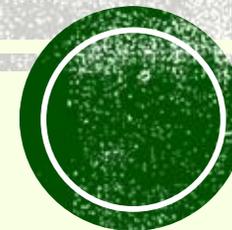


# DATA ENTRY PROCESS UPDATES

AMHA Resident Services



# **KAIZEN = BREAK FOR THE BETTER**

## **Kaizen Model**

Day 1 – Map current process

Day 2 – Brainstorm

Day 3 – Redesign

Day 4 – Planning

Day 5 – Continue Planning & Report Out

## **The way we did it**

Day 1 – Map current process

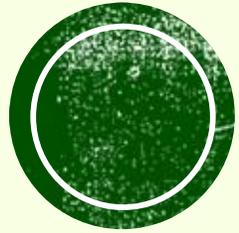
Day 2 – Brainstorm

Day 3 – Redesign

Day 4 – Planning & Report Out

Day 5 – Didn't need it!





# PROJECT CHARTER

Resident Services Data Entry Process

# BACKGROUND & PROBLEM

## Background

- RS uses TAAG as its social services database. All programs use the tool in different ways that evolved over time as a result of molding the software to fit logic models

## Problem

- High level of variation and lack of cross-program understanding make it difficult for
  - Service coordinators to use the database as a tool to help residents
  - The department to tell its “story”



# SCOPE (DEFINED BOUNDARIES)

Address data entry process, not service delivery process!

- First step in the process
  - Resident begins programming and needs to be entered in TAAG
- Last step in process
  - Documenting the end of participation

*Off limits = \$, people, IT solutions, job loss, laws, statutes, regulations, contracts*



# GOALS & PROJECTED BENEFITS

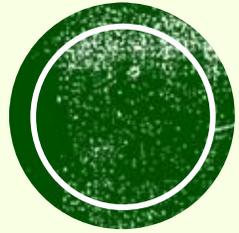
## Goals

- Reduce variation across programs
- Reduce waste in current process

## Benefits

- More time for Service Coordinators to spend with residents
- Simpler for SCs to understand progress in other programs
- Better reporting





# WHAT WE DID

A summary

# THE CUSTOMER FOR DATA ENTRY?

## **Current Process**

Supervisors

## **New Process**

Service Coordinators





RFS: come to SC from Sue/Kim

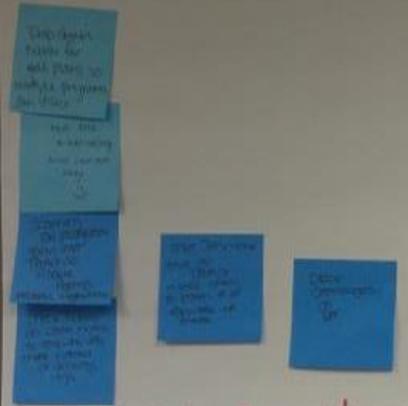
Simplify Referral options/choices

All programs that track goals use the Plan screen

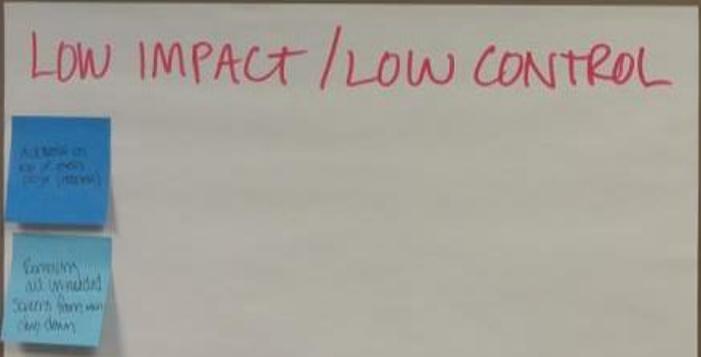
Track enrollments in Milestones

# BRAINSTORMING VICTORIES

The team wrote down potential improvements, and collectively determined which ideas were within our control and would have the most impact



