

Texas State University

Outcomes Report

General Information

Academic Year:	2014-2015
Division:	Finance & Support Services
Unit:	Financial Services
Department:	Office of Payroll & Tax Compliance
Outcome Type:	Administrative / Educational Support
Coordinator/Contact:	Debbie W. Jones
Status:	Results Approvals Complete

Mission Statement

The mission for Payroll and Tax Compliance is to provide a balance between exceptional customer service and compliance. We do this by:

- Leveraging technology to simplify business processes for payroll, which in turn enhances the customers experience
- Leveraging technology to ensure financial, policy, process compliance mandated by federal, state, system, university and regulatory organizations
- Striving for operational credibility in all areas through continuous business process improvements
- Training all department employees across the University serving students

Evidence of Improvement

As this was the first year to assess these outcomes, no comparisons to prior years are possible and no linkage to the prior year action plan exists. The assessments will be performed again with the FY 2014-2015 data forming the baseline.

Outcome 1: This outcome was delayed until FY16, but is scheduled for implementation in September 2015. Future assessments will be performed using the FY 2015-2016 data forming the baseline.

Outcome 2: Project implementation was delayed until May 2015 due to staffing issues. However, from May to July 2015, 118 batches have been scanned containing 26 documents per batch or 2,950 documents. Similarly, two drawers of a 4-drawer filing cabinet have been cleared during this time period.

Outcome 3: In this first year of assessment, 98% of all emails have been responded to within 1-2 days. Our customer satisfaction survey resulted in a 4.91 satisfaction level on a scale of 1 to 5.

Action Plan

Outcome 1:

An upgraded SAP Employee Self Serve (ESS) Portal will provide access for all employees to their calendar year 2015 W-2 forms beginning in January 2016. This new functionality will be marketed to the campus beginning in September 2015 and employees will be encouraged to enroll in the "Electronic Delivery" of their annual W-2 forms. This functionality will save the University both human and financial resources. The University will be transitioning from using a third party provider, ADP to using our in-house ERP System, SAP to provide the electronic W-2's. Using this new method of delivery, we hope to increase electronic participation by at least 5% over the preceding year with the base year beginning in 2016.

Outcome 2:

The Data Management System (DMS) provides our office with the opportunity to electronically scan and store various reports and documents, Based on the time needed to scan and index each batch, we will adjust our projected annual batches to a more achievable goal.

A new student worker will continue to be hired in Fall 2015 and trained on using the DMS. Document Statistics will continue to be gathered to reflect the success of this on-going process and the reduction in the number of metal file cabinets needed.

Outcome 3:

Excellent Customer Service will be provided to all Faculty, Staff and Student Employees and be measured by answering all employee emails sent to the payroll mailbox within 1-2 business days and providing an annual customer service survey attaining a minimum score of 3.75 on a scale of 1 to 5.

Outcome 1

Category: Support Service Outcome

Enrollment in electronic receipt of annual W-2 forms is increased to ensure timely receipt of tax information for all University Employees.

Outcome 1 - Method 1

We will compile and analyze the faculty, staff and student employee enrollment in electronic receipt of annual W-2 forms to determine the percentage change each calendar year. The performance target for enrollment in electronic W-2's is to increase participation at least 5% each year.

Outcome 1 - Method 1 - Result

Outcome 1, Method 1 - We will compile and analyze the faculty, staff and student employee enrollment in electronic receipt of annual W-2 forms to determine the percentage change each calendar year. The performance target for enrollment in electronic W-2's is to increase participation at least 5% each year.

Though not implemented in FY2015, this upgrade allows for the in-house production of annual W-2 forms in SAP versus using ADP, our previous third party W-2 provider. The University Community never fully accepted the use of ADP as the provider and electronic W-2 enrollment was a mere 16% after four years. Payroll management determined that a change was necessary to achieve departmental and University long term goals. Due to the delay of installing the upgrade to the SAP Employee Self Serve (ESS) Portal, we were unable to report on the results for FY2015 but will report in FY2016.

In January 2016, the 2015 W-2's will be available to those employees who select electronic delivery and will be our base year of measurement. We anticipate participation to exceed the projected 5% increase in future measurement periods. Because this was our first year of measuring, there is no corresponding action plan from last year.

Outcome 1 - Method 2

We will compile and analyze mailing of paper W-2 forms each calendar year. The performance target for mailing paper W-2 forms to University Employees is to decrease participation by 5% each year.

Outcome 1 - Method 2 - Result

Outcome 1, Method 2 - Payroll will compile and analyze the mailing of paper W-2 forms each year to those Faculty, Staff and Students who do not select electronic delivery of their annual W-2 forms which results in a printed and then mailed paper W-2 .

