome and doesn't match policy.
- Softdocs will be evaluated as a possible solution.

### 3. Student Job Postings (Completing August)

- Created a new website that list jobs available and hiring information for students and departments.
- Requiring student to apply in Tigerlink (Handshake).
- Designed a job posting web form for departments to complete to post jobs to Tigerlink (Handshake).
- Policy SA8010 Student Employment was created and submitted to PRB.
- Incorporated Chartwells and Follett job postings.
- Benefits for the student is there will be a single-point to look for campus jobs.

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## 4. COVID-19 Communications (Completing August)

- Provost formed a team to draft communication plans and promotional materials to promote faculty, staff, and students to be vaccinated.
- Signage placed throughout campus advertising on-campus clinics.
- Promotional material provided for New Student Orientation.
- COVID-19 website updates.
- Parent's communication encouraging vaccinations among students.

## 5. Labor/Salary Redistribution

- Implementing Banner Self-Service base-line Labor redistribution module for implementation.
- Allow designated departmental staff to manage salary re-distributions with appropriate electronic approvals, eliminating routing of paper forms.
- Process will reduce data entry errors and transactions by Grants Accounting and Financial Reporting staff.
- Team currently testing.

## 6. Softdocs Etrieve Implementation

- Softdocs will provide a cost-efficient solution for departments needing electronic signatures and workflow.
- Functional training is scheduled for September 14-15.

## NEW PROJECTS SUBMITTED

### 1. Foundation Budget & Reconciliation Process

- Streamline the budget reconciliation process throughout the fiscal year (scholarship office, foundation office & colleges).
- All departments and stakeholders are aware of the process.
- Allocate all scholarship funds during the academic year, as appropriate.
- Train stakeholders on the tools available (Argos's dashboard) to assist in making decisions.
- Provide the terms of the foundation agreements to key stakeholders.
- Create a Scholarship Management policy as it relates to the percentage donor funds spent for the academic year, as appropriate.

## FUTURE PLANNED PROJECTS FY22 (START DATES TO BE DETERMINED)

### 1. Banner Effort Certification (Spring 2022)

- Evaluate Banner base-line Effort Certification process to replace the current in-house system. This process will allow faculty certification verification in Banner and in a timely manner.
- Baseline module would replace current in-house system developed by IT.
- After evaluation, team will determine if system benefits the university.

### 2. Banner Grants Billing module (Summer 2022)

- Evaluate Banner base-line Grant's billing module to replace the current paper process.
- Streamline and enhance current procedures, eliminate manual approvals, manual invoicing and improve efficiencies.
- After evaluation, team will determine if system benefits the university.

### 3. Faculty Status Change (9-Month) (Spring 2022)

- Develop an electronic eContract with approval workflow and eliminating unnecessary processes and paper forms.
- Enhance for improved error checking and validations, like the new Temporary eContract system.

### 4. Leave Reporting tied to Payroll Process (TBD)

- Process will improve leave overpayments when employee's leave balances are inadequate to cover payment and reduce current labor intense indebtedness process.
- Project start depends on HR staff availability.

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## **5. Performance Evaluations Deans/Assoc & Assist Deans/Chairs (Fall 2021)**

- Review and evaluate the three different evaluation submission processes.
- Evaluate if current in-house system can be modified to create a single point of entry.
  - Use SAMS (Staff Assessment Management System) staff appraisal system as model

## **6. Student Complaints (Winter 2021)**

- Review current process for students to file complaints and develop a single point of entry.
- Determine who will manage complaints.
- Project scheduled to begin in March.