

**Ohio**

**Rehabilitation Services  
Commission**

## **Kaizen Event**

**Vocational Rehabilitation  
Eligibility and Order of  
Selection Determination  
Process**

# *Team SUPERMODEL*



# The Team

Christy Ash – Eligibility Counselor, Youngstown  
Devin Aumend - Caseload Assistant, Columbus  
Sandy Burtscher – Supervisor, Sandusky  
Pat Carroll - Account Examiner, Mansfield  
Bocar Dieng – Consumer, RSC Staff  
Maria DiGennaro - Account Examiner, Columbus  
Brian Eskridge - Caseload Assistant, Youngstown  
Mark Fay - Area Manager  
Karen Johnson – Eligibility Counselor, Columbus  
Katherin Karwatske - Counselor, Portsmouth  
Bill Lindsey - Eligibility Counselor, Lake County  
Aneesa Locke - Rehabilitation Program Specialist, VRP3  
Tom Melfo - DDD Manager (Outside Perspective)  
Lois Mescher – Eligibility Counselor, Dayton  
Curt Morman - Area Manager  
Marianne Porter - VRP3 Liaison Counselor  
Margaret Smith - Aerial Engineering, ODOT  
Kerri Stickney - Caseload Assistant, Centennial



**Facilitators:** Bill Demidovich, Steve Wall, Gloria Calcara, Sue Kirby, Rich Martinski

# Leadership

**Senior Leadership:** Director Kevin Miller and Chief of Staff Brenda Cronin

**Sponsors:** Susan Pugh, Deputy Director of BVR and Dan Connors, Deputy Director of BSVI

**Team Leaders:** Area Managers: Mark Fay and Curt Morman

**Subject Matter Experts:** VR Policy, Chief Legal Counsel, AWARE project manager, IT

**Others:** Performance and Innovation (Raivo Murnieks and Steve Trammell for data support)



# Background

The Ohio Rehabilitation Services Commission (RSC) establishes and implements performance standards for the prompt and equitable handling of applications for vocational rehabilitation services. The applications must be widely made available to individuals with disabilities throughout Ohio. The process includes informing individuals of application requirements and gathering the necessary information to initiate an assessment(s) for the purpose of determining eligibility and priority status for order of selection.



# Stakeholders



- Individuals with disabilities seeking employment and careers
- Other state and local service providing entities
- Contract partners
- Ohio taxpayers – maximize draw down of federal VR dollars
- ORSC Staff



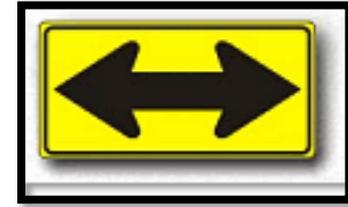
Maria DiGennaro

# Reasons for improving this process:

## Process Goals

1. Improve the 'front door' experience for individuals with disabilities that are seeking services from RSC by reducing the time it takes to determine whether or not they are eligible for services.
2. Increase the percentage of consumers engaged in the eligibility determination process.
3. Maximize the use of staff serving consumers on caseloads.

# Scope of Event



The process begins when an individual is referred or makes application for services and ends when eligibility is determined and an Order of Selection is completed.

This event will evaluate the consumer experience from the time they are referred, and/or making application for vocational rehabilitation services, to the time they are determined eligible for services, (including order of selection decision).

# Out of Scope

## **Areas that will NOT change as a result of the Kaizen event :**

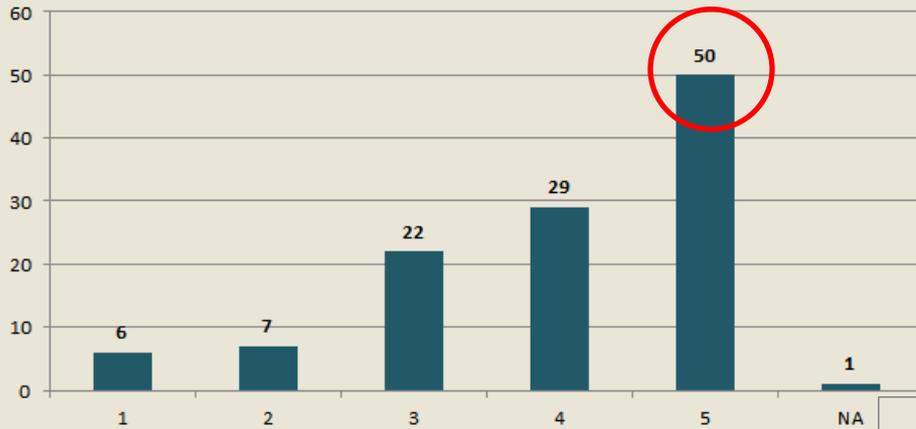
- No one loses their job because of the Kaizen event, but duties may be modified.
- Need for additional personnel is independent of the process.
- Need for additional money is independent of the process.
- No legislative changes or changes to collective bargaining agreement.
- IT solutions are independent of the process.



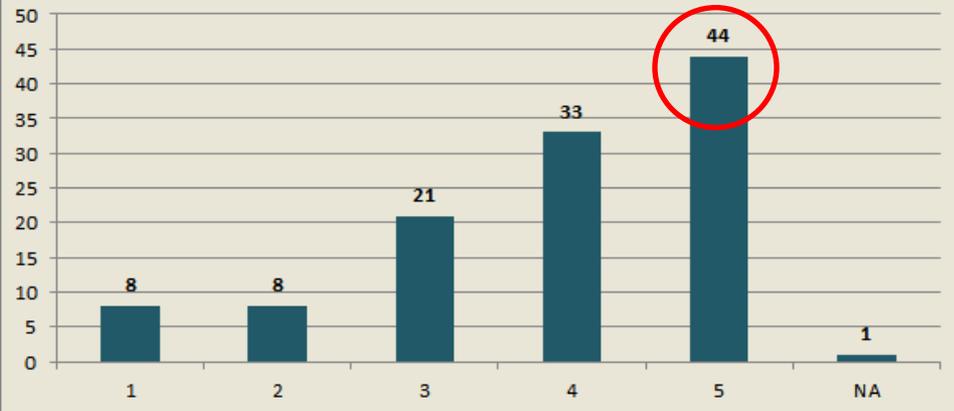
Lois Mescher

# Voice of the Customer

How satisfied were you with the process for receiving and submitting the application for RSC services?