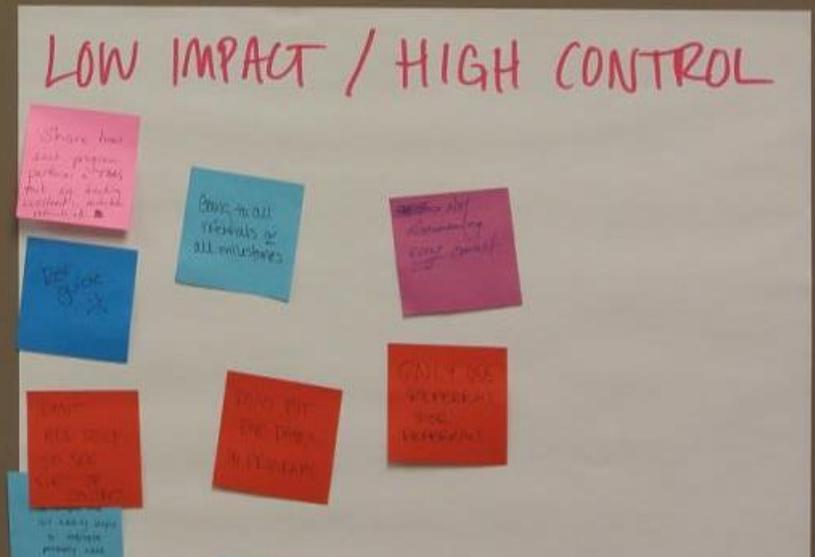
HIGH IMPACT / LOW CONTROL



LOW IMPACT / LOW CONTROL



HIGH IMPACT / HIGH CONTROL



LOW IMPACT / HIGH CONTROL



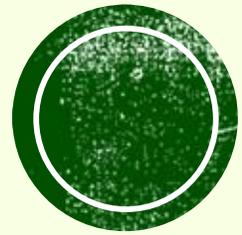






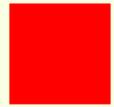






# FROM 10 TO 4

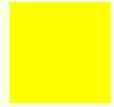
Reducing variation in the way we enter data



Types of data entry



Beginning and end points of the process



Any activity where work is performed in the process (All)



Any activity where work is performed in the process (some)



