



Opportunities for Ohioans with Disabilities

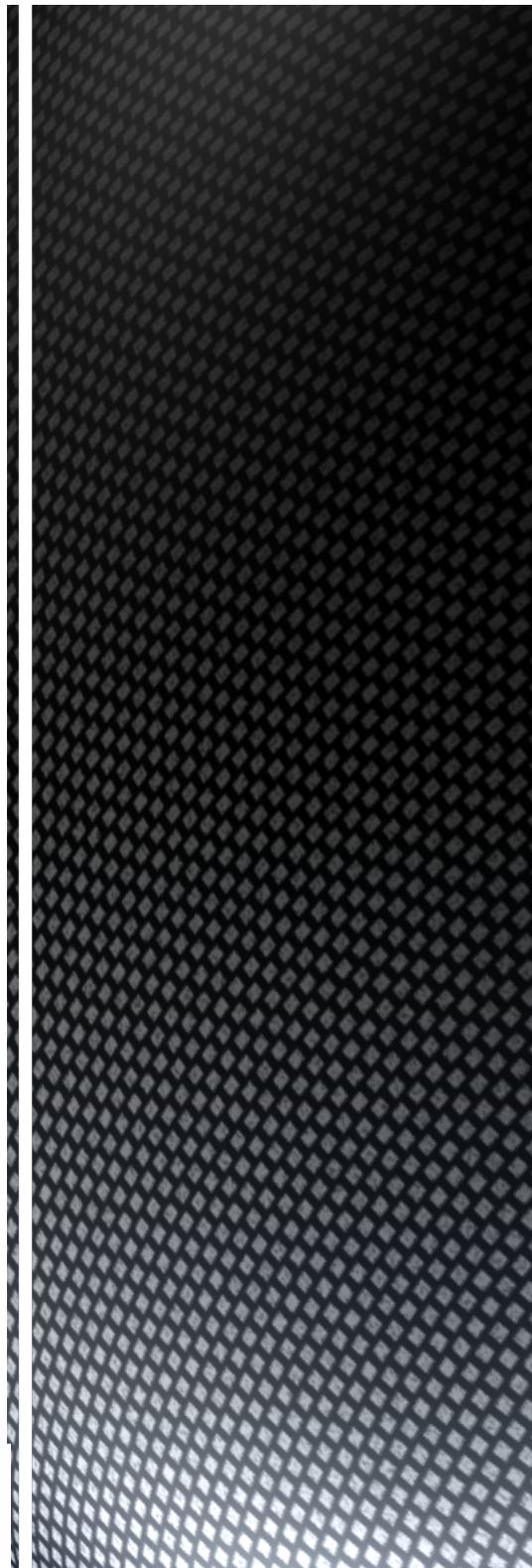
John R. Kasich
Governor
Kevin L. Miller
Executive Director

Bureau of Services for the Visually Impaired
Bureau of Vocational Rehabilitation
Division of Disability Determination

