



# Department of Job and Family Services

Green Belt Six Sigma Project Report Out

Pauline Chan-Yount

Ohio Dept. of Job and Family Services

July 2017

## WORKER TRACKING SYSTEM (WTS)

# WTS ODJFS TEAM LEADS & SMES

SharePoint - Bill Minckler, Doug Berger & Casey Walters

Human Resources - Nancy Hyme-Brewer, LaKisha Morris,  
Lisa O'Connell -Paccioretti, Amy Bick

Payroll - Deb Fafrak & Becky Castorano

End User Support - Jodi Wilkinson

Access Control - Shari Ward & Matt Riggle

OCI Security - Todd Back

Facility Operations - Adam Borland

Fiscal CAPIS - Paul Dick & Nahshon Moore

Fiscal OAKS - Samuel Cooper

Fiscal Payment Card - Joyce Guice & Yvonne Gore

Software Enterprise - Doris Shuler & Ted Hampton

Telecom - Brain Wilson & Dennis Wellman

Wellness Mgmt - Carla Hall

ADA - Jorge Irizarry

Business Continuity - Robin Ulrich & Steven White

# BACKGROUND- SCOPE

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**Problems:** When a worker leaves their current job (off-boarding or internal moves), the agency had no standardized process to:

- ❑ Notify relevant parties who had actions to perform
- ❑ Assure all assigned worker assets were returned, necessary paperwork were completed and all appropriate access were terminated.

**Scope:** Create an agency system/tool with auto-generated notifications to relevant parties and the functionality to track completion of essential tasks whenever a worker change occurs.

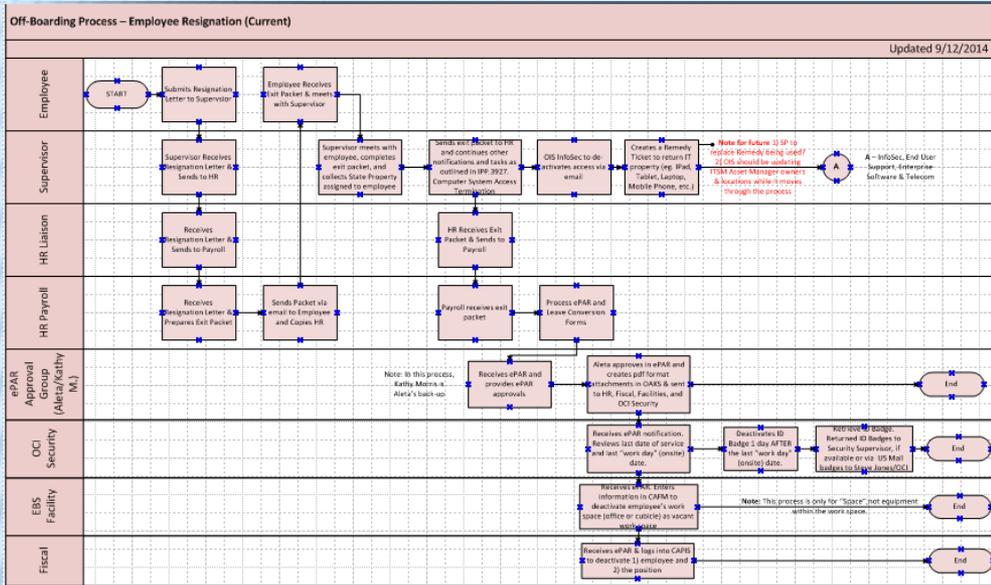
- ❑ First Step: Create a collaborative, cross-functional agency team to review known issues and to analyze possible solutions.
- ❑ Last Step: Implement new agency system/tool within ODJFS

