

# ODJFS OAKS REQUISITION TO PURCHASE ORDER PROCESS

Green Belt Six Sigma Project Report Out

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Ohio Department of Job and Family Services/OFMS

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# THE SIDE BARZ

## *Team Members*

Joyce Guice

Doris Shuler

Ted Hampton

Thuy Do

Elaine Haley

Denise Black

Wanda Phillips

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Betty Johnson

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Laura Miller

Anthony Norwood

George McNab

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## *Support*

Clift Connor

Don Oxenrider

Anita Jennings

Vivian Rice

## **SME**

Linda Kemper

## **Facilitator**

Margo Canady-Johnson

# BACKGROUND- SCOPE

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Due to various inefficiencies, there can be delays, cancellations and stagnation in obtaining approval. Requisitioners and other stakeholders in the process do not know what others need or experience when obtaining a Purchase Order.

## Scope:

First Step: Requisition is entered into the OAKS Financial system. This is the 1st step in a 7 step process.

Last Step: Purchase order is approved and continues the process. This is the 4th step in a 7 step process.

# PROJECT GOALS

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- ✘ To identify common areas of deficiency and provide staff development.
- ✘ To lessen the time from a Requisition to a Purchase Order being submitted for approval.
- ✘ To lessen the amount of Requisition to Purchase Order cancellations.
- ✘ Identify if there are other issues which cause delay in the approval process.
- ✘ Decide if the process align with the current Legislation 10 day rule? Meaning process is completed in 10 business days.

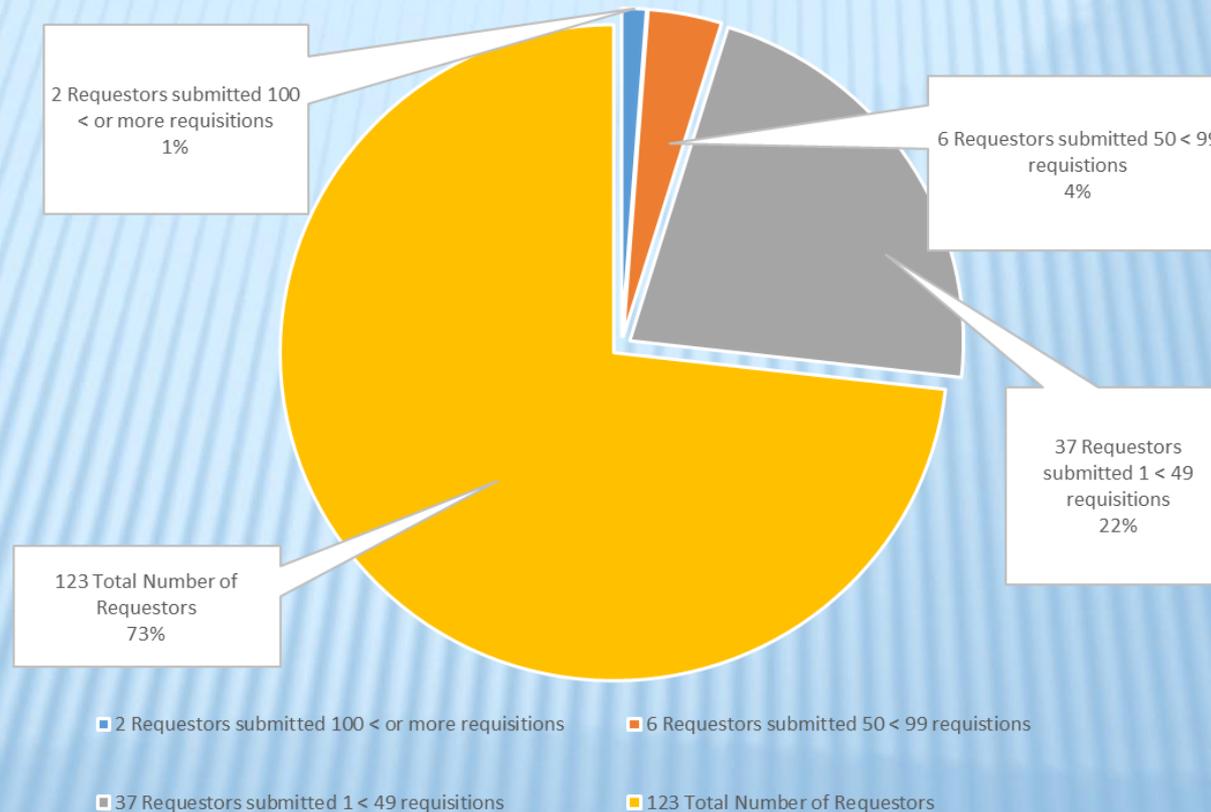
# REVISED PROJECT GOALS

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- ✘ To identify common areas of deficiency and provide staff development.
- ✘ Identify if there are other issues which cause delay in the approval process.
- ✘ Streamline the back end of the process
- ✘ Identify improvements throughout the process
- ✘ Increase communications

