

# Medicaid Rules : Improving Rules Processing

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IT PM 1

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Green Belt Report Out



*Making Ohio Better*

# Overview

Ohio Department of Medicaid staff are responsible for the development and implementation of numerous rules for the Medicaid program each year. Rules are categorized as new, amended, rescinded, and 5 year rule reviews. The rules span all of Medicaid including: eligibility policy, long-term care services and supports, non-institutional provider services, hospital services, and state plan services.

Rule processing can cross many ODM bureaus, sister state agencies (DODD, MHAS), processes (reviews, JCARR, public hearings), and systems (Electronic Rule Filing, Sharepoint, Rules Authorization Tracking System) to drive a rule from draft, clearance, original file, re-vise file (if needed), final file, to publication and implementation.



# DEFINE

The Voice of the Customer, Charter,  
High level process overview

## The Customer:

- ✓ Anyone in ODM involved in getting policy from concept through the RATS approval process:
  - Policy Staff across multiple bureaus and sections
  - Policy Reviewers and Approvers – including legal counsel, Bureau and Section Chiefs, and Leadership
  - Policy Administrators

## Customer Needs/Opportunities:

- ✓ Faster approvals
- ✓ Consistency in processes across bureaus
- ✓ Workable and user friendly system
- ✓ Standard measures for reporting

“The RATS in Sharepoint is not user friendly”, VOC.

“Processes and Protocol are not clear and often cumbersome”, VOC.

# Project Charter

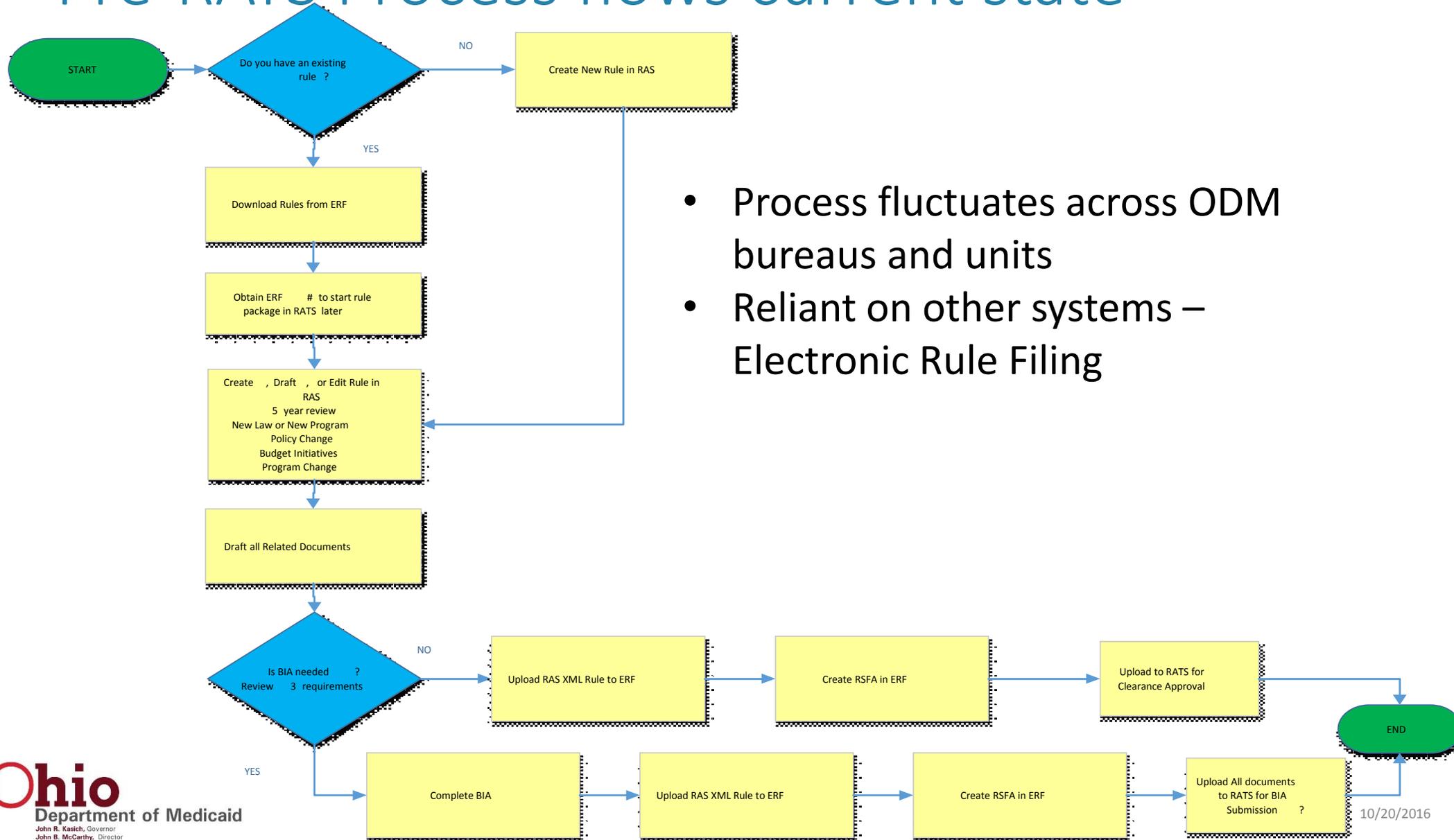
## Problem Statement:

The Rules Approval process in RATS is slow, disjointed and varies across The Ohio Department of Medicaid's Bureaus. The need is to **improve the approval process in the agency by first looking to minimize pre-RATS workflow errors, standardize processes and procedures and identify areas for RATS and Sharepoint system education/training to prepare for better flow through RATS.**

- ✓ Several Iterations
- ✓ Change of focus from strictly RATS processes to include Pre-RATS processes