# PROJECT GOALS

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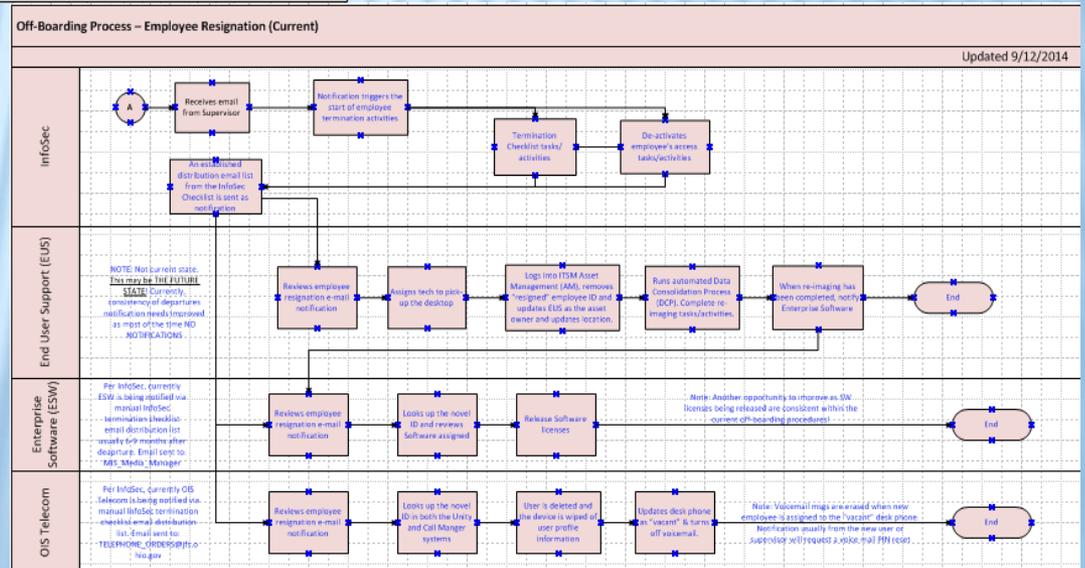
- ❑ Risk reduction for ODJFS
- ❑ Prompt notifications – Eliminate paper forms & manual notifications
- ❑ Overall Process Improvements - Standardize process & eliminating waste to gain efficiencies
- ❑ Ability to track & manage completion of critical customized tasks
- ❑ Improve accountability and completion of worker movement records
- ❑ Create an “easy to use” customer friendly tool

