TITLE: Undergraduate Petitions: Changing Majors Across Colleges

BACKGROUND
- Students have three distinct opportunities to change their major after applying to UCR: Prior to admission (via MyUCR); at Highlander Orientation for Freshmen and Highlander Orientation for Transfers; and post orientation, if they decide their chosen major isn’t right for them or if they are advised by their college to choose another major due to academic issues.
- Different processes exist for students to change majors from one college to another, which can be challenging for both students and advisors.
- Delays and issues within the change major process affect the goal of graduating in four years, class accessibility, financial aid resources, student satisfaction, student experience, graduate career paths and their likelihood of contributing to or engaging with UCR post-graduation.

CURRENT CONDITIONS
- Process can take up to seven weeks if no additional requirements need to be met. Additional requirements may add several quarters to complete and involve several cycles with advisors.

GOAL
- Determine value as defined by the client
- Determine possible improvements to the process to enhance outcomes

ROOT-CAUSE ANALYSIS
- There is no centralized, standardized system for processing major change petitions
- Delegation of authority decisions are made by each college, and therefore approvals levels vary from one college to another. Some colleges have devolved authority to approve major changes to lower levels than others.
- Colleges have different requirements for major changes which creates the perception that it would be difficult to standardize the process.

COUNTERMEASURES/RECOMMENDATIONS
- Standardize major change process across colleges
  - Benefit: promotes process clarity for advisors and student, reduces roadblocks and time wasted in current process as student is sent from one advisor (current college) to another advisor (desired college)
- Convert major form to standardized, centralized web based form rather than paper based, allowing for electronic signatures from students and faculty/staff (as needed)
  - Benefit: Transparency, visibility, and opportunity to capture data on those students who apply for change of major but are denied
- Incorporate “push” notification technology in process to keep students (and advisors) informed as change major petition moves from one area in the university to another
  - Increase client satisfaction and awareness of process and reduce time wasted “checking” on status
- Provide consistent cross-training to advisors across colleges so that they are better able to offer information and advice to students seeking to change majors
- Develop and distribute consistent messaging about the challenges associated with changing majors across colleges to students prior to admission to UCR. This messaging would clearly state that while it is possible for students to change majors after admission, it is not simple or easy. Statistics about the number of students who successfully change majors across colleges would be useful in this messaging, and would be captured through our second recommendation (above).

EFFECT CONFIRMATION (RESULTS)
- Reduction in the time period between student petition for changing major across colleges to successful major change (current can be up to 7 weeks).
- Successful standardization of this process would increase the number of students graduating in four years, class accessibility, effective use of financial aid resources, student satisfaction and positive student experience, heightened career opportunities, and increased contributions and engagement with UCR post-graduation.
- Decreased number of visits to current college advisor for change major. Increased awareness of requirements should direct students directly to new college processes/advisors.

FOLLOW UP (ACTIONS)
- Share findings with Banner implementation team to inform and enhance the capabilities of Banner’s Student Information System, Degree Works, and scheduling.
- Share findings with leadership to inform and enhance conversations surrounding delegation of authority and standardization of processes across colleges.
- Determine necessary steps and tools to increase student awareness of requirements and access to information in a uniform way.
**BACKGROUND**

ePay is UCR's Online Payment Request application which was created to replace a paper based process (Form 5). ePay processes payment requests to single or multiple payee(s) and payments applicable to business meetings, entertainment and other occasions. ePay incorporates online business rules and improved policy controls, in due course, processing payments either by check or Electronic Funds Transfer (EFT). In FY 2013 ePay processed 13,239 requests for a total value of $13M. The ePay Kaizen Team decided to limit the scope of the study to focus on processing payments for business meetings, entertainment and other occasions. This payment process was perceived as the most unfavorable by ePay customers.

Per communication with the customer, the team determined the "customer's voice". It was found that they:
- Want the ePay process to be completed within 2 weeks of submission of request;
- Perceived inconsistencies in approval levels, felt that the process is policy based and overly risk averse;
- Believe that approval requirements should be adjusted to accommodate low value and low risk requests;
- Perceived a high error rate within ePay (many soft/hard rejections);
- Are confused regarding what policies are dictated by UCOP as opposed to the Campus and/or their Organizations.

