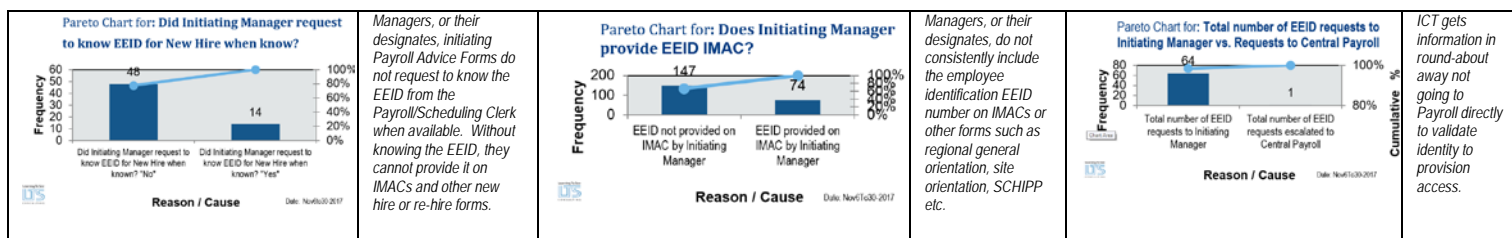## **Project Details**

Organization/SDO	Southern Health – Sante Sud	**Site/Program**	Regional Information and Communication Technology
Project Description (7 words max)	Identity Management	**Project Facilitator/ Belt Level**	Carol Garnham, Regional ICT Service Lead, Yellow Belt (Trainee)
Project Sponsor	Christine Aymont, Executive Green Belt	**Project Team Members**	Andy Alksnis, Bernie Wolfram, Carol Cairns, Carol Garnham, Christine Aymont, Leanne Wiebe, Quentin Peters, Shaun Twist, Shelley Emerson.
Project Start Date	Fri.Oct12-2017	**Project End Date**	Fri.Mar2-2018

Problem Statement

Current processes to uniquely identify employees and non-employees and share the unique identifier with other customers are not well developed. They are complex, fragmented, and often involve internal and external groups with differing needs including SH-SS Departments/Units, Affiliates, DSM, eHealth, Agency Employees, Physicians, Students/ Residents, Volunteers, Medical Clinic Staff, Auditors, Vendors and Board Members.

Current State Analysis – current process, pre-change data

- Process is not clear…Fragmented… and the different pieces don't tie together
- Onus is on ICT to request the EEID from Manager when IMAC form information is received incomplete.
- Has time constraints (priorities and deadlines)
- Managers, or their designates, initiate documentation for new hires/changes, but do not always have the information they need,
  - No consistent access to the EEID or perception of restricted access to information
  - Untimely completion of requests for credentials or incomplete information on IMAC to provision credentials
  - ICT information is often out-of-date when there are changes i.e. Name, Position, Site
- Payroll/Scheduling staff do not all consistently provide the new hire or re-hire SIN to Central Payroll Support to verify previous employee history
- Process cobbled together worked within regional boundaries, but doesn't with the number of new customers i.e. LMS, Auditor, eHealth, HPS.
- Doesn't provide employees themselves with easy and timely access to their EEID when they need it
- Doesn't have a single uniform method to acknowledge, assign credentials and track non-employees i.e. students, fee-for-service, vendors, etc.

Managers, or their designates, initiating Payroll Advice Forms do not request to know the EEID from the Payroll/Scheduling Clerk when available. Without knowing the EEID, they cannot provide it on IMACs and other new hire or re-hire forms.

Managers, or their designates, do not consistently include the employee identification EEID number on IMACs or other forms such as regional general orientation, site orientation, SCHIPP etc.

ICT gets information in round-about away not going to Payroll directly to validate identity to provision access.

Project Aim – what you plan on achieving and by when

By February 2018, the number of times ICT provisions credentials without knowing the EEID, excluding non-employees, will be a reduction in defects to 0%.

