



*Performance Matters!  
Ron O'Connell, theater professor  
Founder, All the World's a Stage,  
a showcase for original student work.*

**SUNGARD** HIGHER EDUCATION

SUMMIT 2008

# Banner Workflow Process Examples

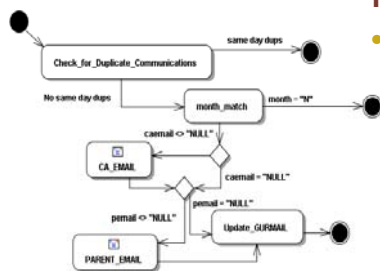
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## **Real World Process Examples**

- **Finance / AR – Billing Notifications**
- **Financial Aid – Scholarship Payment Authorization Process**
- **Financial Aid / All Departments – Hire a Work Study Student**
- **Banner General**
- **Student/Admissions – Graduate Admissions Application Processing**
- **Advancement**
- **HR – Hire Adjunct Faculty/Employee Appointment**
  
- **+ Other Example Processes in each area that Professional Services has helped clients with**

## Finance / AR – Billing Notifications



### Plymouth State

#### • Problem:

- Manual mail merge to notify students of Billing information waiting for them in Banner Self-Service.
- Untimely delays in Accounts Receivable of payments.
- No automated mechanism to notify students of Billing information between mail merges other than manual emails.

#### • Process:

- Process identifies whether students have a credit, balance, or zero balance, and provides them instructions on how to log into Banner Self-Service and process payments, etc.
- Email routing information is updated and logged in Banner for better Customer Service communication.

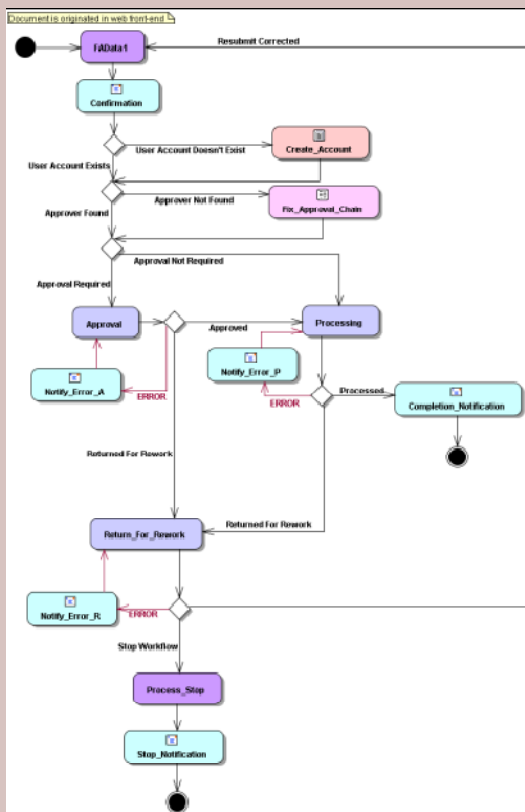
#### • Benefits:

- Accounts Receivable increased significantly in a more timely fashion.
- More tailored specific communication to students and parents.

## **Finance / AR – Other Processes**

- **Creation of New Fund / Detail Code with Approvals**
- **Requisition Approval**
- **Budget Exceeded process**
- **Retired Fixed Assets**
- **Zero Balance**

# Financial Aid – Scholarship Payment Authorization Process



## Kent State

### Problem:

- Initiators can't see how their scholarship funding is set up to make good budgetary decisions
- Paper forms routed through campus mail cause a delay in processing
- Initiators can't find out where paper is once it has left in campus mail...they must call around to find the status of a request

### Process:

- Allows departments to notify Student Financial Aid which students to award scholarships
- Routes documents to dean for approval

