



Opportunities for Ohioans with Disabilities

John R. Kasich
Governor
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Bureau of Services for the Visually Impaired
Bureau of Vocational Rehabilitation
Division of Disability Determination

VENDOR ADD PROCESS IMPROVEMENT

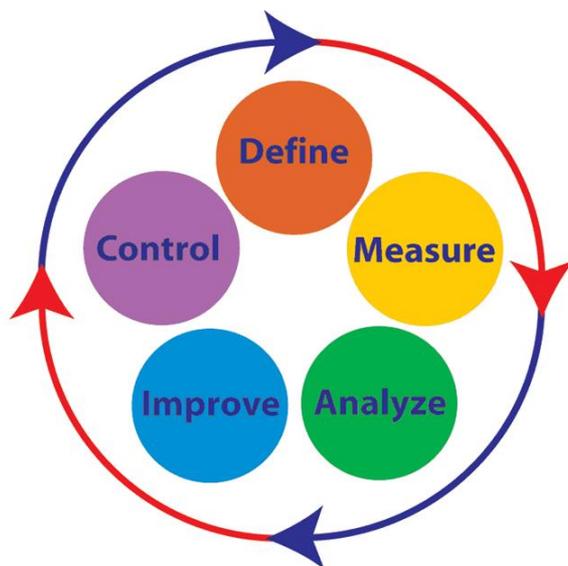
Green Belt Six Sigma Project Report Out

Rita Gram

Opportunities for Ohioans with Disabilities

July 13, 2017

Background - Problems Facing Clerk 3s



- Staffing issues
- Shift from paper to electronic business processes
- Lack of data on work being completed

Background – What is a Vendor Add?

- Disability determinations are processed electronically through a Case Processing System (CPS)
- In order for an adjudicator to request medical records, a medical source must first be added to CPS
- Required information includes the medical source's name, address, telephone number, and tax ID

Vendor Add - The process of obtaining information necessary to add a vendor to the CPS in order to generate a vendor number and request medical records for disability claim adjudication

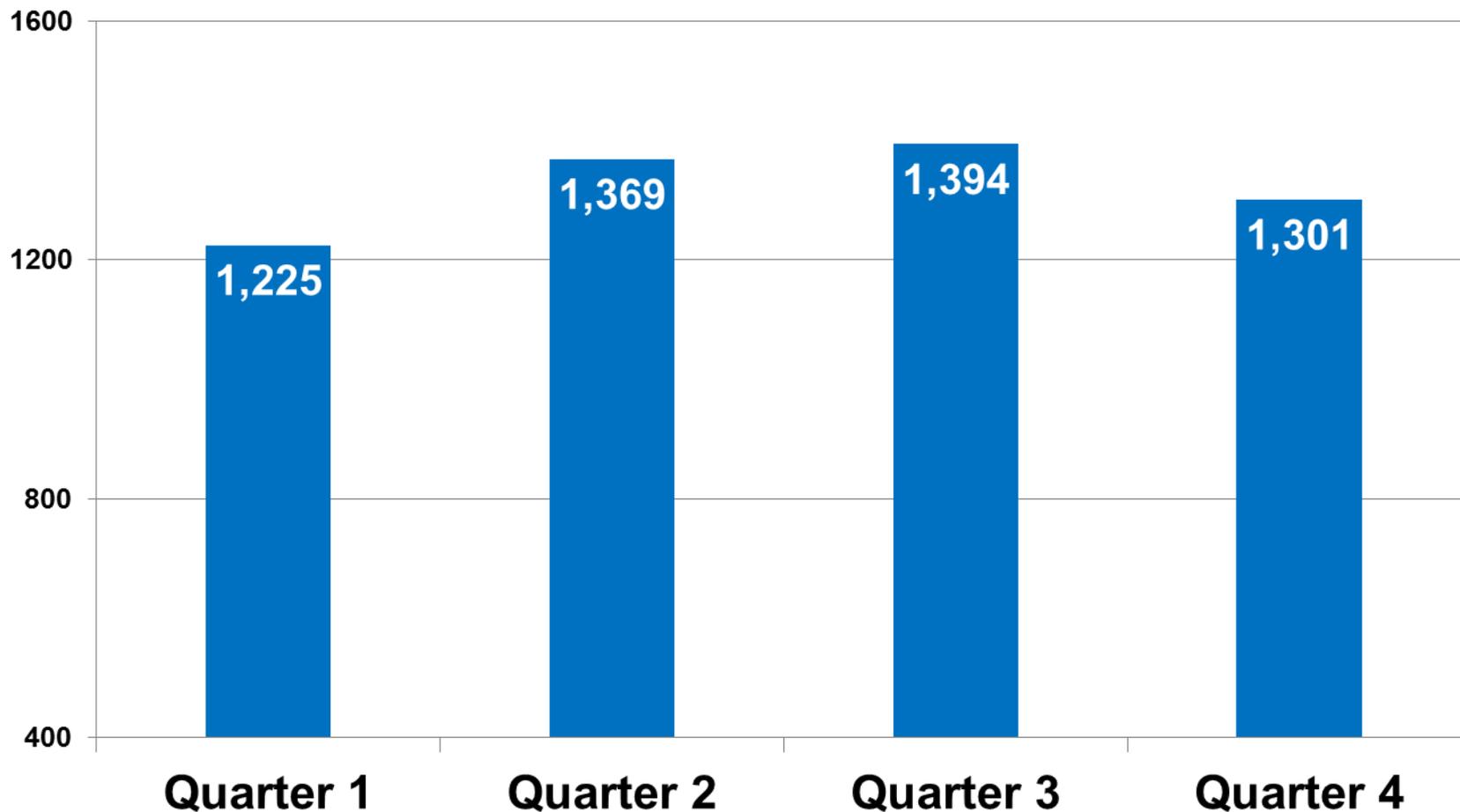
Current State – Problems with Vendor Adds