Implementation Plan PDSA – Brief Description and Implementation Date

- Frequency that SIN is provided will increase. – Implement Jan15-2018
- The EEID will be communicated back to initiating requestor and ICT. - Implement Jan15-2018
- Central Payroll will provide ICT record of prior employment information on new hire, re-hire and changes. If additional employee information is needed, ICT Deskside will go directly to Central Payroll Support, when necessary. - Implement Jan15-2018
- Where credentials are supplied by ICT without EEID, "other" will be identified by category to identify and minimize potential for "special cause". - Implement Jan15-2018

Project Outcomes – *improvements achieved, post-change data, saving summary, potential for spread and/or continued PDSA work*

Post-change Data:

- Initiating Manager, or designate, responsible for the new hire or re-hire gets the EEID at the same time as the Payroll/Scheduling Clerk and ICT. With the EEID, the Initiating Manager can now include the EEID on the Install, Move, Add, Change (IMAC) form. This can also be completed on other new hire/ re-hire employee package forms i.e. Regional General Orientation, Site Orientation, WHMIS, etc. This savings is further downstream as something that will spread as a benefit to employees in the Staff Development Department who must verify employees on education sign-in sheets prior to entry in the education module of Quadrant Human Resources. RGO and Site Orientation is mandatory for all new hires and some re-hires. The same calculation can be used.
- As ICT continues to reduce the number of existing AD accounts without an EEID. It is a productive positive impact on work for other regional projects and initiatives and day-to-day operations i.e. Electronic Health Record Support & Solutions (EHRSS) for future clinical or health information projects, ability to ensure accurate employee identification; relationship between EEID/User will spread organically to match up in the active directory forest and domain, and our partner forests and domains i.e. Computer Training Services, Learning Management System.
- From inconsistent processing of task(s) to consistent. ALL new hires or re-hires must be verified by Central Payroll. This triggers a push of the employee ID to the Initiating Manager and Information, Communication and Technology. This will minimize and/or eliminate creation of employee credentials where credentials may exist for employee previously employed at another SH-SS site, occasionally under a different name i.e. Married/Maiden etc.

Improvements/Changes Noted:

The EEID was requested by the Initiating Manager 23% of the time. The EEID is now provided for new hires/re-hires by Central Payroll without request 81% of the time. We found that the 19% gap is due to a different process which does not require the Payroll/Scheduling Clerk for Procura employees to conduct verification.

The SIN is required for Central Payroll to conduct an employee verification history for all employees. It was being done 58% of the time. Following a change in process where Payroll Scheduling Clerks no longer have access to the EEID list, it is now being done 85% of the time. We did not achieve 100%. This was directly related to staff on-boarding with the Payroll/Scheduling Clerk responsible for Mental Health and Home Care employees scheduled on Procura. This person is uniquely responsible for maintaining and managing the EEIDs for Procura. With verification completed, Central Payroll places the employee history file in a shared location with ICT for direct access to manage/ create network credentials.

Savings Summary *(report as applicable)*		
Indicator	*Example*	
Cycle Time	*1800 processing days saved yearly*	55.46 hours saved per annum across ICT Deskside Support

Controls Utilized – *type of change and description put into place to sustain PDSA improvement*

- ALL new hires or re-hires must be verified by Central Payroll. - **Fundamental Change**
- Initiating Manager, or designate, responsible for the new hire or re-hire gets the EEID at the same time as the Payroll/Scheduling Clerk and ICT. ICT then receives the employment history verification via the shared folder directly from Central Payroll. Central Payroll uses newly created Email account "ICT-EEID@" to cc:ICT for employment history verifications. Central Payroll uses newly created shared folder B://ICT-EEID to place SH-SS and DSM QHR data dumps in on a bi-weekly basis. - **Error Proofing**
- If ICT receives an IMAC without EEID field completed, they will check the ICT-EEID Email and then the ICT-EEID Shared folder. If the EEID information is not in either place, ICT goes directly to Central Payroll. For all prior employment history verifications, if Payroll/ Scheduling Clerk requests additional employee information, over and above verification and EEID, ICT must be removed as cc: recipient i.e. Is not privy to SIN. - **Standard Work**
- Central Payroll performs a cross-check that a verification request was received from a Payroll/Scheduling Clerk for each new hire or re-hire. Goal 100%. If audit result is 100%, repeat in six months; if under 100% repeat every pay for six pay periods. – **Audit**
- Revised Payroll Checklist for Payroll/ Scheduling Clerks. - **Checklist**

Spread Plan – *how will you spread the improvements to other areas/programs*

- Communication to PAF Initiating Manager, or designate, with rationale for EEID being sent to them i.e. Spread, EEID on to other new hire/ re-hire forms
  Enquire if employment history verification could spread to Procura to minimize potential for duplicate accounts when employees are a re-hire due to previous employment at a site in the region or former regions South Eastman Health or RHA – Central MB.
  - Prior employment history verification for ALL hires, re-hires including staff set-up and scheduled.
  - Communicate EEID to PAF Initiating Manager, or designate, and ICT for all new hires and re-hires set-up and scheduled.
- As above to spread to Affiliate Contract Health Corporations.