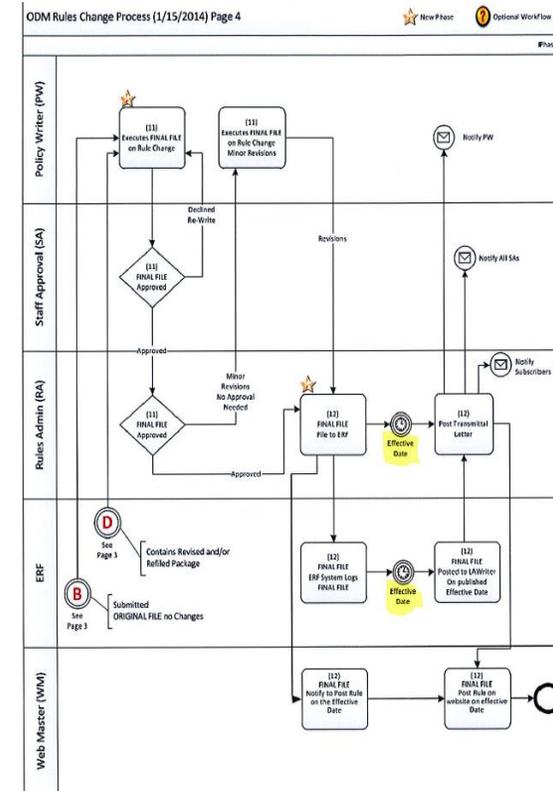
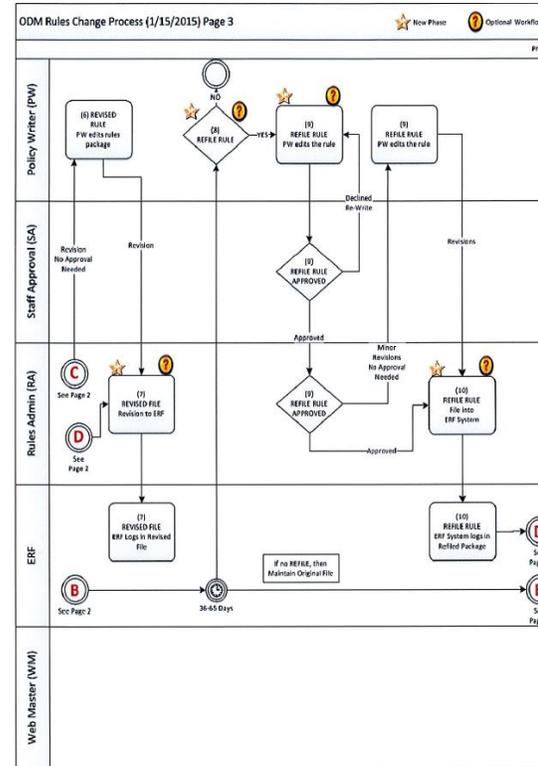
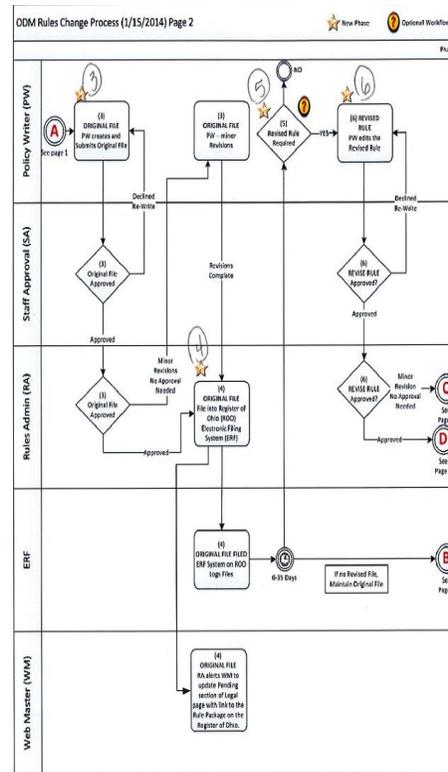
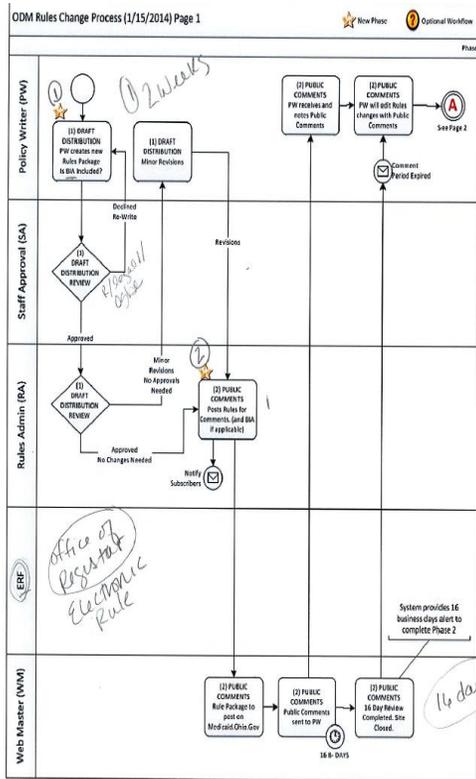
Ohio Department of Medicaid		Project Charter			
John R. Kasich, Governor John B. McCarthy, Director					
<b>Project/Event Title</b>	Rules Improvement Process				
<b>Project Facilitator</b>	MCD Lean				
<b>Agency/Organization</b>	Ohio Department of Medicaid				
<b>Project Mentor</b>	Felicia Sherman				
<b>Charter Last Updated Date</b>	5/16/2016				
<b>Project Background</b>					
The RATS system (Rules Authorization Tracking System) is an ODM SharePoint solution that maintains rule package files and allows individuals to electronically track a rule throughout the rule process. Prior to entering a rule package into RATS, a Policy Writer actually interacts and uses the ERF (Electronic Rule Filing System) administered by the Legislative Services Commission. ERF is used by agencies to file rules with JCARR (Joint Committee on Agency Rule Regulation). Policy Writers determine if the rule needs a BIA (Business Impact Analysis) using three pre-determined questions. Then they download the rule, obtain the ERF # to start the rule package and they draft the rule in RAS3 the Rule Authoring Software. Next they draft all the related documents including RSFA(s). Finally, Policy Writers begin first workflow for review and approval and upload to RATS for Clearance or CSIO (Common Sense Initiative Office) Review.					
<b>Problem/Opportunity Statement</b>					
The Rules Approval process in RATS is slow, disjointed and varies across The Ohio Department of Medicaid's Bureaus. The need is to improve the approval process in the agency by first looking to minimize pre-RATS workflow errors, standardize processes and procedures and identify areas for RATS and Sharepoint system education/training to prepare for better flow through RATS.					
<b>SCOPE</b> (define boundaries)	<b>First step in the process:</b> Determine plan for rule package				
	<b>Last step in the process:</b> The rule package is in effect				
<b>Project Goals</b>					
1. Minimize missing effective date					
2. Reduce number of rejected rule packages that need re-issued through the system especially minor changes like spelling and					
3. Minimize time converting between document types					
4. Develop recommendations for future state system requirements for ERF and RAS					
<b>Project Boundaries</b>					
State of Ohio Rules Process Requirements for CSIO, LSC, and JCARR.					
<b>Performance Metrics:</b> What measures will tell you if you are successful.		<b>Performance Metrics</b>			
		<b>Current</b>	<b>Goal</b>	<b>Final</b>	<b>% Change</b>
Meeting the Effective Date (Pass/Fail) - % Pass					
Time first workflow started for approval to final file complete - RATS					
Current number of steps in the process vs. Future number of steps in the process (decrease number of steps in process)					
<b>Projected Benefits</b>					
Increased standardization across policy workers, better accuracy when completing work, and minimize needed RATS rejected rule packages					
<b>MITA Component</b>		<b>YES</b>	<b>NO</b>	<b>AS IS</b>	<b>TO BE</b>
None identified			X		
<b>Project Team</b>					
<b>Team Lead:</b>		Roseann Culver			
<b>Team Champion/Sponsor:</b>		Tommi Potter and Douglas Henkel			
<b>Process Owner:</b>		Brienne Brown			
<b>Team Members:</b>		Roseann Culver, Amy Hogan, Nicole Northrup, Peggy Day, Douglas Henkel, Dennis Frazier, Bryan Stout, Susan Fredman, Hope Roberts, Melissa Little, Quyen Huynh, Lara Morris, Meng-Chien Kuo, Erica Munnerlyn, Tommi Potter, Nichole Small, Meghan McClaskie, Kimberly Hartman			
<b>Subject Matter Experts:</b>		Jim Tassie, Brienne Brown, Natalie Brown, Lisa Rodriguez-LSC, Julie Hartzell - LIS, Ranjan Rao			
<b>Project Champion/Sponsor and Process Owner Sign-Off:</b>					
<i>I am committed to supporting this project and implementing the teams improvements.</i>					
<b>Sponsor Signature:</b>					
<b>Process Owner:</b>					

