

<b>To: Oversight Committee</b> President Gamble Business Process Review Oversight Committee	<b>From: BPR Accounts Payable</b> Ed Binkley Lynne Hendrickson Bonita Jans Peggy Kastella Lorraine Johnson Sue Ost Jim Nielsen
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## MSU Business Process Review Business Case: INVOICE PAYMENT

### Executive Summary

The accounts payable process for invoice payment was found to be paper and labor intensive and included multiple signatures and reviews causing significant delays on the Bozeman campus. The remaining campuses have a centralized system which allows them to code, review and pay the invoice once they have received it, eliminating the need for routing to other departments on campus for further reviews and approvals. Further review of the process unveiled that 70% of invoices submitted for payment were under \$500. These particular requests for payments received the same level of scrutiny as one for \$10,000. This area needed to be explored to determine if all of the routing and signature authority were necessary to pay these invoices. Our goal was to reduce errors, process and expedite payments in an efficient and timely manner.

	<u>MSU- BOZ</u>	<u>MSU- BILL</u>	<u>MSU- NOR</u>	<u>MSU- GF</u>	
Annual Transactions	52,472	20,204	4,748	3,620	<b>81,044</b>
BPA's <\$500	70%	78%	69%	78%	
	36,730	15,759	3,276	2,824	<b>58,589</b>
Processing Costs B4 PI	12.00	5.00	12.00	4.00	
	\$629,664	\$101,020	\$56,976	\$14,480	<b>\$802,140</b>

The Accounts Payable team, in regard to invoice payments, PCard and travel ( as subsets of invoices), recommends the implementation of Banner Approval Queues and supplementing them with a Document Imaging system on the Bozeman campus at a minimum. Implementation on the other campuses would be at their discretion due to their level of volume.

We strongly encourage the use of the PCard for transactions under \$500.

We promote the use of the ACH feature. Each campus will promote this effort where it applies to their respective vendors.

We also advocate the fast track payment process for transactions submitted under the \$500 threshold that do not utilize PCard. This method would reduce the number of approvals needed on items <\$500. Only two sign-offs (the purchaser and their supervisor) should be required to allow payment on these small amounts, with local approval to be determined at the departmental level.

Oversight Committee approval of these recommendations was conditioned on:

- Oversight Committee reviewing the Purchase Order/requisition model after a 12 month period. The Oversight Committee was concerned about the introduction of massive changes all at the same time.
- Review of the assumption that receipts have to be seen before approval is given. This is also subject to individual department approval.
- Review of the assumption that Bozeman requires central storage of invoices as opposed to departmental storage of invoices on a decentralized basis. This review must consider OSP document retention requirements.

Although document imaging is considered the best method to implement this Team's recommendation, it is recognized that this method is considered to be very expensive. Therefore, several methods should be investigated by the Implementation Team with close consultation with ITC and Aleks Berzins. Those methods include:

- Scanning an invoice and attaching the scanned document to an e-mail addressed to all approvers. Consideration needs to be given to recent Microsoft changes that, reportedly, make it more difficult to attach a scanned document to an e-mail.
- Approval Queues with decentralized archiving of documents. OSP document retention requirements must be considered.
- Outsourced document imaging for archiving purposes. This would particularly apply to PCards. The State of Montana currently images documents. Investigation should be made into the possibility of buying scanning services from the State.
- Linking Approval Queues with document imaging

This proposal recommends and assumes implementation by November 30, 2007.

## Table of Contents

<b>Executive Summary .....</b>	<b>1</b>
<b>Table of Contents.....</b>	<b>3</b>
<b>A. Introduction .....</b>	<b>4</b>
1. MSU Business Process Review.....	4
a. Summary of Processes to be Redesigned or Modified.....	4
b. Business Process Review Objectives .....	4
c. Scope of This Case.....	5
2. Business Process Review Business Case Purpose .....	6
3. Background.....	6
a. Problems and/or Opportunities Addressed by Business Process Review .....	7
b. Connections to other Projects/Products or Programs .....	8
c. Other, Alternative Actions .....	8
d. Current Problems or Limitations.....	8
e. Other Important Historical or Situational Information .....	9
<b>B. Methods and Assumptions.....</b>	<b>9</b>
1. Financial Metrics .....	9
2. Business Case Scope and Boundaries .....	9
a. The Analysis Period .....	10
b. Geography or Location.....	10
c. Organizations .....	10
d. Functions and Positions .....	10
e. Technology .....	10
3. Scenario Design .....	10
4. The Cost Model.....	11
5. The Benefits Rationale.....	11
6. Data Structure .....	12
7. Data Sources and Methods .....	12
8. Assumptions .....	12
9. Financial Model and Cash Flow Statements .....	12
10. Analysis of Results .....	12
11. Non-financial and Non-quantified results .....	13
12. Security and Risk Analysis .....	13
<b>C. Conclusions and Recommendations.....</b>	<b>13</b>
1. Conclusions .....	13
2. Recommendations .....	14

