2012 Quality Improvement Grantees Learning Congress

November 1, 2012

Continuing Education/Training Request Process Improvement

Kitsap Public Health District

Project Team

- Tracey Kellogg, CPA, Finance Manager – Team Lead
- Beverly Abney, Accounting Assistant, Accounts Payable
- Jan Brower, Solid & Hazardous Waste Program Manager
- Melanie Dalton, BS, IT Specialist
- Karen Holt, Human Resources Analyst
- Loan Nguyen, Purchasing Agent

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Project Identification

•Project identification came from the District's quality training workshops in which the team being trained identified and prioritized potential projects.

• The Continuing Education (CE)/Training Approval process was voted the highest priority.

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AIM Statement

The purposes of our Quality Improvement project were to:

➢ Increase customer satisfaction with the CE/Training approval process,

➢ Decrease the number of errors and omissions on request forms, and

➢ Reduce rework and cycle time

Project Activities

- ➢ Surveyed District staff regarding satisfaction with the current process

- ➢ Identified the process' "customers"; not only the requestors, but the end users of the form; Accounting, Purchasing & Human Resources

- ➢ Used Mind Manager to map the existing process

- ➢ Audited completed CE/Training forms for accuracy

- ➢ Identified root causes of problems with form and process

- ➢ Brainstormed new electronic form and process

Quality Tool – Process Mapping

➢The map identified all the steps currently used in the process

➢The QI Team identified numerous handoffs, re-work and variations, depending on components of the request

Process Mapping: What a mess!

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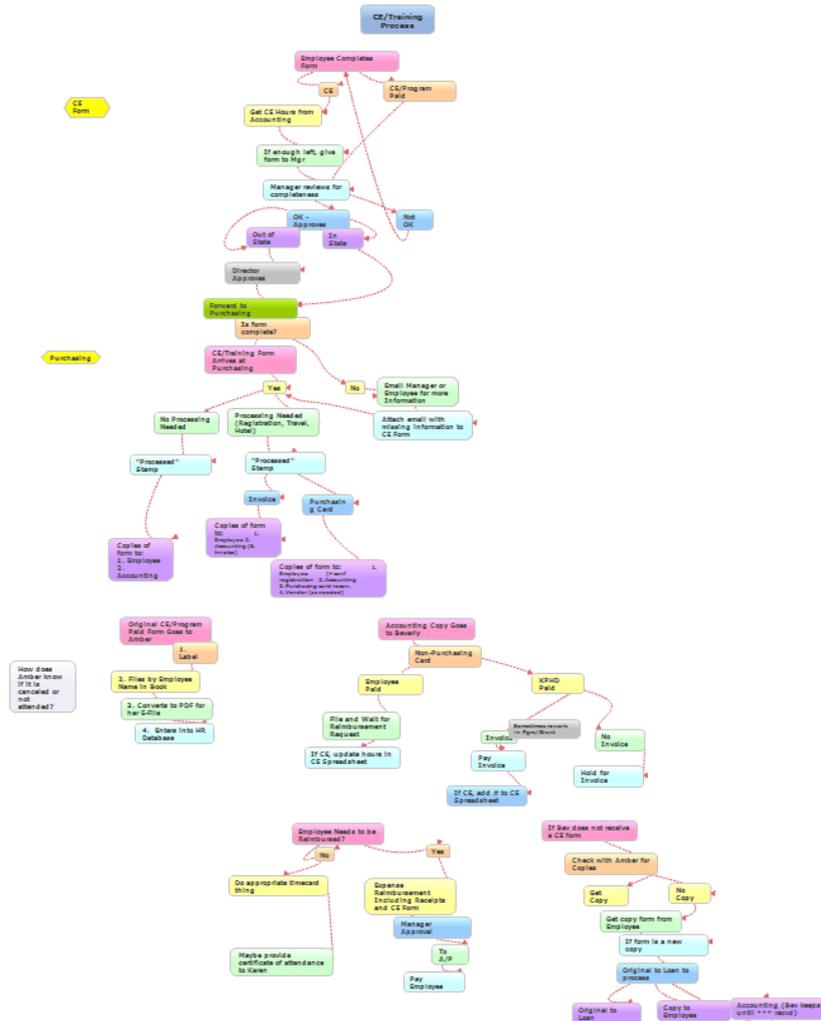
Results – Solution Identification

➢Redesigned the form using a fillable .PDF version that only opened relevant sections of the form based on the requestor's needs as elicited by a series of simple questions

➢Designed system of electronic approvals that automatically e-mails the person responsible for the next step in the process

➢Designed a set of folders to store forms based on where the request was in the process, allowing users to check the status of their request

➢Added a step that requires the requestor to confirm their attendance

Results – Solution Identification and Implementation

❖ Solutions will be implemented by October 2012

❖ Solutions will be evaluated in November & December, 2012

❖ Discussed potential long term solution and implementation of SharePoint software for routing documents to eliminate the need for manual data tracking. This was outside the initial scope of the project.

Enter Final Date

Next Steps

- Complete implementation of solutions (Do)

- Measure progress (Check):

  - Increased accuracy and compliance

  - Reduced handling time by Purchasing, Accounting and Human Resources

  - Increased requestor awareness of process and status of their request

- Make adjustments as needed (Act)

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