# Pre-RATS Process flows current state



- Process fluctuates across ODM bureaus and units
- Reliant on other systems – Electronic Rule Filing

# RATS Process flows current state



- Minimal Staff input for original workflow development
- Clunky/not user friendly

# MEASURE

How is current state meeting the customer needs?

# Operational Definition

- Operational definition was difficult to obtain for a variety of reasons.
- Based on information cumulated from business operations and rules administration it was determined:

Operational definition= Number of days to navigate the rules approval process in RATS. A rule should be able to complete the RATS process 180 days or less and meet the desired effective date.

# Project Y

## The measure/output of the process for Improvement

Measurement= Meeting Rules Effective Dates

(Y) The number of days to get through the Rules Approval Process in RATS 180 days or less

(Y) Are we meeting the effective date Yes or No?

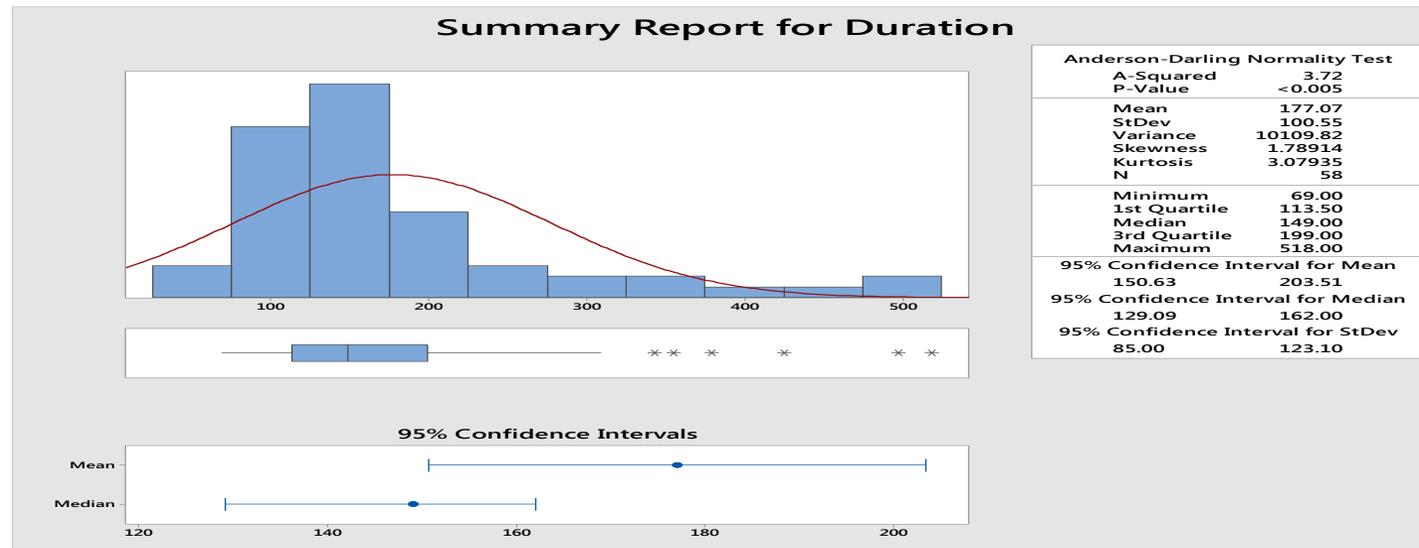
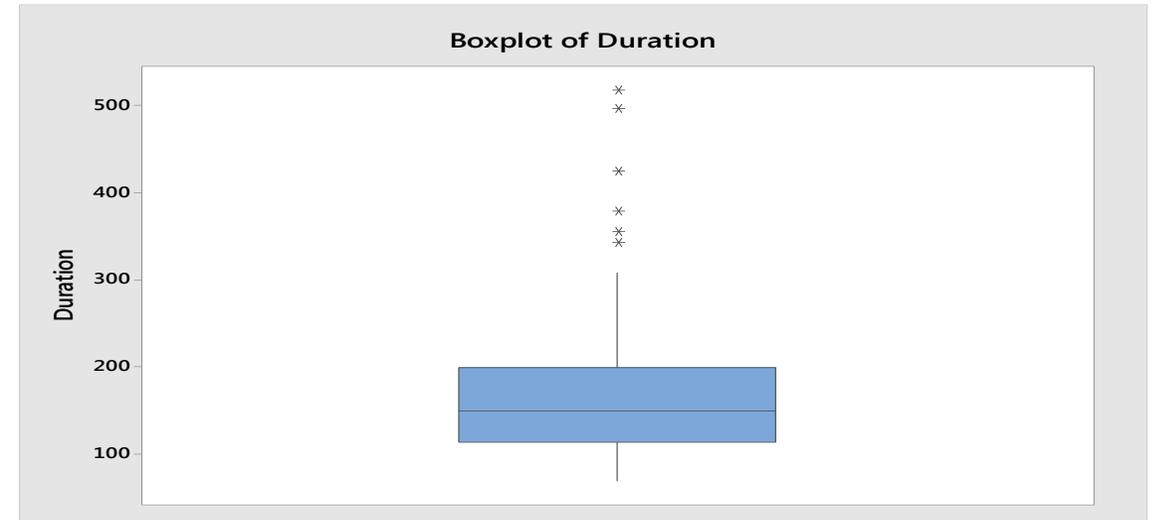
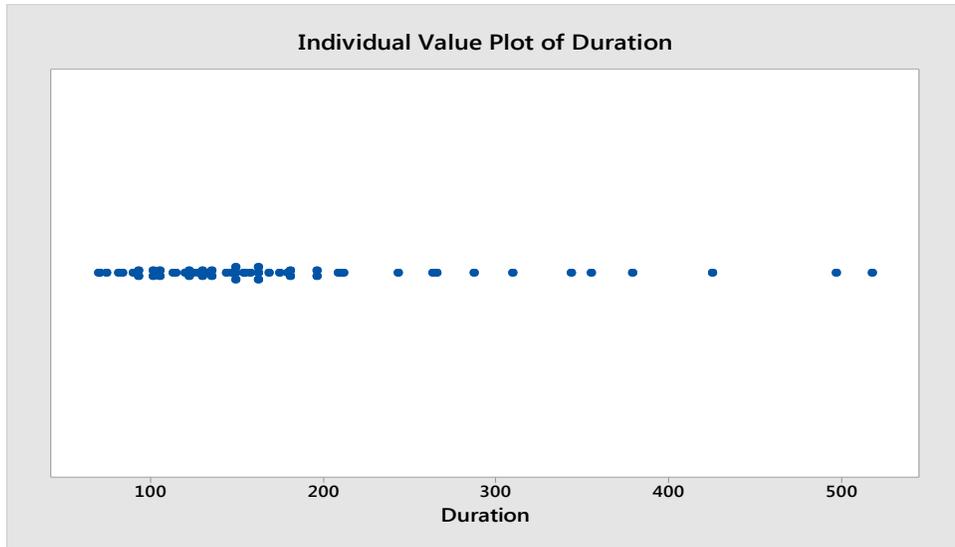
# Data Collection Plan