## A. Introduction

### 1. MSU Business Process Review

The 4 campuses of MSU were invited to participate in a business process review of all administrative and financial business processes across the 4 campuses.

There were several strategic objectives:

- develop a single process to be used by the 4 campuses,
- have a consistent set of definitions for all data elements, and
- improve institutional and system efficiencies and effectiveness.

Each of the processes will be:

- Redesigned,
- Modified, or
- Remain unchanged.

Each process will have a business case and cost benefit analysis to support the final recommendations.

The investigation and development phases (Phases I and II) occurred during 2006. Implementation of approved recommendations will occur during 2006 and 2007 in alignment with business cycles and resources availability.

The Invoice Payment process is the payment of vendors for goods and services purchased by the University ensuring prompt and accurate payments to vendors.

#### a. Summary of Processes to be Redesigned or Modified.

<b>Process Title</b>	<b>June 28<sup>th</sup> 2006 Receommendations</b>
Travel	Redesign
Purchasing Card	Redesign
Invoice Payment	Redesign
1099s	modify
Data Entry	Modify
Manual Checks	Modify

#### b. Business Process Review Objectives

President Geoff Gamble's letter to the MSU campuses focused on 6 major desired outcomes of the BPR project:

1. A strategic effort to enhance all of the University's business processes that fall under the general umbrella of Administration and Finance operations.
2. Establish a University wide information system based upon a set of common, standardized data elements and business processes used by all campuses and agencies.

3. The BPR teams will review all processes and develop a standardized design for all data elements and business processes which will be selected for President. Gamble's final approval.
4. The BPR outcomes will be a visible example of a more operationally consistent Montana State University.
5. MSU will enjoy a higher level of efficiency and effectiveness throughout our administrative operations and information systems
6. MSU's commitment to the Board of Regents in support of their Strategic Goal III – Improving institutional and system efficiency and effectiveness.

These 6 major strategies can be translated into 6 subordinate strategies or tactics that can be identified and measured for many of the individual processes to demonstrate achievement and accountability:

- Improved institutional and systems efficiencies and effectiveness;
  - Single process across 4 campuses,
  - Data consistency,
  - Quality process,
  - High level of customer service, and
  - Timeliness of product or service delivery.
- Reduction of paper based transactions.
- Improved records management.
- Improved technical functionality.
- Development of Business Continuity Plan.
- Implementation of Front Office/Back Office concept

Invoice Payment Process Objectives- in addition & specific to scope

- Timely payments to vendors
- Reduction of multiple approvals
- Reduction of a paper intensive process
- Efficiencies in the processing of payments under \$500
- Knowledge of process status of invoices

### **c. Scope of This Case**

As proposed by President Gamble, the BPR project will review all administrative and financial processes across all four MSU campuses. During 2006 BPR Teams collected and analyzed data as part of the assessment and recommendation periods, being Phase I and II respectively. Implementation will occur during 2007.

It was assumed that since the BPR project could only make recommendations pertaining to administration and finance policies and procedures, any investigation would be contained to within central administration and finance departments. Cost benefit analysis will include estimates for the whole organization based on detailed analysis in central administration and finance, and extrapolated analysis of other departments.

Recommendations pertaining to other Divisions, for example, Student Administration, or Office of Sponsored Programs, could be made based on the Administration and Finance Division data collection and analysis. Although the implementation of such recommendations would be determined by the Executive of these other Divisions.

