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 polices 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 be 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.

For additional information or to suggest a project, go to [http://www.memphis.edu/processimprovement/](http://www.memphis.edu/processimprovement/)
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 assists 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.