How satisfied were you with the time it took to gather documents / records that were necessary to determine eligibility?



# Voice of the Process

## RSC Staff Survey

- 148 staff suggestions from the December 2011 Staff Survey were utilized in the session
- Directly utilized 98 of 148 (66%) comments in the redesign



Mark Fay

# AVERAGE DAYS CYCLE TIME

SUMMARY				
Average Days Cycle Time				
	Referral to Application	Application to Eligibility	Eligibility to OOS	Referral to OOS
<b>Number of Cases</b>	883	2,053	2,423	8,682
<b>Eligibility Model Used</b>	(average days)	(average days)	(average days)	(average days)
Model 1	25	56	29	118
Model 2	37	67	26	138
Model 3	20	54	10	87
Model 4	43	78	21	153
Model 5	30	71	13	119
Hybrid of Models 2&3	54	80	15	169
Hybrid of Models 4&5	33	91	36	166
Model 2 Modified	53	82	32	183
VRP3	30	56	18	107
<b>Overall Average</b>	<b>35</b>	<b>65</b>	<b>22</b>	<b>129</b>
<b>Severity of Disability</b>	(average days)	(average days)	(average days)	(average days)
Most Significantly Disabled	37	65	20	123
Not Significantly Disabled	48	71	21	141
Severely Disabled	41	76	25	143
<b>Overall Average</b>	<b>35</b>	<b>68</b>	<b>22</b>	<b>129</b>
<b>Bureau Description</b>	(average days)	(average days)	(average days)	(average days)
BSVI	34	62	21	123
BVR	38	70	23	140
VRP3	30	56	18	107
<b>Overall Average</b>	<b>35</b>	<b>65</b>	<b>22</b>	<b>129</b>

