

**Administrative Process Improvement Projects:  
Status as of September 2015**

**COMPLETED PROJECTS**

**Separation Clearance –Began May 2015 – Completed August 2015**

- **Scope:** Review the electronic separation & clearance process that was developed in 2013, for implementation. Employee Separation policy UM1382 will be updated to reflect process changes in order to move forward. Review the electronic form for any enhancements, test submission, approval and notification process. Implementation of this process combines two-step process, eliminates paper, provides automatic email notifications to all necessary departments and security officers, and provides reporting capabilities. Process will include all categories of employees (excluding retirement).
- **Outcomes:**
  - Created new-online form for voluntary and involuntary terminations with automated approval routing. .
  - Eliminated the paper form process.
  - Streamline two-step process into one.
  - Ensured necessary departments are notified when form has been submitted.
  - Created new email notifications for all parties involved with their responsibilities.
  - Created administrator tool for HR Records Management and Student Employment.
  - Process includes all termination types for staff/faculty/temporary and student employees.
  - Policy UM182 was reviewed and updated.

**Travel Shared Services – Campus Roll Out – Began May 2015 – Completed July 2015**

- Team met to review the current process as it exists with the Pilot departments
- Recommends;
  - Incorporate the TBR policy that allows scan copies of travel receipts
  - Investigate possibility to upload .pdf forms to Matrix
  - Create a process to notify traveler when travel reimbursement does not match claim
  - AP direct deposit forms be completed during New Employee Orientation
  - Move forward with implementation of the Banner Travel Module or create an in-house eExpense form with electronic approvals

**Termination Users’ Banner Access Review – Began January 23, 2015 – Completed July 2015**

- **Scope:** Review the current processes and make procedural changes to remove banner access for terminated users in a timely manner. Review policies and procedures and recommend changes where applicable based on risk assessment by April 1st.
- **Outcomes:**
  - SQL script written that will automatically deactivate Banner Oracle account upon employees’ last day worked, eliminating manual processes.
  - SQL script written that will inactive faculty tabs in Banner student.
  - New LDAP group created to notify all the Banner Security Officers.
  - Requested the Separation/Clearance group reconvene to implement electronic process for all job types.
  - Policies UM1832 – Employee Separation/Clearance and UM1337 – Data Access were reviewed and changes recommended to accommodate new process.
  - Reports reviewed and improved to provide information to the Banner Security officers in a timely manner.
  - Future Recommendation: Review all third party systems terminating access procedures.

**Tigerbuy Process – Began January 15, 2015 – Completed July 2015**

- Scope: Review the current Tigerbuy process; perform risk assessment of the current procedures with an emphasis on separation of duties during the requesting, approval and receipting of orders. Review internal controls, the university signature policy and propose improvements to current controls or additions by April 1st.
- Outcomes:
  - Separated duties relating to the requestor, approve and receiver.
  - Added organization hierarchy roll-up approvals for all organizations to eliminate bottleneck of waiting for approvals.
  - Policies UM1303 – Authorized Signatures for Financial Transactions and UM1507 – Procurement and Contract Services were reviewed and changes recommended to accommodate new process and roles.

**GA eContract Appointments - Began September 10, 2014 – Completed July 2015**

- Scope: Review the current GA eContract to incorporate enhancements that will allow department flexibility in the terms offered for fee waivers and stipend amounts. Determine if contract periods should be for a semester or for full academic year. Incorporate departmental signatures and conform to the new eContract format. GA EPAFs will be modified to comply with new process flow. Update existing documentation/training materials and Argos reports.
- Outcomes:
  - Online help section
  - Tuition waivers entered in dollar amounts instead of percentages, allowing departments flexibility for budgeting.
  - Criteria compliance/validation fields added from Banner Student.
  - Mobile friendly.
  - Improved look of the form.
  - Created Turbo questions to direct originators to correct path for revisions.

