

## WORKFLOW SUCCESS STORIES

### Finance/AR Billing

#### **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 with 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.**

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

### Plymouth State

- **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

## 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.

## 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

## Student Grade Change Workflow

### Wayne State

- **Problem**
  - The Student Grade Change process took 2-4 weeks to process with all the approvals needed and transit around campus.
- **Process:**
  - Faculty are more involved as they have direct control over when and how their changes are handled.
  - Every grade change can be monitored including: details of who initiated it; when it happened; whom approved it and when; and the date and time the change was posted to academic history.
  - The communications flow includes notifications to all parties involved in a process, from the faculty/initiator, the student, and the chair or approver.
  - For grade changes that require no approval changes are posted in less than one minute. Changes requiring approvals now take hours or days rather than weeks.
- **Benefits:**
  - They are no longer ordering paper grade change forms so there are financial savings.
  - Records maintenance staff that previously processed 6,000 to 7,000 grade changes are experiencing time savings as they no longer have to process or file paper.
  - Service enhancements occurred including more accurate information being posted to academic history faster.

## **General Workflow Experience:**

### **Dalhousie University**

- **Problem:**
  - **No automation of work processes on campus.**
  - **Minimal training and limited resources dedicated to building workflows.**
- **Process:**
  - **Undertook both BPA and WPA to determine development process**
  - **Learned by doing!**
  - **Wanted to develop a workflow that was low risk.**
  - **Developed a WF to notify significant users of Organization Code Changes.**
- **Benefits:**
  - **Enhanced communication - timeliness of notification**
  - **Gained workflow development experience to begin development of four additional workflows.**