A total of 14,041 cases

**AVERAGE Cycle Time:**

✓ Referral to Application

**35 days**

✓ Application to Eligibility

**65 days**

✓ Eligibility to OOS

**22 days**

✓ Total from Referral to OOS

**129 days**

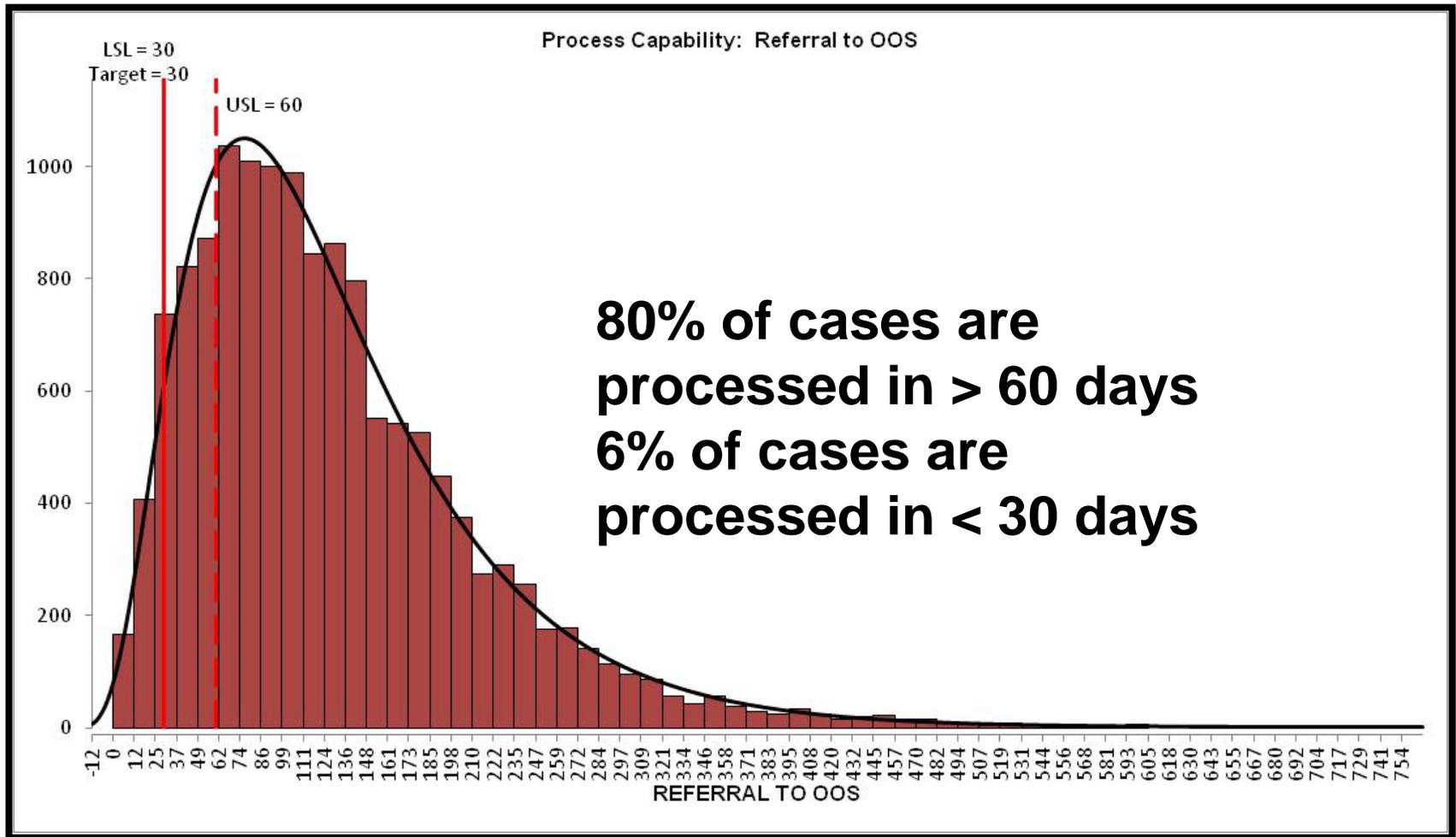
**Fastest Avg. Processing**

**Time** Model 3

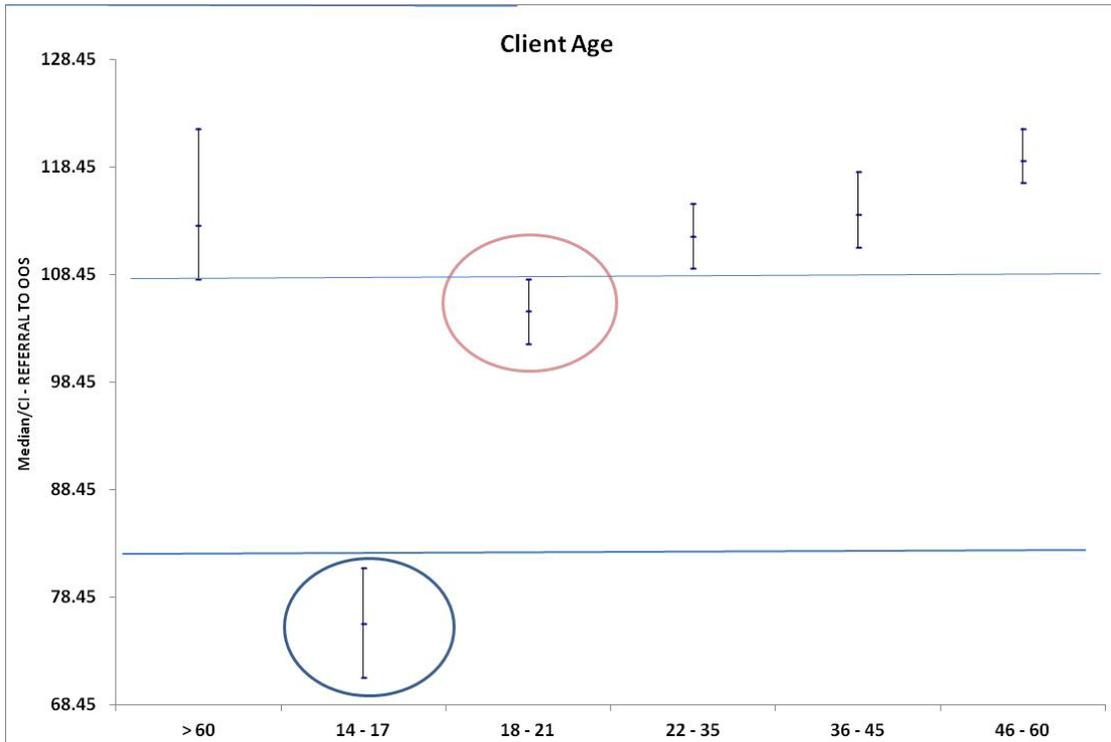
MSD

VRP3

# How well does the current process meet the target processing times?

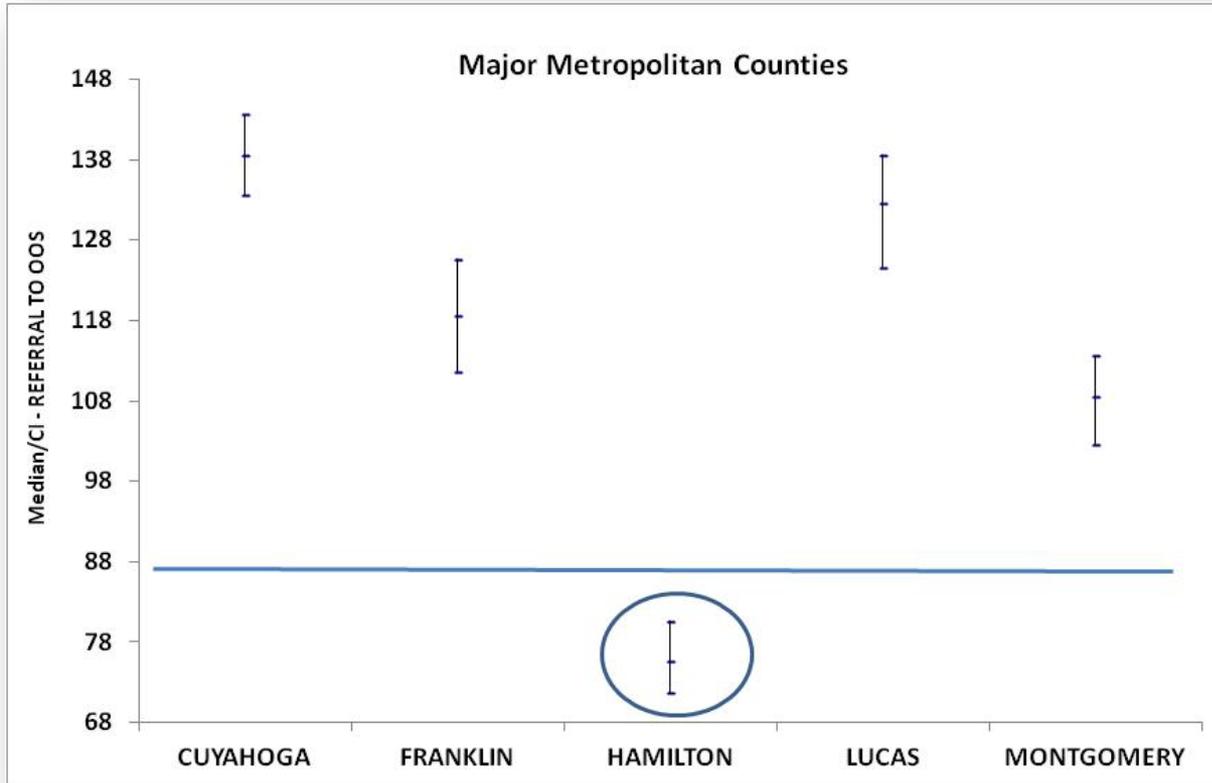


# What impacts Lead Time?



**There is a significant difference in lead time for clients that are in the younger age groups, i.e. 14-17 and 18-21.**

# What impacts Lead Time?



**There is a significant difference in lead time for Hamilton county compared to the other 4 major metropolitan counties.**



Bill Lindsey

# Measures of Success

Measure	Current Level		
<b>Average</b> Processing Time (client eligible for services) <b>1 to 753 days (actual in FFY 2011)</b>	129 days		