Camo Belt Six Sigma Tool Demonstration

Cyndal Glass
2/5/2016

DCA1 TRAINEE ASSESSMENT



TEAM

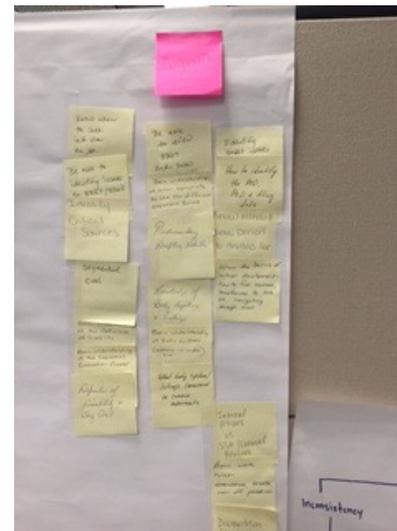
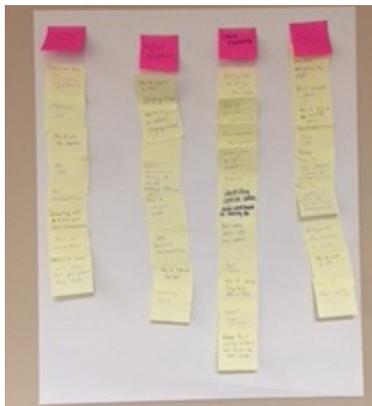
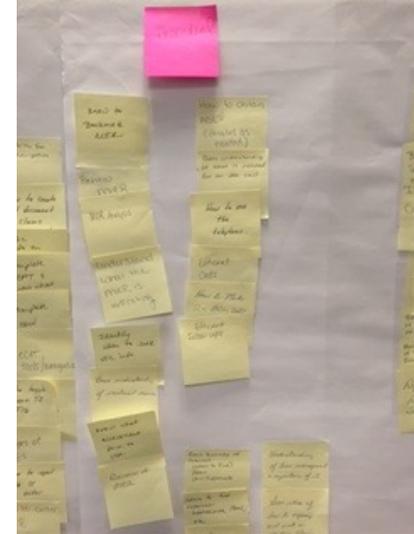
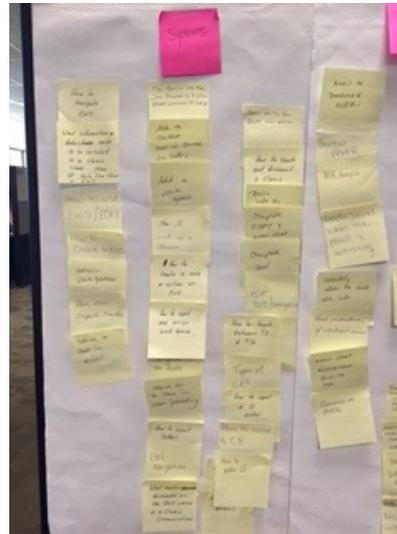
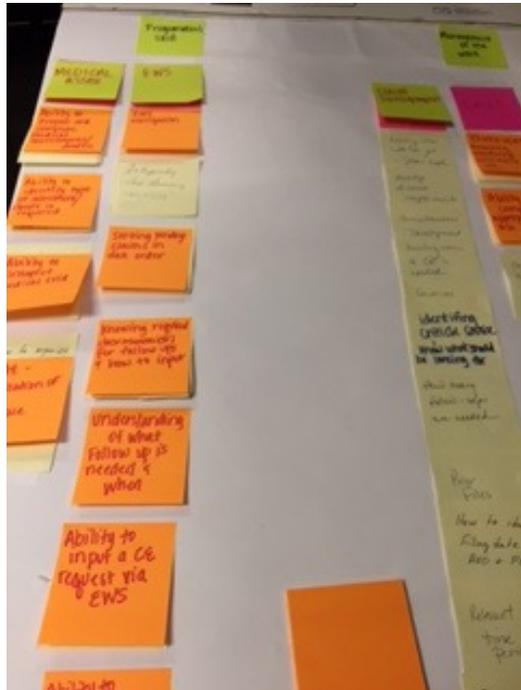
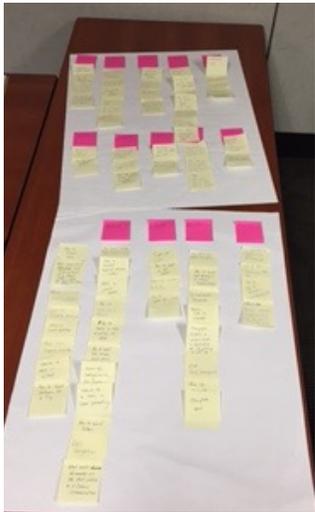
- Sponsor: Rhonda Tanner, Asst. Deputy Director
- Mentor: Tom Melfo, Black Belt
- Michelle Cunningham, Training Department Supervisor, Green Belt
- Fred Schindler, Training Department Manager, Green Belt
- Kristen Alexander, Supervisor, SME
- Elizabeth Bando, Supervisor, SME
- Melissa Leeper, Supervisor, SME
- Jaime McVay, Supervisor, SME, Camo Belt
- Jenny Fleming, Training Department DPS
- Jeff Miller, Training Department DPS

