Office of Vocational Rehabilitation Services

Statewide Continuous Improvement Register

4/16/2012

OVRS STATEWIDE – Continuous Improvement Register

Item#	Date	Description	Suggestion	Person Accountable	Date Due	Date Completed
1	8/17/10	Sharing System	Information Sharing System	Sheila Hoover		2/14/11
2	10/14/10	Improve the JD contract	Job Development Advisory Group	Kris Kennedy Cheryl Furrer	On-going	
3	11/1/10	ORCA Process	Process mapping with a group of stakeholders	David Ritacco		10/24/11
4	11/8/10	ORCA help no signatures in email response	ORCA Help team sign all emails so field knows who responded	Caroline Tresidder		11/24/10
5	11/8/10	Files can't be closed until all AFPs are paid	Address field with explanation	Joe Miller Francine Davis	Feb 2012	12/16/11
6	11/8/10	Work History on Personal Information Form	Update the Personal Information Form	Branch Managers	Jan 2012	12/20/11
7	12/9/10	Some ORCA service categories do not match AFP categories	Service categories match AFP categories	David Ritacco		Forwarded to ORCA User Group
8	12/22/10	Check refund process	Check with stakeholders about changing the process to eliminate the need for codes	Sandy Dalsing		1/7/11
9	12/23/10	Personal Info Form not available in Spanish/Russian	Create form in Spanish/Russian	Sandy Dalsing		4/18/11
10	2/14/11	Business Manager and Branch Manager duties and responsibilities	Stakeholders involved in process improvement activity	Joe Miller Sandy Cooper		9/14/11
11	3/9/11	ORCA add/delete/change form	Streamline process, update forms	David Ritacco		8/9/11

OVRS STATEWIDE – Continuous Improvement Register

Item#	Date	Description	Suggestion	Person Accountable	Date Due	Date Completed
12	3/9/11	Refund letter	Add refund letter to ORCA letters	David Ritacco		3/9/11
13	3/9/11	ORCA uses outmoded term "mental retardation"	Change the code in ORCA disability page drop down menu to 'intellectual disability"	Peter Fox		8/9/11
14	3/15/11	Business Review Summary Form	Add feedback from Branch Managers and Field Service Managers to the Business Review Summary Form	Business Managers		4/12/11
15	3/21/11	Job Development Survey	Add new letter to ORCA	Terry Fletcher	Dec 2012	12/14/11
16	3/25/11	Orientation	Create and online orientation	Sandy Cooper Sandy Dalsing		12/1/11
17	5/11/11	Service desk tickets and computer requests	Create process with stakeholders	Twyla Olson	April 2012	HOLD Until Outlook rollout completed
18	5/13/11	File Closure Checklist	Re-vamp this list with Stakeholder input	Jerry Wilbur	May, 2012	On hold
19	5/18/11	Vendor AFPs	Add the phone and fax numbers on AFPs	David Ritacco	ORCA USER GROUP COMPLETED	
20	5/25/11	R-21 Financial Aid	Streamline process with stakeholders	Sue Hart	April 2012	
21	10/9/11	Emails	Too many irrelevant emails sent	OIS	Feb 2012	11/18/11

OVRS STATEWIDE – Continuous Improvement Register

Item#	Date	Description	Suggestion	Person Accountable	Date Due	Date Completed
22	10/6/11	Rights and Responsibilities	Create a form that shows client what their rights and responsibilities are	Pete Karpa Martha Dodsworth	April 2012	
23	10/3/11	Application	Update the Application for Services	Pete Karpa Martha Dodsworth	April 2012	
24	10/2011	Professional Disclosure	OVRS Professional Disclosure requirement	Stephaine Taylor	April 2012	
25	10/20/11	Vendor entry system	Automate integration between ORCA and SFMS	Pending until vacancy is filled	Pending	ON HOLD
26	11/3/11	OVRS Organization Chart	Clear chain of command	Exec. Team		ON HOLD
27	11/3/11	Program Integrity	Single source of authority for policy.	Peter Fox	July 2012	
28	11/3/11	Core Reports for Columbia River	Move The Dalles staff to East Port. Branch report. Move Hermiston staff to Eastern OR Branch report.	Terry Fletcher	Jan 2012	COMPLETED
29	11/9/11	90 day and 6 month reviews	Remove as an OVRS requirement	Katie Glaser: ORCA user group	TBD	
30	11/9/11	Vendor List	Create a vendor update only sheet.	OVRS Techs.	TBD	On the ORCA Priority List
31	11/16/11	Core automatic email	Subject line from Core email has the Vendor name	OVRS Techs	TBD	On the ORCA User Priority