Due to the delay of SAP Employee Self Serve (ESS) Portal upgrade, we were unable to report on the results of this method until the following reporting period. This upgrade allowed for the in-house production of annual W-2 forms in SAP versus using ADP, our previous third party provider. The University Community never fully accepted the use of ADP as the provider which resulted in FY 2015, the printing and mailing of 8700+ paper W-2 forms.

In January 2016, the 2015 W-2's will be available to those employees who fail to select electronic delivery and will be our base year of measurement. with the introduction of SAP online W-2's, we anticipate participation to exceed the projected 5% increase in future measurement periods. Because this was our first year of measuring, there is no corresponding action plan from last year.

Outcome 2

Category: Support Service Outcome

A data management system solution is in place to ensure timely and efficient retrieval of source documents.

Outcome 2 - Method 1

Payroll Student Workers were trained on how to scan documents and Staff were trained on verification of scanned document batches, how to index those batches and how to retrieve documents stored in the Data Management System solution. Statistics will be maintained on the number of successfully completed batches (25 pages per batch) with a target of 2,000 batches annually.

Outcome 2 - Method 1 - Result

Method 1 - Payroll Student Workers (2) were trained to scan documents and staff members were trained on verification of scanned document batches, how to index those batches and how to retrieve documents stored in the Data Management System (DMS). Statistics will be maintained on the number of successfully completed batches (25 pages per batch) with a target of 2,000 batches annually.

Due to staffing issues, this project was delayed until May 2015. Through July 23, 2015, **118 batches** have been scanned containing 25 documents per batch or **2,950** documents. Based on our short history, a batch takes up to one hour to be scanned and then an additional hour for verification and indexation. We didn't reach our anticipated goal of 2000 batches and will revise that goal for FY16. Because this was our first year of measuring, there is no corresponding action plan from last year.

Outcome 2 - Method 2

We will compile and analyze the various documents to determine the number of inches of paper documents scanned, indexed and shredded each year thus reducing the need for traditional file cabinets of 3 per year.

Outcome 2 - Method 2 - Result

Method 2 - Payroll will compile and analyze the batches scanned, indexed and shredded each year in order to determine the number of inches of paper documents processed thus reducing the number of file cabinets by 3 per year.

Due to staffing issues, this project was delayed until May 2015. Based on our short history, we were successful in clearing out 2 drawers of a 4 drawer file cabinet containing employee direct deposit forms in FY2015 or 40 inches of paper documents. We will need to address staffing issues for this project. Because this was our first year of measuring, there is no corresponding action plan from last year.

Outcome 3

Category: Support Service Outcome

All Faculty, Staff and Student Employees experience excellent customer service by Payroll and Tax Compliance staff.

Outcome 3 - Method 1

Employee emails sent to the Payroll email address: payroll@txstate.edu will be read and answered within 1-2 business days. A log will be created and maintained on response time with a goal of 90% annually.

Outcome 3 - Method 1 - Result

Method 1 - Employee emails sent to the Payroll email address: payroll@txstate.edu will be read and answered within 1-2 business days. A log will be created and maintained on response time with a goal of 90% annually.

Payroll staff have created a log spreadsheet for FY2015 of all email correspondence to the Payroll email box. Year-to-date, 98% of all emails have been responded to within 1-2 days and surpassed our 90% goal through July 20, 2015, for FY2015. We will increase our customer service efforts to maintain timely customer responses. Because this was our first year of measuring, there is no corresponding action plan from last year.

Outcome 3 - Method 2

Payroll and Tax Compliance will design and circulate an annual customer service survey for all University Faculty, Student and Staff Employees in April of each year to assess the current level of satisfaction with a minimum score of 3.75 on a scale of 1 to 5.

Outcome 3 - Method 2 - Result

Method 2 - Payroll will design and circulate an annual customer service survey to all Faculty, Staff and Student Employees to assess the current level of satisfaction with a minimum of 3.75 on a scale of 1 to 5.

Payroll staff designed and circulated an annual customer service survey during the months of June and July with the current level of satisfaction surpassing the goal of 3.75, with a 4.91 on a scale of 1 to 5 for FY2015. We will increase our customer service efforts to maintain customer satisfaction levels. Because this was our first year of measuring, there is no corresponding action plan from last year.

Approval History

Approval History Event	Approver
Outcomes Approved Level 1	Darryl Borgonah (djb129)
Outcomes Approved Level 2	William Nance (wn02)
Outcomes Audit Report Submitted	Ana Garza (ag02)
Results Approved Level 1	Darryl Borgonah (djb129)
Results Approved Level 2	William Nance (wn02)