Background

I attended LeanOhio Boot Camp from June 8-12, 2015. Upon returning to my agency, I began working on how to demonstrate some of the tools I recently learned. At the time, I was in a “Helper” role; involved with assisting in the training of new DCA1’s. Since I was involved with the training process at that time, I was interested in using these Lean Tools to help improve the overall training process. I met with the project sponsor, Asst. Deputy Director Rhonda Tanner, and it was decided that the first step in improving the current training process would be with focusing in on the beginning, 8-10 week classroom training. To do this, my first objective was to determine what main competencies a DCA1 should be able to demonstrate at the completion of their initial training period. After further discussion, the sponsor specifically requested a tool, a check list, that could be used to determine if the DCA1 could demonstrate the core competencies at the end of the classroom training period.

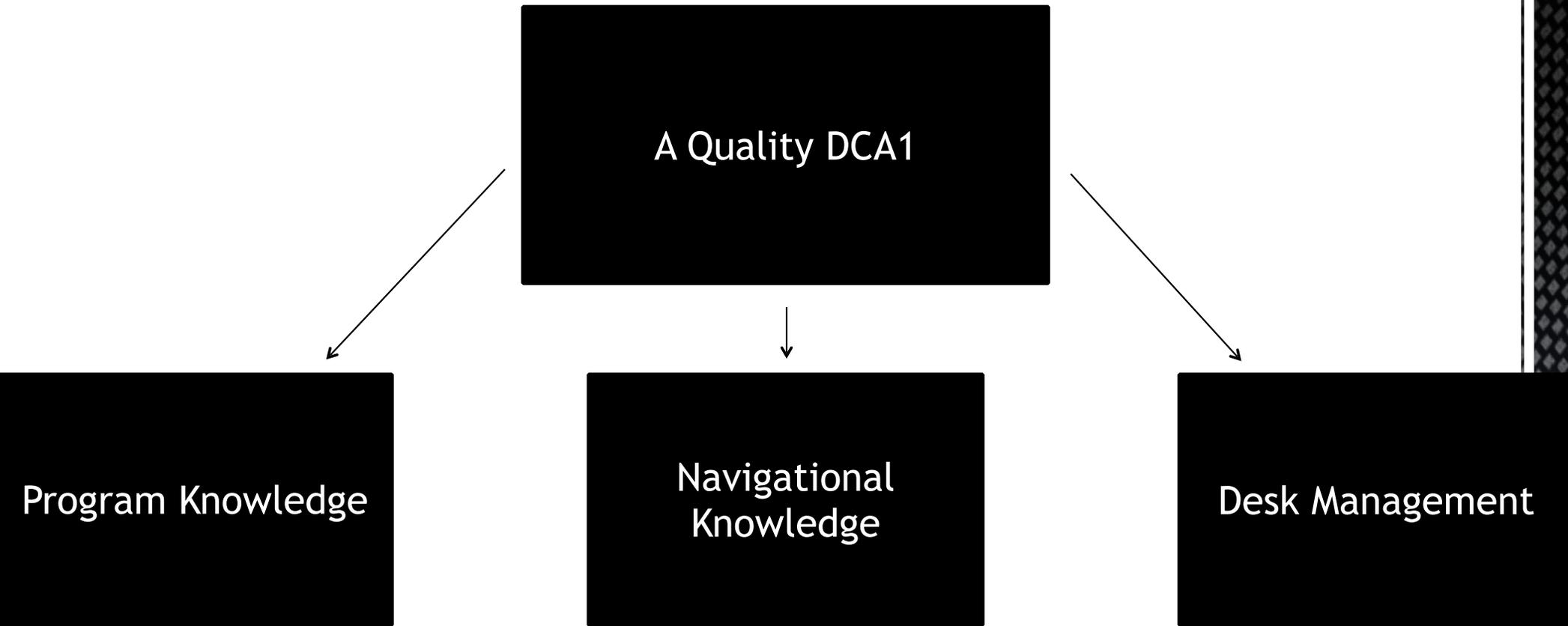
Project Summary

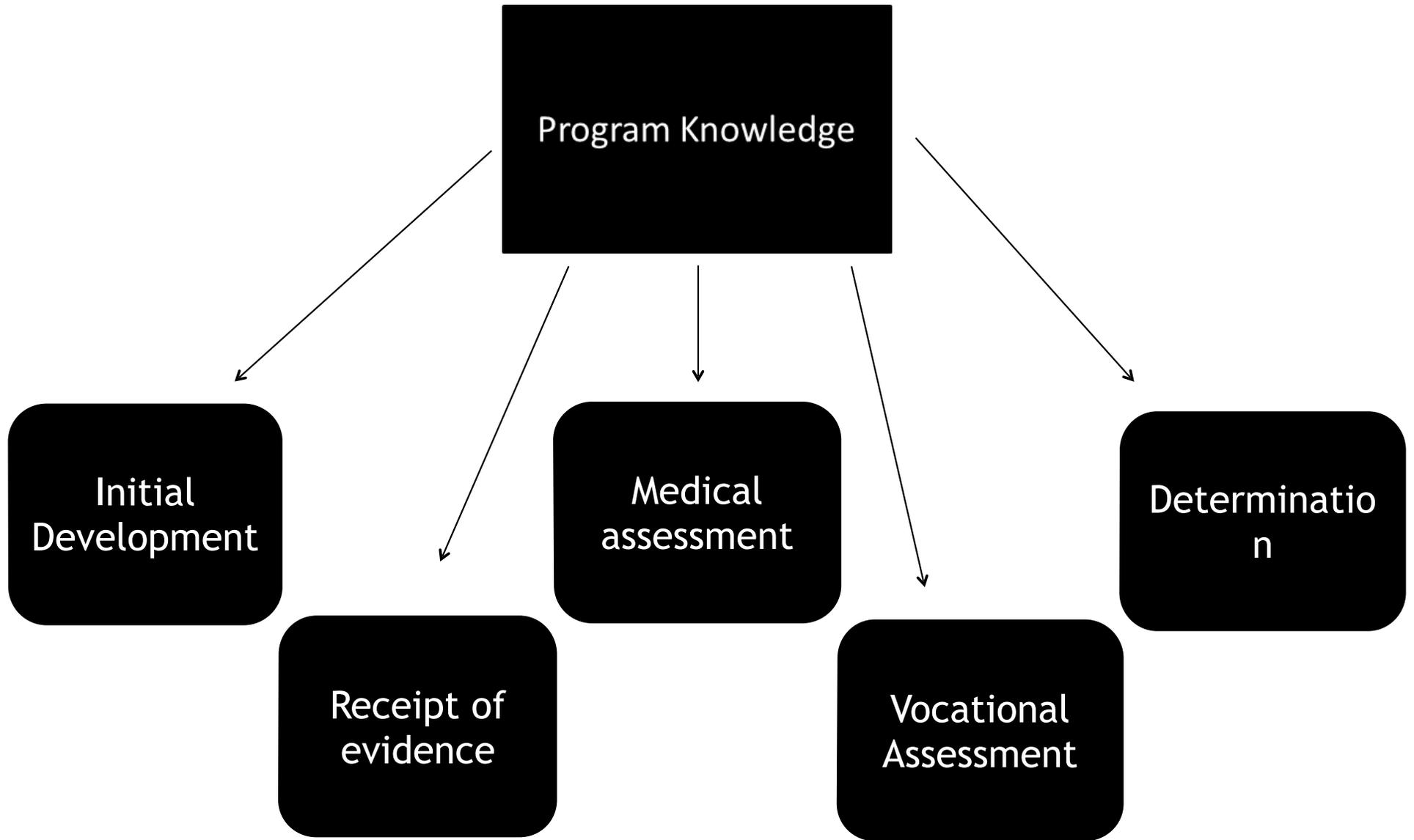
To identify these core competencies, a group of SMEs were brought together and through a group activity evidence was obtained that led to the list of core competencies provided here.