OVRS STATEWIDE – Continuous Improvement Register

Item#	Date	Description	Suggestion	Person Accountable	Date Due	Date Completed
32	11/17/11	Job developer referral form.	Have one Form in ORCA to refer consumers to all services.	Cheryl Furrer		12/19/11
33	12/16/11	Continuous Improvement Actions	All CI's should be required to document impact across programs.	Continuous Improvement Unit		Sent to The Continuous Improvement Unit. 3/13/12
34	12/16/11	Budget Presentations to Legislators	DHS to work with other programs to initiate Legislature to standardize budget presentation from year to year.	Continuous Improvement Unit		Sent to The Continuous Improvement Unit. 3/13/12
35	12/16/11	Vendor Additions – Liability Insurance and Criminal History Background Checks..	Remove requirements for Liability Insurance and Criminal History Background checks.	Continuous Improvement Unit		Sent to The Continuous Improvement Unit. 3/13/12
36	12/22/11	No policy or training on Social Media and job search	Create a Policy and staff training	Sheila Hoover	July 2012	
37	2/1/12	Inequity of expectation of Labor Market Surveys	Clarification of what exactly needs to be in Labor Market Survey to be able to write Plan	Program Techs	May 2012	
38	2/16/12	VRCs take hand written notes then translate notes into computer.	VRCs to use notepad computers that translate notes automatically to computer.	Katie Glaser	July 2012	
39	2/13/12	Shared DHS Office	Move out of DHS Building into a	Joe Miller	July 2012	

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
40	**3/9/12**	**Counselors and job developers often get inaccurate criminal background info from consumers which leads employers to think consumer is hiding something or dishonest and Job Developer untrustworthy.**	**Provide means to get reliable criminal history checks, similar to employers, prior to Job Development when needed.**	**Sheila Hoover Sandy Dalsing**	**June 2012**	**Jeanette Scinto Central Portland**
	3/13/12: CI was presented to the Executive Team. The decision was made to have Sheila Hoover and Sandy Dalsing accountable for gathering data to present at the next meeting on April 10th.					

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
39	**2/13/12**	**Shared DHS Building**	**Move out of DHS Building and into a stand alone, or Employment Dept.**	**Joe Miller**	**July 2012**	**Springfield Staff**
	3/13/12: This CI idea was presented to the Executive Team. Joe Miller is accountable for responding to the Springfield Staff request.					

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
38	**1/16/12**	**Counselors take hand written notes then translate notes into computer.**	**Counselors to use Notepad computers that translate notes automatically to computer .**	**Katie Glaser**	**July 2012**	**David Ritacco**

4/9/12: Tablets have been ordered for a pilot group. They are expected to arrive on 4/23/12 and at that time software will be loaded. Data will be collected regarding the cost and effectiveness during the pilot.

3/19/12: OIS is still working on the request for the tablets Katie Glaser is waiting for price.

3/13/12: CI was present to the Executive Team. The ORCA team will be ordering some notepads and gathering data on cost and staff savings during a trial period.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
37	**2/1/12**	**Inequity of expectation of Labor Market Surveys**	**Clarification of what exactly needs to be in Labor Market Survey to be able to write a Plan**	**Program Techs**	**May 2012**	**Donna Luckett North Portland**
	4/10/12: The Program Techs expect to have a draft of this to David Ritacco by 4/13 for his review. 3/13/12: Continuous Improvement sheet was presented to the Executive Team. The Program Techs have been assigned as accountable . The completed CI Sheet was e-mailed to Dan Morris, Sue Hart and Ben Koerper. It was also cc'd to David Ritacco .					

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
36	**12/22/11**	**No policy or training on social media and job search. In some job searches this is becoming essential.**	**Evaluate, identify need and what is appropriate for us. Train accordingly. Identify VR experts for us.**	**Sheila Hoover**	**July 2012**	**Lynn Wallace**
	3/13/12: Per Executive Team, Sheila Hoover will explore options for staff training on the use of social media. She will gather information and provide staff with tools to provide to consumers .					