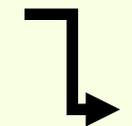
Decision Point



Delay



Connects activities



Electronic movement from one person to another

# PROCESS MAP KEY



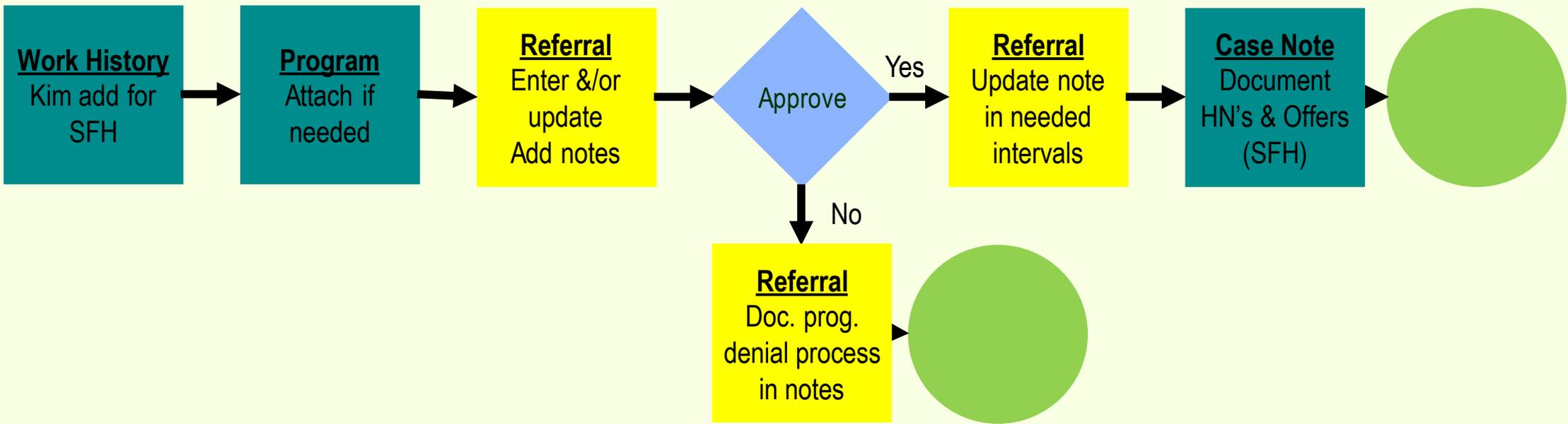
# ALL DOCUMENTATION BEGINS THE SAME WAY



# DOCUMENTING APPROVAL REQUESTS

Current Programs:

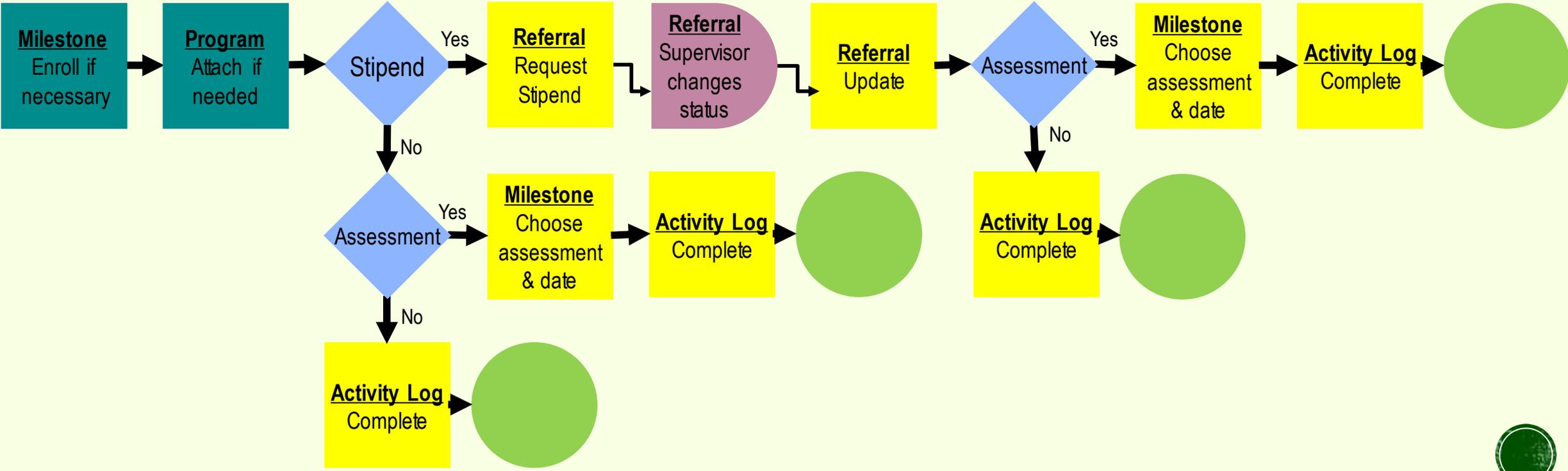
Reasonable Accommodation, Single Family Home



# DOCUMENTING GROUP ACTIVITIES

Current Programs:

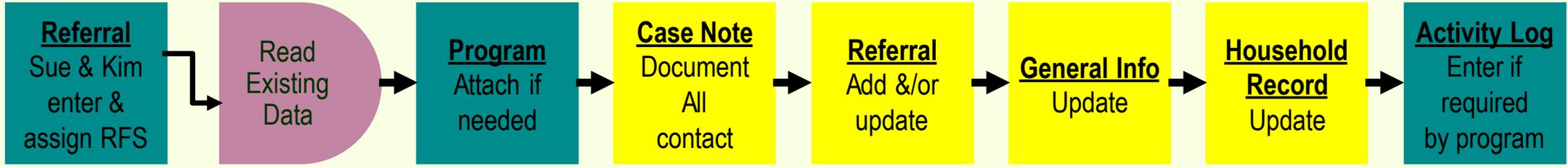
Community CARES events, ECI Family Outreach Events, ECI Mom-ME Time, Resident Volunteers, Resident Organizations, A-CAN, Wellness Wednesdays, etc.