**CURRENT CONDITION: VALUE STREAM MAP**

The ePay process for business meetings, entertainment and other occasions has a processing time ranging from approximately 18 to 96 minutes, depending on the event’s complexity, approval requirements, and if the ePay request is for a Purchase Order Backup. In most cases the total processing time will be under 30 minutes. On average, the delay time will be 13 days in the requesting department and 5 days in the Accounts Payable Department. Additionally, departments on average do not submit an ePay request until 25 days after the event has taken place. There are also delays relating to the creation of the voucher, PO vouchering, and the disbursement that are not caused by the ePay process directly.

**SUMMARY OF CURRENT CONDITION (RESULTS)**

<table>
<thead>
<tr>
<th>Processing Time:</th>
<th>P/T = 18 m 30 s – 26 m 20 s</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processing Time (PO Backup):</td>
<td>P/T (PO) = 24 m 40 s – 96 m 10 s</td>
</tr>
<tr>
<td>Delay Time:</td>
<td>D/T = 18 days (average)*</td>
</tr>
<tr>
<td>Lead Time:</td>
<td>L/T = 18 days (average)*</td>
</tr>
<tr>
<td>Total Number of Touches:</td>
<td>Touches = 3 – 9</td>
</tr>
</tbody>
</table>

*Between the event date and the creation date of the ePay request an average of 25 days elapse. If this was to be included in the delay time the average time for this process would increase to 43 days. After A/P approves the request, 2.5 days would be added for vouchering and disbursements unless this is a PO Backup, which would add between 9 and 11 days.

**ANALYSIS PROCESS**

For our analysis, we prepared a SIPOC diagram and top-down flowchart to better understand the process. This was followed by the creation of a cross-functional flowchart and value stream map to depict the current-state of the process. The team also used a minimum specifications exercise and critical-to-quality tree diagram to organize our Voice of the Customer data.

**ROOT-CAUSE ANALYSIS**

- Routing process creates delays; there is an inconsistency of policy across departments/organizations
- ePay implementation of policy creates multiple approval requirements regardless of dollar value
- Lack of proper training for system users, lack of training requirements
- Lack of “Best Practices” documentation for departments
- Lack of system enhancements and lack of feedback implementation – Need future enhancements
- Approvers are not quickly approving ePay requests
- ePay requests are not being promptly submitted following campus events
- Lack of data dashboard and/or other pertinent feedback causes ePay users to assume the fault for delays are caused by an inefficient ePay process or by Accounts Payable

**COUNTERMEASURES**

- Work to eliminate duplication in approval levels, some departments have redundancy in review process
- Establish "Best Practice" model for users/departments with feedback from Subject Matter Experts (SMEs)
- Encourage departments to reduce the total number of Transactors to reduce errors
- Reduce e-mail notification, move to a targeted email system for users/approvers
- Work to create a robust training material for ePay users

**FOLLOW UP (ACTIONS)**

- Update the value stream map with additional metrics that are currently unable to be determined without raw system data
- Work with Audit Services and/or CNC to assist in gathering missing metrics from system data
- Obtain rejection data to diagnose consistent problems and identify common reasons for known issues
- Draft “Best Practices” with help from Subject Matter Experts (SMEs)
- Work with Accounting department to develop ePay training material/program
- Identify opportunities to reduce staff administrative time associated with process
- Identify opportunities to cluster department functions with low volume ePay requests
- Work with departments (internal) processes to reduce number of touches
- Introduce Lean process improvement tools in system
- Seek advice/input from Audit & Advisory to better align processes (by way of workgroup involvement)

**FUTURE PROCESS IMPROVEMENTS AND SYSTEM IMPROVEMENTS**

- Enforce role specific mandatory training and development for all ePay users
- Enhance system to allow events with multi-payee requests to be completed in single request to eliminate delay time between multiple requests/approvals
- Enhance system to allow all users to soft reject ePay requests and to route to any prior approvers
- Enhance system to include features such as “copy as new” and “recall/retrieve submitted request”
- Enhance ePay to add a “system approve” criteria for ePay request not limited by policy
- Enhance ePay to provide “Reports” link to include business metrics and dashboard (Integrate with Business Intelligence System)
- Enhance system integration for payment look ups (UCRF5) and to authorize eBuy purchase orders

