

Form: Workflow Proposal Request

Submitted: Aug 2, 2023 5:03PM

Submitted By: Leigh Anne Rozell

Name Leigh Anne Rozell

Department Deposit Services

Request Type *

☒ New Request ☐ Change Request

Workflow Name * Release of Stop Payment

Business Owner * Leigh Anne Rozell

Target Start Date *

08-02-2023

Target End Date *

09-01-2023

Process Subject Matter Expert - Who currently is the expert on this manual process? *

Leigh Anne Rozell

Workflow Description - What is current manual process? *

HUB Form that requires a wet signature and then an employee has to maintenance the core to remove the stop.

Expected Benefits - efficiency gains (reduction of hours for completion), customer or operations related benefits, increase to income, more capabilities for customer retention or onboarding? *

Automate the process and remove signature requirement. It will also allow us to remove the ability for front line to access the stop payment screen.

Current jhaEnterprise Workflow Utilization: Does department currently use Enterprise Workflow? *

Yes, once the stop payment workflow goes live.

Workflow Purpose: Is the workflow for tracking? Process Improvement? Both? What is the problem/opportunity you are trying to solve? *

both

Current detailed procedures are required for approval on all Workflow requests. Please attach procedures here: *

Stop Payment Manual.docx

How long does it take 1 employee to complete the current process? *

2-5 minutes

How many employees does it take to keep up with current demand? *

2

What is the current demand? *

5-10 a week

Current Procedures: Current written procedures should be available upon request. *

yes

External Customer Impact: An assessment of whether the workflow will require direct customer action. *

none

Department Impact: What departments will be impacted by the creation of this workflow? *

retail, bookkeeping

Technology/Vendor Influence: What vendors/technology is used in the current process? *

Synergy, Silverlake

Regulatory/Audit Constraint: How is the current process audited or reported on? Impact to business or failure to comply. *

none

Reason for Change Request: What is the driving force behind needing to make the change? Cosmetic/Confusion/Need additional functionality? *

additonal funtionality

Area(s) of Change: Where in the workflow do updates need to be made? Attaching screenshots or referencing your project plan will help the evaluation process. *

na

[View Form Response](#)