Academic Affairs

Digitizing the Process: Development of a Digital Academic Requirements Committee Petition

End-of-Project Report
Project Description
Created online resources, including workflows and electronic signatures, to accelerate the Academic Requirements Committee (ARC) petition process. Digitizing this process enabled us to rethink every aspect of our petitions, eliminate redundancies, create institutional memory, and work toward a paperless environment.

Project Outcomes
- Deployment of a fully functional digital ARC petition.
- Trained appropriate faculty and staff on the use of the digital ARC petition.
- Increased efficiency of the ARC petition process by reducing turnaround time from up to 10 weeks to the average petition taking between 1-10 days to be reviewed and processed.

Project Lead
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Project Team
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Project Sponsor(s)
- Alan MacCormack - Chair, Academic & Research Computing
- Yves Labissiere - Interim Director, University Studies
- Cindy Baccar - Registrar, Enrollment Management and Student Affairs

Impact of Project
One of the key components of this project was to develop an online academic requirements petition process for students that would increase efficiency of the process for both students submitting petitions, as well as for reviewers. The project used OnBase, PSU's enterprise document imaging and workflow solution in every step of the electronic deliverable from the online form to workflow to electronic approvals. This would not have been possible without the major Hyland OnBase project OIT funded and implemented in 2012. Within the first month of launching the new process, the processing time of submitted petitions was significantly reduced from up to 10 weeks to between 1-10 days.
Another key component of this project involved implementing an online internal review process, which allows Academic Requirements Committee members to review and vote on petitions prior to ARC meetings. Petitions that receive consensus approval by reviewers automatically move along in the approval process without requiring the Academic Requirements Committee to discuss in-person. Digitizing this process has expedited the approval process and has also reduced meeting times for the Academic Requirements Committee, which can now focus on arriving at consensus for petitions that warrant further discussion by the group.

Two training sessions were held to train the campus on the new system for petitioning academic requirements. Following a "train-the-trainer" model, these training sessions focused on equipping the necessary leads with the information needed to bring new users up to speed. In addition, a user manual was developed to support users on how to access and review petitions in OnBase, the platform used to manage and coordinate workflow.

Advising & Career Services also held a follow up session to explain the Academic Requirements Petition process itself, after learning in the first sessions that there wasn’t a universal understanding of the petition process amongst faculty, advisors, and other staff involved in the process. These initiatives have helped promote a greater understanding of PSU’s policies and procedures around petitioning academic requirements, particularly amongst advisers and reviewers.

Digitizing the process has helped to improve documentation and visibility of the petition process from start to finish. This has also eliminated the risk of losing physical paperwork, contributing to a reduction in overall processing time.

**Project Deliverables**
The key deliverable for this project was the creation of a digital Academic Requirements Committee petition. In addition, a number of supporting deliverables were created for the purposes of this project and are listed below:

- Website for students to access instructions and the digital ARC petition form.
- OnBase User Manual as a reference document that details the review process for faculty, staff, administrators, and ARC members.
- OnBase ARC Petition workflow graphic for future reference
- Assessment Plan for assessing effectiveness of digital ARC petition process, as well as for continual process improvement.
- Memorandum of Understand (MOU) establishes how the digital ARC petition process will be supported and sustained post-Provost’s Challenge.

**Project Sustainability**
The digital ARC petition will be supported by the Office of Information Technology (OIT), Enterprise Applications (EA), the Registrar’s Office (RO) and University Studies (UNST). The roles and responsibilities of each department involved are outlined below:
● Enterprise Applications (EA) is the primary owner of the OnBase system and will provide technical support related to the ARC petition.
● Registrar’s Office (RO) will be the primary owners of the ARC petition process. The Degree Certification Specialist will be the primary resource within RO for basic user support, issues with petitions that have been misrouted, as well as other workflow process related issues that may arise.
● University Studies (UNST) receives a large number of ARC petitions. They appointed a workflow coordinator within UNST who is responsible for routing petitions as needed and assigning petitions to the appropriate cluster coordinators.

Regarding ongoing maintenance and updates-- an initial evaluation will occur at the end of the 2014 Fall term. No major changes will be made at this time. An in depth evaluation will occur at the end of the 2015 Spring term. Any enhancements will be made throughout Summer 2015.

Additional details around the specific support and service levels provided by each department can be found in the project’s MOU.

Lessons Learned
The project was successful in large part due to the team that was assembled. Bringing together the expertise of those who deeply understood the ARC petition process, combined with those who were skilled in process mapping, workflow development, and OnBase was incredibly helpful and allowed us to successfully outline the process.

The project management support from OIT was key in documenting the process and best practices for other projects that will require this type of collaboration.

Furthermore, the workgroup who developed the online petition process worked collaboratively and effectively to create a model for future online student process development. The team was committed the project’s success. This collaborative nature allowed us to move things forward and resolve any roadblocks that arose in an efficient manner.

Organization of Provost’s Challenge
The Provost’s Challenge initiative provided the necessary platform to make digitizing the Academic Requirements Committee petition a priority. Bringing together a group of people to advocate for the project’s success helped to move things forward and ensure outcomes were being met in a timely manner.

Additionally, the project management framework and status reports helped build momentum and were useful in conveying the progress being made throughout the course of the project.