- Unable to measure the amount of time it takes to complete the entire Vendor Add process
- Too many communication channels
- The MS Word form takes too much time to complete
- Requests are made on existing vendors, but there is no way to track this
- Operators are processing requests differently



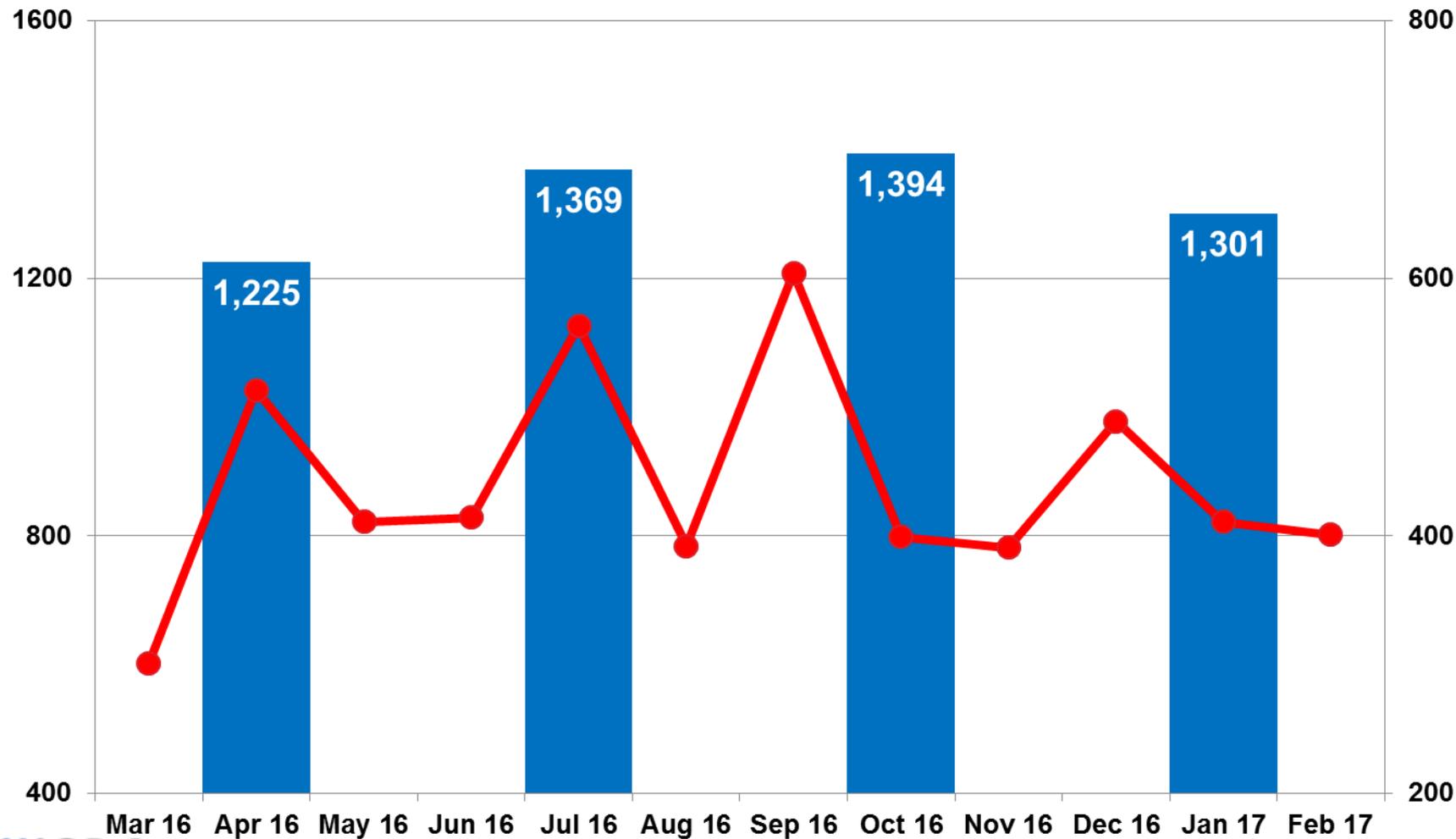
Baseline Data

Vendor Add Work Queue Requests Submitted
03/01/16-02/28/17