<b>% of cases processed in 30 days or less</b>  <b>% of cases processed in 60 days or less</b>	6%		
Customer satisfaction with: 1. overall process 2. customer service  <b>Scale of 1 to 5</b>	3.7 4.1		
Medical records turnaround time average of 10 days	Unknown		



Christy Ash

# The Kaizen Approach

Team-based energy and creativity drives immediate process improvement

DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
Day of Learning	Day of Discovery & Developing Improvement Ideas	Day of Improvement & Creating the New process	Day of Design Implementation & Documentation	Day of Celebration & Results  Schedule 30-60-90-day follow-ups

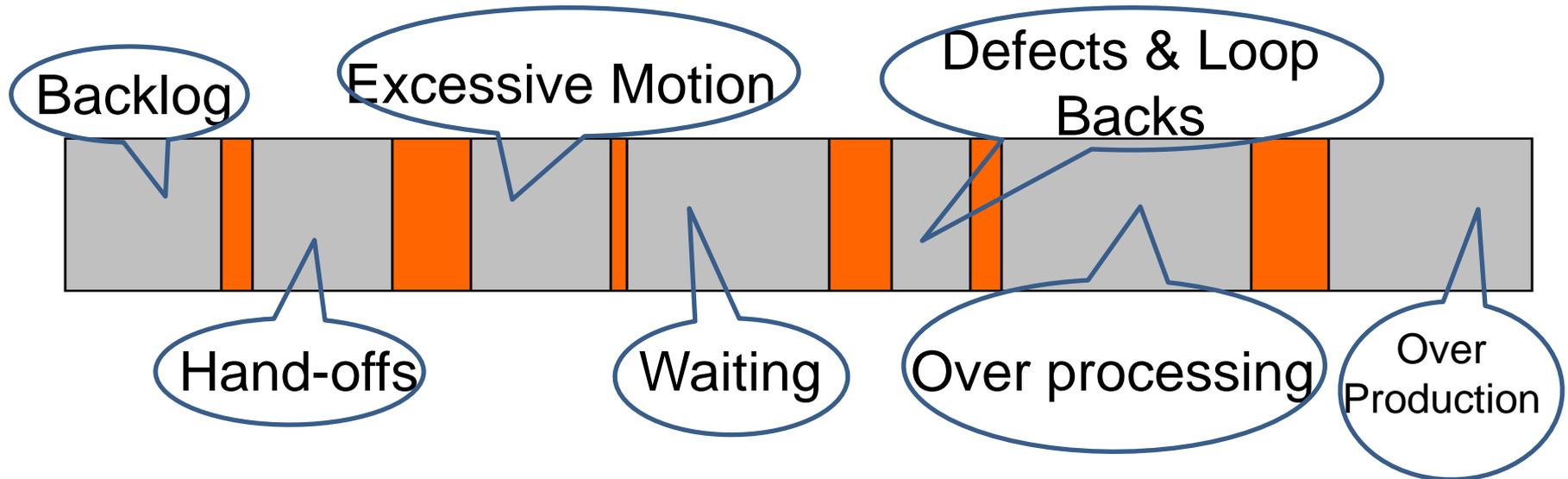


# KAIZEN: To Break Apart for the Better

- Clear objectives
- Team process
- Tight focus on time (one week)
- Quick and simple, action first
- Necessary resources available right away
- Immediate results (end of week)