# DOCUMENTING SINGLE SERVICES

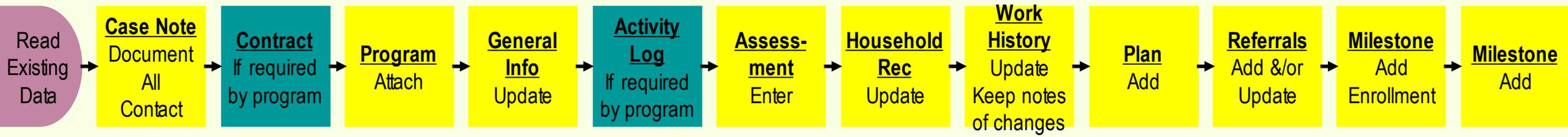
## Current Programs:

Request for Service, ECI non-PAT Home Visitation, SC:  
Family non-contract, SC: Elderly/Disabled

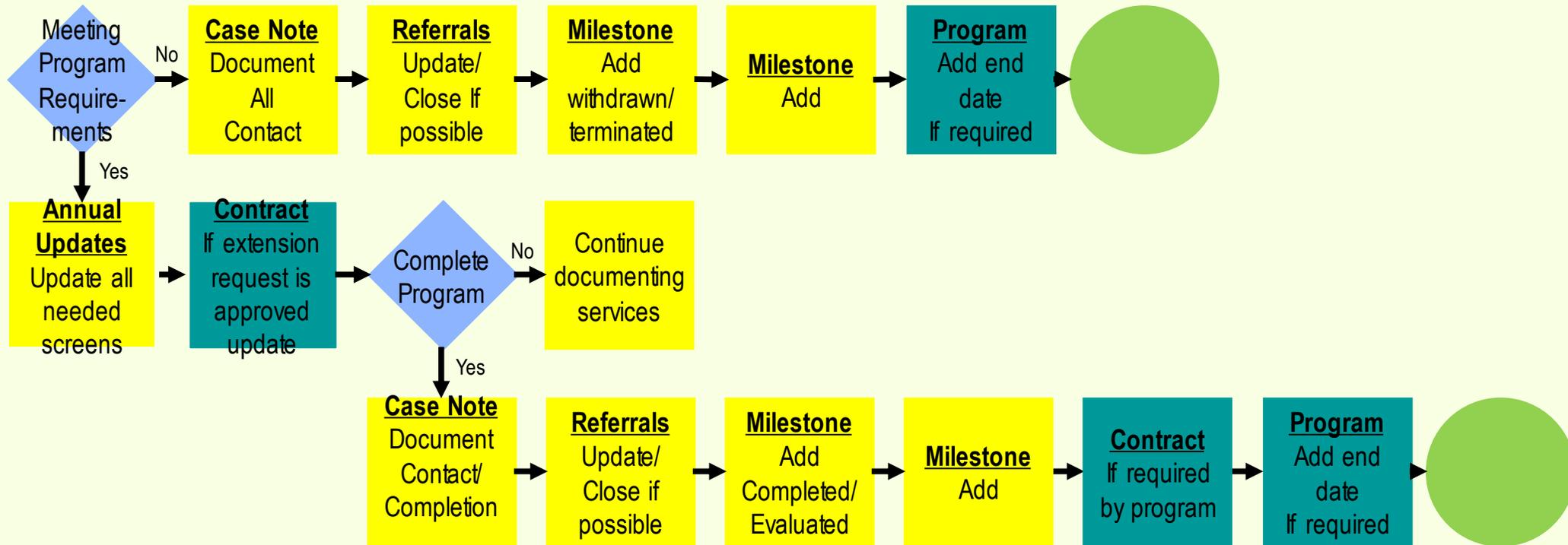


# DOCUMENTING CONTINUED SERVICES (1 OF 2)

Current Programs: FSS, SC: Family w/ contract, PAT



# DOCUMENTING CONTINUED SERVICES (2 OF 2)



# IMPROVED MILESTONE CATEGORIES

1. Self-Sufficiency (everyone uses this)
2. SC:Fam – Participation
3. FSS – Participation
4. ECI – Participation
5. ECI - Screenings