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
35	12/16/12	Vendor Additions	Remove requirements for Liability Insurance and Criminal History Background Checks.		Sent to The Continuous Improvement Unit 3/13/12	Terry Fletcher
	3/13/12: CI Sheet was submitted to the OVRS Executive Team. Per OVRS Administrator this is an Enterprise Wide issue and not within OVRS control. This CI Sheet was sent to The Continuous Improvement Unit to process.					

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
34	**12/16/11**	**Every year budget presentations look different, so budget staff spend a lot of time creating new presentations.**	**DHS to work with other programs to initiate Legislature to standardize budget presentation from year to year**		**Sent to The Continuous Improvement Unit 3/13/12**	**Terry Fletcher**

3/13/12: CI Sheet was submitted to the OVRS Executive Team. Per OVRS Administrator this is an Enterprise Wide issue . This CI Sheet was sent to The Continuous Improvement Unit to process.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
33	**12/16/11**	**Some Continuous Improvements do not consider cross grogram effects, creating a work shift or cost shift, rather than an efficiency.**	**All Continuous Improvements should be required to document impact across programs.**	**Enterprise Wide Issue**	**Sent to The Continuous Improvement Unit 3/13/12**	**Terry Fletcher**
	•3/13/12: CI Sheet was submitted to the OVRS Executive Team. Per OVRS Administrator this is an Enterprise Wide issue . This CI Sheet was sent to The Continuous Improvement Unit to process.					

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
32	**11/17/11**	**New job Developer Referral Form is a mirror image of the Services Referral Form in ORCA.**	**Keep the form in ORCA and use it to refer clients to all services. Delete the JD referral form.**	**Cheryl Furrer**	**COMPLETED 12/19/11**	**Georgie Murphy Shauna Degroot Gaylen Griffin Springfield**

12/19/11: This form is part of the process for the revised job placement services amendment process. The form in question was developed and recommended by the advisory group (which is made up of staff and vendors) this process was also approved by the exec team. Using this form is part of the job developer referral process which will assist in the continuous improvement process by making both staff and contracted job developer accountable for the referral process of job placement services to contracted vendor. The purpose of this document is to ensure that the job developer has a clear picture that the job seeker is truly ready for work by providing the job developer with the work related information that will assist them in deciding whether they can place this job seeker.
The Job Developer Referral Form is completely different from the services Referral Form and is only used for job placement services. There should not be any confusion from staff as to what form to use, since the name of the one associated with job placement services is the only one to use with job developers.
The ORCA team is in the process of adding the Job Developer Referral form to ORCA to make it available for staff to use.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
31	**11/16/11**	**Automatic emails from Core vendor add request is not easy to sort thru in outlook folder. Generic outline**	**Email subject line matches DBA name. Now it just says “Forms Manager Notification”**	**OIS Techs.**	**CI Sheet sent to ORCA Administrator to be added to the ORCA User Group priority list.**	**Johnna Bergman Medford**

•3/13/12: **Business Manual page APP J-1**

•It is no longer possible to change the text in the Form Description field. The Business Manual will be updated to delete this information.

• 12/20/11: Katie Glaser sent CI Sheet to the techs, they will review and let us know if there are feasible technology solutions, how much they would cost and how much time the work would take. After that they will be placed on their work list that will be prioritized by the user group.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
30	**11/9/11**	**Having to fill out everything to make a simple change, such as address, phone, fax**	**Create vendor "update" sheet**	**OVRS Techs**	**Added to the ORCA Priority List.**	**Nancy Traver North Portland**

- 12/20/11: Katie Glaser sent CI Sheet to the techs, they will review and let us know if there are feasible technology solutions, how much they would cost and how much time the work would take. After that they will be placed on their work list that will be prioritized by the user group.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
29	11/9/11	A lot of time spent by All Staff to do 90 day and 6 month reviews.	Stop doing these reviews as ORCA can be used to show cases with no activity on a monthly basis at the Branch Manager level.	Katie Glaser ORCA user group	undetermined	Jerry Wilbur Business Consultant

On December 20th, the executive team reviewed this CI sheet and voted to bring this issue to the ORCA users' work group (composed of counselors, support staff, a business consultant, and branch manager representatives). The ORCA users' work group will be asked to determine if ORCA can automatically populate existing client services into a newly created template so counselors or support staff would only need to type in a few sentences in describing the status of the client. The idea generated is an attempt to reduce the work load of field staff.