**TITLE:** ePay – Business Meetings, Entertainment and Other Occasions

Date: 8/27/2015 Owner: ePay Kaizen Team
### 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 recruitment).
- 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.
- Current state value stream map including metrics
- Identify opportunities

#### 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

#### CURRENT CONDITIONS:

#### 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 iravel 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.
**BACKGROUND**

CPMS was developed to streamline capital initiatives requiring project scope, associated timeline, and funding requirements and sources; providing a framework that could be clearly understood by all stakeholders. The Customer (department, organization, and/or Campus Leaders) enters the initiative or request into CPMS, request routes for Organizational Approval and is queued to the FP&A if $35K for fund source approval then routed to Dispatcher role. Depending on the project and if request is complete including funding, the Dispatcher routes the request to the appropriate Supplier (A&E, CAS, or Physical Plant). At this point CPMS must be queued manually between roles for scope development, additional funding and approvals.

**CURRENT CONDITIONS**

- Key factors: no auto routing, system is passive, no prompting unless request is “opened” to specific individuals, huge time lags, unless communication occurs outside of system no awareness to address request occurs, system is not intuitive, and no training/definitive guidance.
- % Complete & Accurate: Long Delay Time (D/T) plus amount of Process Time (P/T) = Total Lead Time (L/T) in Capital Programs suggests that requests are not 100% complete and ready for routing, e.g., incomplete scope, budget, funding source not identified, multiple approvals required, etc.
  - Capital Programs: D/T = 91 Days from 10/2014-4/2015
  - Capital Programs: 9/1-10 Minutes in CPMS to enter data/add comments.
  - Capital Programs: 10 Minutes P/T + 91 Days D/T = 91 days, 10 minutes L/T
  - Capital Programs Touches: = 26% Touch Time (Greatest share compared to all other Constituencies)

**ROOT CAUSE ANALYSIS**

- System designed to be data/document repository and budget/funding tool.
- Requests being returned for information, scope development, funding, FAU identification/correction, and re-approval between customers and suppliers.
- Long wait time in queues also due to defining/redefining scope, funding decisions, FAU can only be changed/updated by request owner; if central funding is approved, request must route back to original department to enter central FAU and amount. (System flaw).
- Data gathered during interviews with Stakeholders (Customers, Suppliers, Processors, etc.) indicated actual “Touch Time” ranged from 1-10 minutes in CPMS.
- Processes do not match capabilities of CPMS; further definition, examination, and process mapping should occur for each process, e.g., Major, Minor, Maintenance/Repair, Alteration/Renovation, etc.—then determine system needs (CPMS modification or other?)
- Why doesn’t CPMS work? CPMS designed for specific purpose with a limited scope; current state demands do not match.
  - Why no match? Current state not clear, lacking full customer involvement during scope development.
  - Why no customer involvement? System expectation was to control funding, rather than facilitate project completion.
  - Why did expectations change? System did not include customers, only perform tasks.
- Why evolved? Campus vision and strategy, technology, complexity, funding constraints, and demand.

**COUNTER-MEASURES**

- As a campus, examine and clearly define and outline the capital business process including funding, scope, schedule, stakeholders, customers and goals to ensure streamlining, efficiency, goal achievement and continuous improvement.
- Provide assistance to users in the form of a Customer Service Rep. Streamline processes can eliminate delays.
- Streamline the estimating process to ensure: correct estimates based on accurate project scope. Rapid decision making opportunities for users (such as initial ballpark estimate to allow a “go” or “no go” decision). Early inclusion of necessary teams (CAS, A&E, and Physical Plant). Comprehensive and complete estimates without the need for multiple site walks.
- Suggest processes should be mapped “outside of” or “without consideration” of CPMS to determine whether CPMS modification or consideration of other system is appropriate. Replace or revise current software system.
- Rather than “ad hoc” or all at once demand for work/projects, develop strategic plan for project requests with specific frequency, i.e., annually, allowing suppliers/processors to schedule work strategically, adjusting resources to meet demand, allowing Campus Leadership to budget strategically.