# PROCESS MAP - CURRENT "RESIGNATION" PROCESS

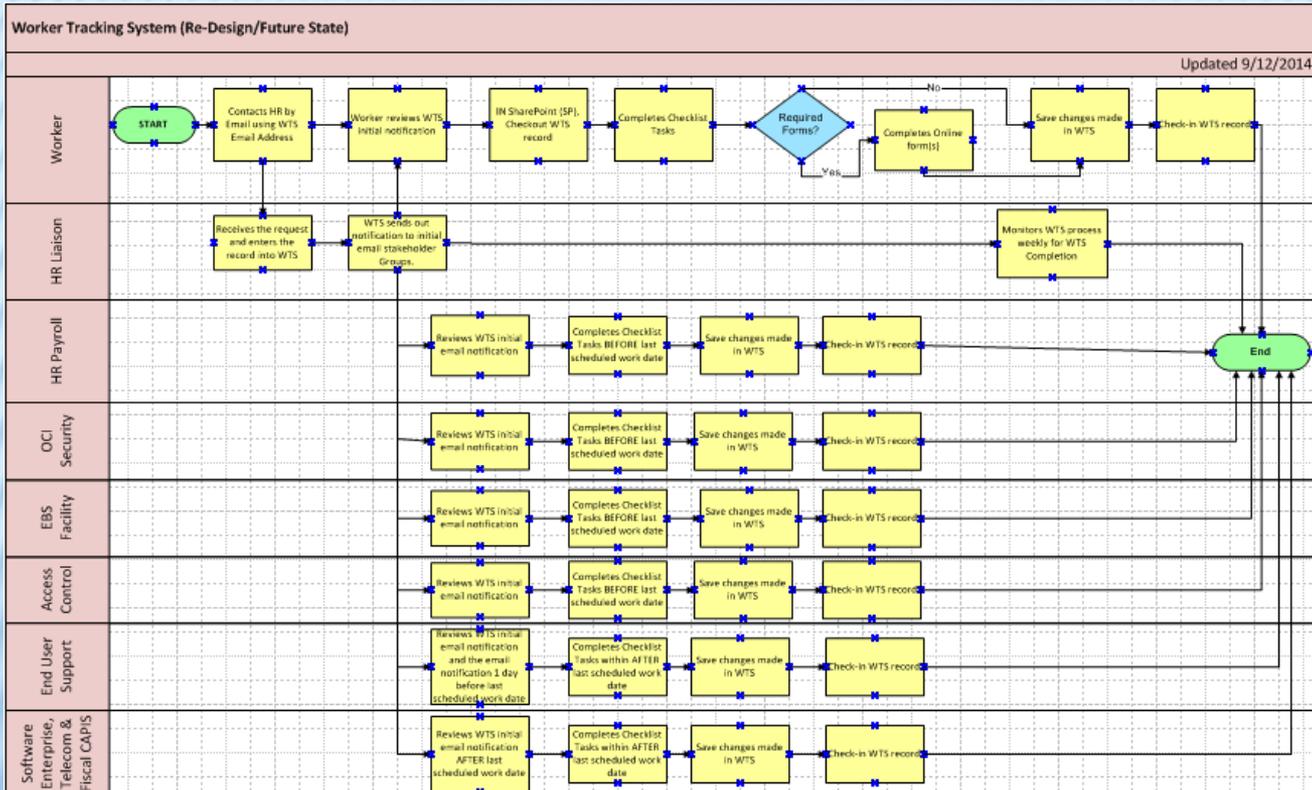


## TIMUWOOD:

- T (Transportation) = 11 times
- M (Motion) = 15 times
- W (Waiting) = 17 times



# PROCESS MAP - DETAILED RE-DESIGN MAPPING



## TIMUWOOD:

- T (Transportation) = 1 time
- M (Motion) = 1 time
- W (Waiting) = 1 time

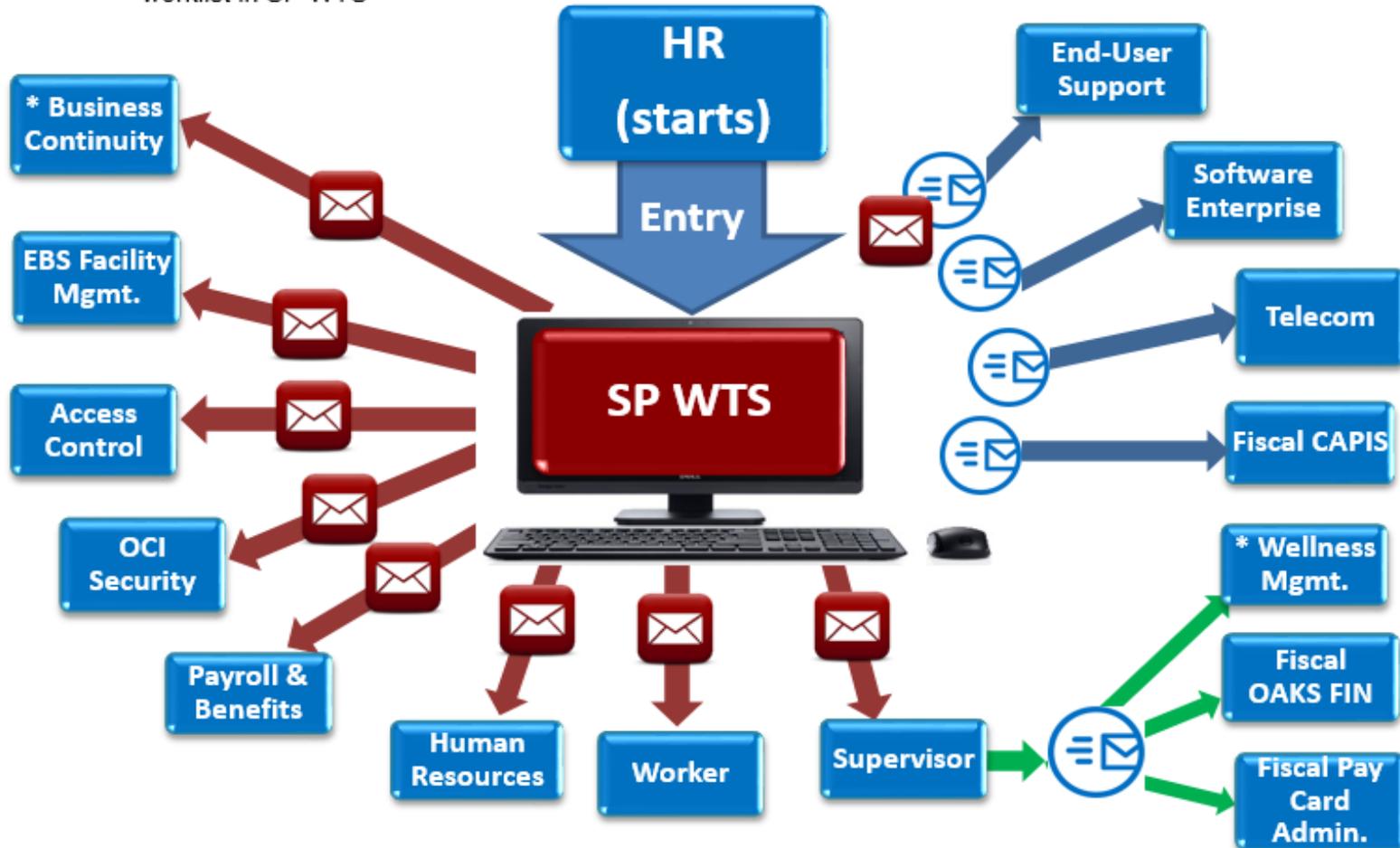
# “HIGH LEVEL” PROCESS - STAKEHOLDERS & NOTIFICATIONS