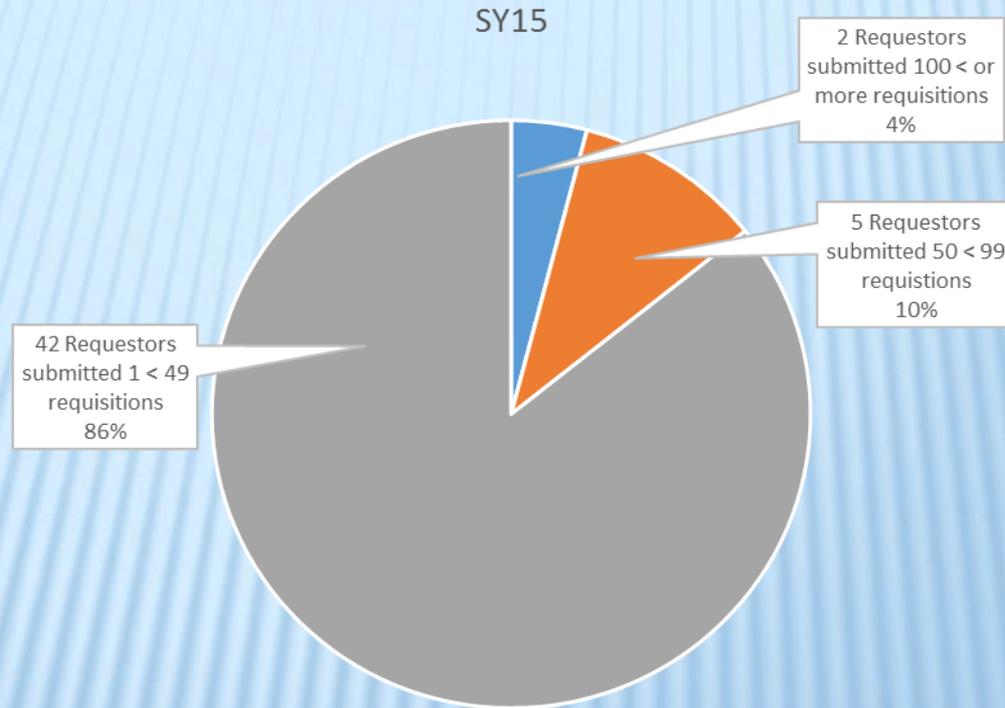
# BASELINE DATA

## FY 2016 Requisition Requestors by the Numbers



# BASELINE DATA

## FY 2015 Requisition Requestors by the Numbers

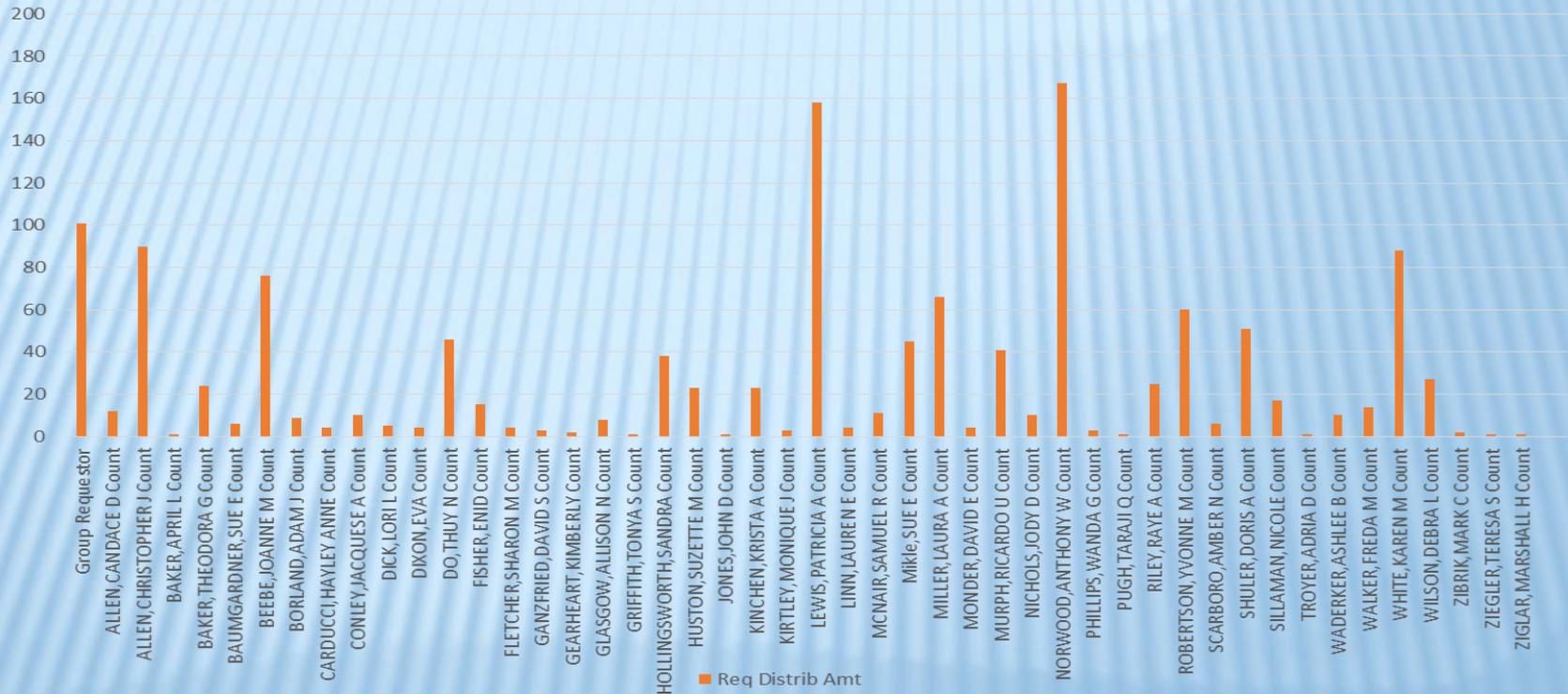


- 2 Requestors submitted 100 < or more requisitions
- 5 Requestors submitted 50 < 99 requisitions
- 42 Requestors submitted 1 < 49 requisitions

# BASELINE DATA

## 2016 Requestors by the Numbers

2016 Requestors by the Numbers



# SFY 2016 REQUISITION STATUS

SFY - Month	JFS01				
	Canceled w/ Coding	Canceled w/o Coding	Approved	Open	Total
2016-01 Jul	240	38	450		728
2016-02 Aug	87	21	136		244
2016-03 Sep	57	23	127	6	213
2016-04 Oct	49	9	88	2	148
2016-05 Nov	50	11	104	1	166
2016-06 Dec	78	10	119	1	208
2016-07 Jan	53	9	55		117
2016-08 Feb	23	12	87	1	123
2016-09 Mar	47	10	94	2	153
2016-10 Apr	1	0	41	3	45
<b>Total</b>	<b>685</b>	<b>143</b>	<b>1301</b>	<b>16</b>	<b>2145</b>
<b>Average Per Month</b>	<b>68.5</b>	<b>14.3</b>	<b>130.1</b>	<b>2.28</b>	<b>214.5</b>

# SIPOC

Supplier	Input	Process	Output	Customer
<ul style="list-style-type: none"><li>• Program Offices</li><li>• DAS</li><li>• Fiscal Budget – OA</li><li>• OIS</li></ul>	<ul style="list-style-type: none"><li>• Knowledge of process</li><li>• Contracts</li><li>• DAS Procurement Manuel</li><li>• Internal Processes</li><li>• Remedy Ticket</li><li>• Speed Charts</li><li>• CATS, ITPS</li><li>• OAKS</li><li>• Budget</li></ul>		<ul style="list-style-type: none"><li>• Dispatched P.O.</li><li>• Release &amp; Permit#</li><li>• CB #</li><li>• Waiver Release (Printers)</li><li>• R.T.P.</li><li>• Item/Service</li><li>• Remedy #</li></ul>	<ul style="list-style-type: none"><li>• Program Office</li><li>• Vendor</li><li>• Requisitioner</li></ul>

Identify Need,  
Quotes,  
Approved

Funding

Check  
Resources

Request Item  
or Service

OAKS  
Requisition &  
Approvals

Becomes P.O.