The charge of the Accounts Payable BPR team was to redesign the invoice payment process. The parameters of this process were to be contained only in the Administration and Finance arena. An invoice navigates through each of the designated approvals until a check is prepared. Routing of the invoice was found to be a major stumbling block in the production of a timely vendor payment. In reviewing the payment process for each campus, it was soon determined that each had its own unique clientele. It was duly noted that each campus had vendors who were small business owners that would desire payment in a more timely manner. The team knew that a greater effort should be placed in our new process to benefit the processing of these invoices. A team effort will result in a renewed process that is efficient and sensitive to the needs of each vendor. Each campus will strive to improve business performance in its peer setting, improve invoice tracking and ultimately improve the speed of vendor payments.

## **2. Business Process Review Business Case Purpose**

This business case is to provide an overall project perspective and high level recommendations to the Oversight Committee, and in turn, President Gamble to seek approval for Phase II recommendations, and development and approval of Phase II implementation plans and timeframes.

The Accounts Payable team was tasked with reviewing the Invoice Payment process on each of the four campuses.

The purpose of the business case is to provide the Oversight Committee with the background information used to make the recommendation of Approval Queue functionality and Document Imaging as the most beneficial to streamline the invoice payment process. The case includes flowchart visuals of the refined process and a cost benefit analysis to address specific processing costs. The information presented will be utilized by the Accounts Payable staff of all four campuses.

## **3. Background**

At a very high level, the background to the MSU Business Process review is based on:

- a commitment by President Gamble to the Board of Regents to improve the institutional and system efficiency and effectiveness of MSU, and
- addressing issues that were identified by the Pappas Consultants (see Appendix 1) being:
  - decision-making lacks a system wide perspective,
  - inefficient business processes,
  - suboptimal use of technology, and

- operational information, expertise and best practices are not systematically identified and shared across MSU Administration and finance organizations

In Phase I the research was done to discover the costs associated with invoice payment. The process was found to be labor intensive as well as paper intensive in the steps taken to complete an invoice payment. Multiple entries were noted in the creation of a Banner Payment Authorization request form. Requests for signature authority were multifaceted at the department level as well as within Admin and Finance.

We learned from our surveys that the timeliness and accuracy of payments are most important to our vendors and internal customers. The survey respondents were least satisfied with timeliness and with understanding the campus policies on invoice payment. Our focus groups suggested additional training in procedures, and implementation of the Approval Queue functionality in Banner to reduce paperwork and approval time. One of the problems that seemed to be at the forefront of the discussions was the bogging down of the process by multiple approvals and each approver's department making a paper photocopy of the invoice.

The current process is centralized on the smaller campuses and decentralized on the Bozeman campus because of the large volume associated with paying vendors. The current process is efficient on the smaller campuses because of their size and the community demographics.

Through the research of Phase II, the Accounts Payable team recommends the implementation of Approval Queues and Document Imaging. Banner Approval Queues will allow institutional staff to use electronic transactions instead of paper documents for specific financial transactions and allow electronic routing for approvals. Approval Queues does not require any additional hardware or software to implement. Implemented in conjunction with Approval Queues, document imaging could facilitate the electronic provision of the source documents for review, reducing the need for paper and minimizing delays that would otherwise occur if the paper document had to be routed in addition to the electronic approval process. Audits and reviews could be facilitated more easily. Departments outside of Administration and Finance could also leverage enhanced Banner interaction e.g. Office of Sponsored Programs.

**a. Problems and/or Opportunities Addressed by Business Process Review**

- Opportunities presented by BPR to address problems identified through the Pappas Review process include:
  - Single process across 4 campuses to promote efficiency, succession planning, training, and improved ability to meet peak demands.
  - Data consistency to improve the reliability of management reports both from an individual campus perspective and a comparative, cross campus perspective.
  - Quality process to improve quality, reduce error rates and improve the targeting of training and reference materials,

- Improved timeliness of product or service delivery thus improving ongoing process efficiency.
  - Reduction of paper based transactions will reduce the costs of paper, usage and associated costs of printers, cartridges, photocopiers and cartridges. In addition, there is an opportunity to improve records management by moving towards electronic transactions, irrespective of whether document imaging is implemented.
  - Improved technical functionality by implementing Banner functionality that MSU already owns, but has not implemented, as well as potential to purchase and implement other IT enhancements subject to budgetary constraints.
  - Development of Business Continuity Plan (BCP) based on a risk assessment of improved processes. A BCP will also link in with an IT Disaster Recovery plan.
  - Implementation of Front Office/Back Office concept. This concept was proposed by the Pappas consultants where the client interface still occurs on a face to face basis with the client dealing with “their” own campus. Any transactions that do not include a face to face client interaction, a “moment of truth”, can be processed at any campus where there are available resources. This will improve overall efficiency and effectiveness and smooth out resource demands across the four campuses.