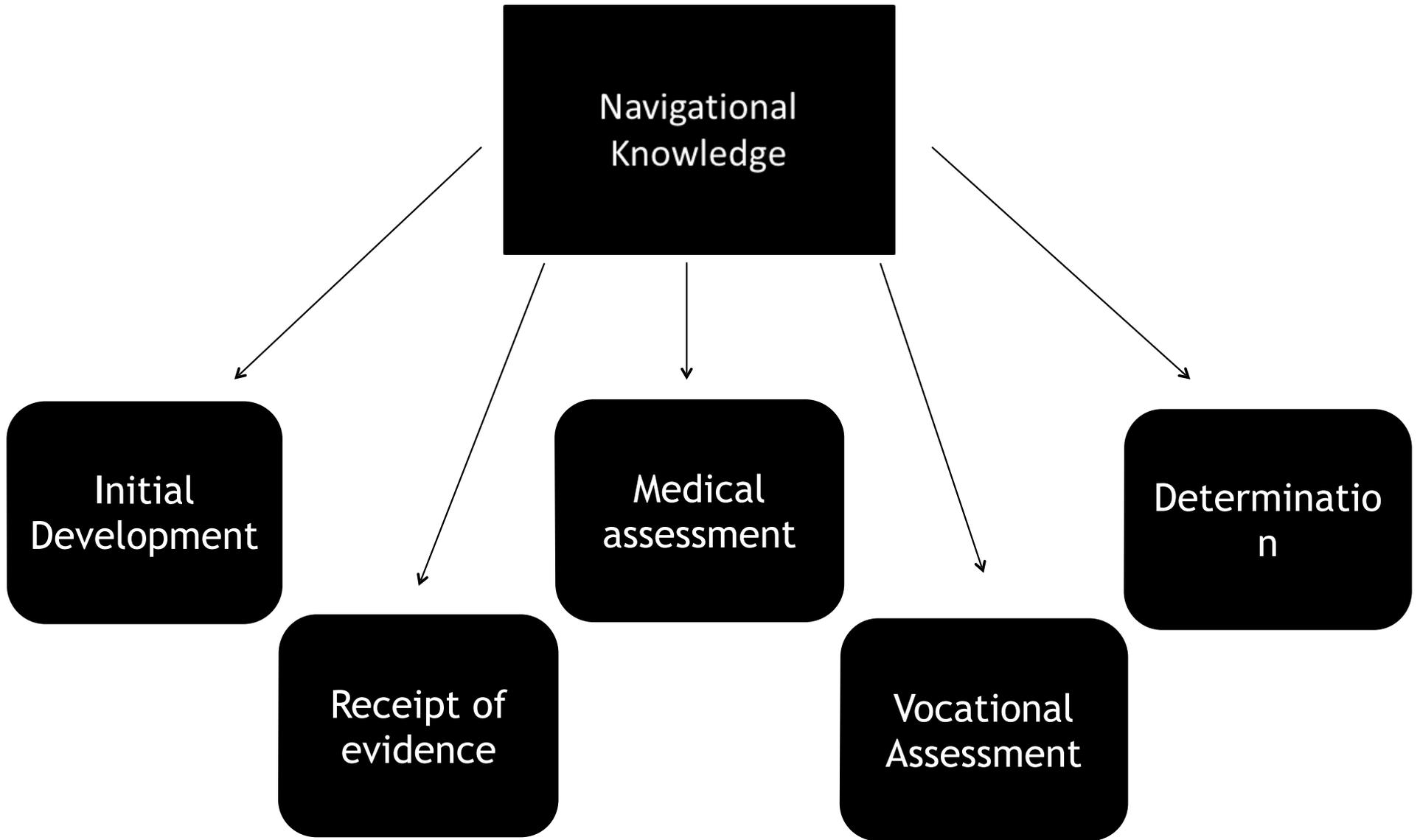


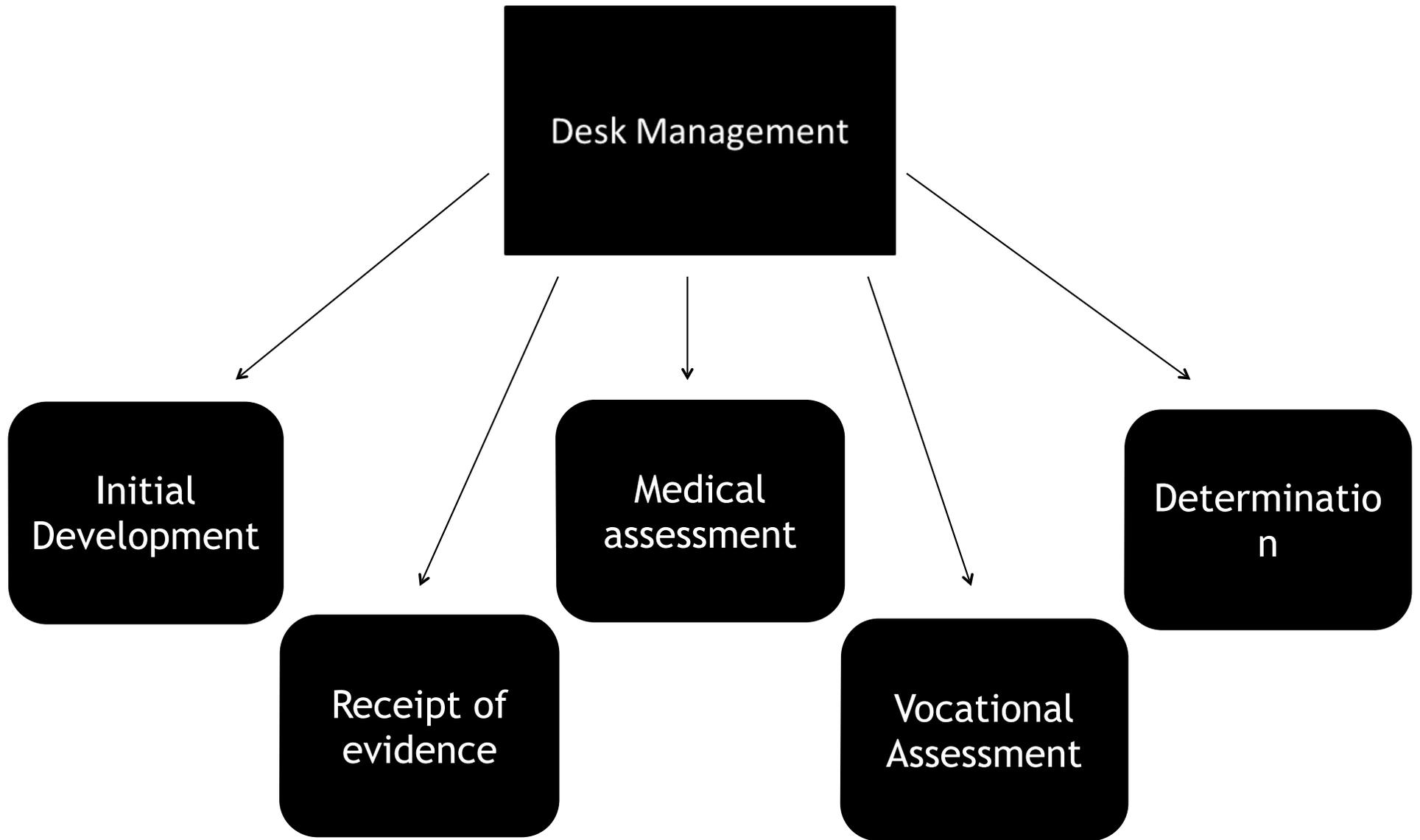
Project Summary

With the information obtained from the group activity, I used the CTQ tool to identify what a DCA1 should be able to demonstrate before transitioning to their units.









The Tool

DCA1 TRAINEE ASSESSMENT

Name:

Date:

PROGRAM KNOWLEDGE

Initial Development _____

Receipt of evidence _____

Medical Assessment _____

Vocational Assessment _____

Determination _____

NAVIGATIONAL KNOWLEDGE

Initial Development _____

Receipt of evidence _____

Medical Assessment _____

Vocational Assessment _____

Determination _____

DESK MANAGEMENT

Initial Development _____

Receipt of evidence _____

Medical Assessment _____

Vocational Assessment _____

Determination _____

|

Assessment Guide

ASSESSMENT GUIDE:

The DCA1 trainee assessment is a list of competencies the trainee should be able to demonstrate at the end of their classroom training.