**Immediate initial *auto-generated* email notification** \* = 1 time notification group; no worklist in SP WTS



**After the Last Scheduled Work Date *auto-generated* email notification**



# WTS HUMAN RESOURCE (HR) ENTRY SCREEN

**Worker Information**

Worker Name:    Worker Type: Full-time Permanent 

Network/Novell ID:   Date Reported: 6/30/2017 

State User (SU) ID:   Action Reason: Select...  

Position Number (PN):  Effective Last Employment Date:   

Classification Status: Select...  Last Scheduled Work Date:   

Job Type: Select...  Supervisor/Manager:   

Office Name: ▼  Office Coordinator:   

HR Liaison:     Office Coordinator:   

	Status	Building	Floor	Street Address	City	State	Zip Code
Work Location(s):	<span>Current</span>	<input type="text"/>	<input type="text"/>	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 
<input checked="" type="checkbox"/> Insert another Address							

Work Phone:  Contact Phone Number:

Work e-Mail:  Home e-Mail:

Attachment Description	Attachment
Resignation Letter	 <a href="#">Click here to attach a file</a>
<input checked="" type="checkbox"/> Insert another Attachment	

After you have saved your changes, please check in the document to make it available for others to update their sections.

# WTS “SAMPLE” AUTO-GENERATED NOTIFICATION

Attached  Worker Tracking System Supervisor Notification Attachment.pdf (245 KB)

**From:** SharePointAdmin@msds.jfs.ohio.gov [mailto:SharePointAdmin@msds.jfs.ohio.gov]  
**Sent:** Thursday, March 16, 2017 1:51 PM  
**To:** <Supervisor's Email Address>  
**Subject:** Resignation Worker Tracking System Supervisor Tasks - Please complete immediately for Worker <WORKER NAME>  
**Importance:** High

Workflow Notification

The SharePoint Worker Tracking System (SP WTS) is the ODJFS online system to capture worker movements, changes or departures. I, [HR Liaison's Name](#) am your assigned OEBS HR Liaison. On 3/16/2017, I entered the request into SP WTS for your employee, [Worker's Name](#), with an Effective Last Employment Date of 4/28/2017 and Last Scheduled Work Date of 4/28/2017. Your employee and the Office Coordinator: [Office Coordinator's Name](#) have also been notified.

As your 1<sup>st</sup> task to begin the process, it is important that you watch the short eLearning tutorial, [SP WTS – Supervisor eLearning tutorial video](#) The e-Learning tutorial will help you understand your critical role in the process, learn how to navigate and edit within SP WTS in order to complete the mandatory supervisor section checklist tasks. You should review the tutorial today or within the next 24 hours before accessing SP WTS and attempting to complete the mandatory supervisor section checklists. You, as the assigned supervisor, are responsible to ensure the worker and supervisor sections have been completed all tasks in SP WTS before the worker's last scheduled work date of 4/28/2017.

**After viewing the e-learning tutorial, start completing the SP WTS Supervisor Section Checklist:**

1. Review and complete the Checklist within [SharePoint Worker Tracking System](#).
2. For EACH checklist item, enter the **Action Completion Date** (this is not updated date but the *actual date action was completed*), **Action Taken By**, **Comments** (when applicable like clarification, discrepancies, etc.), Check Completed OR Check N/A (Not Applicable) Note: If you do not review and complete an action on each checklist item, the Supervisor Section will not reflect as COMPLETED.
3. Under the IT Issued Property Section, pay attention to additional mandatory information required for specific assigned assets such as the JFS TAG.
4. Use the **Attachment** feature at the bottom of the section to attach important documentation as part of the official e-record (such as emails, explanations of unique worker movement, circumstances, etc.)

**Still have questions?** Use the provided e-learning tutorial link and the attached document with useful resources to assist you with completion of the checklist. As your assigned OEBS HR Liaison, I am the point of contact for this record and you may reach out to me after exhausting the resources named in this email.