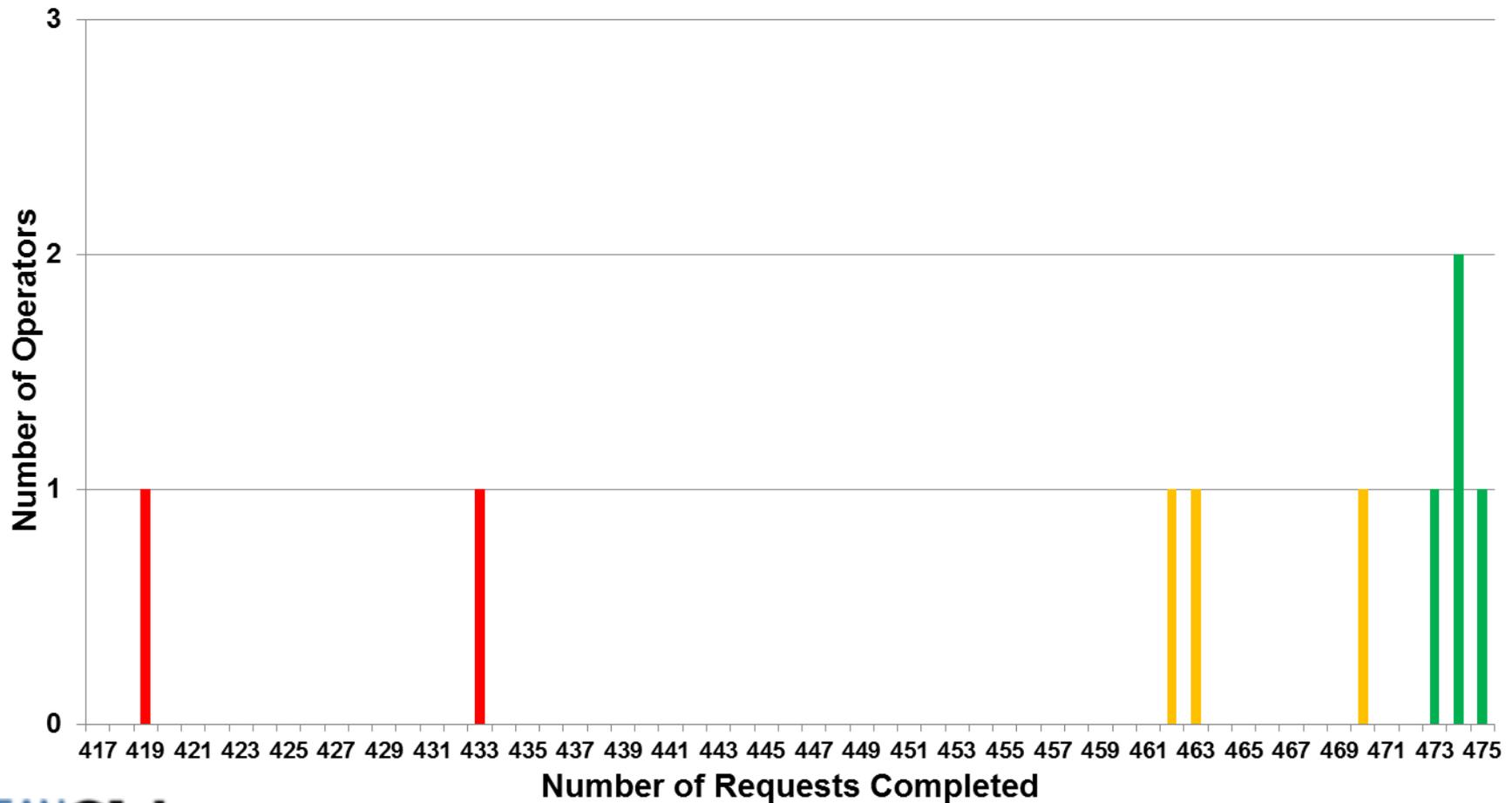
Baseline Data

Vendor Add Work Queue Requests Submitted
03/01/16-02/28/17



Baseline Data

Total Number of Completed Work Queue Requests per Operator 03/01/16-02/28/17



Project Goals

1. Create an efficient process that is in compliance with SSA requirements
2. Create a data measurement system to measure time of Vendor Add completion
3. Create a consistent and user-friendly process for staff to add a vendor