Next Step: Exploring the feasibility for programming ORCA to extract the individualized client services and populate these services into a template requiring only a sentence or two in updating the client's status is being assigned to Katie & the ORCA users' work group.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
28	**11/3/11**	**Metrics are hard to retrieve for East Portland and Eastern OR Branches as these offices each have 2 staff still listed on Branch 15/Columbia River employees.**	**Move the Dalles staff to East Portland reports and Hermiston staff to Eastern Oregon branch.**	**Terry Fletcher**	**COMPLETED 2/9/12**	**Robert Costello** **Branch Manager East Portland**

•2/9/12: completed

•12/19/11: Terry Fletcher will contact Branch Manager, Robert Costello during the week of 12/27/11.

<table>
<tr><th>#</th><th>Date Received</th><th>Description</th><th>Idea</th><th>Person Accountable</th><th>Timeframe</th><th>Person who submitted CI Sheet</th></tr>
<tr><td>27</td><td>11/3/11</td><td>Policy questions often generate multiple conflicting answers.</td><td>Single source of authority for policy, either person or team.</td><td>Exec. Team

Peter Fox: next step</td><td>July 2012</td><td>North Salem Branch</td></tr>
<tr><td></td><td colspan="6">3/28/12: A draft form is in process. The Q+A on the staff tools page is part of Section 7 of the Policy Manual and is up to date with the latest counselor training. It will be updated again after our upcoming revision (details coming shortly…)

2/9/12: The executive team wishes to empower counselors and support staff to reach out to either their branch manager or their program tech to answer client specific questions at the local level for a speedy response. The policy analyst in admin. will also be available to answer questions pertaining to the OVRS policy manual, TAGS, CFRs, RSA policy directives, and vendor related issues.

The executive team agreed that overall communication about policy can be improved. Discussion ensued about the suggestion of a form being created to gather the most frequently asked questions or issues which may be confusing to staff. Using a newly created form, branch managers, program techs, and field service managers would be encouraged to submit the most frequently asked questions or issues to the admin. policy analyst to identify trends or improvements for future changes to the policy manual. The policy analyst would also post frequently asked questions and answers on the Staff Tools webpage for all OVRS staff to read.

Next Step: The task of creating a new form to gather input from the branch managers, program techs, and field service managers on most frequently asked questions and issues arising in the field is being</td></tr>
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#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
26	11/3/11	Lack of delineation of roles and responsibilities.	Realign staff to enhance effective communication between Administration and Field Staff.	Exec. Team	On hold due to current budget climate.	North Salem

•OVRS admin. has turned in policy option packages for the previous two bienniums (2007-2009 and 2009-2011) requesting additional legislative authority to increase the number of administrative and field staff positions. Due to statewide budget deficits, these requests were not considered when the legislature finalized the state budget. Thus, OVRS is unable to hire District Managers or other field positions without the legislative approval. No additional newly created positions are being considered by the legislature nor the Governor given the current budget climate

•12/20/11: December Exec Team meeting with Lean Leader had to be canceled. CI sheet was emailed to the Exec. Team for review.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
25	**10/20/11**	**Reduce the amount of time it takes to enter an OVRS Vendor into SFMS System.**	**Automate Integration between ORCA and SFMS.**	**Pending**	**On Hold pending Vacancy to be filled**	**David Ritacco**

•12/20/11: Pending until Vacancy is filled.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
24	**10/20/11**	**As of 1/1/11, the CRCC has required the use of a Written Professional Disclosure Statement. OVRS does not yet comply with this requirement.**	**Make available to OVRS staff a Professional Disclosure template to allow them to be compliant with the CRCC Code of Professional Ethics for Rehabilitation Counselors, as well as any other licenses or certifications they hold.**	**Stephaine Taylor**		**Jessica Atalla, Roxanne Nakamura** **Clackamas Branch**

12/30/11: Stephaine is taking the information received to the Assistant Attorney General to review.

