A3 Report – In Progress

Prepared by:

Project Details

Organization	Southern Health-Sante Sud	Facility	Public Health-Healthy Living
Project Name	Super Supports	Project Facilitator/Belt Level	Tegan Bailey – Yellow Belt
Project Sponsor	Stephanie Verhoeven	Project Team	Eleanor Rose, Diane Connelly, Tanya Doell, Wendy Unrau, Bev Unger & Stephanie Verhoeven
Project Start Date	November 28, 2016	Project End Date	

Problem Statement

Our current admin processes makes us feel frustrated, overwhelmed, out of the loop and unappreciated by management, program staff and regional departments due to the lack of communication, role clarity, consistent timely processes, clear expectations and appropriate tools/resources to do our job in a timely and effective manner.

Current State Analysis - What's the Data Story?

The data tells us that each admin is fairly consistent on their timing of doing expense claim documents; which includes, reviewing time, the delay of time to get back from managers approval as well as the batching time it takes us. There are a few that were outliers but not as many as I think we all anticipated that there would be.

The data also tells us that majority of our defects were in Expense Claims rather than payroll documents (flow sheets, request for leaves and additional service logs). The defects that really stood out in the expense claims was incorrect coding/having to add codes as well as staff using the wrong expense claim forms. However, with the payroll document defects, the ones that stood out more were having to send reminders to staff to send in their flow sheets as well as having to remind them to send any supporting documents based on that flow sheet.

By looking at the pareto charts and run charts, we definitely have room to make things more efficient and in a timely manner as well as communicating to staff our expectations/deadlines for these documents.

Due to the way that we did our measurement piece, we haven't been able to really identify a median as of yet as one whole group but individually on 3 different graphs per admin.

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Project Aim

Our goal in this project is to maintain consistency for processes in and around payroll and expense claims as well as ensuring staff are using the up to date forms and completing them correctly. Our goal is to reduce the time spent on processing expense claims and invoices and streamline payroll document approval processes using electronic solutions to make our jobs easier as well as completed in a timely manner and to create a way to make work efficient when covering when managers and/or admins are off (eg. Vacation).

Implementation Plan

	PDSA – Brief Description	Implementation Date
1	Staff will use an expense claim that has locked cells to decrease opportunity for error. Going to get clarification on appropriate things to expense, what is a meeting expense, expectation for signing and receipts	March 1
2	Staff will have a clear knowledge and understanding of the purpose and use of payroll documents through the development of a quick reference guide to be reviewed on hire and for existing staff once they are created.	March 1
3	Use of electronic system for processing expense claims, invoices and payroll documents	March 13 - trial

Controls Utilized

☐Fundamental Change	
☐Error Proofing	
☐Visual Control	
☐Standard Work	
☐Training	
☐Continue to Measure	
☐Audit	
☐Checklist	
☐Policy & Procedure	
☐Written Sign	

Outcomes – Qualitative and Quantitative Outcomes