Vendor Add Project Team

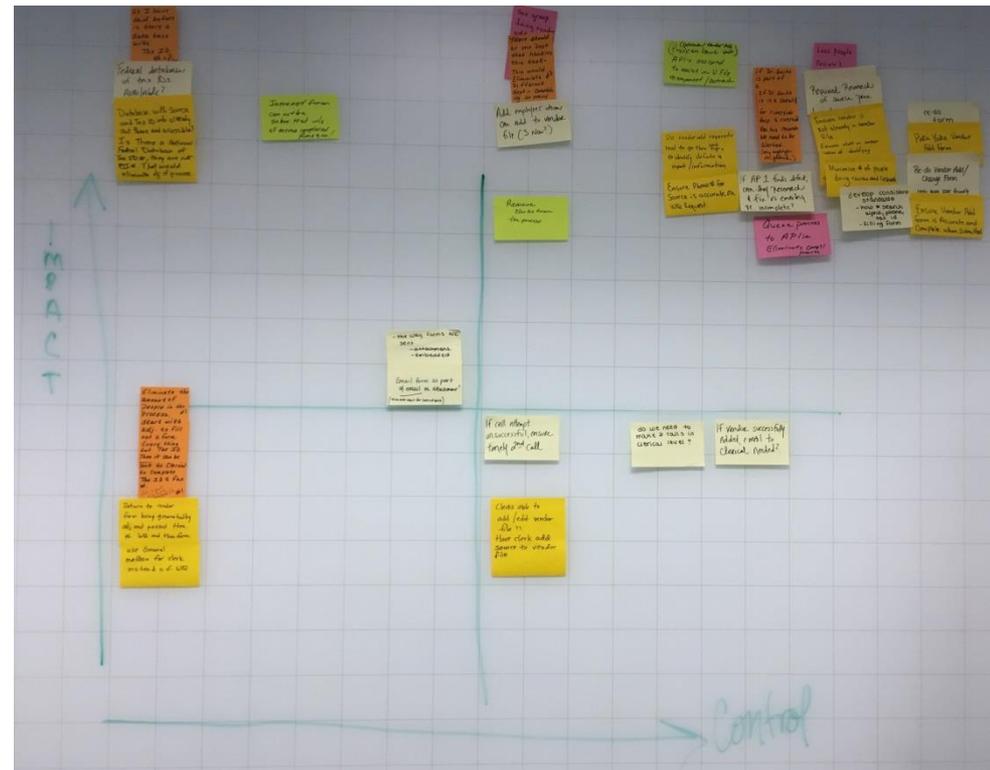


Gary Weaver, Clerk 3
Linda McGrath, Clerk 3
Matthew Sonk, Clerk 3 Supervisor
Amy Wobser, Clerk 3 Supervisor
Stephanie Biller, AP 1
Stephanie Johnson, AP 1
Cindy Flynn, AP 1 Supervisor
Laelle Burkhardt, Adjudicator 3
Ty Flowers, Adjudicator 3