**b. Connections to other Projects/Products or Programs**

The BPR project has ongoing links with:

- Business Continuity Planning
- Disaster Recovery Planning
- Pre-Disaster Mitigation Planning
- National Industry Benchmarking

**c. Other, Alternative Actions**

Implementation of Approval Queues without Document Imaging would not accomplish any significant efficiencies. Without Document Imaging, hardcopy invoices and other documents would necessarily travel the campus through “snail mail” and the delay to approval of the document would remain the same.

**d. Current Problems or Limitations**

Current problems or limitations include:

- Financial constraints on:
  - Implementation projects
  - Purchase of IT enhancements
  - Human resource availability
- Different cultures across the 4 campuses
- Change management issues such as:
  - Technophobia,
  - Performance anxiety

### **e. Other Important Historical or Situational Information**

The Bozeman campus is unique because it has a decentralized process. A majority of the Accounts Payable process starts within the individual outlying departments on campus. Although the scope of the Business Process Review was to review only the functions completed within Admin and Finance, in order for this campus to gain the greatest efficiencies we need to keep in the back of our minds the costs and processes involved at the department level in order to complete an accounts payable process.

## **B. Methods and Assumptions**

During Phase I of the review, data was collected at a high level of review that populated the flowcharts, thus providing documentation and visuals of the paper flow. Additional costs/data were captured in the work distribution charts, detailing salary amounts and percentages of effort to complete the specific tasks for each campus. The Phase I recommendation was to investigate the delegation of approval authority within the departments to eliminate some approval steps, explore the Banner Approval Queue functionality, and to research the feasibility of purchasing and implementing an imaging system on the Bozeman campus.

In Phase II a higher level of detail was required and collected via Data Collection Templates, updated Work Distribution Data and highly detailed flowcharts utilizing the Process Model. Work Distribution information was further analyzed to capture value added tasks versus non-value added. In addition to the formal collection of data, the team met in person on the Bozeman and Billings campus and held weekly conference calls.

### **1. Financial Metrics**

The Accounts Payable Invoice Payment business case proposal provides a comparison of the current to recommended costs. Value added (business necessity for customer satisfaction) and Business Value Added (business necessity for compliance and reporting) costs were quantified utilizing the Cost of Quality tools. In addition, the Cost Benefit Analysis was used to analyze “Business as Usual” vs. “Process Improvement” scenarios. Several of the processing steps were streamlined including employee and processing costs, dollar thresholds were recommended to provide greater efficiencies for the Bozeman campus, and additional training to the outlying departments.

### **2. Business Case Scope and Boundaries**

The boundary of our process includes all four campuses and will be utilized in the accounts payable offices. We are interested in seeing this process grow and develop on the small, intermediate and large campus settings. The goal is to improve efficiency and pay bills in a timely manner.

Data was collected from each of the four campuses at the following levels, a high level (top tier) review of work performed and flowcharting of the process. In phase I,

- The process was found to be labor intensive and paper intensive in the steps taken to complete an invoice payment.
- Multiple entries were noted in the creation of a banner payment authorization request form.
- Requests for signature authority were multifaceted at the department level as well as Administration and Finance.

Data collection was then taken a step further with a more refined review of the work distribution and eventually compiled information for the recommended process with additional flowcharts documenting the new process.

Phase I and II occurred February 2006 through February 2007, with implementation scheduled for the start of Fiscal Year 2008.

**a. The Analysis Period**

The Cost Benefit Analysis was comprehensively evaluated over a five year period starting in July of 2007. The analysis was completed on a fiscal year basis to coincide with MSU's funding model.

**b. Geography or Location**

The Accounts Payable team feels it would be inefficient to recommend the same process for the Bozeman campus and the other three campuses. While the continuity of front office/back office will still be somewhat maintained, meaning the front office will be consistent across all four campuses, while the back office approach will compliment each individual campus's level of transactions.

**c. Organizations**

The organizations covered by this business case include the administrative and finance processes across the following:

Montana State University

- Billings campus
- Bozeman campus
- Great Falls campus
- Northern campus

**d. Functions and Positions**

The recommendations made in this case apply to the Admin and Finance processes only. The Bozeman invoice payment is decentralized and highly fragmented. Whereas the smaller campuses are centralized and much smaller in volume.