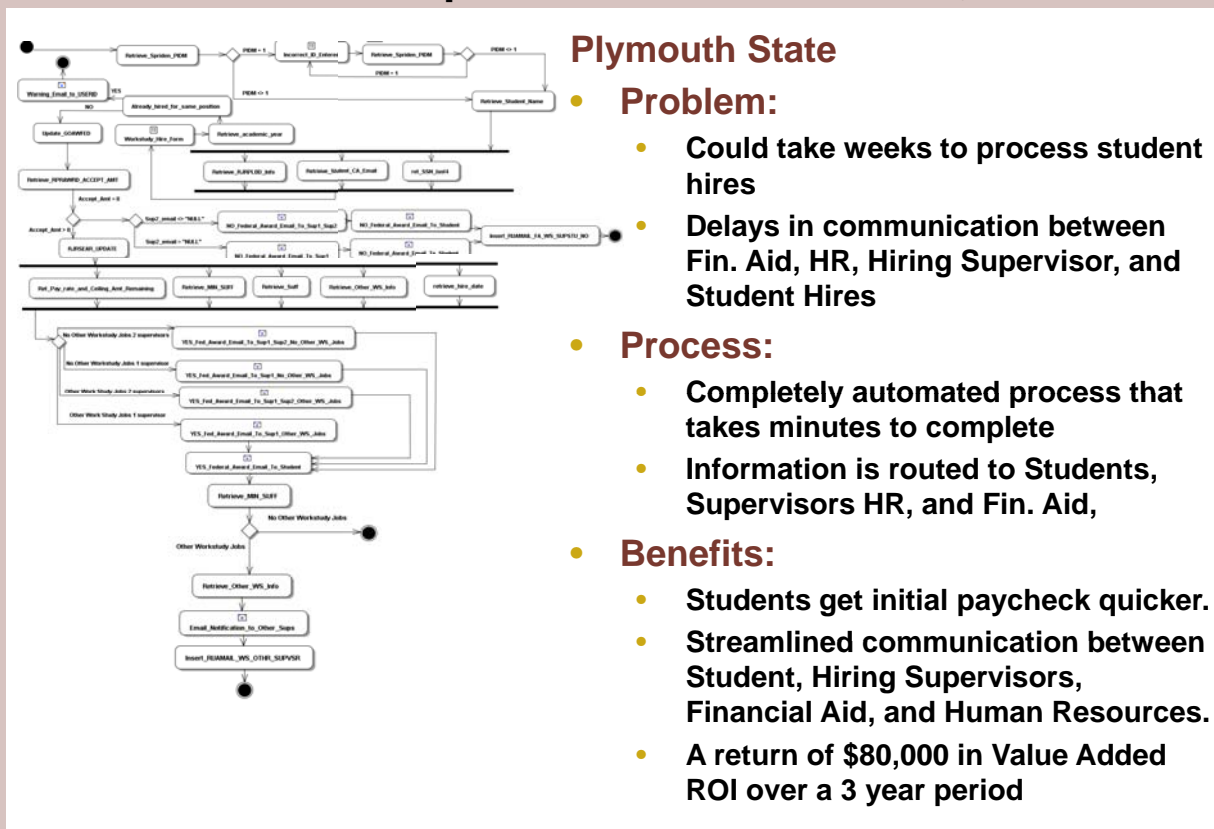
### Benefits:

- Decrease processing time required to award scholarships – especially when rework is required
- Initiator can see which funds/indexes are funding scholarships on the form
- Notifies the initiator when the scholarship has been awarded to the student.

## **Financial Aid – Other Processes**

- **College Work Study**
- **Change of Residency**
- **Verification Process**
- **Notification to AR when Aid Changes**
- **Notification of New Documents after Billing**