# WTS “SAMPLE” STAKEHOLDER CHECKLIST

Supervisor Section						
Supervisor Tasks	Complete	N/A	Action Completion Date		Action Taken By	Comments
Sent Exit Interview Meeting Invite to Worker	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/1/2017		John Smith	Scheduled for 4/27/2017
Completed Exit Meeting with Worker	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/27/2017		John Smith	
Completed all Travel Reimbursement in OAKS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4/1/2017		John Smith	
Requesting Email Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/24/2017		John Smith	
Requesting P Drive Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/24/2017		John Smith	Contacted Access Control
Verified “C” Drive Data was moved by Worker	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/25/2017		John Smith	Moved to shared drive team folders
<b>All Tasks Complete</b>	<input checked="" type="checkbox"/>					

1. Check “Complete” or “N/A” checkbox for each task as they are completed and the system auto-populate Action Completion Date and Action Taken By fields.
2. Comments are recommended but not mandatory fields
3. Look for “All Tasks Complete” to be auto checked when all tasks are completed within the section.

# WTS ONLINE MANAGEMENT CONSOLE

JFS SharePoint

PAULINE P. CHAN-YOUNT 

BROWSE PAGE OPEN WORKER LIST WORKER VIEWS ALL WORKERS

Search this site 

WTS)

Supervisor	Separation Effective Date	Last Scheduled Work Date	Date Completed	Employee Office	All Tasks Complete	Worker Completed	Supervisor Completed	Payroll Completed	Security Completed	Access Control Completed	EUS Completed	Facility Completed	Fiscal CAPIS Completed	Fiscal OAKS Completed	Fiscal Paycard Completed	Software Enterprise Completed	Telecom Completed
CELLY KASSOR	11/29/2014	11/28/2014	1/29/2015	Information Services	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
PATRICK H. MILLER	11/29/2014	11/25/2014	1/29/2015	Information Services	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
RED CRAWLEY	11/29/2014	11/28/2014	2/9/2015	Information Services	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
AWN D. BAKER	11/29/2014	11/28/2014	1/29/2015	Information Services	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
PHILLIP "PHIL" JARRELL	1/30/2015	1/30/2015	6/8/2015	Information Services	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
HILL ENNIS	1/30/2015	1/30/2015	4/30/2015	Information Services	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
JOB K.	2/28/2015	2/26/2015	5/29/2015	Local	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

# PROJECT METRICS - RESULTS

<b>Process Measure</b>	<b>Before</b>	<b>After</b>	<b>Difference</b>
<i>Process Steps</i>	49	14	31
<i>Handoffs</i>	15	1	14
<i>Wait Points</i>	17	1	16
<i>Motion</i>	15	1	14
<i>Transportation</i>	11	1	10

# PROJECT METRICS - RESULTS

Stakeholder Notification	% Improvement	Stakeholder Notification	% Improvement
EUS - Resignations	100%	Software Enterprise - Internal Movements	100%
EUS -Internal Movement	82%	Telecom - Resignations	100%
Access Control - Resignations	50%	Telecom - Internal Movements	100%
Access Control -Internal Movement	82%	Wellness Mgmt - Resignations	100%
Facility - Resignations	45%	Wellness Mgmt - Internal Movement	100%
Facility - Internal Movements	82%	OAKS FIN - Resignations	100%
Fiscal CAPIs - Resignations	92%	OAKS FIN -Internal Movement	100%
Fiscal CAPIs -Internal Movements	92%	PayCard Administration - Resignations	100%
OCI Security - Resignations	97%	PayCard Administration - Internal Movement	100%
OCI Security -Internal Movements	45%	Business Continuity - Resignations	100%
Software Enterprise - Resignations	88%	Business Continuity - Internal Movement	100%

# FUTURE EXPECTED COST SAVINGS

WTS Cost Containment – Savings Opportunity	How is it a Cost Savings Opportunity?
Software (SW) Licenses	<b>SW Licenses are returned to inventory immediately after worker leaves; improve inventory and avoids buying additional licenses upon new user requests</b>
IT Hardware	<b>Timely wiping and return to stock PCs, mobile devices and any IT assets will reduce the need to procure unnecessary new equipment when needs arise.</b>
ADA Equipment	<b>ADA Equipment collected and returned to inventory. Re-use ADA equipment vs. buying new ADA Chairs, etc.</b>
Hard Copy Exit Packet Processing & Storage	<b>Less administrative cost with creation of worker hard paper files, reduce supply cost – folders, paper, ink and warehousing storage and shredding cost.</b>

# PROJECT BENEFITS

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## **Risk Reduction:**

- ❑ Timely access terminations
- ❑ Prompt phone and voicemail reset
- ❑ State assets returned
- ❑ Improve inaccurate/incomplete records