**e. Technology**

Banner approval queues do not require additional hardware or software to implement. Banner access will be required for this functionality and a connection to the internet. MSU currently owns the license and support for the SunGard Higher Ed document imaging product. But a variety of servers, scanners, software, additional licenses, and other support costs would be required for implementation.

**3. Scenario Design**

In this business case, Scenario One is the new process and Scenario Two is the current process. A team effort will result in a renewed process that is efficient and sensitive to the needs of each vendor. Each campus will strive to improve business performance in its peer setting, improve invoice tracking and ultimately improve the speed of vendor payments.

On the Bozeman campus-the current process requires the completed BPA to be forwarded to the accounts payable department, the BPA is sorted and date stamped and then

forwarded on for additional approvals from Purchasing and OSP, as required, before the review of the BPA has begun. The BPA is returned to accounts payable and once again sorted and date stamped. At this stage, it is given another review, coded for data entry and then data entered. Before the entries for the day are posted, a final review of the day's data entry is conducted. This process was found to be paper and labor intensive and included multiple signatures and reviews causing significant delays. The remaining campuses have a centralized system which allows them to code, review and pay the invoice once they have received it, eliminating the need for routing to other departments on campus for further reviews and approvals.

The proposed process would incorporate the need for a dollar threshold of BPAs that could be paid with very few signatures and a minimal review. The addition of approval queues and document imaging would allow the document to be routed to the required outside departments simultaneously, thus reducing the delay time and eliminating the need for date stamping and sorting.

The first step in the new process is the specialization of the accounts payable clerk positions. Each clerk will be responsible to review and process claims, purchasing card transactions and travel for a designated number of departments. All claims will be reviewed and coded on the front end. This will allow one touch to each claim. The claims <\$500.00 will be coded, reviewed and sent to data entry. Routing will not change for the transactions > \$500. We will set the approval queue process to reflect the current routing position. Once an item is data entered, it will not be posted until the approval queue process is complete. We want to document image these transactions, so that we can send it through the approval queue with a scanned invoice available for the approver to view. All transactions are submitted with the original invoice and it is important that approvers have that document in front of them for reference. The approvals can flow through the system in a way that all can approve at the same time.

#### **4. The Cost Model**

The invoice payment process in Bozeman requires several actions in order to be completed, actions such as generating paper forms, manual routing and date stamping, manual signatures, entering data into Banner, and filing.

- Approvals are being done manually from hard copies submitted by departments and colleges. This is very time consuming and there is a duplication of effort.
- Personnel in the Business Office enter into Banner the same data that departments and colleges put onto paper forms. The end users then enter the information in their shadow system for tracking, and
- Multiple copies of the same business document are stored at various offices across campus.

We collected salary data via the Work Distribution Charts and then evaluated value added vs. non value added aspects. The results were quantified in the Cost of Quality Analysis.

#### **5. The Benefits Rationale**

Invoice payment's recommendation of approval queues and document imaging provides

\$300,000 in operating cost savings per year to the MSU campuses. Benefits to be gained include:

- Efficiency could increase by utilizing electronic processes versus manual input (process in hours rather than weeks)
- Fewer errors made inputting requests could save hours per month correcting errors – data entered then reviewed rather than single entry and then correction after review.
- Improved Customer Service
- Immediate access to information
- Knowledge of process status
- Quicker response to customers
- Reduce number of duplicate documents received/requested
- Efficiency of Staff
- Allow multiple users to access electronic documents simultaneously,
- Reduce loss of time searching for misplaced documents,
- Records Maintenance
- Increase the security of records,
- Protect against record damage (water, fire, wear and tear)

## 6. Data Structure

Current Business as Usual scenario in the Cost Benefit Analysis includes actual costs for the present. The Process Improvement Scenario includes projected costs for salaries and processing costs including salary increases and inflation. The two scenarios were compared and analyzed to determine incremental costs/savings.

## 7. Data Sources and Methods

All data collected was collected using the data collection templates, work distribution charts, cost of quality data, and process model data.

