Payroll Distribution Change (PDC)

Business Process Analysis
Collaboration

- Research
- HRM
- Internal Consulting
What is pay-roll distribution?

Allocating payroll expenses to the appropriate FOAP (budget centers)

Grant 1 – 512345
Grant 2 – 523456
Grant 3 – 500457
Grant 4 – 500466
Grant 5 – 599941
Grant 6 – 599960
Grant 7 – 533780
What is pay-roll distribution change?

**Before** expenses have been charged to the wrong FOAP:

- **Job**
  - Change split (1-time) with future dated changes

**After** expenses have been charged to the wrong FOAP:

- **Job**
  - Change split (1-time) with future dated changes

**AND**

- **Expenses**
  - Move *every* mis-allocated expense *(kinda like a Journal Voucher)*
Recipe for PDC process analysis

1. Abstraction Laddering
   - Abstract
   - Concrete
   A way of reconsidering a problem statement by broadening or narrowing its focus

2. Fly-on-the-wall Observation
   An approach to conducting field research in an unobtrusive manner

3. Stakeholder Mapping
   A way of diagramming the network of people who have a stake in a given system

4. Walk-a-mile Immersion
   A way of building empathy for people through firsthand experience

5. Interviewing
   A technique for gathering information through direct dialogue

6. Rose, Thorn and Bud
   A technique for identifying things as positive, negative, or having potential

7. Importance/difficulty Matrix
   A quad chart for plotting items by relative importance and difficulty
Ingredient 1

Stakeholder Mapping
Approach
• Jeff Seo led a discussion with Research users community and HR representatives.
• Jeff W was the fly on the wall

Issues, opportunities identified

Potential Solutions
1. Replace Liquid office with K2
2. Move pay roll processors into research
3. Call HR directly on their cell-phone
4. Limit number of approvals
Abstraction Laddering: Why is it Important?

Concrete
- Possible fine
- Over-charge Northeastern
- Mis-allocation of expenses
- Takes too long

Vague

Ingredient 3
Walk-a-mile Immersion: What is the reality?

**Approach**
- Fabio and Jeff processed a test PDC transaction, reviewed notifications, approvals, form, etc.
Interviewing: What is the back-end process?

**Approach**
Jeff and Monisha interviewed HR to understand the back end of the process – after the approvals were complete.

**Issues, opportunities identified**

**Potential Solutions**
1. Get users to submit requests earlier in the process
2. Hire temp workers to data enter (bandaid)
3. Automate the back-end process
Approach
Jeff, Susan and Jeff presented initial findings to the Operations Council

Issues, opportunities identified

Potential Solutions
1. Expedite the index creation process to minimize misallocations at the start
<table>
<thead>
<tr>
<th>Research community</th>
<th>Human Resources</th>
<th>Internal Consulting</th>
<th>Operations Council</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Seven possible approvers!!</td>
<td>1. Seven possible approvers??</td>
<td>1. Form is online 😊</td>
<td>1. Index not created in a timely manner</td>
</tr>
<tr>
<td>2. No notifications</td>
<td>2. Time consuming when expense misallocated</td>
<td>2. What’s my position #?</td>
<td></td>
</tr>
<tr>
<td>3. Takes too long</td>
<td>3. Invalid/inactive index</td>
<td>3. Is that index right?</td>
<td></td>
</tr>
<tr>
<td>4. Where is my request?</td>
<td>3. Docusign – can’t see the status</td>
<td>3. How many? How long does it take?</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>No data, analytics</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Duplicate notifications</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Dashboard w/o stages or people</td>
<td></td>
</tr>
</tbody>
</table>
Importance/Difficulty Matrix: What’s the priority?

- **Low hanging fruit**
  - Notifications
  - Multiple Approvals
  - LO vs. Docusign?

- **Run away**
  - Analytics and workflow data
  - Dashboard

- **Resources? Maybe**
  - Education & Training
  - Improve index create process
  - Form validation

- **Just do it**
  - Transaction automation
  - Run away Resources?
Recommendation 1 – Bundle workflow improvements

+ Status
+ Approver

🚨 Notification/Alert
🚨 Notification/Alert

🔍 Index description

- Input field
  - This field cannot be empty.

- Valid input
Recommendation 2
Recommendation 3 – review grant setup process

Grant Lifecycle

Proposal → Award → Setup → Management → Close-out

How long after the grant does it take to set up the fund, index, budget, etc.?
Recommendation 4 – look at the possibility of automation