## **Process Automation:**

- ❑ Advanced notification & reminder emails
- ❑ Online forms, customized checklists & real time status
- ❑ History of user, date & time stamped for audit compliance
- ❑ E-records – Centralized paperless records & retention

## **Gained Efficiencies:**

- ❑ One system with standardize process
- ❑ Eliminating waste & cost (i.e. wait time, ink, paper consolidation and records storage)
- ❑ Online customized training tutorials

# KEY IMPROVEMENT SUMMARY

## Current Key Issues

Agency risk whenever a worker fails to return assigned assets, ID Badge, VPNs, State Payment Card or JFS delays termination of application access due to untimely notification

Key Stakeholders did not received timely worker off-boarding or moves communication

Hard Paper Exit Packet was not consistently followed or completed.

Non-effective, non-standardized process with waste and wait time

Customers didn't know what to do for worker off-boarding and internal movements

No streamline process causing wait & waste

## How We Improved

WTS Stakeholder customized checklist tasks

WTS initial e-mail notifications & reminder notifications are automated until ALL checklist tasks are completed

WTS online checklists & visibility of worklists completion

ONE online system with specific user checklist and forms (if applicable)

Single point of contact, Human Resource Dept., the WTS Production owner & self-service training.

Reduced wait time, ink & paper and hard copy records filing and storage efforts & warehousing cost

# IMPLEMENTATION PLAN - SAMPLE OF MONTHLY TASKS (WEEKLY MEETINGS)

June  
2017

- **HR to review the Interweb links to ensure new IPP doesn't conflict with:** ODJFS Employee Moves and Position Changes Manager's Responsibilities or Remove a Users Access to a specific application guidance *BEFORE* publishing the revised IPP. **(Completed by June 9,2017)**
- **Publish the final IPP version** of the revised Worker Tracking System for agency use and add to SP WTS resource link (5.8.17 - Pending resolutions from April 28 update:Legal had some issues w/the worker sytem policy. I'll get their comments next week.) **(Completed by June 9,2017)**
- (Added 4/25) Contents within the inner-web:The ODJFS Employee Exit Process needs updated prior to the end of the SP WTS roll-out to avoid confusion. **(Completed by June 9,2017)**
- (Added 4/25) Contact Forms Central: Employee Exit Questionnaire/Survey, the Sick Leave Conversion Form and other form within SP WTS needs removed from Forms Central after the SP WTS roll-out since it is on-line within SP WTS **(Completed by June 9,2017)**
- Complete **SP WTS Tutorial Revisions** with SP WTS vs. SP OTS, newer content and send to OIS **(Completed by EBS IM and sent the last tutorial to OIS on 6/6/2017 @ 3:43 PM)**
- OIS SP Support to update **revised tutorial links** in email notifications within SP WTS (5.8.17 - Sent supervisor tutorial the week of 5.1.17 however, had to pull back to get the V/O revised for 1 slide on 5.8.17. Dependency for SP Support to getting tutorials updated is based on the 5.19.17 OEBS completion and sent over to OIS.) **(Completed June 9,2017)**
- Extract a blank Worker Feedback Form (6.6.2017 Task Owner- Casey Walters - **Completed June 9,2017**)
- Metric Reports for Project Closure (6.6.2017 Task Owner- Casey Walters - **Completed June 21,2017**)
- Complete last 2 Go Live scheduled meetings **(Completed on 6.5.17)**
- Final turnover SP WTS to OEBS HR as business owner & management **(Completed - Friday, 6/9/2017 meeting)**
- June SP WTS Stakeholder meeting - Peoject Celebration/Close Out Meeting **(Completed - Friday, 6/9/2017 meeting - Project Participants plans to attended the scheduled on 6/9/2017, 10-11 AM meeting as a celebration of project closure.)**
- HR schedules and attends the 1st SP WTS ENHANCEMENT TEAM meetings of 2017. Plans to meet in late June. **Note:** Monthly to start and may go to quarterly to start working on the enhancement list. **(Completed - 1st meeting to occur on June 29, 2017)**