# NEW MILESTONES

1. FSS – Enrolled
2. FSS – Graduated
3. FSS – Graduated – TTP $\geq$ FMR
4. FSS – Terminated – Move Out
5. FSS – Terminated – Non-compliant
6. FSS – Terminated – Voluntary Withdraw
7. SC:Fam – Enrolled
8. SC:Fam – Successful Completion
9. SC:Fam – Withdrawn – Moved Out
10. SC:Fam – Withdrawn – Non-compliant



# IMPROVED REFERRAL CATEGORIES

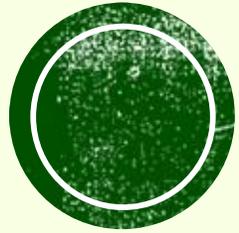
## FOR ALL

1. Client Initiated Participation
2. Adult Education/Workforce Development
3. Youth Services
4. Self-Sufficiency Resources
5. Resident Needs
6. Health

## FOR SOME

1. Reasonable Accommodation
2. Request for Service
3. Single Family Home





# SUMMARY

# FINAL TALLY

	<b>Current</b>	<b>New</b>	<b>% Change</b>
Steps	122	49	60%
Decisions	24	7	71%
Handoffs	2	3	-50%*
Loopbacks	1	0	100%
Delays	16	3	81%
Types of data entry	10	4	60%

*\* 2 handoffs were forgotten in the original process map; truly, there should be 4 in the current process*



# CHANGES

## FOR ALL

1. SC receives RFS directly from Sue or Kim
2. Simplified Referral Categories
3. Simplified Milestones Categories
4. Document education level/degree in Assessment screen

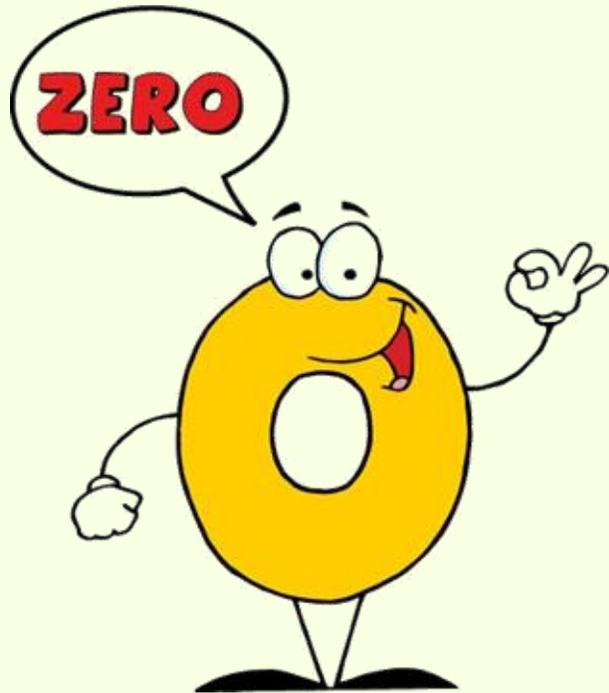
## FOR SOME

1. No longer overwrite goals in the Plan screen
2. Participation will be documented in Milestones (FSS, SC:Fam)



# ADDITIONS

## FOR ALL



## FOR SOME

1. Work History screen
2. Plan screen for goals
3. Documenting education level/degree



# OMISSIONS

## FOR ALL

1. Education Screen
2. Employment Screen
3. Social Network Screen, etc.
4. Income Screen
5. Most SFH Notes

## FOR SOME

1. Attach to Program (RA, SC:E/D, RV, ECI:HV)
2. Management assigning RFS



# FEEDBACK

- 89% of Staff reported spending less time on data entry
- Time for department to complete board report reduced by 3 hours
- Resident Services staff are now taking initiative to make suggestions to “lean up” processes

