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 assists 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

For additional information or to suggest a project, go to http://www.memphis.edu/processimprovement/
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.

2. 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.

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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.