- **Extract data from RATS Sharepoint Database**
- Over 2700 data points available!
- Data sorted by “Posted for Public Comment” or “BIA Sent” as Begin Date and “Date Final Filed” for End Date to determine length of time spent in RATS
- Data sorted by Desired Effective Date V Effective Date to determine Status of met or not me
- Once reviewed – only 58/41 usable data sets based on sort criteria from RATS. Approximately a .02% of usable data.
- **Pull bureau/individual pre-RATS data**
- No usable data from the pre-RATS process!

# Capability for Project Y

Basic analysis graphs were created instead of capability because the data for pre-RATS was non-existent and RATS data was questionable.....

# Variation – Simplest Terms



Current Average to move a rule through the RATS Approval Process is 177 days.

67% of Rules not meeting their effective date

# Improvement Goal

- Standardizing Pre-RATS processes and protocols will ultimately decrease the time it takes to get through the RATS Approval Process.
- Identifying key training and user development areas will decrease the time it takes to get through the RATS Approval Process.

# ANALYZE

Identifying the cause of the problem

# Voice of the Customer/Employees Identified Problems

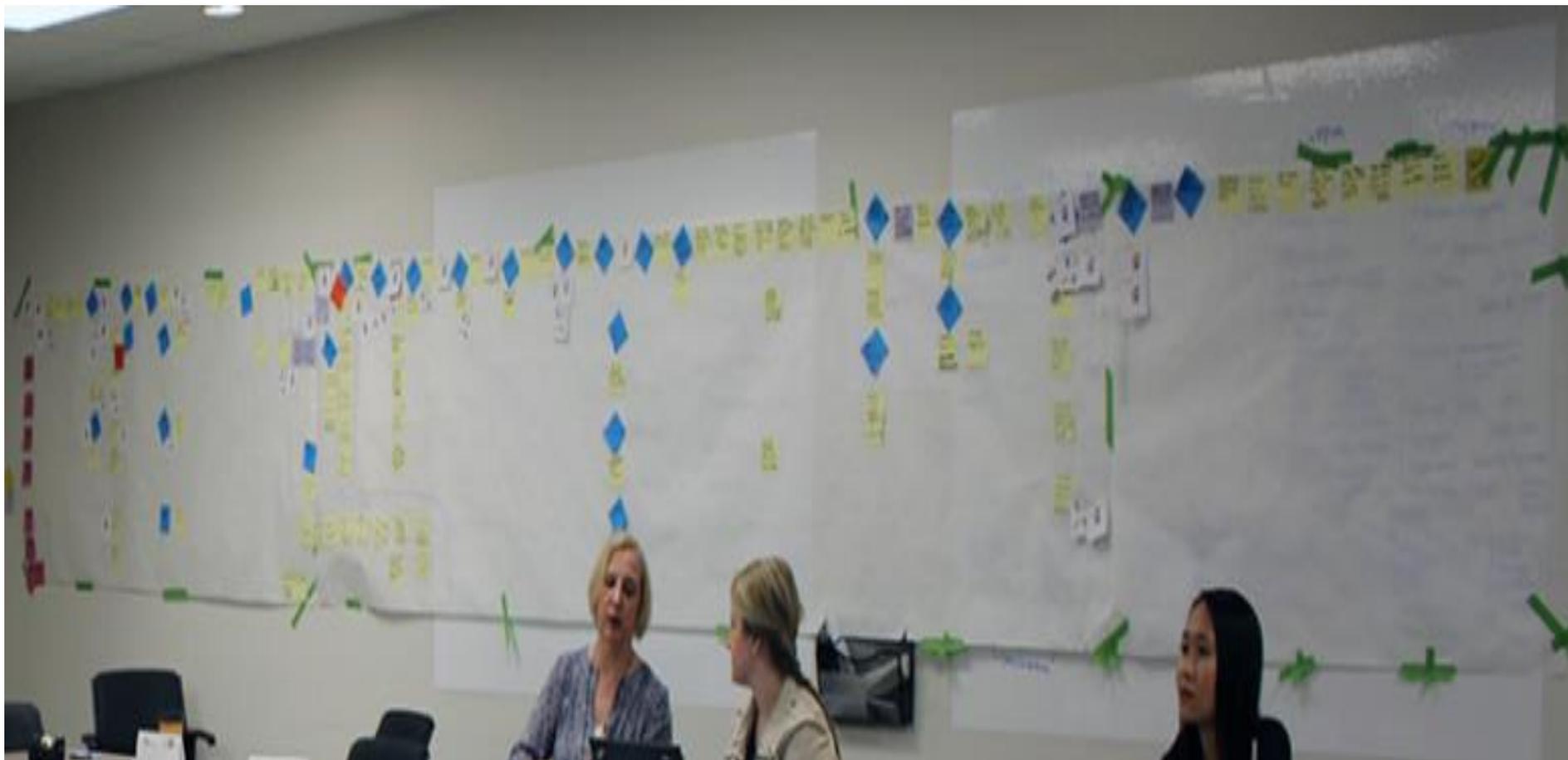
Standard time Measure for entire rules process does not exist	Back up is needed for the Rules Administrator	Long delays in approval	The ability to provide a list of approvals - per approver and per stage in process - is needed.
Fields to provide data for analysis are not consistently filled out in Sharepoint (example, desired effective date)	Training is inadequate	No master template of what review criteria is needed at each approval level	Use of JD Date calculator or other date tracking tool across all bureaus.
Process and Procedures vary across bureaus	Documentation is inadequate	Pre-RATS/Stakeholder system more robust in some areas than others	Use of Multiple systems
Denials go back through entire workflow even for minor edits	Information on required forms is duplicative	Requirement to place in word is a hardship to Policy Writers	There is no ability for staff to see what rule packages have been assigned and since delegated to other staff (you can see what is in your queue that hasn't been approved yet)
Rules often rejected for non-consistent reasons	Sharepoint is overall insufficient/inadaquate	BIA requirements confusing and not clear to all policy writers	No alerts to authorizers if policy has not moved in process
Some areas are not fully staffed	"Secret Button" in Sharepoint	Manually type changes back into ERF after working with Stakholders in word	Check in/check out issues

