Banner Workflow Process Examples
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
Problem:
- Could take weeks to process student hires
- Delays in communication between Fin. Aid, HR, Hiring Supervisor, and Student Hires

Process:
- Completely automated process that takes minutes to complete
- Information is routed to Students, Supervisors HR, and Fin. Aid,

Benefits:
- Students get initial paycheck quicker.
- Streamlined communication between Student, Hiring Supervisors, Financial Aid, and Human Resources.
- A return of $80,000 in Value Added ROI over a 3 year period
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
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