**TARGET CONDITIONS (GOALS)**

- Customers want communication, need answers and assistance. They are not experts, they are seeking experts.
- Customers want assistance to prepare the “right” documentation in order to make the correct request.
- Provide assistance to users in the form of a Customer Service Rep.
- Streamline the estimating process to ensure: correct estimates based on accurate project scope. Rapid decision making opportunities for users (such as initial ballpark estimate to allow a “go” or “no go” decision). Early inclusion of necessary teams (CAS, A&E, and Physical Plant). Comprehensive and complete estimates without the need for multiple site walks.
- Suggest processes should be mapped “outside of” or “without consideration” of CPMS to determine whether CPMS modification or consideration of other system is appropriate. Replace or revise current software system.
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**IMPLEMENT PLAN**

- What exactly needs to be done? Map/define all processes, compare to CPMS or other.
- Who needs to be involved? Stakeholders, Customers, Suppliers, Processors, Dispatchers, etc.
- How will this be attempted at first? TBD
- Where will it be attempted? TBD
- When will it be attempted? TBD
- What preparations must be made? TBD
- How will progress be evaluated? Pilot project examples and compare Current and Future State statistics.
- When will the reviews for follow-up be held? TBD
BACKGROUND AND PROCESS OVERVIEW

The process of onboarding new staff employees is decentralized across the campus. Each organizational unit provides oversight for the administrative process, in accordance with campus policies. Staff onboarding includes the completion of payroll forms, fingerprint/background clearances, requisition and deployment of new computers and equipment, issuance of parking passes, job related training, and granting of systems access. A combination of manual processes, systems, and tools are used to complete components of the service request. Service providers include department or Shared Services payroll, systems administrators, and IT personnel, Police, Transportation and Parking Services, CKC, HR and Labor Relations. Onboarding was identified by the campus as an area for improvement during the first Organizational Excellence series, which aim to directly support UCR’s 2020 Strategic Plan, organizational excellence goals, and cultural transformation initiatives. Specifically, process improvements will enable the University to quickly and efficiently hire and onboard staff into critical positions and increase administrative efficiency and effectiveness.

CURRENT STATE: STAFF ONBOARDING PROCESS PERFORMANCE VALUE STREAM MAP (VSM)

GOALS FOR PROCESS IMPROVEMENT

Improve the client’s onboarding experience, by offering timely, integrated, and efficient value added services. Improve communication and collaboration between service providers by ensuring visibility into each other’s processes. Minimize waste producing activities to reduce the 43-day lead time, free up the demand of resources, and redirect them to value creating activities.

ROOT-CAUSE ANALYSIS

<table>
<thead>
<tr>
<th>Problem</th>
<th>Why is the problem occurring?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overproduction of materials.</td>
<td>• Up to 126 steps and decision points in the process causes bottlenecks and delays.</td>
</tr>
<tr>
<td>• Approximately 50+ manual forms to complete with duplicative information.</td>
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</tr>
<tr>
<td>Waiting: Onboarding a single employee takes on average 40 days.</td>
<td>• Average delay of 19 days between hire and fingerprint appointment. There is one fingerprint machine in UCRPQ, which is a grant from the county and was not intended for campus-wide use.</td>
</tr>
<tr>
<td>• 14% of weekly fingerprint appointments are no shows, which reduces access for others.</td>
<td></td>
</tr>
<tr>
<td>Waiting: Limited availability for new hire orientation and training.</td>
<td>• Up to 2-month waitlist for new staff hire orientation - class size limited to 18 people.</td>
</tr>
<tr>
<td>• Limited resources to complete staff orientation.</td>
<td></td>
</tr>
<tr>
<td>Movement: New hires must visit multiple locations to complete onboarding process.</td>
<td>• Service providers are dispersed across the campus and not organized.</td>
</tr>
<tr>
<td>• 12 non-integrated systems are utilized to complete service requests.</td>
<td></td>
</tr>
<tr>
<td>• No campus wide strategy for managing client expectations or requirements.</td>
<td></td>
</tr>
<tr>
<td>Defects: Errors in scan type based on position.</td>
<td>• 86% accuracy in the background check scan type that is requested by the department. For example, employees in critical positions do not always receive both DDI and FBI scans as required by policy based on their position.</td>
</tr>
<tr>
<td>• Lack of training, awareness, or cost may impact level of scan requested.</td>
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</tr>
<tr>
<td>Over-processing Information: Client request service multiples times from service providers.</td>
<td>• Information disconnects between the customer, systems, and service providers.</td>
</tr>
<tr>
<td>• Information managed by email, phone, manually, and in 12 segregated systems.</td>
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</tr>
<tr>
<td>• No common or standard process to manage information flow.</td>
<td></td>
</tr>
<tr>
<td>• No campus protocol for the standardization of processes and integration of related systems.</td>
<td></td>
</tr>
<tr>
<td>• No visibility by service providers to see services in other provider's queue to plan and anticipate resource requirements.</td>
<td></td>
</tr>
</tbody>
</table>