The administrator is to observe the DCA1 attempt to perform each item identified on the score guides and provide a rating based on the number of items the DCA1 adequately demonstrated.

-2 = more than two issues not demonstrated

0 = one to two issues missed, if more than four issues ratable

+2 = demonstrated all

The score guides do not cover the totality of what can be evaluated within each competency being observed. Additional items can be considered and added to each form.

Program Knowledge- score guide

-2 = more than two issues not demonstrated

0 = one to two issues missed, if more than four issues ratable

+2 = demonstrated all

PLEASE NOTE: This guide does not cover the totality of what can be assessed. Additional items can be considered and added to this form.

Initial Development -2 0 +2

The DCA1 has demonstrated the ability to review initial claim documents and identify/demonstrate the following:

1. Can identify the different claim types
2. Allegations
3. The time frame for claim adjudication
4. Medical sources that need to be contacted and the letter types that need to be sent to each source
5. What additional information needs to be clarified from the clmt and an understanding of what questions to ask to obtain ADLS
6. Can locate OS 142 and has an understanding of expectations in regards to claim development

Receipt of Evidence -2 0 +2

The DCA1 has demonstrated the ability to review evidence as it is received and apply to claim development by identifying/demonstrating the following:

1. A basic understanding of objective evidence vs subjective evidence by their bookmarks and summary of evidence
2. MDI's in evidence received
3. What Listings to refer to in regards of MDI
4. An understanding of a program acceptable medical source
5. A medical source/other "opinion"
6. When a CE is needed

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7. An understanding of simultaneous development

Medical Assessment -2 0 +2

The DCA1 has demonstrated the ability to use the summary of evidence to guide them to a medical assessment by identifying/demonstrating the following:

1. An understanding of which medical assessment form to use depending on meets/equal, not severe, physical, psychological, etc.
2. An understanding of the difference between sedentary, light, medium RFCs and mild/moderate limitations within the PRTF/MRFCs
3. An understanding of how to assess clmt's symptoms and credibility
4. An understanding of how to weigh a source opinion
5. Can summarize medical evidence in terms of work related limitations

Vocational Assessment -2 0 +2

The DCA1 has demonstrated an understanding of step 4 and 5 of sequential evaluation by identifying/demonstrating the following:

1. Clmt's vocational profile
2. Obtain clmt's past relevant work
3. An understanding of when expediting vocational assessment is an option during claim development
4. Utilizes Occubrowse to search for DOTs
5. The vocational rule by using the medical-vocational grid

Determination -2 0 +2

The DCA1 has demonstrated an understanding of completing a disability determination by identifying/demonstrating the following:

1. Reg basis codes for allowance/denial
2. Onset date
3. If payee is needed/capability
4. Diary types
5. When a PDE is needed and how to write one

Navigational Knowledge- score guide

-2 = more than two issues not demonstrated

0 = one to two issues missed, if more than four issues ratable

+2 = demonstrated all

PLEASE NOTE: This guide does not cover the totality of what can be assessed. Additional items can be considered and added to this form.

Initial Development -2 0 +2

The DCA1 has demonstrated the ability to start development in each system we use for processing claims by identifying/demonstrating the following:

1. How to use EWS to identify date claim was assigned and how to put claims in date order
2. Search for treating sources through our vendor list (EWS)
3. Create notes/RCS/action items and document case actions and what's needed (EWS)
4. Create and print letters (EWS)
5. Create work queue requests and assign to claim reviewer (EWS)
6. Completes needed sections in eCat for initial development (technical page/claims communications/FOFAE)
7. Utilize eview to see claim messages/identify prior claims/copy prior evidence
8. Utilize the phone to make outgoing calls/transfer a call/check voicemails