**Travel for Shared Services Center – Recommendations – Began July 1, 2014 Completed: December 2014**

- Scope: Review the 2014 TBR travel policy updates; identify the pains and issues with the current process. Identify and implement improvements for the traveler using the Shared Service Center.
- Outcomes:
  - Team recommends an electronic process to eliminate the current paper process.
  - Solutions are to develop an in house electronic form or purchase an existing software solution.
  - Software demos were reviewed in December with ConCur Solutions and Ellucian Banner Travel and Expense module.
  - After the demo the team recommends the evaluation of purchasing the Ellucian Banner Travel and Expense module or develop in-house solution.

**Temporary Staff Appointments – Began May 20, 2014 Completed December 2014**

- Scope: Review current policies, administrative processes and practices related to the recruitment and appointment of temporary employees. Include detail process mapping to design and implement an improved process, using the eContract/EPAF model. Create reports as needed, to meet the needs of end users departments, HR, and Shared Services. Update existing documentation/training materials and websites.
- Outcomes:
  - An improved paper form was created to meet the January 1<sup>st</sup> deadline for all temporary

- employees to receive new contracts beginning 2015.
- WorkForum Temporary Applications forms went live January 2015.
- Future recommendation: eContract/EPAF solution with Shared Service Center.

**Part-Time Faculty – eContract to EPAFs – Began January 2014 Completed: May 2014**

- Scope: Using the work of the 2011 Part-Time Faculty Appointment Team as a starting point, develop and implement an electronic appointment process for part-time faculty (Banner E-Class = PF) using the eContract/EPAF model. (Note that effective spring/early summer 2013, all EPAFs will be created by the Shared Services Center.) Create or modify existing reports, as needed, to meet the needs of end user departments, HR, and SSC. Create or modify documentation and training.
- Outcomes:
  - New eContract created eliminating the paper process.
  - Shared Services will create all EPAFs for the departmental users, reducing errors.
  - ARGOS reports created for the departmental users.
  - User's guide created for the eContract process and how to process ARGOS reports.
  - Updated WorkForum application to add data needed that eliminated the current paper form.
  - Eliminated the entire paper packet creation process, saving time and reducing paper cost.
  - Training sessions provided.

**Student Quality Survey Bursar – Began February 2014 – Completed June 2014**

- Scope: Incorporating best practices from other universities and organizations as warranted, develop and implement an automated, transaction-based customer service survey system, focused on the student services areas of admissions/enrollment, bursar, financial aid, advising.

**GA eContract enhancement for RCM Budget Model – Began October 2013 Completed May 2014**

- Scope: In order to adopt Responsibility Center Management (RCM) Budgeting formula for fall 2015, the team met to identify the changes needed for the GA eContract and Banner EPAFs.
- Outcomes:
  - GA eContract enhanced to separate Master and Doctoral students.
  - New Banner eClasses created for ease of reporting GA student levels.
  - ARGOS reports created for the departmental users.
  - Training materials updated to reflect changes.
  - Training sessions provided.

**Facilities Minor Renovation- Began August 2013 – Completed March 2014**

- Scope: Review current administrative processes and practices related to minor facilities renovations, from submission to completion; Implement 'quick hits' to standardize, streamline and improve processes, maximizing the use of existing technology to the extent possible and improving coordination across units. Identify and implement 'Quick Hits' to standardize streamline and improve process. Maximize the use of existing technology to the extent possible. Improve coordination across units. Minimal cost and safety and establish a system.
- Outcomes & Recommendations:
  - Create guideline for campus when requesting space improvements
  - Creates new Estimate Worksheet for Customers
  - Create New online Project Request form
  - Create New Space Improvement Website
  - Notification process when New Employees are hired
  - Project Solicitation streamline to occur twice a year

- Oversight Committee for Review of Projects – **Completed**
- Update/Create Space Policy –
- Team recommends Facilities Software be purchased before the recommendations are moved forward