Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, March 26, 2020  
Time: 2:00 – 3:00 p.m.  
Location: WebEx Meeting

1. Introductions.


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| 1. REQ to PO Tracking & Timelines  | **New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process.  

**A Procurement Process training video** was also created as a quick educational resource around purchasing best practices.  

**Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices.  

*Ongoing.* |

| 2. Policies & Procedures Education and Transparent Leadership | **Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment.  

**Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing.  

**Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings.  

*Ongoing.* |

| 3. Training Videos. | Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a |

Contact the Quality Assurance Improvement Manager with any questions, concerns, and/or feedback via telephone at (262) 472-1772 or email at stokesa@uww.edu
variety of different informational topics including compliance-related best practices and other scenarios.

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<tr>
<td>4</td>
<td>Digital On-Campus Swap Shop.</td>
<td>In Progress.</td>
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<td>7</td>
<td>Direct Deposit Requirement for Student Refunds.</td>
<td>In Progress.</td>
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<td>9</td>
<td>Transactional Hub (Workgroup scheduled through Cabinet).</td>
<td>In Progress.</td>
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<td>10</td>
<td>Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).</td>
<td>In Progress.</td>
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| 11 | Process Improvement Collaborations with ITSCM 410:  
   • Student Fee Appeal Request Process  
   • Prizes, Gifts and Awards Process  
   • Student-Faculty Account Application/Check Process  
   • Transfer Request Form Process | In Progress. |

3. Discussion  
      i. Questions, Concerns, or Comments regarding processes or procedures?  
   b. BP Logix and E-Workflows.  
   c. Outside Activities Reporting (OAR) Process.  
   d. Spikes Cavell Spend Analytics Workgroups.  
      i. Project Update.  
   e. Budget Website and PIAT Ideas Intake Form.

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