# Lead-time Reduction



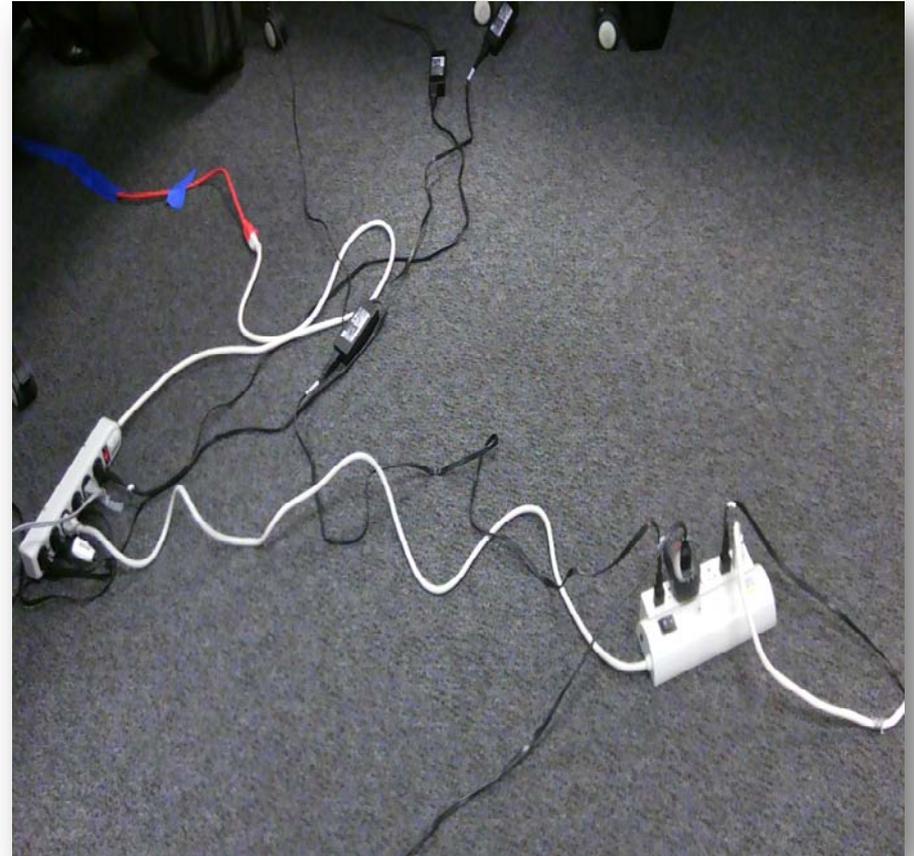
**TIM WOOD** – Transportation, Information, Motion, Waiting,  
Overproduction, Over processing, Defects



Sandy Burtscher

# The original processes had:

- Too many steps
- Too many eligibility models
- Too many delay points
- Too many hand-offs
- Caused too much process lead time
- Resulted in long process times