# Pre-RATS Current State Output from Kaizen



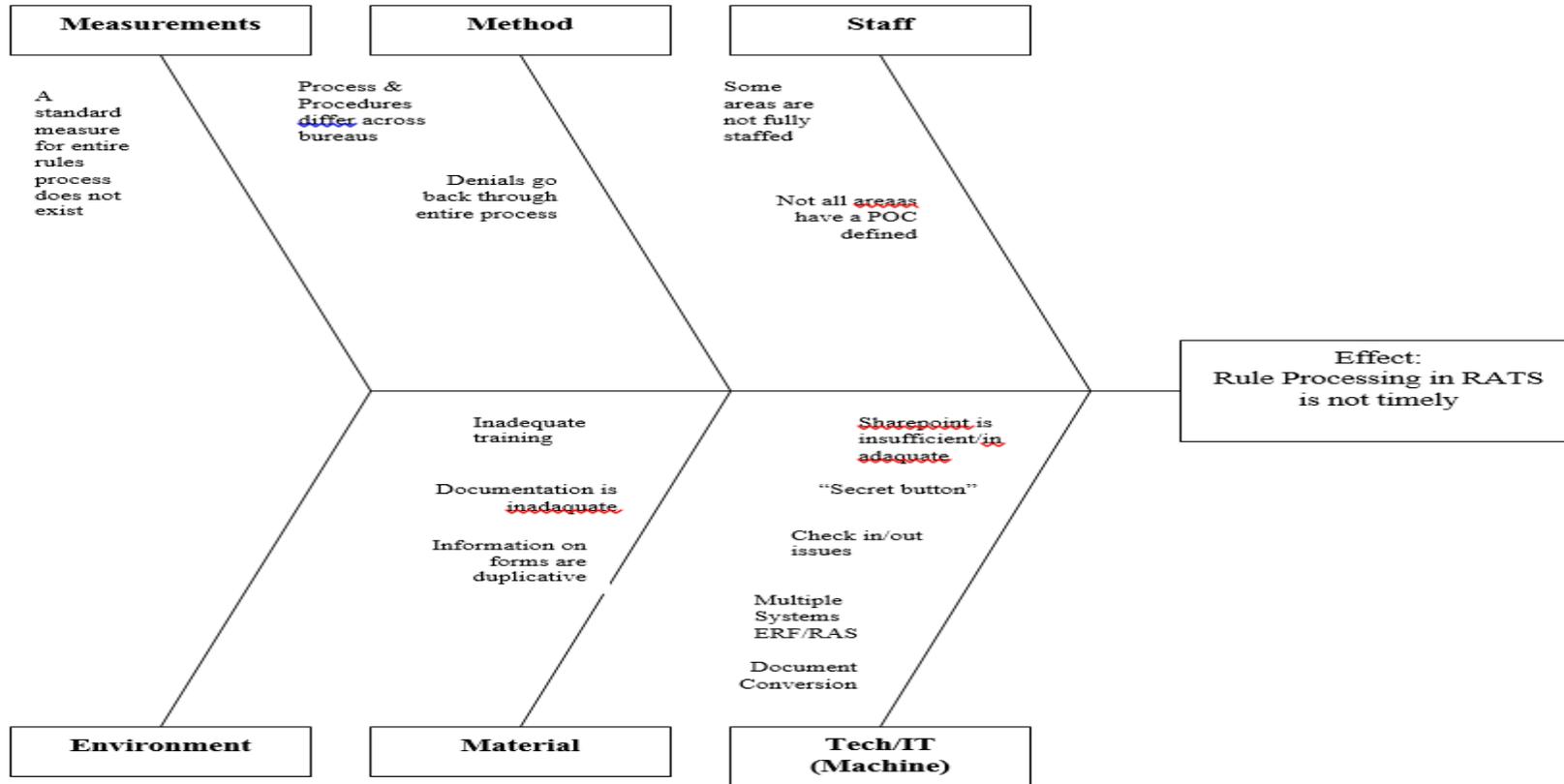


# RATS Current State Output from Kaizen



# Fishbone:

## Capturing the X (influences on the Y – Meeting rules effective dates)



# Prioritized List of X's

## Cause and Effect Matrix

Rating of Importance		10	10	10	10		
#	X's from Fishbone	Rules Meet Anticipated Effective Date	Automated Approval Process is user friendly/concise/meets ODM needs	supplemental documents (Executive Summary, etc.)	provide value (how long a rule is in process, which stage, WHY, etc)	Total	% Rank
1	Need for new System/Total Sharepoint (RATS)	10	10	0	10	300	21.28%
5	Many rules do not meet their effective dates	10	10	5	2	270	19.15%
2	Current RATS workflows need updates (see Sharepoint wishlist for	10	8	0	5	230	16.31%
4	A standard measure for rules process does not	4	0	0	10	140	9.93%
3	Duplicative information on supplemental Documents	3	0	10	0	130	9.22%
6	Rules rejection reasons are not consistent	7	0	3	3	130	9.22%
8	Rules Administrator does not have a	8	0	0	0	80	5.67%
9	Training on Rules 'Applications' is inadequate	8	0	0	0	80	5.67%
7	Some Bureaus are not fully	5	0	0	0	50	3.55%
						<b>1410</b>	<b>100.00%</b>