HIGH LEVEL PROCESS - SIPOC



Brainstorming

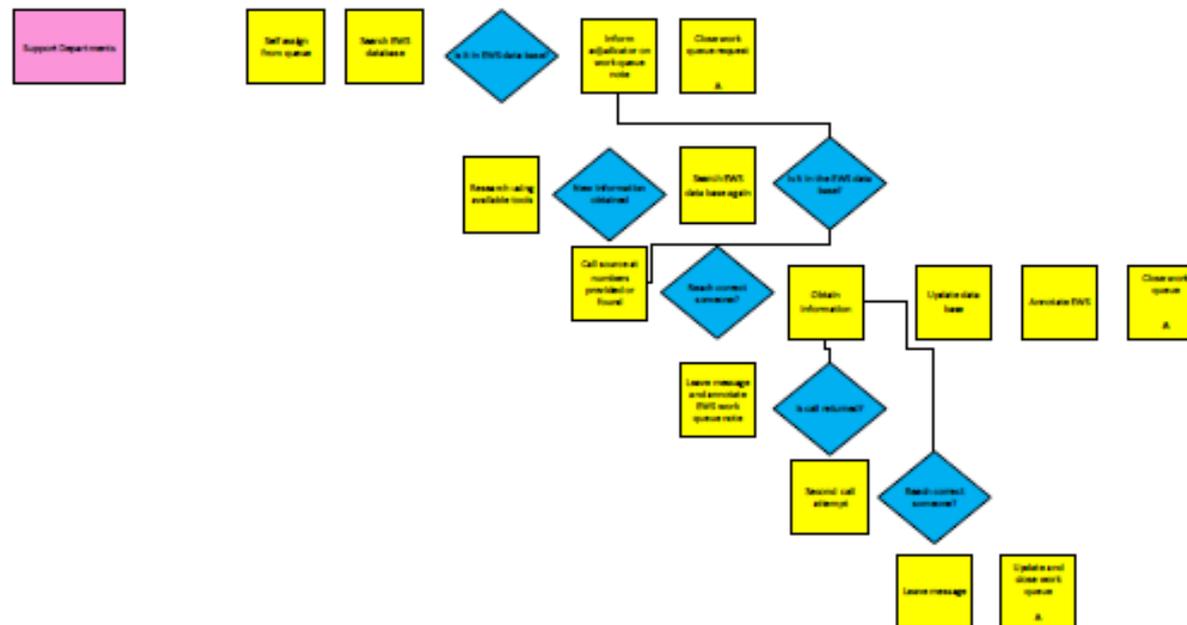


Clean Sheet Redesign

Detailed Process Map – Future State



- 16 process steps
- 3 handoffs
- 6 decisions



Poka-Yoke

MS Vendor Add/Change Form

Vendor Add/Change Form			
Add <input type="checkbox"/>		Date of Request: 6/7/2017	
Change <input type="checkbox"/>		Vendor Code: [REDACTED]	
Requestor Name: [REDACTED]		Unit: [REDACTED]	Phone Ext: [REDACTED]
Case Information complete <u>at least</u> one field		Case #: [REDACTED]	
Source Phone: [REDACTED]		Climt Name: [REDACTED]	
Source Service Information: <small>(If a copy service is used you do not need to get a payment address or Tax ID number)</small>		Do you use a copy service (Y or N): [REDACTED]	
Address Where Patient Received Treatment		Name of copy service used: [REDACTED]	
P.O. Boxes will not be accepted		Contact Name (if applicable): [REDACTED]	
Special Mailing Address		Attention Line (if needed): [REDACTED]	
Payment Address If Different <small>(If copy service used-not needed)</small>		Street Address (Line 1): [REDACTED]	
Tax ID Number: <small>(If copy service used-not needed)</small>		Street Address (Line 2): [REDACTED]	
Medical Specialty:		City: [REDACTED]	ST: [REDACTED] Zip: [REDACTED]
Original 827 (Y or N): [REDACTED]		Fax Phone Number: [REDACTED]	
E-mail to: JOHDDD Vendor Change		Payment Phone Number: [REDACTED]	
Details of any problems delaying the completion of this form: [REDACTED]			
Clerical Use: Date received: [REDACTED]			
Date sent to Vendor Change Staff: [REDACTED]			

RECOMMENDATIONS

- All Vendor Add information is noted on a work queue request
- Work queue request will be created at the time a Vendor Add is submitted and closed at the end of the process
- Work queue requests are self-assigned
- Training for adjudicators on researching the vendor database prior to submitting a request
- One group of staff processes Vendor Adds
- Standardize the business process

Project Metrics

Measure	Before	After	Difference
<i>Process Steps</i>	33	16	52%
<i>Handoffs</i>	10	3	70%
<i>Decisions</i>	10	6	40%
<i>MS Word Vendor Add Form</i>	1	0	100%
<i>Email request</i>	1	0	100%

Project Benefits - Intangible

