

# University Process Improvement Project Updates November 2020 – March 2021

## SUMMARY:

Completed - 5 projects since November 2020  
Faculty/Staff hours saved - 939  
Active projects - 4  
Future projects – 7  
New Submissions - 2

## COMPLETED PROJECTS:

### 1. Foreign Language Retroactive Credit (October P098)

- Designed a new Banner process that allows students to register for a 'Foreign Language Retro Credit' course via permit that's issued by their advisor.
- Payments will be made through TouchNet.
- Registrar will post retro credit earned to the student record once the student has passed the upper level course with a grade of 'C' or better.
- Process will eliminate administrative staff processing paper forms, scanning, emails to the student, routing for departments signatures, admissions staff posting credit hours.

### 2. Financial Aid Verification Process (December P099)

- Reviewed current university process for collecting student and parent information, creating a more efficient, streamlined process; improved form submission and use of DocuSign for redesign of the forms.

### 3. Review 2019 Strata Student Back-to-Basic Report (December P100)

- Facilitated meetings with a group representing Admissions, Financial Aid and Registrar offices to review the Strata reports to prioritize and determine which recommendations the team can implement.

### 4. Chrome River Encumbrance – load to Banner (February P101)

- Served as resource for testing and documentation
  - Analyzed process to load transactions from Chrome River to Banner
  - Assist in testing IT programs and transactions loaded to Banner
  - Documented outcomes

### 5. Temporary Employee Appointment (March P102)

- Team has designed a new eContract employment form.
- System incorporates workflow for financial managers, HR Service Desk, HR Partners, and candidate.
- Validates Banner data to assist originators by reducing data entry errors.
- New process eliminates paper, five handoffs, removes waste, and saves time.
- Tentative go-live April.
- **Estimated Staff hours savings: 939 hours annually**

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## ACTIVE PROJECTS:

### 1. Access Control/Annual Audit

- Prepare Access Control system for faculty/staff annual key/fob inventory.
- Update with new departmental audit feature.
- Develop notification to Financial Managers of non-compliant employees.

### 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.
- Team recommended creating a new system developed by IT.
- System specifications are being developed.

### 3. Graduate Scholarship

- Reviewing current departmental process for providing financial assistance for graduate students.
- Develop a new electronic contract incorporating approval workflow for financial managers and student acceptance.
- Eliminate manual steps printing web form, gathering signatures, scanning, and emailing.
- Eliminate USBS process of creating an excel document that summarizes paper forms and emailing to the Scholarship office to process.

### 4. Labor/Salary Redistribution

- Reviewing 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.
- Process will reduce data entry errors and transactions by Grants Accounting and Financial Reporting staff.
- Team currently testing and determining approval queues.

## NEW PROJECTS SUBMITTED

### 1. Student Complaints

- 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.

### 2. Performance Evaluations Deans/Assoc & Assist Deans/Chairs

- 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

## FUTURE PLANNED PROJECTS FY21 (TIMELINE TO BE DETERMINED)

### 1. Access Control – Lambuth Campus – On Hold

- Enhance the Access Control System to collect and manage key inventory for Lambuth faculty and staff.
- Include departmental billing, approval workflow and signatures, provide Lambuth Physical Plant ability to create unique key coding.
- Waiting for Physical Plant decisions where/how keys can be made and purchase of equipment.

### 3. Banner Effort Certification – Summer 2021

- Evaluate Banner base-line Effort Certification process to replace the current in-house system. This process will allow certification verification in Banner and in a timely manner.
- After evaluation, team will determine if system will benefit the university.

# University Process Improvement

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### **4. Banner Grants Billing module – Fall 2021**

- Evaluate Banner base-line Grants 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 will benefit the university.

### **5. Faculty Summer Comp eContract – Summer 2021**

- Review Faculty Summer Comp eContracts for streamlining process.
- Evaluate possibility of eliminating EPAF department signatures.

### **6. Faculty Status Change (9-Month)**

- 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.

### **7. Part-time Faculty eContract**

- Enhance for improved error checking and validations, like the new Temporary eContract system.