# List of Vital X's – Significant X's

List of Vital X's (problems)							
Number	Identified X	Can X be measured?	Measurement	How can you test this x?	Statistical Test Used	What will test show?	Significant Does it Matter?
1	Need for new System/Total Sharepoint (RATS) Redesign	Yes - by Voice of Customer	Can ultimately measure meeting effective dates (down the road)	Survey VDC Compare "Begin Date" to "End Date" (TBD) Determine how long each rule is in each process stage VS how long each rule should be in each stage	TBD	If a rule meets its effective date. The number of days by which a rule does not meet its effective date. At what step a rule gets outside required timeline.	Will depend on the P (Hypothesis Value)
5	Many rules do not meet their effective dates (roll up of Action Registers)	Yes - currently not accurately measured due to inconsistent data	Met=Yes or No Number of Days	Compare "Begin Date" to "End Date" (TBD) Determine how long each rule is in each process stage VS how long each rule <i>should be</i> in each stage	1 Sample T 2 Sample T (before and after Test)	If a rule meets its effective date. The number of days by which a rule does not meet its effective date. At what step a rule gets outside required timeline.	Will depend on the P (Hypothesis Value)
2	Current RATS workflows need updates (see Sharepoint wishlist for breakdown)	Yes - by Voice of Customer	Can ultimately measure meeting effective dates (down the road)	Survey VDC Compare "Begin Date" to "End Date" (TBD) Determine how long each rule is in each process stage VS how long each rule should be in each stage	TBD	If a rule meets its effective date. The number of days by which a rule does not meet its effective date. At what step a rule gets outside required timeline.	Will depend on the P (Hypothesis Value)
4	A standard measure for rules process does not exist	Yes - currently not accurately measured due to inconsistent data	Can ultimately measure meeting effective dates and other specified mehta (down the road)	Survey VDC	TBD	If a rule meets its effective date. The number of days by which a rule does not meet its effective date. At what step a rule gets outside required timeline.	Will depend on the P (Hypothesis Value)

# The DATA – INCONCLUSIVE!

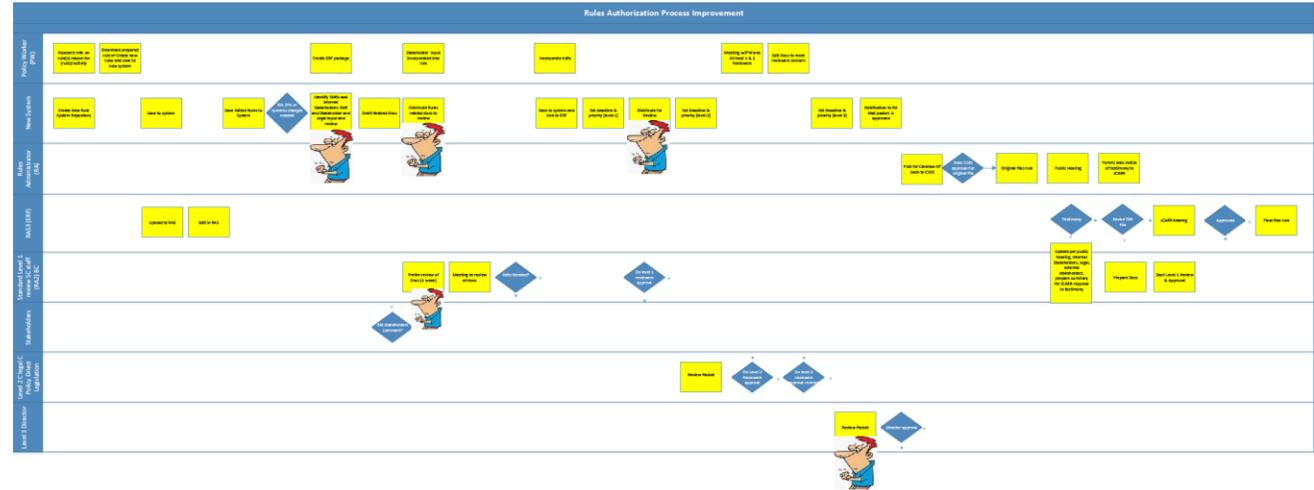
- **WHY?????**
  - Minimal Data Points Collected
  - Fields in Sharepoint are optional
  - Fields have different meanings across bureaus
  - Not all bureaus represented in data collected
  - Rules rolled up into packages – could not identify individual rules
  - No meaningful data!
- 

# IMPROVE

Determining solutions based on  
uncovered problems

# Future State Map

Measure	Rules Creation	NEW	%Change
Process Steps PW	95+	26	<b>-73%</b>
Decision Points	44	7	<b>-84%</b>
Delays/Waste	17	6	<b>-65%</b>
Processes	8	1	<b>-88%</b>



**GOAL: Simpler, Faster, Better, Lest Costly**

# Prioritized List of Solutions

## The Significant X's and how they can be controlled

Number	Identified X	Significant - did you test it or not?	What is the control?	How do you keep in control?
1	Need for new System/Total Sharepoint (RATS) Redesign	N/A	Requirements	Implementing workflow, specific user setting
5	Many rules do not meet their effective dates (roll up of Action Registers)	Yes - currently not accurately measured due to inconsistent data		
5A	Inadequate training/Knowledge repository	N/A	Creation of training Materials (manuals, online, video, etc), Web FAQs	Material 'owner' can access and change, controlled/deliberate updates
5B	Executive Summary needs to be revised	N/A	Edits to existing document	"Executive Summary" owner makes the changes across all bureaus.
2	Current RATS workflows need updates	Yes - by Voice of Customer		
2A	The solution now displays a top banner which allows users to create rule packages without finding the "Secret		Requirements	Implementing workflow, specific user setting
2B	The solution now supports top navigation to provide quicker access to Supporting Documents, My Tasks and JCARR Date Calculator links.		Requirements	Implementing workflow, specific user setting
2C	The solution now provides a link to "Rule Authorization Tracking System (RATS)" from the Medicaid Central home page->Tools tab		Requirements	Implementing workflow, specific user setting
2D	Rule Authorization Tracking System (RATS) - Supporting Files" is now removed from the ODM Point Solutions Page.		Requirements	Implementing workflow, specific user setting

2E	Workflow headers are unclear (Rename the workflow headers in RATS (Clearance/BIA, Original File, Revise File, Refile, Final File)		Requirements	Implementing workflow, specific user setting
2F	Workflow alerts do not meet current needs (creat/update Reminder emails/alerts in RATS)		Requirements	Implementing workflow, specific user setting
2G	Rule packages do not always have same priority (Add Priority Status for rules packages (for example - 5 yr review, budget, etc) in RATS		Requirements	Implementing workflow, specific user setting
2H	Moving documents in sharepoint is difficult once loaded (Allow users to move order of uploaded documents in RATS)		Requirements	Implementing workflow, specific user setting

### Prioritized Problems/Solutions

Number	Identified X	Significant - did you test it or not?	What is the control?	How do you keep in control?
4	A standard measure for rules process does not exist:	Yes - currently not accurately measured due to inconsistent data		
4A	Fields used for current data collection are optional (Determine which fields should be pulled into data sets and make		Requirements,	Evaluating effect on data before creating new headers/fields, access restriction
4B	Fields have different meanings across bureaus (Standardize headers and meanings)		Standardization	Evaluating effect on data before creating new headers/fields, access restriction