## 8. Assumptions

All BPA's under the \$500 threshold could be fast-tracked for data entry (with the exception of the Havre campus which is currently doing business this way)

All campuses had opportunities for increased efficiencies

Efficient electronic processes can be achieved

## 9. Financial Model and Cash Flow Statements

See Cost Benefit Analysis

## 10. Analysis of Results

Summary of Results – 5 year horizon

	<u>AS IS</u>	<u>RECOMMENDED</u>	<u>SAVINGS</u>
Central Process Costs	\$5,188,570.30	\$2,926,504.30	\$2,262,066.00
Dept Process Costs on MSU-Boz	1,185,718.39	1,185,718.39	-
Error Correction	271,024.74	75,076.57	195,948.17
Paper/Storage	157,267.74	49,295.10	107,972.64

Training	28,473.51	28,473.51	-
Refrence Materials	-	5,040.00	(5,040.00)
Doc Imaging Maint x 4 campuses	-	477,822.22	(477,822.22)
Approval Queues Maint x 4 campuses	-	131,003.04	(131,003.04)
Workflow x 4 campuses	-	-	
Asset- Doc Imaging X 4 campuses		400,000.00	(400,000.00)
Asset-Scanner X 4 campuses		16,000.00	(16,000.00)
<b>TOTAL COSTS</b>	<b>\$6,831,054.68</b>	<b>\$5,294,933.13</b>	<b>\$1,536,121.55</b>

In addition to the cost benefit analysis, we did a volume analysis for invoices processed during a three month time period. It was determined that 70% of the total invoices processed were in fact in the category of less that \$500.00. This area needed to be explored to determine if, in fact, all the routing and signature authority was necessary to pay these invoices.

1. We sampled a group of these invoices to determine if it was essential to route and obtain signatures on these claims. It was determined by the purchasing department that only 5 out of the sample of 50 actually needed routing and additional signature authority. In addition, OSP has indicated their willingness to review their sign-off requirements in regards to <\$500 payments.

**11. Non-financial and Non-quantified results**

- Ability to meet customer needs
- Knowledge of process status
- Immediate access to information
- Security of records

**12. Security and Risk Analysis**

We have considered the following areas in our mitigation of risk:

- Confidentiality- most of the data used in our process is not considered confidential, however we must maintain the privacy of sensitive data such as ACH vendor info
- Integrity- internal controls must be in place in order to ensure processes are carried out accurately and that all information is correct. Key punching errors are minimized with one entry point followed by end of the day data entry review before posting.
- Availability-information must be available to those who need to access it in order to do their job. Testing and on going maintenance of hardware and software is key to the success of implementing a system that allows multiple users to access the same document electronically.

**C. Conclusions and Recommendations**

**1. Conclusions**

Our goal is to introduce a process that will in fact be a pilot program that will start in accounts payable with the capability of expanding to the outlying departments or provide a model that the departments can use. We do not want to lose accuracy in the processing of claims but to make the process more efficient and cost effective. Savings will be noted in

the area of warrant costs and employee costs due to hand routing invoices to other departments. Warrant costs will be reduced due to the increase in the PCard utilization.

We plan to implement a process that will integrate an efficient way to obtain electronic signatures and yet preserve timeliness and accuracy for check creation. All approvers must have an original invoice in order to approve payment. Document imaging will provide that copy at a glance and the delegated authorities can approve simultaneously through the process. Implementation should start in accounts payable, our projections will benefit the Bozeman campus the most because of their volume. .

We want to endorse the simultaneous implementation of approval queues and document imaging for the purpose of effective and efficient processing of invoices. The approvers will be able to review and approve invoices simultaneously. We noted a lot of time is spent in the hand-routing of invoices for approvals. This will make the process much more efficient and less time consuming. Consequently, the vendors will be paid in a much more timely manner.

With the implementation of document imaging, an invoice payment will be easily tracked. A vendor will not have to wait for information regarding payment status. The touch of a key in Banner will provide the image of the invoice and a return call will not be necessary. Digging through files will be a thing of the past in the pursuit of invoice information.

## **2. Recommendations**

The Accounts Payable team, in regard to invoice payments, recommends the implementation of Banner Approval Queues and supplementing them with a Document Imaging system on the Bozeman campus at a minimum. Implementation on the other campuses would be at their discretion due to their level of volume. We strongly encourage the use of the PCard for transactions under \$500. We promote the use of the ACH feature and fast-track payment process for transactions submitted under the \$500 threshold that do not utilize PCard. Each campus will promote this effort where it applies to their respective vendors.