# Current Process

50,000 view  
31 steps, 1 to 753 days

20,000 view  
13 steps, 49 to 231 days

Field Process

20,000 view  
15 steps, 49 to 231 days

In House

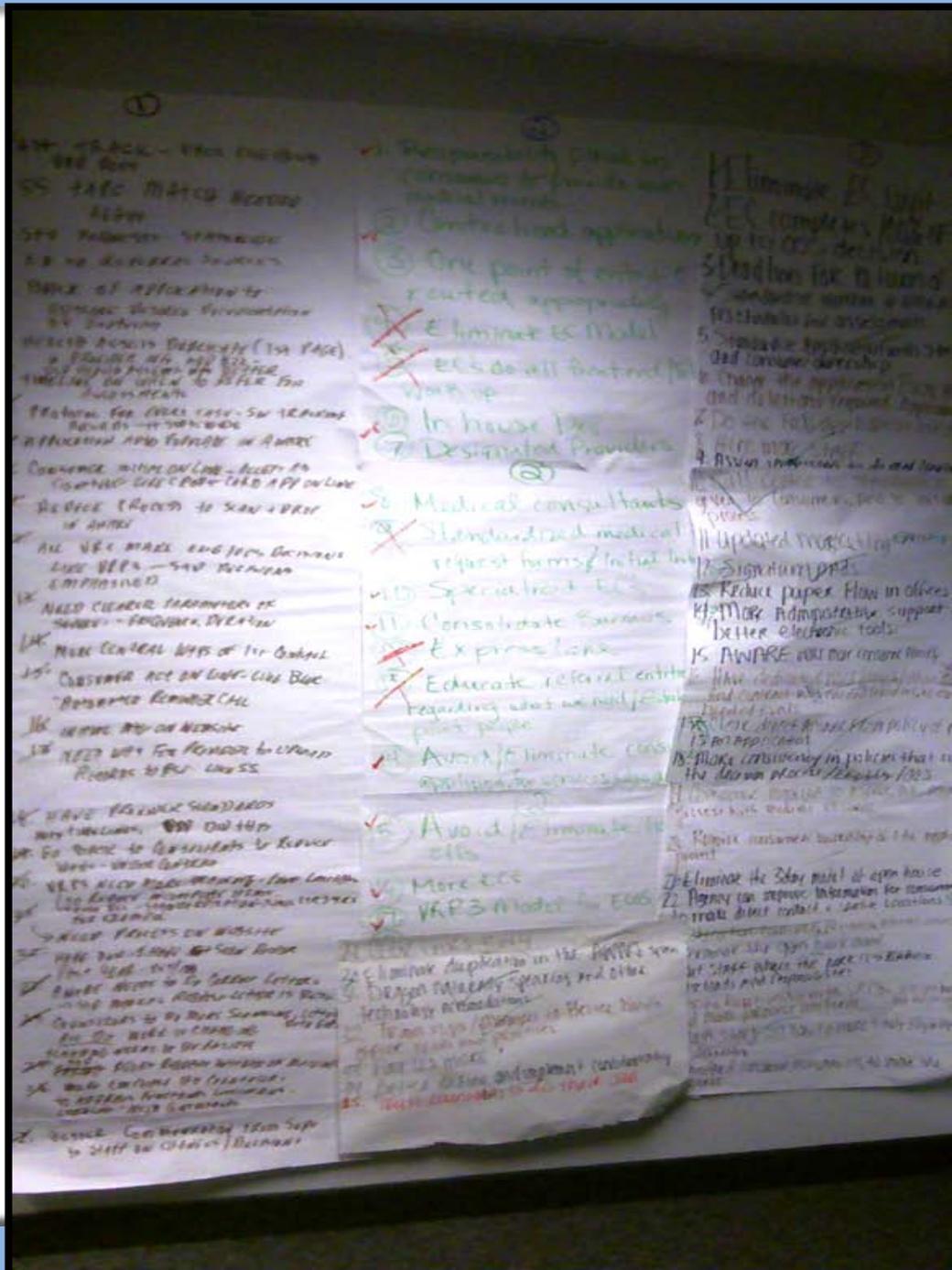
# Measures of Success

Measure	Current Level	Target	Gap
<b>Average</b> Processing Time (client eligible for services) <b>1 to 753 days (actual in FFY 2011)</b>	129 days	30 days	99 days
<b>% of cases processed in 30 days or less</b>  <b>% of cases processed in 60 days or less</b>	6%  20%	75%  95%	69 percentage points  75 Percentage points
Customer satisfaction with: 1. overall process 2. customer service  <b>Scale of 1 to 5</b>	3.7  4.1	4.5  4.5	0.8  0.4
Medical records turnaround time average of 10 days	Unknown	60%	



Aneesa Locke-Hines

# The Team "Brainstormed" more than 81 Fresh Ideas





# Common Ground

## COMMON GROUND

### EC MODEL

CENTRALIZED INTAKE

MED DOC SOLUTION

INFORMED CONSUMER  
UPFRONT INVOLVEMENT (REQ)

STANDARD FORMS/SCHEDULING  
AUTOMATED INTAKE

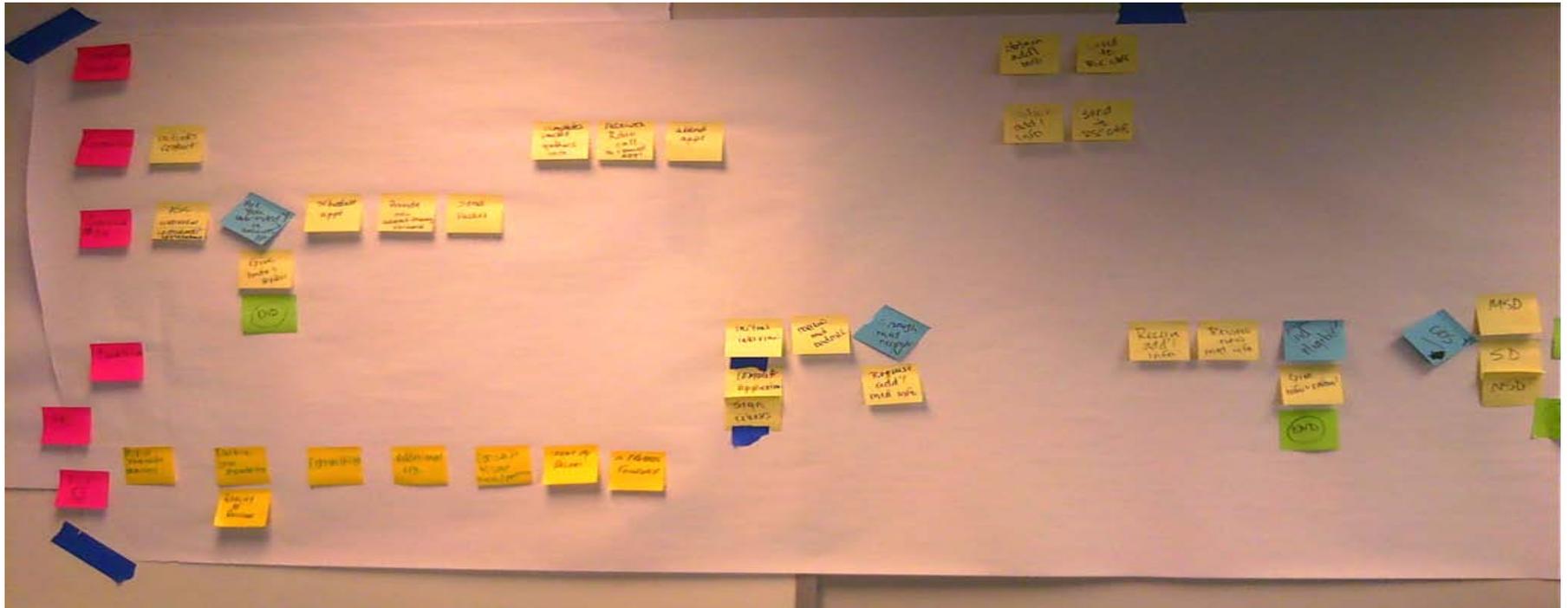
REAL TIME ASSISTANCE  
(STAFF TO THE NEED)