PROBLEM ELIMINATION COUNTERMEASURES: VOICE OF THE CUSTOMER – FY 14/15 NEW HIRES

<table>
<thead>
<tr>
<th>What do our clients value?</th>
<th>What are our client’s specific requirements?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seamless and welcoming &quot;one stop&quot; onboarding experience.</td>
<td>Centralize onboarding service providers or bring activities directly to the customer to reduce travel time (waste). Focus activities on welcoming new hires to UCR vs. administration.</td>
</tr>
<tr>
<td>Fingerprint and background checks prior to start date.</td>
<td>Conduct fingerprint and background checks earlier in the recruitment and selection process. If a negative clearance is returned, it can result in a release from employment during probationary status, equating to waste time and resources required to recruit the position.</td>
</tr>
<tr>
<td>Automated parking options.</td>
<td>Develop an automated process for permit delivery and payment and eliminate in person permit application and payment authorization.</td>
</tr>
<tr>
<td>Systems access upon hire.</td>
<td>Schedule job related training for completion during orientation process. Employee cannot receive system access without completing training requirements.</td>
</tr>
<tr>
<td>UCRNetID and Password upon hire.</td>
<td>Eliminate 24-hour delay due to PPS systems update requirements. Update PPS System Software with the ability to grant immediate access.</td>
</tr>
<tr>
<td>New Hire Orientation 1st month of hire.</td>
<td>Eliminate 2-week waitlist for orientation due to seating limitations. Increase capacity to accommodate more new hires and/or offer it more frequently. Reduce 8 hour in person staff training, by placing some modules online.</td>
</tr>
<tr>
<td>Standardized and transparent onboarding process.</td>
<td>Create standard inventory of activities and steps to complete the onboarding process, to ensure accuracy and consistency in information flow to customers. Reduce number of forms.</td>
</tr>
</tbody>
</table>

IMPLEMENTATION PROPOSAL FOR PROCESS IMPROVEMENT

- Organize a 5-day "Kaizen - improvement" event to include a broader cross-campus group of stakeholders, clients, and service providers; and immediately plan for the future state of the onboarding process. Develop a campus communication and implementation strategy. Evaluate connections to other services, such as recruitment and off-boarding.
- Conduct a resource analysis to understand the demand on resources imposed by the current state process and understand how these resources may be freed up and redirected to value creating activities.
ONBOARDING: The administrative components of the onboarding process is considered complete when a new employee has the required resources, tools, training, systems access, and clearances to effectively perform their job duties.

PROBLEM: Clients report that the onboarding process is time consuming, labor intensive, and inefficient, which results in significant time delays to complete their onboarding process.

BACKGROUND AND PROCESS OVERVIEW

The process of onboarding new academic employees is decentralized across the campus. Each organizational unit provides oversight for the administrative process, in accordance with campus policies. Onboarding requests of new academic hires include the completion of payroll forms, assisting international scholars to obtain the required visa for their specific appointment, requisition and deployment of new computers and equipment, issuance of parking permits, job-related training, and granting systems access. Service providers use a combination of manual processes, systems, and tools to complete components of the service request and manage communication.

Onboarding was identified by the campus as an area for improvement during the first Organizational Excellence series, which aim to directly support UCR’s 2020 Strategic Plan, organizational excellence goals, and cultural transformation initiatives. Specifically, process improvements will enable the University to quickly and efficiently hire and onboard academic personnel and increase administrative efficiency and effectiveness.