# Prioritized List of Solutions

The Significant X's and how they can be controlled

## ***Summary (top 4):***

1) New System/Total Sharepoint redesign

**\*\*Including standard measurements and robust data collection for analysis\*\***

2) Interim Sharepoint Fixes

3) Revised Executive Summary

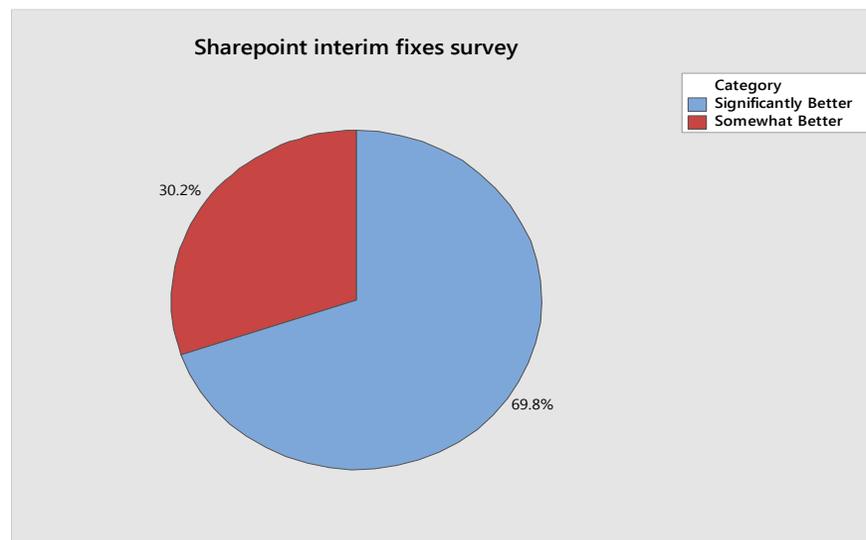
4) Training recommendations and plan



# “Pilot” Solution

## Production rollout of 4 Enhancements to SharePoint RATS Solution (2XA-D) during Kaizen Event

- Before rollout – User tested/reviewed by Policy Areas
- Production roll out – June 15, 2016
- Gathered Data from users (survey) to determine if the enhancements made the user Sharepoint experience better.



# Solution(s) and Implementation Plan

## **X1 – New System/Total SharePoint (RATS)Redesign**

ITS – Meng-Chien Kuo

Planning in Progress

Projected implementation date - ???

# Solution(s) and Implementation Plan, con't

## X2 – Current RATS workflows updates

ITS – Meng-Chien Kuo

**X2E – Rename workflow headers - As of 10/10 proposed solution rejected by users – Still in process**

Effort Estimate: 2 weeks Target Completion Date: 8/1/2016

**X2F - Create/Update reminder emails/alerts - As of 10/10 solution is in system test**

Effort Estimate: 4 weeks Target Completion Date: 8/31/2016  
(assuming requirements completed by 7/29/16 and are similar to ITS current understanding)

**X2G – Add rule package priority status - As of 10/10 solution is in system test**

Effort Estimate: 4 weeks Target Completion Date: 8/31/2016  
(assuming requirements completed by 7/29/16 and are similar to ITS current understanding)

**X2H – Ability to move order of uploaded documents - As of 10/10 solution is in system test**

Effort Estimate: 4 weeks Target Completion Date: 8/31/2016  
(assuming requirements completed by 7/29/16 and are similar to ITS current understanding)

# Solution(s) and Implementation Plan, con't

## **X4 – A standard Measure for rules process does not exist**

**X4A** – Determine which fields should be pulled into RATS data sets and made mandatory

Long term solution incorporated into X1 – short term solution added to action register

**X4B** – Standardize RATS headers and meanings across Policy areas

Long term solution incorporated into X1 – short term solution added to action register

# Solution(s) and Implementation Plan, con't

**X5 A– Executive Summary Revision** - Changes Approved. **New version deployed to user group 7.18.16**

**From 11 questions to 4**

Megan McClaskie/Jim Tassie

**X5 B – Training and Knowledge repository updates – As of 10/10 work with Leadership group continues**

**Outline and recommendation complete**

Hope Roberts

**Continued monitoring of Kaizen event action register at 30/60/90**

# CONTROL

Conclusion of the “Journey”  
Solid hand-off to maintain the ‘gains’

# Sustained Solutions New SOP – Standard Operating Procedures

- Standard Operating procedures drive the project results
- SOPs for Rules Improvement are in progress. They are:
- Training manuals/Training Development – Hope/Icilda/Melissa
  - Meetings with Leadership buy in and direction in progress
- Training guides for Sharepoint Development – Meng/IT Sharepoint
  - Guides are deployed to Sharepoint RATS users with each release deployment
  - Guides/Training will be developed for future solution – new system/existing workflow overhaul

# Project Documentation/Control Plan

- A [Control Plan](#) is a method for documenting the functional elements of quality control that are to be implemented in order to assure that quality standards are met for a particular product or service. The intent of the control plan is to formalize and document the system of control that will be utilized.

Six Sigma Control Plan							Date: 8/29/2016	
							Organization Name: Ohio Department of Medicaid	
							Process Name: Rules Improvement	
							Project Name: Rules Improvement	
Process or Process Step: What I've changed or plan to (Prioritized list of solutions)	Input (X)/Output (Y)	Control Characteristic	Specification or Tolerance (The Specs)	Measure Technique	Sample Size	Responsible	Control Method	Reaction Plan
Training	Input	Training Material	none	Email	When an email is received	Policy Admin	Via email submission	Received email then review/correct or respond
Workflow changes (enhancement requests/problems)	Input	Functionality and usability of the workflow	none	ticket	Review if ticket is submitted	IT Staff	Via ticket submission	Received ticket then respond and correct/scope
Executive summary	Input	Usability of Summary	none	email	When an email is received	Policy Admin	Via email submission	Received email then review/correct or respond

# 30-60-90 day Action Register

## SYSTEMS ACTION REGISTER

SYSTEMS AND NOTIFICATIONS ACTION REGISTER				
WHO	WHAT	WHEN	STATUS	UPDATE
TS (Meng)	(Clearance/BIA, Original File, Revise File, Refile, Final File)	June 1 - July 1 for impact analysis		Rosie now sending Meng the names and they will do a trial demo next week
TS (Meng)	Reminder email/alerts in RATS	June 1 - July 1 for impact analysis		Effort Estimate: 4 weeks Target Completion Date: 8/31/2016 (assuming requirements completed by 7/29/16 and are similar to ITS current understanding)
TS (Meng)	New System or total redesign of RATS - including incorporating a document management system	June 15 (start requirements)	Not started	Requirements starting early August 2016 Projected implementation date - TBD
TS (Meng)	Add Priority Status for rules packages (for example - 5 yr review, budget, etc) in RATS	June 1 - July 1 for impact analysis	Not started	Effort Estimate: 4 weeks Target Completion Date: 8/31/2016 (assuming requirements completed by 7/29/16 and are similar to ITS current understanding)
TS (Meng)	Send email to all users who are impacted by release of new RATS functionality	June 1 - July 1 for impact analysis	Complete	
TS (Meng)	Allow users to move order of uploaded documents in RATS	June 1 - July 1 for impact analysis		Effort Estimate: 4 weeks Target Completion Date: 8/31/2016 (assuming requirements completed by 7/29/16 and are similar to ITS current understanding)
TS (Meng)	RATS - My Tasks		Complete	
TS (Meng)	RATS - Supporting documents		Complete	
TS (Meng)	Added Link to JCARR calendar		Complete	
TS (Meng)	Removed the unnecessary link to access RATS which caused confusion - 2 links but one wasn't real		Complete	