Devin Aumend  
Aneesa Locke-Hines

# The New, Improved Process



**27 Steps**  
**4 Decisions**

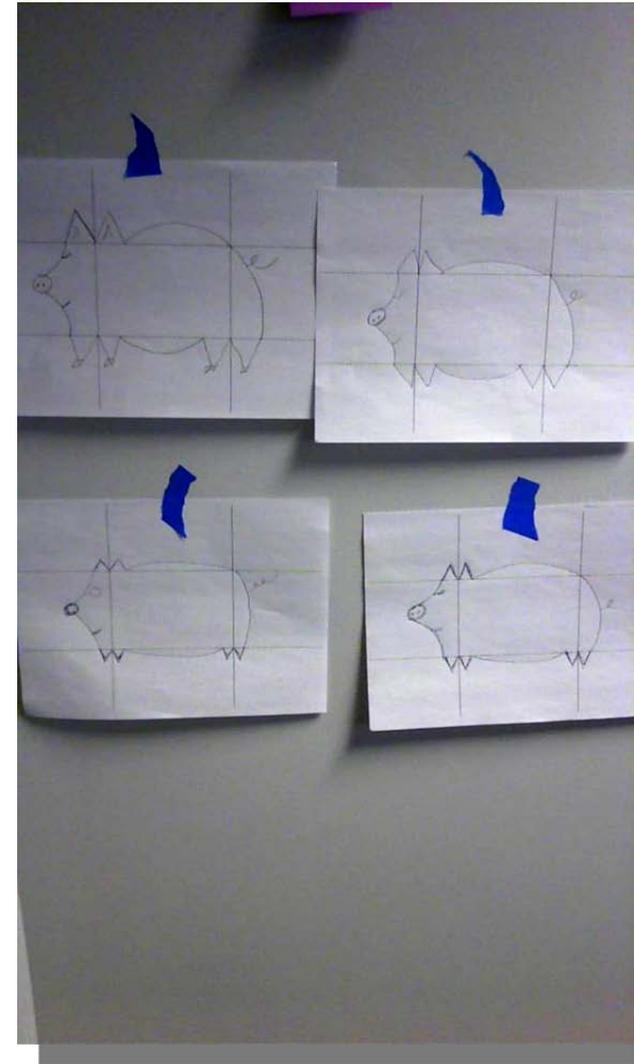
Measure	NOW	Projected After	Difference
Steps	31 to 46	27	<ul style="list-style-type: none"> <li>4 to 19 steps</li> <li>13% to 41% decrease</li> </ul>
Decisions Points	12	4	8 Fewer 66% decrease
# Models	88	1	87
Referral to OSS Processing Time	<p><b>Overall average 129 days</b></p> <p>Referral to App. – 35 days average App. To eligibility – 65 average Eligibility to OSS – 22 average</p> <p><b>Range in FFY2011: 1 day to 753 days</b></p>	<p><b>1 - 37 days</b></p> <p><b>30 day Average</b></p>	<ul style="list-style-type: none"> <li>92 day avg. decrease</li> <li>71% reduction in processing time</li> </ul>
Delays	14	2	12 fewer -86%



Brian Eskridge

# More Results

- Better service to our customers in responding to *“I just want a job”*
- Reduced job frustration; revitalizing job satisfaction through faster response.
- Buy-in from all levels of staff
- Much improved and more consistent service delivery
- Over 200 consumer & staff comments considered





Curt Morman  
Kerri Stickney

# Implementation Plans

- Medical Documentation plan
- Standardized Intake Plan
- Training plan
- Communication plan
- Technology Plan
- Goals & Measures



# Information Technology Plan



IT		
WHAT	WHO	WHEN
MED DOC UPLOAD (ON-LINE)	John/Maria	3 mos
ELECTRONIC STIG. → AWARE	AWARE Project team/Bill/legal	2 mos.
ON-LINE: APP, CONSENTS, HAQ	Communications (content) IT (on line access) Brian	6 mos
WEB-BASED COURSE (JFS) LINK	IT/Legal, Bill	3 mos
SOC SEC "TAPE-MATCH"	Ticket Tracker	1/2
IT Con't		
WHAT	WHO	WHEN
Consumer-Status ON-LINE Personal Information	IT	Parking Lot
Scanning Issues (outside office)	IT Project (David Maria)	Present
Scheduling (Central) Techniques	Brian IT	
Portability Equipment	IT Pilots	In Progress
AWARE	Teji-IT CIO, Bill	Now - Quetsi posed (action)

# Communications and Training Plan

IS

## Communication

What	Who	When
① Future state address	All of us Kaizen Team	12/9/11 @ 11:15
② Phased In Implementation + Training	Kaizen Team	12/9/11 @ 11:15
③ Action Registers	Team Members	See respective timelines
④ Kaizen Follow-ups	Kaizen Team	30-60-90 day 6 months + Year
⑤ ISO Story In Weekly Focus	Office of Communications	12/9/11 + updates

State ?'s

QUARTET

Post-it Recycled Target Pad

Recycle 60% Reciclado 60%

23 ENVIRONMENTAL 30% RECYCLED 43.5 cm x 30.2 cm CONT. 1 BLOCK DE 30 Hojas

## Training

What	TARGET AUD	Who	When
Develop S.I.T.	VRS, VRC, CA VRP??	Jan M. / 2 kaizen members	Feb. 1
Deliver S.I.T. Training	"	Jan M. <del>Sandy</del>	Feb / March VET
EC/ops Training	VRC/VRS	Jan, EC'S EC SPS Christy / Sandy	Feb / March
Updated VR Planning/Travel policy <del>kinoshort</del>	Current EC'S	Jan M. Aware S.M.E'S SPS	Feb / March

What's here yet all



Brian Eskridge  
Maria DiGennaro

# Intake Plan



## Central Intake Register

WHAT	Who	When
1. Info- what 15 BAR/BSU - process - FAQ/referrals - resource list	VRC/CA/VRS/EC	1st contact
2. central phone system - routing calls - reminder calls	IT/VR Prof 1	before 1st contact
3. Website - update - detailed info - <del>submit contact forms online</del> - request info form - live chat, skype - online case check		ongoing before 1st contact
4. (tracking) referrals from online/ <del>VA/AAE</del> CA	CA	ongoing before 1st contact
5. Standardized forms (health assessment, ROI, II)	IT	ongoing before 1st contact
6. Training - Staff vendors/community	HR/VR Prof 1	ongoing before 1st contact
7. Location - area or long night		ongoing/within 24-48 hrs
8. Sending info - overview/apph letter/email required info - SSA and other info	VR Prof 1 SUPPORT	1st call - 2 days 2nd call - 3 days 3rd call - on 4th day 15
9. request medical - for specific request	CA	