Receipt of Evidence -2 0 +2

The DCA1 is able to adequately review evidence when received and make next action in each system we use for processing claims by identifying/demonstrating the following:

1. Ability to identify when evidence has been received and review in date order
2. Utilizes DMA viewer tools to bookmark/highlight/copy evidence
3. How to request a CE when needed (EWS)
4. Understands the difference between BO/FU follow ups that are generated and how to complete these

5. Able to complete all sections of eCat at this step of development (CE page/Evidence of Record page/FOFAE)
6. An understanding of what evidence should be summarized on the FOFAE

Medical Assessment -2 0 +2

The DCA1 has demonstrated an understanding on how to complete medical assessment in each system we use for processing claims by identifying/demonstrating the following:

1. Ability to create assessment forms in eCat
2. Completes all sections in eCat needed for medical assessment (impairment/severity page/symptoms and credibility page/medical source opinion page)
3. Creates medical referrals for medical consultant review

Vocational Assessment -2 0 +2

The DCA1 has demonstrated an understanding of how to complete a vocational assessment in each system we use for processing claims by identifying/demonstrating the following:

1. Ability to apply information received from clmt regarding past relevant work to complete the Past Relevant Work page in eCat
2. An understanding of when "other work" page should be completed in eCat
3. Ability to use Occubrowse to find DOT codes

Determination -2 0 +2

The DCA1 has demonstrated an understanding of how to complete a determination in each system we use for processing claims by identifying/demonstrating the following:

1. Where/how determination is completed in eCat
2. How to create closure forms on the EWS
3. How to send a claim to closure

Desk Management- score guide

-2 = more than two issues not demonstrated

0 = one to two issues missed, if more than four issues ratable

+2 = demonstrated all

PLEASE NOTE: This guide does not cover the totality of what can be assessed. Additional items can be considered and added to this form.

Initial Development -2 0 +2

The DCA1 has demonstrated the ability to manage their case pending by identifying/demonstrating the following:

1. Can identify the oldest new receipt in their pending
2. Completes all actions before leaving a claim
3. Completes full initial development in a timely manner

Receipt of Evidence -2 0 +2

The DCA1 has demonstrated the ability to manage their case pending by identifying/demonstrating the following:

1. Review evidence in date order
2. Ability to utilize dual screens for reviewing evidence while summarizing/documenting in eCat
3. Copy/paste evidence
4. Completes all actions before leaving the claim

Vocational Assessment -2 0 +2

The DCA1 has demonstrated the ability to manage their case pending by identifying/demonstrating the following:

1. Obtains vocational information from clmt timely by mailing the Vocational History questionnaire at initial development when warranted and/or during the clarifying call

Determination -2 0 +2

The DCA1 has demonstrated the ability to manage their case pending by identifying/demonstrating the following:

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1. Basic understanding when all evidence has been received, assessments signed, and the

Recommendations

- This tool should be an ever-evolving assessment, depending on what information is obtained after each training class
- This is not a pass/fail test. It is designed to diagnose issues and/or dysfunctions and identify where continued improvement can be made
- The goal for this assessment to be objective as possible. This assessment can be administered by anyone. The expectation is that if a DCA1 is assessed by two different individuals, the overall ratings given by each administer would be the same

Benefits of the tool

This tool can be beneficial in many ways.

- It will give the training department the opportunity to look at the current state of the classroom schedule and evaluate if the current state provides the opportunity for the DCA1 to learn and demonstrate what is needed before exiting out onto the floor and receiving live cases.
- This tool can also be a guideline to make changes with the classroom schedule, if needed.
- It will allow all DCA1 supervisors to and helper be on the same page to ensure consistency across the board while instructing and evaluating.
- This tool will provide improvement in overall communication and consistency within the training department.

Special Thank You to...

Executive & Senior Leadership

Kevin Miller, Executive Director, OOD

Bill Bishilany, Assistant Executive Director, OOD

Erik Williamson, Deputy Director DDD/OOD

Rhonda Tanner, Assistant Deputy Director DDD/OOD

Teresa Gray, Assistant Deputy Director DDD/ OOD

Tom Melfo, Assistant Deputy Director DDD/OOD

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