## Financial Aid / All Departments – Hire a Work Study Student

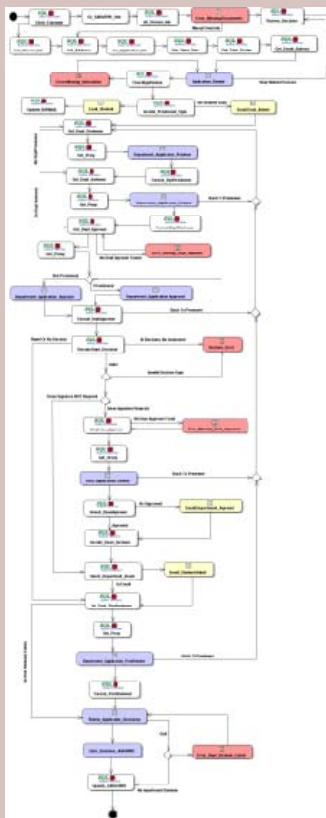


## **Banner General – Other Processes**

- **Change of Name Notification**
- **Change of Address Notification**
- **Death Notification**
- **Duplicate PIDM Processing**



## Student/Admissions – Graduate Admissions Application Processing



### Mississippi State

- **Problem:**
  - Routing of applicant packet was not always happening in timely fashion - lost in the paperwork shuffle, no way to know whose desk it was on or where it was in the process
- **Process:**
  - This particular workflow is used by Office of Graduate School in conjunction with academic departments to make the admission decision on graduate students.
- **Benefits:**
  - Eliminated the need to send a packet of paper documents/copies from Office of Graduate Admissions to Academic departments.
  - Faster turnaround time on applicant decisions.
  - Ability to determine exactly where an applicant is in the process.
  - Ability to identify bottlenecks.
  - All of the above = faster, more efficient processing of applicants.

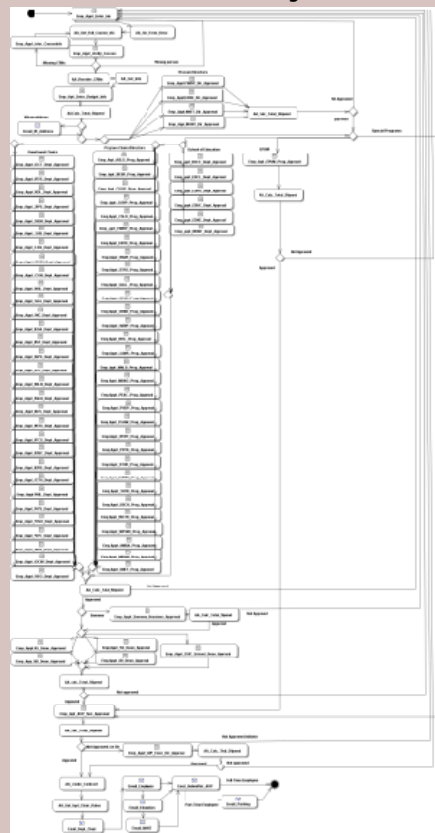
## **Student – Other Processes**

- **Notification of Change in Schedule**
- **Notification of Change in Catalog after Print Date**
- **Notification of Change in Residency**
- **Withdrawal Student**
- **Grade Change**
- **Admissions Approval process**
- **Course Load Below a Certain Level**
- **Faculty Load Below a Certain level**
- **Notify Wait-listed Students of New Sections**

## **Advancement – Other Processes**

- **New Gift**
- **New Campaign Notification**
- **New Designation Process**
- **Goal Reached**
- **Change of Campaign Name**

## HR – Hire Adjunct Faculty/Employee Appointment



### Xavier University

- **Problem:**
  - Adjunct Faculty not paid on time
  - No validation of data including exceeding # of credits per instructor
- **Process:**
  - Adjunct contract information entered, validated, and processed in an efficient and consistent way.
  - Process routes contract approvals and electronic forms to appropriate parties
- **Benefits:**
  - Estimated Savings of \$40,000/year
  - Approvals are quick and pay is not delayed in the shuffle

## **HR – Other Processes**

- **New Hire**
- **Termination**
- **Benefits and Deductions**
- **Position Requisition**
- **Salary Increase Over Certain Percentage**
- **Employee Review Due in x Months**
- **Vacant Position**
- **Change of Employee Class**