

Banner® Workflow Enables Better Service to Constituents and Decreases Costs and Manual Labor at Plymouth State University

By integrating Banner Workflow into its SunGard Higher Education Banner administrative system, Plymouth State University (PSU) has added value to many business processes while decreasing administrative time and costs.

"The product has really added value to our business processes," said Zachary Tirrell, MIS manager at PSU.

The Workflow Management Coalition (WfMC) defines workflow in part as an automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules. Banner Workflow is an open, flexible tool that unites processes, information, and people. It automates, simplifies, and directs the flow of information through your entire enterprise. The results are efficient operations, increased automation and visibility, institution-wide consistency, and easy exception handling.

Plymouth State University has successfully deployed 20 workflows in various departments. Two of the workflows that are having the most impact have been implemented by the Financial Aid team. Financial Aid began considering the solution after Crystal Finefrock, senior associate director of Financial Aid at PSU,



Plymouth State University

Enrollment: 4,629

Plymouth, NH

www.plymouth.edu

Results With Banner Workflow:

- Time to process student hire has been reduced from 7 days to minutes
- Improved customer service
- Significant decreases in clerical work
- Improved accuracy of data
- Assists with transition to paperless office





saw a presentation on Workflow at a Summit user conference. Workflow's automated processes allow business events in Banner to trigger user notifications, business process logic, external or internal emails, and automated activities.

"I saw an opportunity to create efficiencies and to communicate more effectively with students and parents," recalled Finefrock. The Financial Aid team had been using Banner Financial Aid for almost three years and was striving to create a paperless environment with the support of Banner Self-Service.

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"Banner Self-Service had greatly reduced the amount of paper we generated, however, we needed a way to more easily communicate with families when Banner information was changed or updated," said Finefrock.

The Financial Aid team created a workflow to generate emails automatically and immediately to students and parents to alert them when Banner information is changed. Now, when data with a specific code is added to a Banner form, Workflow automatically generates an email to that student and to the parent if a parent email address is present. Workflow also tracks that the email was sent and to whom it was sent.



"All this happens sight unseen," explained Finefrock. "The immediacy of the communication allows students and parents to react to requests for information more quickly, and this helps speed up the financial aid process. Families and students are very appreciative of the immediacy and availability of information which helps reduce some of their anxiety with the process. And by giving them access to more information in an electronic format, we have reduced our reliance on paper. Also, the volume of phone calls coming in to our office has decreased. These changes allow our staff additional time for one-on-one counseling with families who need our assistance with other financial aid related issues."

The second significant workflow that PSU created has automated the student employment hiring process. The administrative requirements for the student hiring process were very labor intensive and paper heavy. By automating the process, PSU reduced administrative processing time, eliminated all paper from the process, and is providing more timely communications to everyone involved.

"It used to take up to a week to transact all of the processes required to hire a student," said Finefrock. "With Banner Workflow this entire process now takes less than 10 minutes!"



In the past, a supervisor hiring a student to work in their department would complete a four-part form, and send three of the copies to the Financial Aid team. The team would fill out a section on the form and retain a copy for their files. A copy would be sent back to the supervisor for their records, and another copy was sent to Human Resources so the student data could be entered into the Banner HR system. Because of the lengthy process, sometimes information would not be entered in time for the student to be paid for the first payroll period. Additionally, Financial Aid team members also had to enter the same data into the Banner Student system to document that the student was hired. They also entered the hiring department and hourly rate.

If any information was missing from the original form, the process would stop and processing delays would occur. The time from when the initial form was completed to the time the data was entered into Banner HR could take up to a week. Considering that PSU hires approximately 700 students a year for this program, the associated administrative work was significant.



Using Workflow, today the entire process takes less than 10 minutes. A supervisor utilizes the online Workflow system and initiates the hiring process, using the job descriptions and hiring codes established by PSU. By following six easy prompts, the supervisor can enter all information required. Then Workflow automatically verifies the student's eligibility and immediately sends an email with confirmation or denial. All information is automatically updated in the student's Banner record.

“Workflow has been a huge timesaver for us. Within a matter of days, we are able to electronically hire approximately 500 students, knowing that the data is accurate and that students will be paid promptly.”

— Crystal Fineck, senior associate director of Financial Aid, PSU

The supervisor is automatically provided with the student's federal work-study award and information on any other departments where the student is working. This information, along with timely reporting, has reduced the number of adjustments required for students who exceed their Federal work study authorization. If the hire is approved based upon automated system checks, the data is accessible by HR and entered into the Banner HR system. When needed, staff can easily retrieve and print the information for auditing purposes. Although mapping out current processes and building workflows can take a significant amount of time, the resulting applications are very easy for functional users.

“This workflow has been a huge timesaver for us,” emphasized Fineck. “Within a matter of days, we are able to hire approximately 500 students, knowing that the data is accurate and that students will be



paid promptly. We are able to provide students and supervisors with much better service and it frees our staff from verifying data, entering data, filing, and re-mailing forms.”

Many of PSU’s other workflows revolve around actions that occur in Banner which trigger an email communication. For example, there is a requirement associated with the Federal Perkins Loan to notify students when funds are disbursed. Students have only a limited amount of time to act once the loan is disbursed, so it is important to notify them quickly. PSU has created a trigger tied to the Federal Perkins Loan disbursement which initiates an email communication to the student. Many of the email communications direct students to Banner where they can view their messages in a secure environment.

The university also created a workflow to make sure that housing is available when student athletes and other early arrivals descend on the campus prior to the start of a semester. Another huge timesaver is a workflow to manage duplicate record resolution, which was a significant issue for the university.

“Workflow is a great product that really impacts the efficiency of the institution,” emphasized Tirrell. “It’s a great example of a solution that lets us leverage the content that is already in our Banner environment to provide better services to our constituents.”