12/21/11: Sheila will be word smithing the Washington example to customize it to OVRS and may also use some of the language in the version CRCC proposed.
That document will then be sent over to the ORCA team, who will add it in as a form/case note. It is my hope that staff will be able to use pick-lists and drop-down menus to make completion faster. ORCA **<u>does not</u>** have capability to auto fill staff members' degrees and certifications, so staff will have to do that on each form they complete. The good thing is, there will be a minimum of typing required--likely only in the field that will be reserved for their degree focus (Psychology, Rehab Counseling, Social Work, etc).
Once the form is in ORCA, I'll work with Exec to get the word out about who must complete it.

12/13/11: Exec Team meeting with Lean Leader was canceled. Joe Miller assigned Sheila Hoover as accountable for

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
23	**11/3/11**	**Application for services is outdated and invalid.**	**Re-do the application so that it pertains to current information.**	**Martha Dodsworh and Pete Karpa**	**March 2012**	**Martha Dodsworth Branch Manager**

4/10/12: The Application for Services has been approve and sent to DHS for printing.
3/20/12: Pete Karpa and Martha Dodsworth presented the completed Application. Next Step- Martha will send the draft form to the OVRS Program Techs for review.

12/20/11: Pete is working on the rough version to take to all the managers.
The discussion with the managers did not take place at Branch Managers this month due to agenda change
We will attempt to put it on the Branch Managers agenda for Jan or Feb.
Plan is to put together a rough draft that is a good VR document then take it to managers and admin and let them tell us what we need to put back in to meet DHS language requirements, if any.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
22	10/6/11	Rights and Responsibilities	Create a form that shows client what their rights and responsibilities are	Pete Karpa Martha Dodsworth	March 2012	Dawn Sandoval Grants Pass

STATUS

4/10/12: The Rights and Responsibilities form has been approved and sent to DHS printing.
3/20/12: Pete Karpa and Martha Dodsworth presented the completed Rights and Responsibilities form.
Next Step- Martha will send the draft form to the OVRS Program Techs for review.
2/9/12: Draft format was provided to the Branch Manager Workgroup. Each Manager to ask a VRC from their office for feedback on the form. All feedback is to be e-mailed to Pete Karpa and Martha Dodsworth by the end of the day on 2/22/12.
12/20/11: Pete is working on the rough version to take to all the managers.
The discussion with the managers did not take place at Branch Managers this month due to agenda change
We will attempt to put it on the Branch Managers agenda for Jan or Feb.
Plan is to put together a rough draft that is a good VR document then take it to managers and admin and let them tell us what we need to put back in to meet DHS language requirements, if any.

- Branch managers workgroup will look at this process on 12/14/11

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
21	**10/9/11**	**Emails**	**Reduce the number of emails we receive that do not impact our agency**	**Office of Continuous Improvement**	**Forwarded to OIS**	**Jeff Danzik Grants Pass**

STATUS

- 11/18/11: Wesley Charley has passed this up to Jeremy Emerson. Due to the amount of issues OIS is currently handling this may not be high on a priority list. Wesley suggested using filters within Outlook for the time being, here is a link http://office.microsoft.com/en-us/outlook-help/add-names-to-the-junk-e-mail-filter-lists-HA001230163.aspx
- 11/7/11 Lean Leader sent an email to Wesley Charley with the Office of Transformation to clarify how to handle continuous improvement ideas that reach outside of OVRS.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person w submitte Sheet
20	5/25/11	R-21 Financial Aid	Streamline process by eliminating steps or clarifying with colleges how to fill out the R21 and whether or not it's their responsibility.	Sue Hart Sheila Hoover	Stakeholders meeting quarterly to discuss what has been completed towards developing this process.	Jessica Ata Clackamas

STATUS

4/10/12: Sue Hart and Sheila Hoover will schedule a meeting to define this process.
2/9/12: Sue Hart and Sheila Hoover are working on revising the form and the process. They taking the required interaction with the financial aid offices away and will be exploring maki form a web or orca based form that will do the calculations automatically.
12/19/11:Sue Hart and Sheila Hoover met 12/15/11 to do prelim review on the materials re from 8 state VR programs. Agreement made to contact Alaska VR to ask if they have a form t review as well. Sue and Sheila are both reviewing other states' policies, forms and guidance documents to see whether there is existing material to incorporate into OVRS' references/practices.
Sue and Sheila will meet again on Wednesday, January 4th to review notes and start putting together in draft format.

