

A3 REPORT TRAVEL

BACKGROUND

- Note any contextual or background information necessary to fully understand the issue.
- Indicate how this problem affects the organization's goals or is related to its values.

Customer is the traveler: faculty, staff, students, non-affiliates (i.e. faculty recruitments).

- When the customer spends excessive time trying to understand and comply with the process (cumbersome) it takes time away from the time they spend advancing the University's mission.
- When it takes too long to reimburse or the process is too cumbersome it erodes goodwill.
- Possible budget, tax, contract & grant ramifications of untimely payment and unit is unaware a trip has not been reimbursed.
- Process is creating cases of travelers supplying short term interest free loans to the University

These conditions affect faculty, students, prospective faculty (i.e. non-affiliates), and staff relationships with the University in a negative way.

GOAL:

To standardize work and business processes so that end customers have minimal financial and administrative burden.

- Complete current state value stream map including metrics
- Build skills in the use of LEAN process improvement tools.
- Identify opportunities

ROOT CAUSE ANALYSIS:

- Lack of visibility as to status of travel reimbursement (at all levels), e.g. management reports
- Lack of SLA/targets at departments
- Lack of mandatory training
- Over processing - dept., unit policies over-process G28 w/out documented authority
- Too many low-volume TCs- reluctance to cluster due to fear of slower service
- Lack of consistent information to traveler

COUNTERMEASURES:

- Establish SLA/Targets
- Create Dashboard/Scorecard, on-demand reports/inquiries (management reports), make status transparent
- Rebalance workload to Travel Coordinators in departments/clusters/units so TCs are high-volume processors.
- Follow G28 as strict guideline for each department. Any additional rules at a unit or department level should be approved, documented, and communicated.
- Enhance automated notifications/alerts to travelers and processors when TEVs are sitting in queues too long. Determine service levels per step.
- Simplify iTravel input system by having more auto populated fields in the system.

EFFECT CONFIRMATION RESULTS:

- Reduction in time to reimburse traveler
- Reduced lead times and processes times
- Standardization of process across campus
- Reduction in administrative costs

FOLLOW UP (ACTIONS):

- Buy in & resources for report/online inquiry development
- Buy in from CFAOs to require training & require documented exception for anything more restrictive than G28.
- Resources to enhance training
- Resources to enhance emails/notifications when vouchers move through queues (including reject notification) or experience delays.

CURRENT CONDITIONS:

