Southern Health-Santé Sud

Mental Health Program Administrative Assistants
The A Team

Define

We wanted to understand the nature of work provided by 10 administrative assistants across the region working in Community Mental Health Programs.

There was a sense of inefficiency and lack of effectiveness among the administrative assistants that caused a growing element of frustration.

After measuring and through analysis of the data the scope was narrowed to the three area hubs, Steinbach, Winkler and Portage.

Future work was identified for activities not directly involved in general supports to the program.

Define

We went through three revisions of the problem statement and this ended in the following opportunity statement:

Our current processes are not standardized and have too many cooks in the kitchen. It leaves the A team and customer confused and frustrated and results in work created in an inefficient manner.

Measure

We measured the following areas:

Source of work – email, walk-in, phone call etc.

Who requested the work – clients, workers, managers etc.

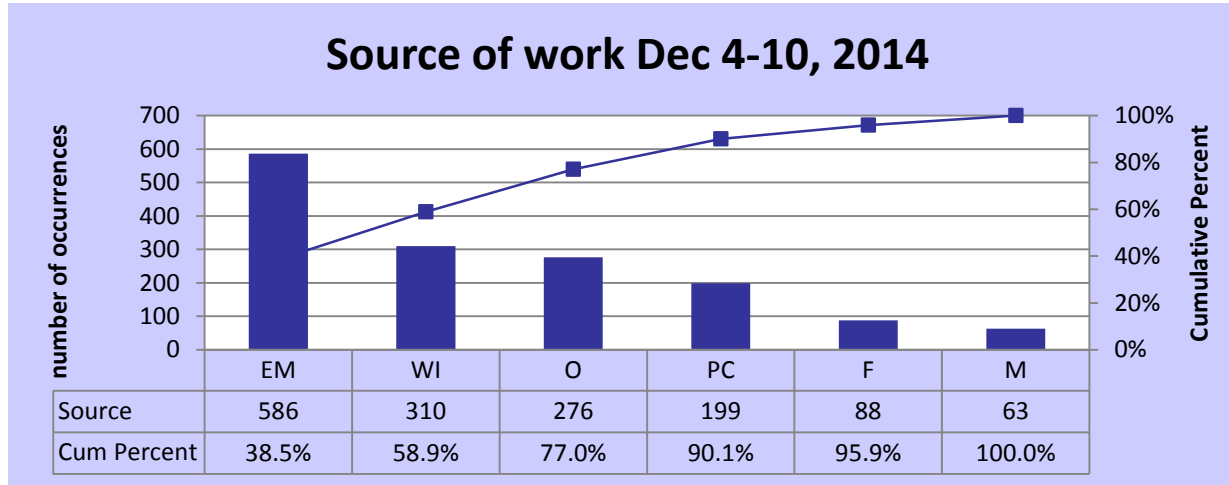*What component was involved – adult, children's, seniors etc.*

Type of work – what were the typical types of work they completed.
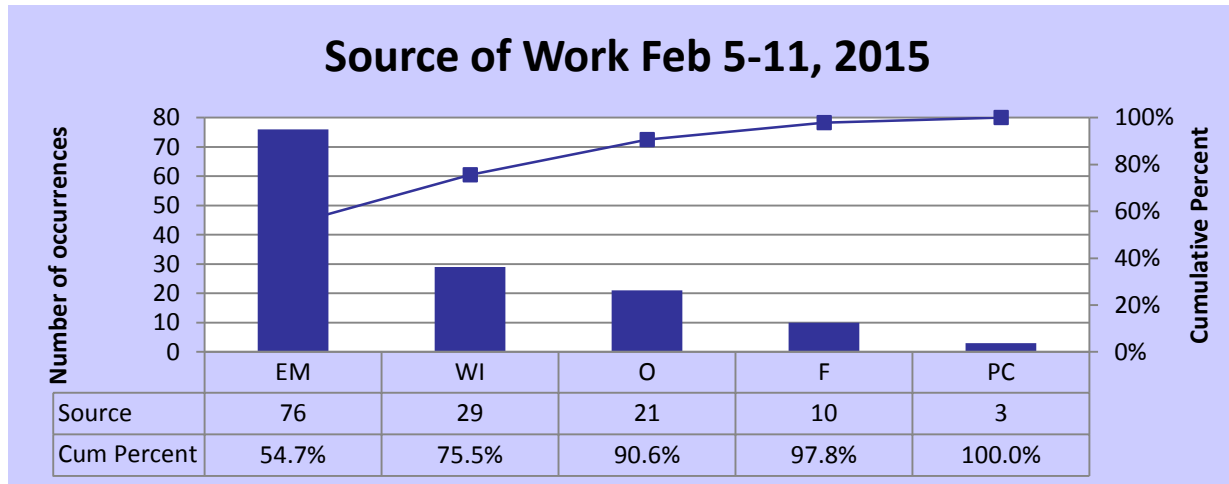
Time to complete the work.

Interruptions in the flow of work.

Numbers of issues experienced in completing the task.
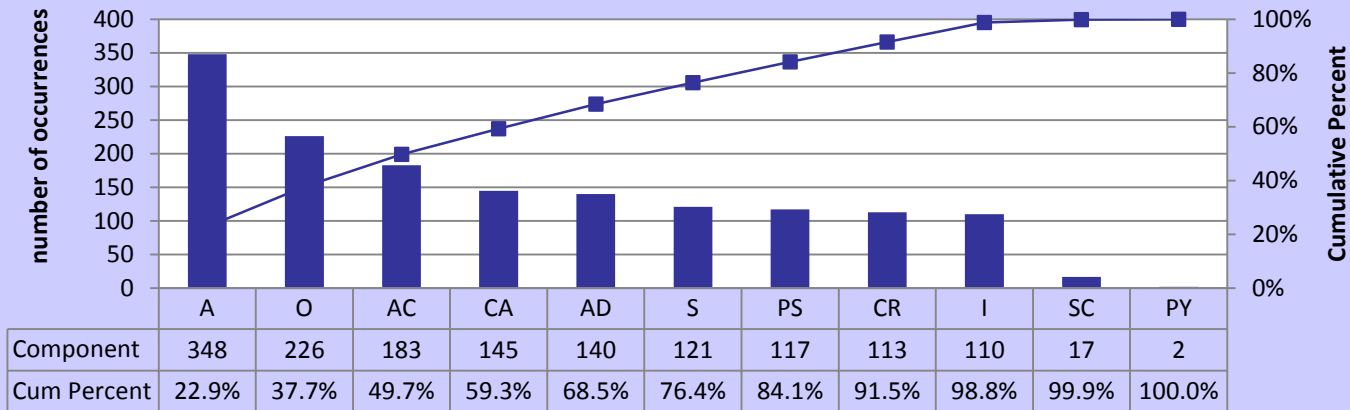
How work arrives at the admin desk across the region.

Source of work Dec 4-10, 2014

	EM	WI	O	PC	F	M
Source	586	310	276	199	88	63
Cum Percent	38.5%	58.9%	77.0%	90.1%	95.9%	100.0%

Source of Work Feb 5-11, 2015

	EM	WI	O	F	PC
Source	76	29	21	10	3
Cum Percent	54.7%	75.5%	90.6%	97.8%	100.0%

EM – email
WI – Walk in
O – Other
PC – Phone Call
F – Fax
M – Mail

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Which component initiates or requires admin supports.

Which component involved in requests Dec 4-10, 2014

	A	O	AC	CA	AD	S	PS	CR	I	SC	PY
Component	348	226	183	145	140	121	117	113	110	17	2
Cum Percent	22.9%	37.7%	49.7%	59.3%	68.5%	76.4%	84.1%	91.5%	98.8%	99.9%	100.0%

Component	
Adult	SC
Adult	A
Children's	CA
Senior's	S
Crisis	Cr
ICM	I
Access	Ac
Proctor	PS
Admin	Ad
Psychiatry	Py
Other	O

Which component involved in requests Feb 5-11, 2015

	A	AD	S	CA	O	I	PS	SC	CR
Component	39	18	16	15	14	14	12	7	4
Cum Percent	28.1%	41.0%	52.5%	63.3%	73.4%	83.5%	92.1%	97.1%	100.0%

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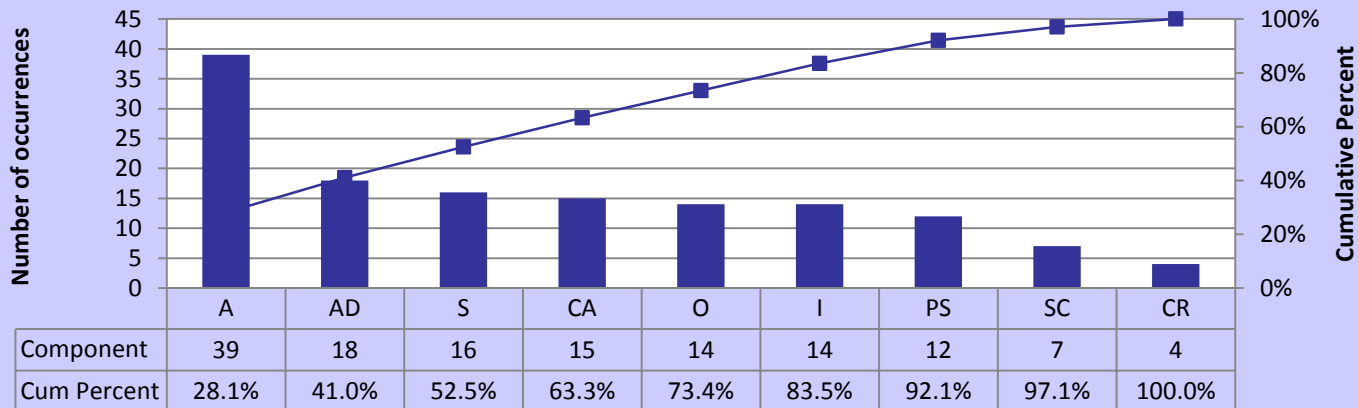
Who is requesting support from administrative assistants.

Who did request come from Dec 4-10, 2014

	W	O	M	ADM	CL	RHA	PY
From	660	352	186	162	90	49	23
Cum Percent	43.4%	66.5%	78.7%	89.4%	95.3%	98.5%	100.0%

MH Staff
- W – Worker
- ADM – Admins
- M – Manager

Regional Staff RHA
Psychiatry PY
Client Cl
Other O
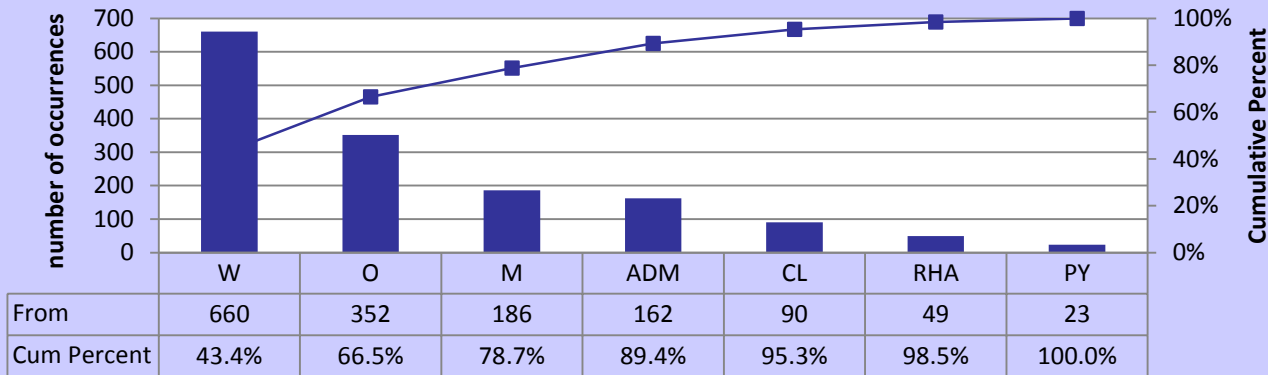
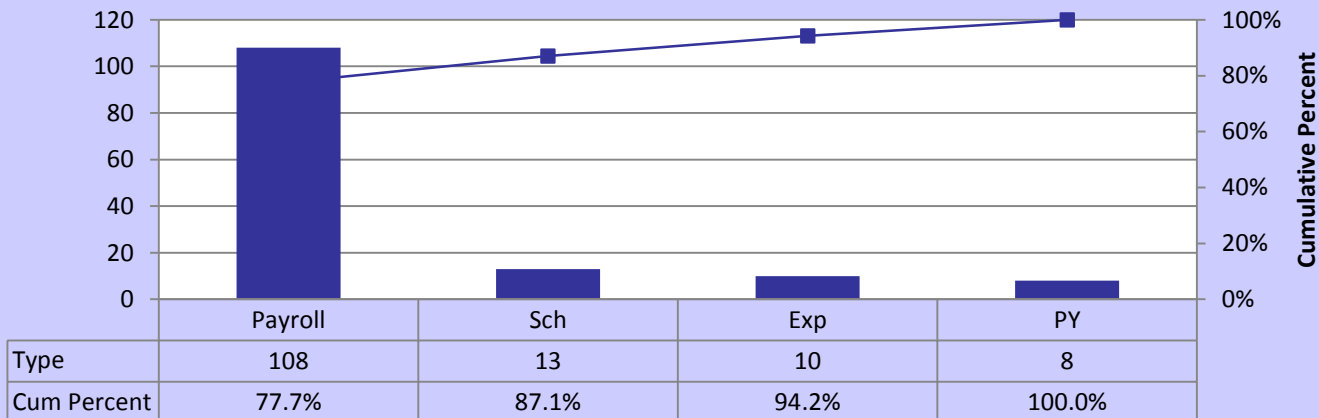## Who did request come from Feb 5-11, 2015

	W	AD	RHA	M	O	S	Py	CL
From	71	27	13	11	9	6	1	1
Cum Percent	51.1%	70.5%	79.9%	87.8%	94.2%	98.6%	99.3%	100.0%

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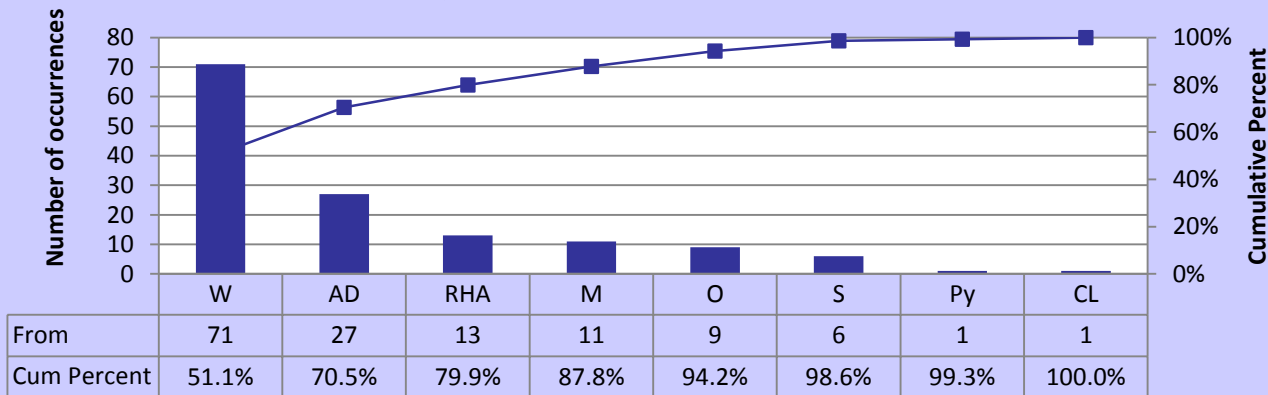
The types of work performed over the collection period.

Type of work Dec 4-10, 2014

Type	Payroll	Stats	Cl rel	AA Duties	F Mgmt	Refe	Sch	Psy	W req	HR	comp	Mtg	Other
Type	194	154	143	132	120	97	94	73	57	53	45	44	316
Cum Percent	12.7%	22.9%	32.3%	40.9%	48.8%	55.2%	61.4%	66.2%	69.9%	73.4%	76.3%	79.2%	100.0%
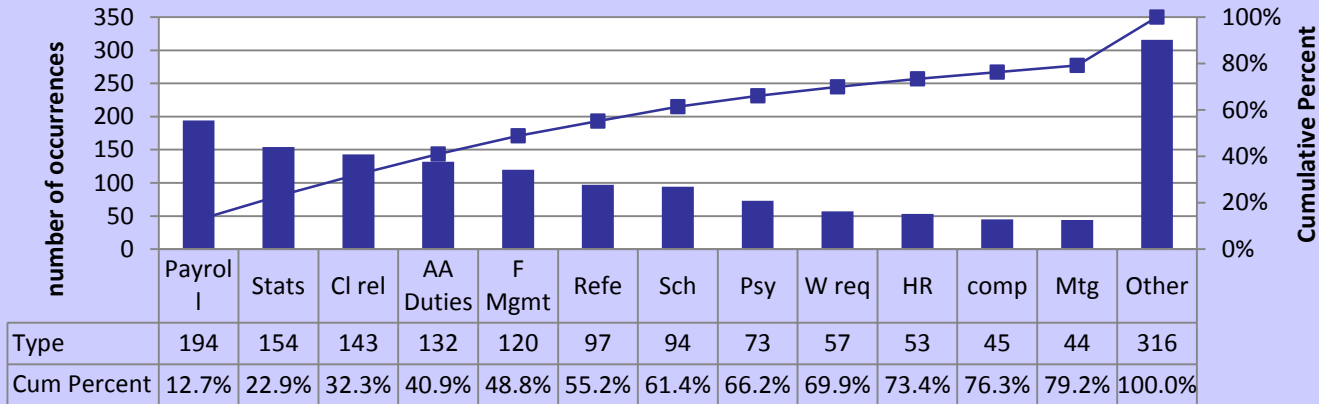
This are the types of work selected for the improvement phase.

Type of work Feb 5-11, 2015

Type	Payroll	Sch	Exp	PY
Type	108	13	10	8
Cum Percent	77.7%	87.1%	94.2%	100.0%

Type
Payroll
Stats
Cl rel – Client related
AA Duties
F Mgmt – File management
Sch – Scheduling
Refe – Referrals
Psy – Psychiatry
W req – Worker Request
Comp – Computer work
HR – Human Resources
Mtg – Meetings
Other

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Data Story

What we found:

Email provides the majority of requests for assistance or tasks for admins.

Most requests originate from the adult component .

Workers make the most requests for admin support for a variety of reasons.

Top types of work vary only slightly among the three areas with payroll functions occupying the top activity spot regionally.

Completing payroll functions is done daily with varying time frames from 1-2 minutes to several hours to resolve complicated issues.

Other top duties vary from office to office and have differing impacts on overall work. It is clear from the data that the confusion and frustration expressed is very real for the admin assistants.

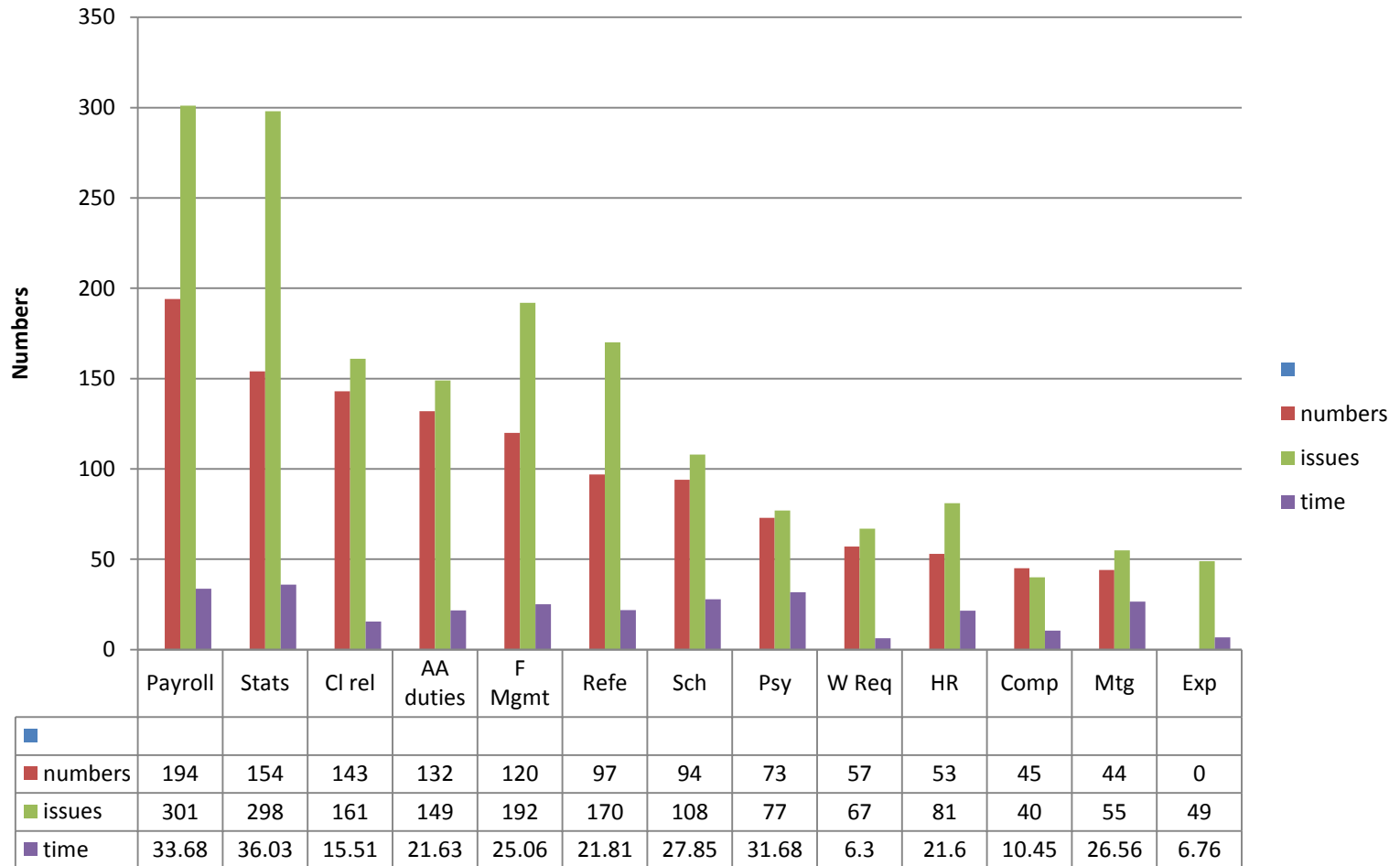There was no significant change in these areas in the second data collection cycle.

Data Story

The comparison by count, time and issues showed some variations to consider.

While numbers of occurrences is one part of the picture, the numbers of issues and then the time involved to complete the activity will help us to determine what we want to improve upon.

We found that the way we collected the information was not reproducible so we focused upon type and time in the improvement cycle
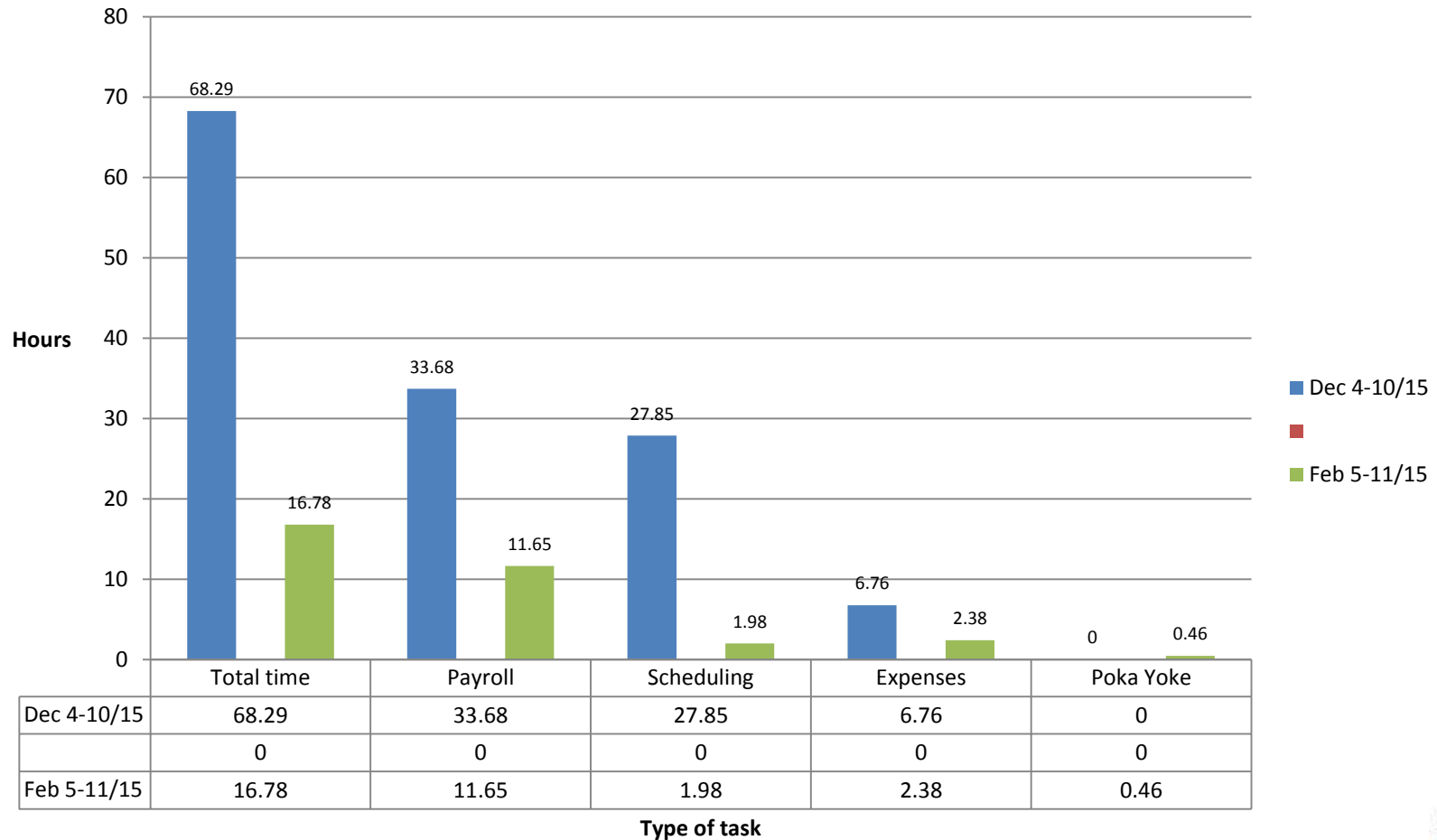
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Type of work in Mental Health Administration
December 4 to 10, 2014

	Payroll	Stats	Cl rel	AA duties	F Mgmt	Refe	Sch	Psy	W Req	HR	Comp	Mtg	Exp
numbers	194	154	143	132	120	97	94	73	57	53	45	44	0
issues	301	298	161	149	192	170	108	77	67	81	40	55	49
time	33.68	36.03	15.51	21.63	25.06	21.81	27.85	31.68	6.3	21.6	10.45	26.56	6.76

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Improvement Cycle

Type of Work Comparisons in Mental Health Administration
December 4 to 10, 2014 and February 5 to 11, 2015

	Total time	Payroll	Scheduling	Expenses	Poka Yoke
Dec 4-10/15	68.29	33.68	27.85	6.76	0
	0	0	0	0	0
Feb 5-11/15	16.78	11.65	1.98	2.38	0.46

Type of task

Total time saved = 51.51 hours per week or 2678.52 hours per year

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Improve

The results from the second round of data collection for types of administration work has shown a reduction in overall time to complete the most frequent tasks in payroll processing, expense claim validation and processing and scheduling meetings.

We standardized the process of form completion in order to reduce errors and used poka-yoke to effect a system change. We started measuring this as part of the improvement cycle.

Improve

PDSA 1

Aim: To reduce the amount of time it takes Admin Assistants to schedule and coordinate activities for managers and other staff by 50%.

Description: The improvement implemented was to have the A Team request access to outlook calendars and thus eliminate multiple emails and phone calls trying to find mutually agreeable times. **Date Implemented:** January 23, 2015

PDSA 2

Aim: To standardize and streamline payroll and expense processing and to reduce the amount of time for Admin Assistants to complete these tasks by 80%.

Description: The improvement implemented was to create a virtual Hub where payroll, expenses and other documents needing manager signature would be managed by Admin Assistants thus reducing multiple efforts to locate a manager to sign off on documents. **Date Implemented:** Work began January 22, 2015, full implementation February 5, 2015.

PDSA 3

Aim: To improve the health and wellness of Admin Assistants by creating awareness and respect for their shared spaces we worked to reduce noise and disruptions that interfere with their ability to perform their daily tasks.

Description: We created a survey to gauge current experience and post implementation experience. We removed some equipment that created noise in the environment. We also created a section on the quality board to address some of the issues that emerge from not appreciating the environmental needs of the Admin Assistants. **Date Implemented:** January 26, 2015
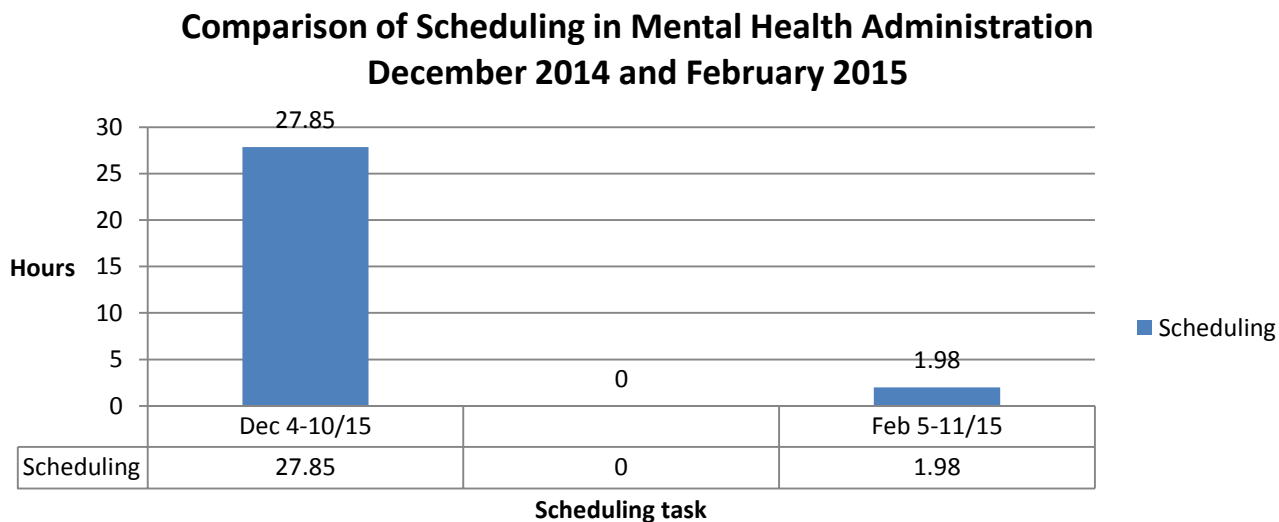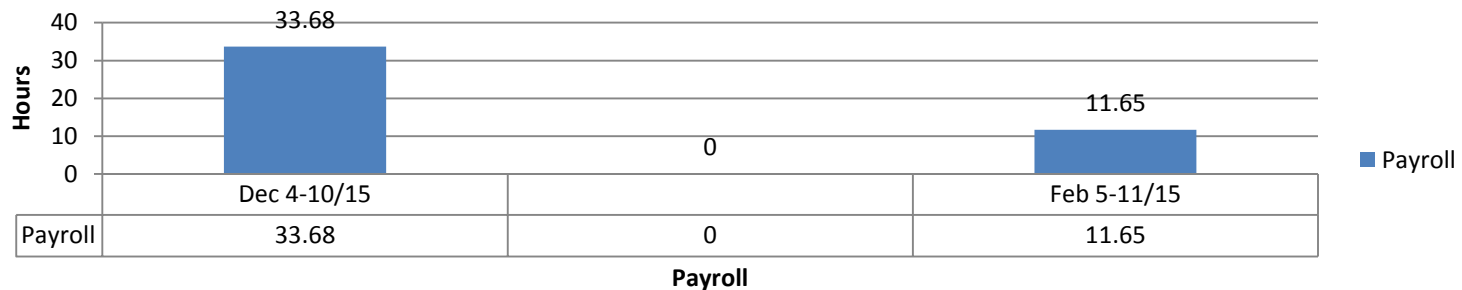
PDSA 4

Aim: To standardize the completion of documents and reduce the number of errors made by staff on forms by 100%

Description: Memo was sent to all staff that all forms were to be filled out correctly and Admin Assistants would return incorrect forms to originating employees for correction and resubmission. **Date Implemented:** February 2, 2015

PDSA 1

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Comparison of Scheduling in Mental Health Administration December 2014 and February 2015

	Dec 4-10/15		Feb 5-11/15
Scheduling	27.85	0	1.98

Hours

Scheduling task

■ Scheduling

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PDSA 2

Aim: *To standardize and streamline payroll and expense processing and to reduce the amount of time for Admin Assistants to complete these tasks by 80%.*

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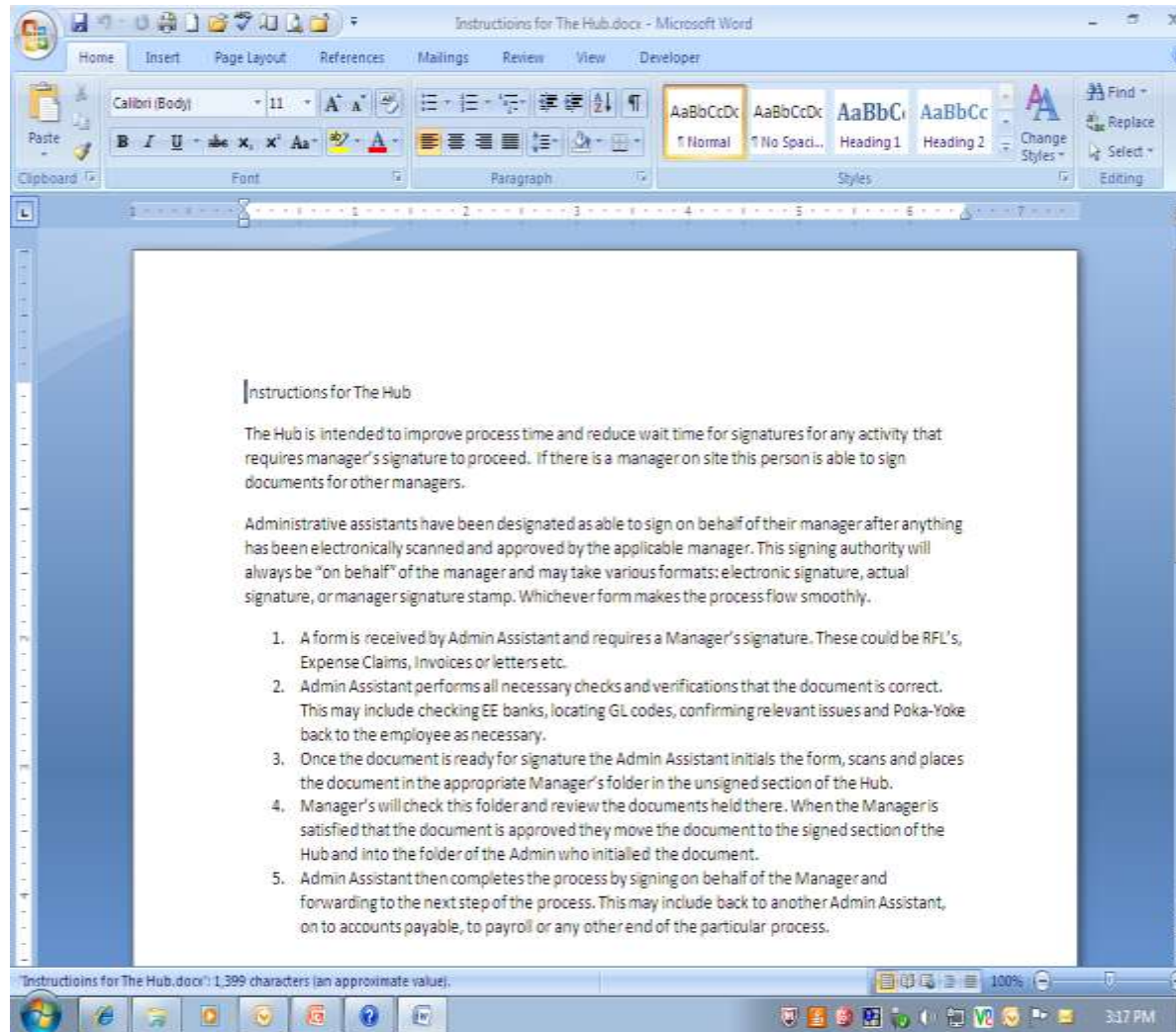
Date Implemented: *Work began January 22, 2015, full implementation February 5, 2015.*

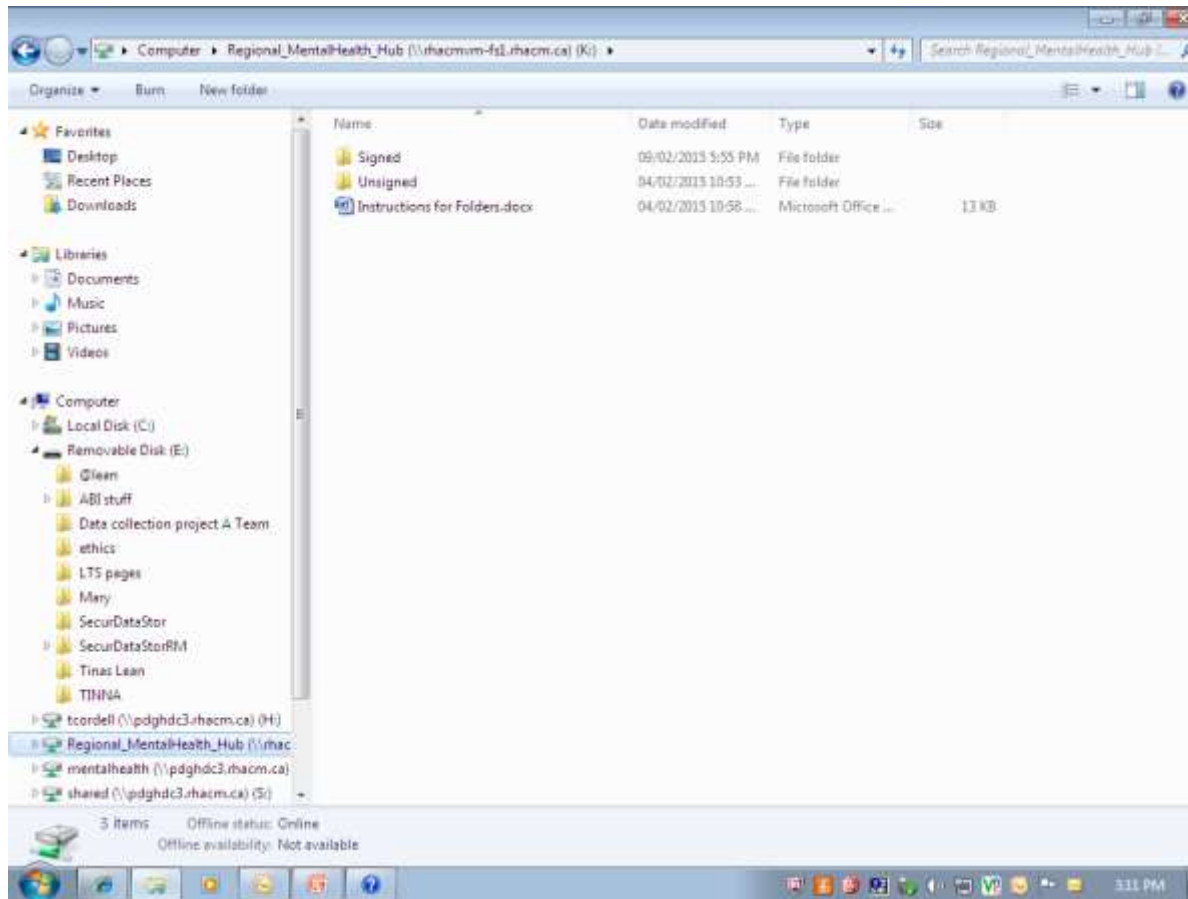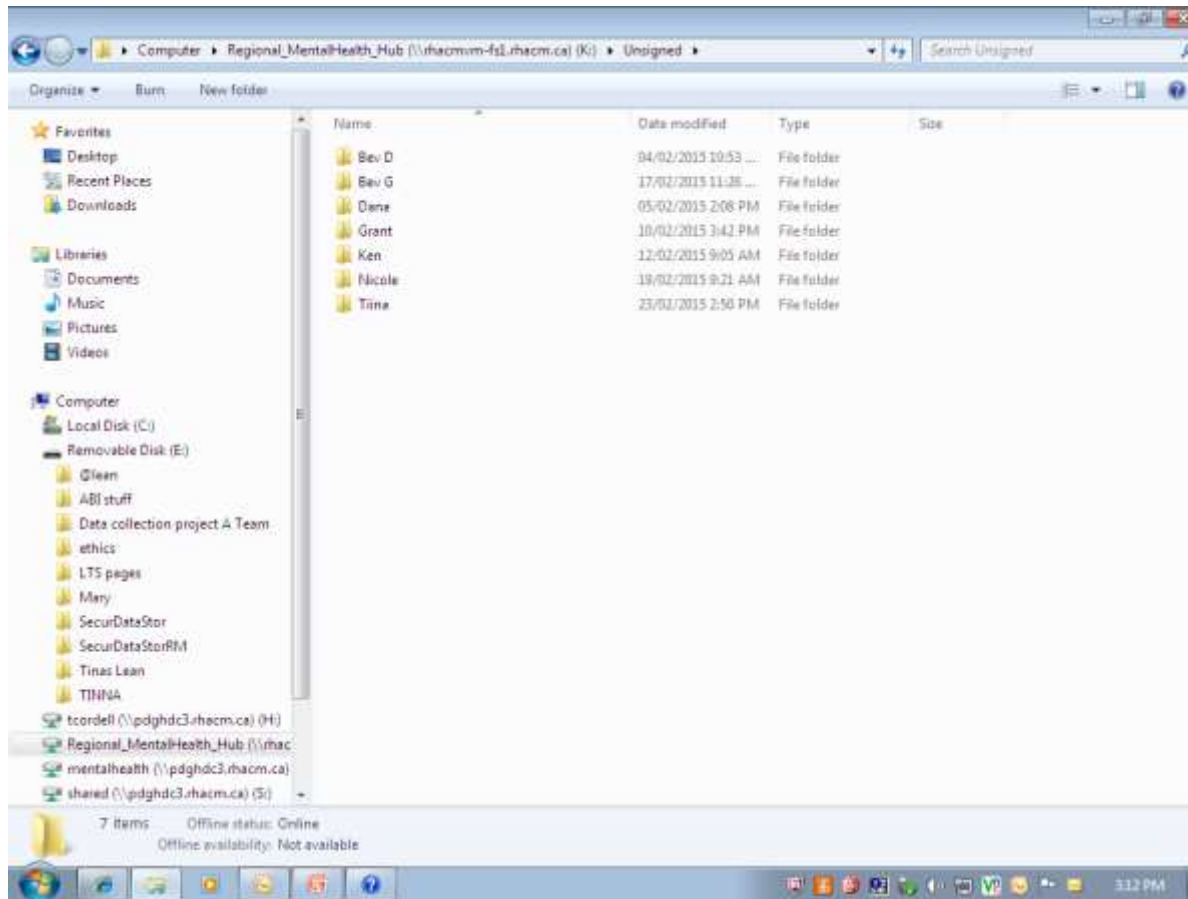**Comparison of payroll tasks in Mental Health Administration December 2014 and February 2015**

	Dec 4-10/15		Feb 5-11/15
Payroll	33.68	0	11.65

Payroll

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The Hub Instructions

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Screen Shot of The Hub

Screen Shot of The Hub

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Screen Shot of The Hub

PDSA 3

Aim: *To improve the health and wellness of Admin Assistants by creating awareness and respect for their shared spaces we worked to reduce noise and disruptions that interfere with their ability to perform their daily tasks.*

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Date Implemented: *January 26, 2015*

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Wellness Survey

A survey was sent out just prior to the collection to get baseline data about the experiences of admin assistants related to their work and space. The following questions were asked:

1. Is your work space environment quiet enough for you to work without distraction?
2. Are you able to close your office to interruptions from others?
3. Do you believe your space is respected by others?
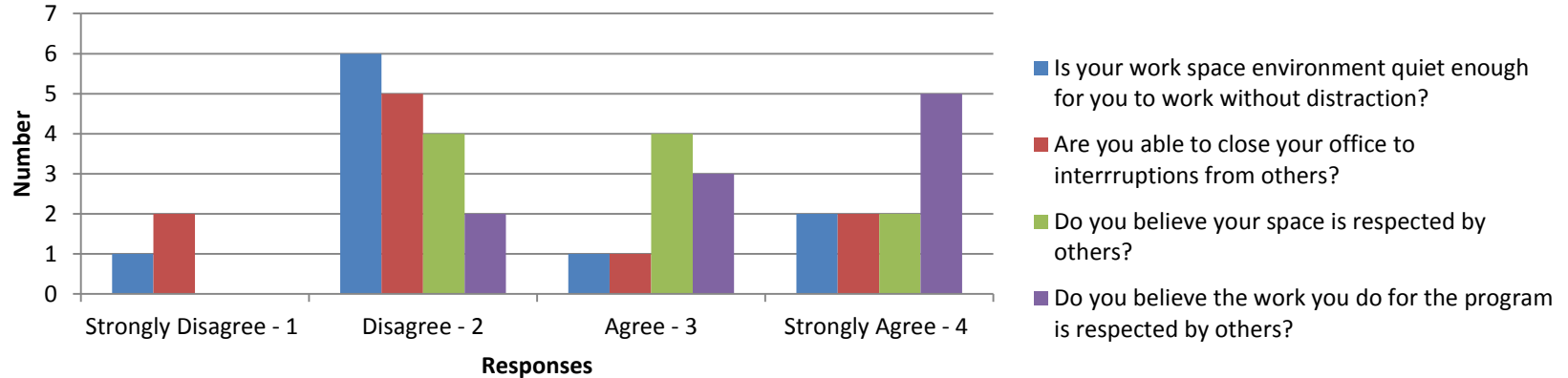4. Do you believe the work you do for the program is respected by others?

The survey was completed prior to improvements and then again after the PDSA improvements were put in place.

Some improvement was declared based on the response scale and this will continue to be an agenda item through our controls.

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Survey

Pre-Improvement January 23, 2015

Legend:
- Is your work space environment quiet enough for you to work without distraction?
- Are you able to close your office to interrruptions from others?
- Do you believe your space is respected by others?
- Do you believe the work you do for the program is respected by others?

Post-Improvement February 20, 2015

Legend:
- Is your work space environment quiet enough for you to work without distraction?
- Are you able to close your office to interrruptions from others?
- Do you believe your space is respected by others?
- Do you believe the work you do for the program is respected by others?

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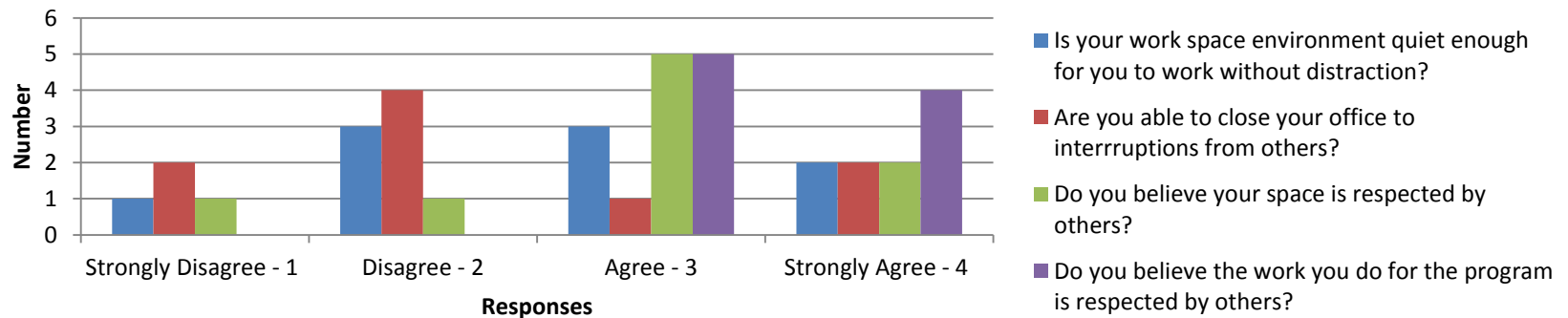
Survey Comments

Pre-Improvements:

"it can be hard to talk on the phone with staff/clients when others are talking in the room"

"the staff is always generous with their appreciation for jobs we do for them. I've always felt appreciated here, more so than at any other job I've had in the past"

"discussion of clients should be done in offices not in our space"

"some co-workers come to chat … on a break from their work, however, they may not be aware that there were previous co-workers doing the same thing before they came to see me…its hard for me to say something because I don't want to be rude"

Post-improvements:

"Our work space has quieted down over the past couple of months, but there are still changes taking place that will help even more once completed"

"Staff have tried to appreciate and respect our workspace, since the memo"

"I had a few comments made right after the memo was sent out about "oh oops this is your space, better get out" but it went right back to status quo shortly after that"

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Dear Jackie

Various pictures of the Dear Jackie section of the Quality Boards.
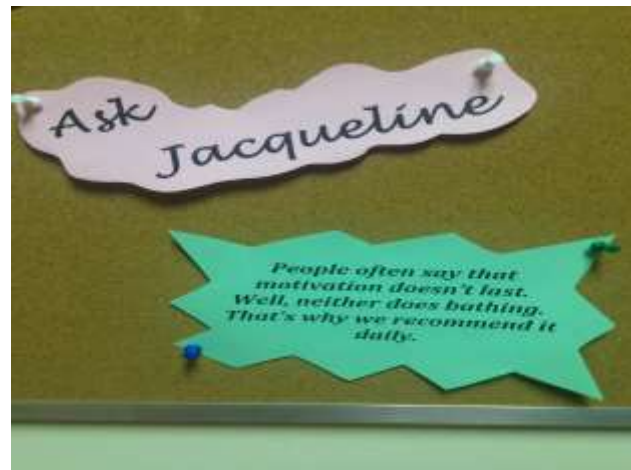
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PDSA 4

Aim: *To standardize the completion of documents and reduce the number of errors made by staff on forms by 100%*

Description: *Memo was sent to all staff that all forms were to be filled out correctly and Admin Assistants would return incorrect forms to originating employees for correction and resubmission.* *Date Implemented:* *February 2, 2015*

We did not explore the amount of time or occurrences of correcting errors on forms submitted by employees in the first round of data collection. Ongoing monitoring of this will be part of Controls to ensure staff follow process as we move towards the 100% target in error reduction.

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Improve

Best comment from the Poka-Yoke:

Staff came with wrong RFL – told them to go get appropriate RFL and come back. ☺ Correctly completed form returned.

It's working well.

Nobody is upset by getting this back and they are making the changes.

Support from Management has helped this process.

Control

The Control plan:

PDSA 1 – Admin's maintain the outlook calendar

Educate Admin's on how to make use of outlook.

Check in on use and maintenance of process 1x per month for three months.

PDSA 2 – Education new RM's on the Hub process.

Use audit chart and check with team on how it's working. Check 1 x per month for three months.

PDSA 3 – Continue to use the Dear Jacquie format. Include wellness agenda for RM meetings.

PDSA 4 – Record each time a form is poka-yoke back to staff. Monitor for compliance. 1x per month for three months.

Savings Calculator

PDSA 2

51.51 hrs per week = 2678.52 hrs per year

Salary of admin = $19.88

51.51 x $19.883 = $1024.01

2678.52 x $19.88 = $53248.97

Admin hours per year = 1885 hrs x $19.88 = $37473.80 annual salary

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Savings Calculator

PDSA 2

Paper baseline: 1 RFL = 4 sheets of paper

Paper PDSA: 1 RFL = 1 sheet of paper

5000 sheets of paper = $40.30

Savings = 3 sheets of paper

Reduced paper use by 937 sheets

$9.37 Saved on one case of paper

Part of our control will be monitoring paper purchase and identifying further reductions

Lessons Learned

Communicating the definitions and the process steps could have been done better. Even when we thought we knew what was meant there was on going dialogue pointing out that we hadn't explained this well enough.

We have a voice and we can make changes!

Knowing that our manager's support us and the changes! They have our backs.

Learned a lot, especially how to empower staff and use non-utilized talent!!! Heightened our working relationships.

Seeing the data on what we do in a day validated all the work we do, we're not just secretaries we are professionals!

Trust the process!

Before we would hear about all these changes and nothing happened, multiple meetings on issues but nothing changed. This process now has shown that we can actually make change happen.

Learning about the technology has given me new ideas on how to use technology better in all our work.

Next Steps

Education on RWP on office etiquette

Continue to refine the payroll processes.

Fine tune The Hub

Realign the V drive.

Identify and standardize work in all offices.

Kaizen on client files and documentation practices.

Standardize stats collection and reporting processes.

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The A Team

Back: Ken Kroeker, Tiina Cordell, Mary Heard, Stephanie Verhoeven.
Middle: Carol Schneider, Cyndi Menke, Jacqueline Kihn, Jennifer Merasty.
Front: Sharon Carroll, Dana Human.

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