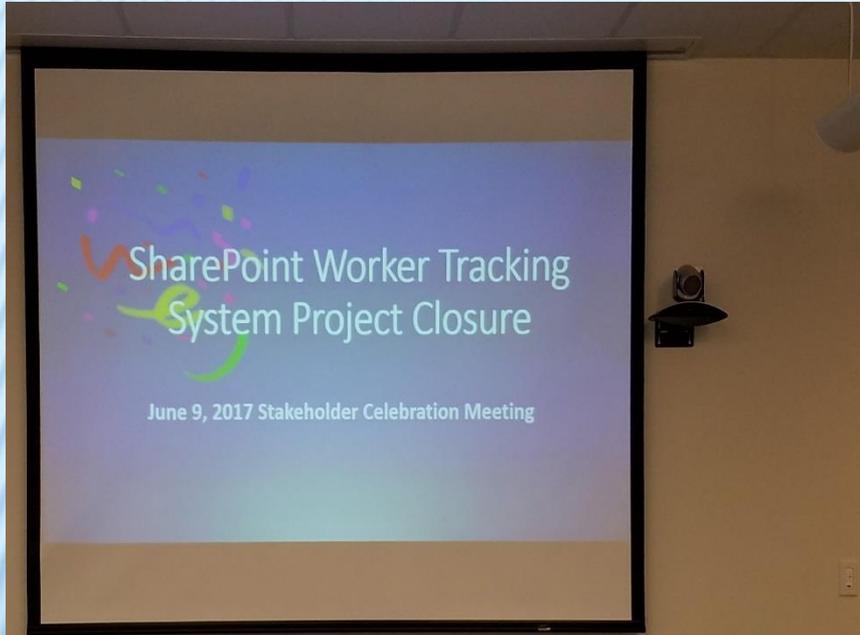
# IMPLEMENTATION PLAN – OFFICE PHASE-IN TRAINING PRESENTATION SCHEDULE

## 2017 SharePoint Worker Off-Boarding Tracking System (SP WTS) Phase-In Go Live Schedule

**\*\* Note: The Director's Office & Legislation will not have an official implementation kick-off presentation since the office directly contact, Cindy, Tiffany or WA for HR needs.**

ODJFS Office	SP WTS "Go Live" Presentations	Human Resources Liaison	Office's HR Liaison/Deputy Director/Director
Employee and Business Services (Implemented)	April 13, 2017, 1:30 -2:30 PM (SOT Room 3001)	Amber Shedd	Tiffany Richardson/Jayne Brown
Unemployment Insurance Operations (Implemented)	Two Webinar Sessions: April 19th 1-2 and 3-4 PM as or Monday April 24th, 1-2 pm and 2-4 PM	Pam Rumbaugh-Fisher	Heather Ambos/Julie Smith/Bruce Madson(HR contact for OEBS) Sam McNair
Fiscal & Monitoring Services (Implemented)	April 20, 2017 1-2 PM (State Office Tower - Performance Center Conference Room)	Amy Bick	Freda Walker(HR contact for OEBS) Sharon Fletcher/Susan Ballinger
Workforce Development (Pilot Office) (Implemented)	April 24, 1-1:30 PM (30 minute webinar in JFS)	Lisa O'Connell-Paccioretti (Amy Bick)	Joyce Richardson/John Weber/Bruce Madson(HR contact for OEBS) Emily Dyser
Family Assistance (Implemented)	May 3, 2017 9:30am -10:30am (4200 Air Center G179)	LaKisha Morris	(HR contact for OEBS) Stacey Yergin/Kara Wenke/Michael McCreight
Information Services (Pilot Office) - (Implemented)	May 4, 2017, 9:00 AM (Air Center G179)	LaKisha Morris	(HR contact for OEBS) Kim Gearheart/Greg Jackson
Child Support (Implemented)	May 4, 2017, 1:30 - 2:30 PM (3801, SOT Large conference room )	Amy Bick	(HR contact for OEBS) Annette Windland, Jeffrey Aldridge/Michael McCreight
Legal and Acquisition Services (Implemented)	May 9, 2017, 10-11 AM (SOT Room 3001)	Amber Shedd	(HR contact for OEBS) Julie Malfe/Judi Cicatiello/Jay Easterling/Lewis George
Families and Children (Implemented)	May 12, 2017 1:00 - 2:00 PM (AIR4200 G179)	Pam Rumbaugh-Fisher	(HR contact for OEBS) Joanna Valentine/Carla Carpenter/Michael McCreight
Family Assistance (Make - up session) (Implemented)	May 16, 2017, 1-2 PM make-up session (4020 Air Center - A118)	LaKisha Morris	(HR contact for OEBS) Stacey Yergin/Kara Wenke/Michael McCreight
Chief Inspector (Implemented)	June 1, 2017, 2:00-3:00 PM (OCI Conference Room, 32nd floor @ SOT )	Lisa O'Connell-Paccioretti	(HR contact for OEBS) Jody Nichols/Robert Ferguson/Jayne Brown
Communications (Implemented)	June 5, 2017, 2:30 -3:30 PM (OCOM Conference Room, 32nd floor @ SOT )	Amy Bick	(HR contact for OEBS) Hayley Call - Carducci/Jon Keeling
** Legislation (Implemented)	N/A ** Refer below	Amy Bick	Daniel Fitzpatrick (HR contact for OEBS - David Frash)
** Director's Office (Implemented)	N/A ** Refer below	Amber Shedd	Cynthia Dungey (H+A1E16R contact for OEBS)