- ✓ **A dedicated group of staff who specialize in the Vendor Add process**
- ✓ **Management and Staff have confidence in the process**
- ✓ **A process that does not underutilize staff's time and abilities**



Improvement summary

Current Key Issues



A lot of data entry, different modes of relaying information and form completion



Could only measure portions of the process



Perception that Vendor Adds are time consuming and complicated

How We Improved



Consolidated steps to one Work Queue Request and entering information directly into the CPS



Data collection and analysis possible from beginning to end



Time tracking now available and process is more efficient

Implementation Plan

Task	Who	When
Update Operating Manual instructions	Policy and Procedures Supervisor	8/4/2017
Create and implement refresher training for researching existing data base	Training Department Supervisor	8/16/17
Obtain systems access for users	IT Department and Support Department Area Manager	9/1/2017
Create standardized research guidelines & train staff on new process	Support staff direct supervisor(s)	9/8/2017
Roll out new Vendor Add Process agency-wide	Support Department Area Manager	10/2/2017

As a Result

- Lean principles have been applied to the Vendor Add Process
- A data collection process can be put in place to measure the Vendor Add process from beginning to end
- The number of defects can be tracked, continuously improving the process
- Vendor Adds can be resolved more quickly, improving Customer Service

Special *thanks* to...

Senior Leadership:

Kevin Miller, Executive Director

Bill Bishilany, Assistant Executive Director

Erik Williamson, Deputy Director

Teresa Gray, Assistant Deputy Director

Rhonda Tanner, Assistant Deputy Director

Sponsor:

Tom Melfo, Assistant Deputy Director & Black Belt

Process Owner:

Orlando Rodriguez, Area Manager

Team Leader:

Derek Willer, Black Belt Candidate

Mentor:

Heather Graham, Green Belt

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Linda McGrath

Lauren Poore

Mary Lowery-Nelson

Madeline Gumenik

Matthew Sonk

Amy Wobser

Kristen Caldwell

Mike DeNoble

Stephanie Biller

Stephanie Johnson

Laelle Burkhardt

Ty Flowers

Cindy Flynn

Questions/comments