CURRENT STATE: ACADEMIC ONBOARDING PROCESS PERFORMANCE VALUE STREAM MAP (VSM)

The current state map of the academic onboarding process highlights the various stages and activities involved, including the flow of information and support services. This map is critical for understanding the current process and identifying areas for improvement.

CURRENT STATE - ACADEMIC ONBOARDING PROCESS PERFORMANCE VALUE STREAM MAP (VSM)

GOALS FOR PROCESS IMPROVEMENT

Improve the client’s onboarding experience by offering timely, integrated, and efficient value added services. Improve communication and collaboration between service providers by ensuring visibility into each other’s processes. Minimize waste producing activities to reduce the 291-day lead time (international hires) and 40-day lead time (domestic hires), free up the demand on resources, and redirect them to value creating activities.

ROOT-CAUSE ANALYSIS

<table>
<thead>
<tr>
<th>Problem</th>
<th>Why is this problem occurring?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overproduction of materials and Over-processing of information.</td>
<td>• 120 steps and decision points in the process, causing bottlenecks and delays. • Approximately 50-60 manual forms to complete with duplicative information. Forms are difficult to locate and often require rework by various departments.</td>
</tr>
<tr>
<td>Waiting: Onboarding a single employee takes up to 291 days for international hires and 40 days for domestic hires.</td>
<td>• International scholars can expect up to a 4-month delay in obtaining visa clearance from homeland security. International scholars can experience a total delay time of 250 days. • Seasonality leads to bottlenecks as service providers experience an influx of Academic appointments at the beginning of each quarter.</td>
</tr>
<tr>
<td>Waiting: Limited availability for new hire orientation and training.</td>
<td>• Waitlists up to 2 months for new hire orientation – class size limited to 18 people. • Limited resources to complete new hire orientation. • Safety training must be arranged prior to the start of lab work.</td>
</tr>
<tr>
<td>Transportation: New hires must visit multiple locations to complete onboarding process.</td>
<td>• Service providers are dispersed across the campus and not organized. • 8 non-integrated systems are required to complete service requests. • No overall process owner to manage customer expectations or requirements.</td>
</tr>
<tr>
<td>Underutilization of Technology: Information between service providers is not integrated.</td>
<td>• Information manually managed by email and phone in 8 non-integrated systems. • No common or standard process to manage information flow. • No universal ownership by all service providers for the end-to-end process. • No visibility by service providers to see services in other provider’s queue to plan and anticipate resource requirements.</td>
</tr>
</tbody>
</table>

PROBLEM ELIMINATION COUNTERMEASURES: VOICE OF THE CUSTOMER – FY 14/15 NEW HIRES

What do our clients value? What are our customer’s specific requirements?

| Seamless onboarding experience. | Centralize onboarding elements or bring onboarding directly to the customer to reduce travel time (waste). Eliminate unnecessary forms. |
| Online access to employment forms. | An online database for employment forms that is accessible to supervisors and new hires. |
| Automated form fulfillment center so new hire is not required to be physically present. | An online system for completing required employment forms. |
| Automated parking options. | TAPS requires in-person permit application and payment authorization. An automated process for permit delivery and payment. |
| Complete new hire orientation 1st month of hire. | Eliminate 2-month waitlists for orientation due to seating limitations. Capacity must be augmented; orientation should be held more frequently and should be mandatory. |
| Redline ‘onboarding’. | Onboarding should include information about UCR Policy, department vision, and job expectations in order to reduce learning curve. The transition should be smooth. |
| Eliminate delay time in TA appointment onboarding. | Prepare for known peaks seasons by effectively using resources and time during off seasons. |
| Standardize onboarding process to ensure consistency in information and experience. | Elements of onboarding are not standardized, leading to inconsistent delivery, clarity, and type of information provided to the employee. Create standard checklists of activities and steps to complete the onboarding process. |

IMPLEMENTATION PROPOSAL FOR PROCESS IMPROVEMENT

- Organize a 9-day ‘Kaizen-improvement’ event to include a broader cross-campus group of stakeholders, clients, and service providers; and immediately plan for the future state of the onboarding process.
- Conduct a resource analysis to understand the demand on resources imposed by the current state process and understand how these resources may be freed up and redirected to value creating activities.
- Develop an implementation and communication plan for the future onboarding process.
- Evaluate connections to other services such as recruitment and off-boarding.