# GREEN BELT PROJECT CLOSURE MEETING



# AS A RESULT (JUNE 6, 2017 SNAPSHOT)

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## Two Successful Project Pilots

- ❑ OIS
- ❑ OWD

## Agency Training

- ❑ 11 ODJFS Sessions held from April 13, 2017 - June 5, 2017

## 150 Worker Records Entered

- ❑ 59 Retirement
- ❑ 28 Resignation
- ❑ 26 Agency Transfers
- ❑ 19 End of contract
- ❑ 6 Internal Movement
- ❑ 6 Termination
- ❑ 6 Other

# AS A RESULT (JUNE 6, 2017 SNAPSHOT)

## 1893 User Experiences

- ❑ 93 Supervisors
- ❑ 150 Workers
- ❑ 11 Stakeholders x 150 records = 1650 experiences

## 21 Process Continuous Improvements - Enhancements Captured

## 37 Total Incidents/Issues Addressed

- ❑ 29 Technical (78%)
- ❑ 8 Business (22%)

# AS A RESULT (JUNE 6, 2017 SNAPSHOT)

## SP WTS Self-Service Training Resources

Ohio | Department of Job and Family Services

CPI Non-CPI JFS SharePoint Site **OEBS** OCI

# Worker Tracking System (WTS)

Home

**New WTS Document**

Open Work List All Workers

Filter Actions

Click the WTS Worker/Supervisor Training Resource link to access:

1. Supervisor E-Learning Tutorial
2. Worker E-Learning Tutorial
3. Worker and Supervisor Checklist Completion Resource Attachments
4. Desk Aid
5. New Internal Policy Procedure (IPP)

Worker Tracking System

- Worker Tracking System Suggestions
- WTS Issue Tracking
- WTS Worker/Supervisor Training Resource
- WTS HCM Training Resource
- Recent
- Site Contents

# THANKS TO WTS PROJECT CONTRIBUTORS

Tiffany Richardson

Greg Jackson

John Weber

Rory Barrett

Sylvan Wilson

Kim Gearheart

Cindy Orr

Rick Copley

Nancy Hyme-Brewer

Nick Linn

Jeffrey Hissem

Becky Castorano

Jodi Wilkinson

Dale Mosley

Carla Hall

Todd Back

Steve Jones

Doris Shuler

Ted Hampton

Paul Dick

Nahshon Moore

Lisa Perry

Scott France

Deb Fafrak

Kelly Huskey

Adam Borland

Mike Buckley

Kathy Morris

Lisa O'Connell-  
Paccioretti

Amy Bick

Karen Turnau

Lakisha Morris

Doug Berger

Bill Minckler

Mike Rapp

Don Womeldorff

Mehmet Turkoglu

Casey Walters

Radha Ramachandiran

Philip Crosswell

Brian Wilson

Dennis Wellman

Tonya Carter

Yvonne Gore

Joyce Guice

Samuel Cooper

Matt Riggle

Shari Ward

Peggy Reynolds

Shad Hay

Brent Howell

Toni Tuck-Newsome

Bob Atwood

# SPECIAL THANKS TO...

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## Senior Leadership:

- ❑ Tiffany Richardson (OEBS Director)
- ❑ Greg Jackson (OIS CIO)
- ❑ Rory Barrett ( OIS Assist. Deputy)
- ❑ Sylvan Wilson (OIS Assist. Deputy)
- ❑ John Weber (OWD Director)
- ❑ Jayme Brown (COO, Director's Office)

## Subject Matter Experts:

- ❑ All WTS Stakeholder Leads and Teams

## Sponsors:

- ❑ Cynthia Orr (OEBS & Green Belt Project Sponsor)
- ❑ Jeffrey Hissem (OEBS & Green Belt Mentor)

## Key Team Leaders:

- ❑ Bill Minckler (ODJFS SharePoint)
- ❑ Doug Berger (ODJFS SharePoint)
- ❑ Nancy Hyme-Brewer (OEBS JFS HR)
- ❑ Becky Castorano (OEBS JFS Payroll/Benefits)

# QUESTIONS/COMMENTS

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