# 30-60-90 day Action Register

## TRAINING ACTION REGISTER

WHO	WHAT	WHEN	STATUS	UPDATE
<p>Rules Administrator Small group project+a trainer+policy+legal+LSC perspective, and they can choose training approach</p> <p>Icilda will present the idea to leadership for approval small workgroup. Icilda/Hope/Melissa will meet internally first to help frame idea. Rosie will set the initial meeting with Sue, Melissa, Hope, Megan M., Susan M.</p>	<p>Training manuals development for new staff revisor/new</p> <p>Reference information such as LSC manual process documents, systems user information "cookbook" index On-line Manual</p> <p>There isn't 1 place for a new person to find information easily and what makes sense. This will help self-sufficiency. Melissa has created her own binder with information that she has found online/emails etc. Per Bree Tommi had started to make training documentation. Vision is more of an online module ask. Develop material then implement. Hope suggested small workgroup: legal, policy, IT and outside facilitator, trainer. An ELM (like in MyOhio) approach along with job aid/module specific to each part of the high level video or whole process.</p>	<p>Most once a week for 2 or 3 months +TD Draft an overall Train for manuals Online Video (leadership) Improve web presence To be defined by Group and facilitator</p>	<p>Not Started</p>	<p>This is a performance goal for Tommi. Add this to the debrief meeting with Tommi.</p> <p>Assigned to Icilda</p>
<p>Rules Administrator Small group project+a trainer+policy+legal+LSC perspective, and they can choose training approach</p>	<p>At high level with view with direction to more detailed information if needed Involve Medicaid Central -website web presence Video introductions through web presence FAQs Questions and responses posted on the web presence in Medicaid Central Help Hyperlinks for RATS, ERF on the naming conventions There isn't 1 place for a new person to find information easily and what makes sense. This will help self-sufficiency. Melissa has created her own binder with information that she has found online/emails etc. Per Bree Tommi had started to make training documentation. Vision is more of an online module ask. Develop material then implement. Hope suggested small workgroup: legal, policy, IT and outside facilitator, trainer. An ELM (like in MyOhio) approach along with job aid/module specific to each part of the process. Volunteers Sue and Megan McClaskie This is a performance goal for Tommi. Add this to the debrief</p>			<p>Assigned to Icilda</p>
<p>Facilitator (someone external to process Communication Leadership to introduce the process trained by role assignments</p>				
<p>Who to Lead Initiative:</p>	<p>Meeting with JT, BB, TP</p>	<p>By 6/30/2016</p>		

# 30-60-90 day Action Register

## DOCUMENT/ROLES ACTION REGISTER

DOCUMENT/ROLES ACTION REGISTER				
WHO	WHAT	WHEN	STATUS	
Additional Staff Bree	Back up for R.A. Bryan, Mary, Rosie ad hoc now but need for a "true" back up (or more of shared role/responsibilities)	ASAP May 31, 2016		Assigned to Bree - Actually duplicate of last item.
Bree -- Director and Policy Chief IF RA Bree/Jim to Approve	Reduce number of signatures from 7 to ? Change to systems based on workflow. Having all the people signing at each step doesn't add value. (showed a suggested future state recommendation Rosie will send)	30-60 days June 30 start the process continue on task	In Progress	Recommendation to reduce number of signatures by workflow. Bree will present recommendation to Jim Tassie to obtain final approval. Once approved, put in request through Service Now Portal. Rosie will put in the request once Jim Tassie approves.
Tommi -- Task Force or Workgroup Team-Section and BC Tommi Potter	review and approval process for B.C. and S.C. Uniform Review and Approval Before it gets to RATS many ways to get there (different across all bureaus). Need a consistent process even before it gets into RATS. Some vast differences - i.e Melissa loads all stakeholder communication in RATS. Other bureaus do not.	June 30-July 30 - 30 days	Not Started	Need Tommi to return and we can contact her after 8.16 to debrief and discuss the action items.
Policy Chief-Assigned Team Manager Appointed Bree	Revise Executive Summary	June 30-July 30 - 30 days	Complete	
Bree -- Staff Attorney Chief Legal Assign a Workgroup Bree	Train and appoint R.C. s in each area	Start June 30, 2016		Assigned to Bree
S.C./B.C. others ? R.A. Tommi	Standardization of legal process Review prior to submitting to RATS, submit last version	30-Jul-16	Not Started	Assigned to Bree
	Collaborate amongst reviewer	1-Jun-16		
	Create a resource file using R drive. Tommi needs to agree to this and communicate across the bureaus.	7-14 days on going maintenance	Not Started	Use RATS for approvals but use R drive to archive information. Discuss this with Tommi during debrief meeting.
Additional Staff	Back up for R.A.	ASAP	In Progress	Bree has 3 staff serving to assist with Tommi's work; however, no permanent backup has been assigned yet. Bree will discuss with Tommi when she returns.

# 30-60-90 day Action Register

## ACTION ITEMS

Action Items		
Debbie/Rosie	Set meeting to debrief Tommi on Kaizen results	NLT 8.19.2016
Bree	Present workflow recommendations to Jim Tassie and get final approval	NLT 8.30.2016
Rosie	Complete change order request for workflow changes in Service Now Portal	TBD after Tassie approves new workflow
Bree	Assign workgroup to discuss standardization of legal	TBD
Bree	Bree to discuss with Tommi a permanent backup	90 - 120 day follow-up
Tommi	Set up workgroup to assist with developing training materials for rules developers	9.30.2016
Rosie	Set up meeting with other rule developers to discuss training strategy to present to leadership	8.26.2016
Icilda	Present training workgroup and strategy to leadership	9.30.2016

# Lessons Learned

- Share your data analysis with the customers as soon as possible
- Every project is unique. Don't become alarmed if yours doesn't look like everyone else's
- Utilize your mentor!
- Voice of the Customer is extremely important – be diligent in meeting/interviewing your customers

# THANK YOU!

ODM Senior Leadership

Project Sponsors

Kaizen Event participants

Subject Matter Experts/Customers

ODM Lean Team