# CURRENT STATE PROCESS MAP

<b>Approvals</b>	<b>22</b>
<b>Delays</b>	<b>30</b>
<b>Time (Days)</b>	<b>1 – 270</b>

# IDEAS FOR IMPROVEMENT

## High Impact/Low Difficulty

- training on oaks - what can and cannot be done in oaks
- One person do all the checks and balances
- create user manuals
- throw out the \$500 contract requirement
- Don't return requisitions for missing documents/attached documents. The documents cannot be attached once it was submitted
- Budget coordinator. Meet quarterly to share and solve issues
- Training needed across the board - budget coordinators, and everyone in process
- Consolidate areas - Ex. Requisitions, Procurement planning with OCA
- Less approvals - built up over time
- Put IT purchasing back in OIS
- streamline process - too many makes it difficult
- Relax the rules - too many rules - built up over time
- Incorporate OCA earlier in RWU
- SMEs in the program areas - Difficult across the board



**Team came up with more than 100 ideas for improvement!**

# IDEAS FOR IMPROVEMENT



# PROJECT BENEFITS

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- **FIX OAKS 9.2**
- **Visual Crosswalk available in OAKS**
- **Electronic copy of Crosswalk from OBM**
- **Adobe Acrobat Pro licenses for requisitioners**
- **Training webinars**

# IMPROVEMENT SUMMARY

## Current Key Issues

Identified issues in OAKS 9.2 that delay process.

Requisitioners do not have access to CROSSWALK which provides updated codes.

Requisitioners need Adobe X-Pro in order to bundle documents for faster processing

## How We Improved

OAKS helpdesk contacted to request several enhancements. All concerns have been addressed.

Being updated to include pertinent information critical to ODJFS requisitioners.

Available licenses verified and cross checked with current list of requisitioners and installed.

# IMPROVEMENT SUMMARY

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- ✘ Training! Many requisitioners are required to be the requisitioner for their department/unit without proper training.
- ✘ The team identified that proper training/educating requisitioners and budget coordinators is necessary to improve the quality of submitted requisitions.
- ✘ Incorrectly submitted requisitions is the biggest delay in the approval process.
- ✘ As a result a desk aid was created and will be introduced to budget coordinators at the 1<sup>st</sup> quarterly meeting held in July.

# IMPLEMENTATION PLAN

Task	Who	When	Status
Memo – Contract Notation on requisition	Joyce & Felicia	May 9 and 16	Completed
Verify Acrobat Users	Doris	May 9	Completed
Bundling email	Karen & Thuy	May 11	Completed
Crosswalk and coding update request to OBM	Yvonne	May	In progress.
Requisition flow planning meeting	Joyce & Doris	May 11	Completed
Budget Coordinator Meeting	Ted	July 20	Pending
CATS/Agreement Manager Training		September 12	Pending

# LESSONS LEARNED

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- Deeper understanding of requisition process and multiple intricacies and layers associated in order to get approval.
- Communications improved among individuals involved in process.
- Don't make assumptions of process and others job roles.
- Keep an open mind to change
- We are all on the same team
- Be RESILIENT
- Sense of accomplishment and completion
- Hard work appreciated
- Cross Training is valuable

# BIGGEST LESSON LEARNED

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- Important to remain resilient and not let team see or feel you are defeated. Your team will feed off your energy—one participant did not show the following day due to an incident. When they returned (the day after), they and the stakeholders were in total amazement as to how we recovered as a team!
- Adopted motto: ***KEEP CALM AND CARRY ON.***

# AS A RESULT

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- Have had 2 meetings with senior staff in OFMS regarding creating unit dedicated to creating requisitions for entire agency, fixing bugs in OAKS 9.2.
- Management now realizes the various problems with the current system and the steps needed to correct them to create an effective, time friendly approval process.
- Agency wide training for all ***Budget Coordinators*** and desk aids that will ensure fewer requisition cancellations and due to coding error--which is the biggest delay culprit.
- Requisitioners will now have proper software tools to add pertinent documents to requisitions..

# SPECIAL THANKS TO...

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*Senior Leadership:*

Cynthia Dungy  
Jayme Brown

*Management in Fiscal OFMS:*

Kurtis Wingo  
Sharon Fletcher

*Mentor:*

Anita Jennings

*Sponsor:*

Yvonne Gore

*Team Leader:*

Joyce Guice

*Subject Matter Experts:*

Donald Oxenrider  
Clift Connor

*Others who helped from OFMS:*

Erin Collins  
Patti Gorman  
Garth McLean  
Laurie Boffman

*Fresh Perspective:*

George McNabb

# QUESTIONS/COMMENTS

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