What	Who	When
Assessment Schedule	VR Prof 1	at time of intake or after 7 days of no response from medical provider
Assessment	Medical Providers	14 days to get assessment back
II incoming mail/fax - separate fax # for med records - separate fax # for referral/apps	support CA IT	1-2 days before contact

# Medical Documentation Plan



What?	Who?	By When?
<p>⑥ Educate Schools about proper TRS &amp; IERS supply</p> <p>Transition Counselors</p> <p>Immediately</p>		
<h2>Medical Document Action Registry</h2>		
<p>① Create standardized forms that align w/ Program Requirements</p>	<p>Policy/SME/Pie/IT</p>	<p>2 months</p> <p>Some</p>
<p>② Define an acceptable timeline for response for request + should be short.</p>	<p>Policy/SME/Pie</p>	<p>2 months</p>
<p>③ Identify Follow-up procedures to the requests <small>with timeline/Esse</small></p>	<p>Policy/SME/Pie</p>	<p>2 months</p>
<p>④ Reestablish Relationship w/ DDD Chief Psychologist to get info <small>Chief medical and services w/ current needs available. In-house Case Peds</small></p>	<p>Erik Williamson/ Rose Reed/Shelly Rhodes/ Susan Pugh</p>	<p>2 weeks</p>
<p>⑤ More Secure + Responsible method of Medical Info Storage + <del>Retention</del></p>	<p>IT</p>	<p>?</p>
<p>⑥ List on the back of the applications what medical info would be helpful to bring with them.</p>	<p>Policy/SME/Pie/IT</p>	<p>?</p>
<p>⑦ SSA Tape Match</p>	<p>IT</p>	<p>?</p>

# Goals and Measures Plan

Goals & Measurements

What	Who	When
30-Days: Start? to Eligibility/OOS		50% Success: 6-Months
Within 60-Days		85%-90% Success: 6-Mos.
Requests for Medical Records Received w/i: 20 Days		80% Success: 6-Mos.
Initial Interviews Occurs w/i 10 Day of 1 <sup>st</sup> Professional Contact		95% Success: 3 Mos.

Goals & Measurements CONT.

What	Who	When
Independent Eval occurs w/i 10 days of schedule pt		95% Success 6-mos
Evaluation Rec'd w/i 7 days of apt		95% Success 6-mo



Bill Lindsey

# Beginning Next Week...



- Discuss & answer questions from staff
- Group to rewrite processes & procedures
- Develop group to assemble scripts and packets



Marianne Porter  
Karen Johnson

# Benefits

Faster eligibility decisions

Fewer delays

Increased satisfaction among  
customers

Less waiting time

Less frustration for consumers &  
employees

Streamlined process

New process is driven by  
consumers & employees





Sandy Burtscher  
Bocar Dieng

# Personal Lessons Learned

- Took the impossible and made it possible ... IN 5 DAYS
- We've been trying to tackle this problem for 20 years
- Impressed by how we worked as a group.
- Total contribution from team members.
- We achieved consensus!!!!!!!
- Input from new hire – they gave great input we wouldn't have thought about
- Collaborating as a team helped us come up with great ideas
- Great sponsor support before and during the week
- Director put everything on the table
- Put your personal agendas aside for the betterment of the group
- Batching is EVIL!!
- Appreciate input from outside perspectives
- It's incredibly hard work
- Streamlining a statewide process that is designed to meet individual needs is incredibly challenging
- No one defended their turf: customer was always the prime focus
- RSC staff are committed to customers and mission
- Bring sugar-free snacks
- Headaches!!



Pat Carroll  
Tom Melfo

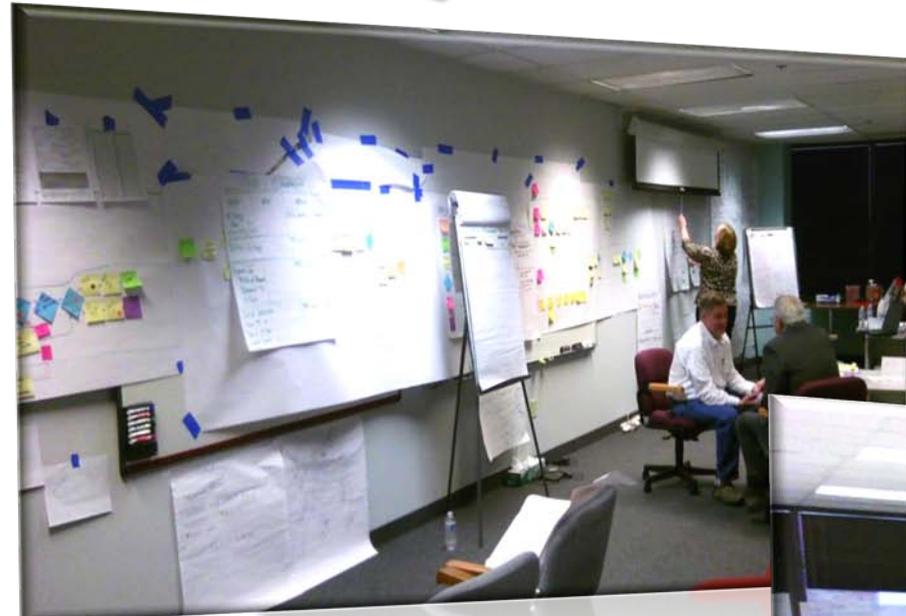
# Life as a member of a Kaizen event Team...



Pat Carroll  
Tom Melfo



# Questions & Comments



The War Room

# Special *THANKS* to...

- Director Kevin Miller
- Susan Pugh & Dan Connors
- Christina Wendell
- Tim Ngyuen & John Seaver
- Raivo Murnieks & Steve Trammell
- Rose Reed
- Chris Glover
- Jan Mader
- Shirley Marchi