- 12/6/11: Sheila Hoover has gathered data nationwide regarding this process. Financial Aid has been edited on Staff Tools, making tabs visible. Sue will meet with Sheila on 12/15 to go data and see how to proceed prior to meeting with stakeholder group.

STATUS CONTUED ON NEXT PAGE

20	**STATUS CONTINUED..**					

STATUS

11/7/11: Sue Hart met with Sheila Hoover to review current Financial Aid forms on Staff Too expected timeframe for form update, December 2011. Sue is continuing to work on this pro and make it work for staff and clients. She has contacted the RSA to get information regardi what we can and cannot change.

- 10/13/11: Sue Hart, Branch Manager, Lead HSA, VRC and Lean Leader met to discuss the R process and improvement ideas. This group will continue to meet quarterly to receive upda from Sue. Sue will contact Colleges and the RSA. Sue will be gathering information on how process can be streamlined for OVRS staff. Sue will update the OVRS Financial Aid forms on Staff Tools Page.
- 10/11/11: Exec. Team reassigned the person accountable as Sue Hart.
- 8/9/11: Patrick Foster, Kris Kennedy to set up a meeting with Clackamas Comm. College Bu office. Group to investigate how process is being done per school and to work towards a statewide process.
- 5/25/11: Per Stephaine - Since this impacts everyone I think this should come to Branch Managers.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
19	5/18/11	No phone or fax number for vendors on AFP's	Add the phone and Fax numbers on AFPs	David Ritacco	COMPLETED	Nancy Traver North Portland

STATUS

•10/11/11: The ORCA team has compiled a ORCA Work Order list of changes to be made in ORCA. These changes have to be made by OIS. Currently OVRS only has 1.5 OIS Staff. At this point it would take a full time OIS staff person 2.5 years to complete what is on the list currently. ORCA staff will make an announcement of when the list will be added to the Staff Tools Page for all staff to view.

•8/9/11: AFPs are still being worked on. Basic issues will need to be resolved before enhancements are put into place.

•5/23/11: The ORCA team is working on improvements to the AFP but they have to be performed by OIS team, who are currently working full time to get 5.9 to work. AFPs are on their to do list. September is the current timeframe.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
18	**5/13/11**	**File Closure Checklist**	**Re-vamp this list with Field input, or advise that current list is complete and no other steps needed in process.**	**Jerry Wilbur**	**May, 2012**	**Lorene Arias** **Clackamas Branch**

STATUS

•2/9/12: This process has been placed on hold until May. Staff person who is on the process group will return to work in May and a change with Business Consultant.

•12/20/11: Stakeholders have drafted the forms and will schedule a meeting in January to finalize the forms and process which will then be presented to the Exec. Team.

•10/31/11: Jerry will take information to Executive team to request approval on writing processes to accompany checklists in business manual.
•10/17/11: Stakeholders met and came up with general idea for both closure and new file checklists. Both have been created and are currently under review by stakeholders for editing.
•9/1/11: Process Improvement Event with Stakeholders is scheduled for 10/17/11.

•8/9/11: Exec Team advised that Statewide Lead Workers complete a Rapid Process Improvement at the next quarterly meeting. Per Business Consultant this is added to the agenda.

•5/23/11: Joe and Sandy to move forward with a workgroup to address this process.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
17	**5/11/11**	**Service Desk Tickets and computer requests.**	**Include all stakeholders in process to encourage collaboration on setting expectations and standards and/or making current standards transparent to field.**	**Twyla Olson**	**April 2012** **Hold until Outlook rollout is completed**	**Lorene Arias** **Clackamas Branch**

STATUS

•4/10/12: OIS has completed the Microsoft Rollout and is to update their standards. Once their standards have been updated our Business Manual will be updated with this process.

•Process will be added to Business Manual after Microsoft migration is complete. OIS is not meeting their expected timelines due to their current workload of migrating to Microsoft.

•9/13/11: Twyla Olson met with Lorene Arias. Twyla contacted OIS and clarified their process. Current process will be added to the Business Manual on The Staff Tools Page.

•8/9/11: Twyla Olson to meet with Lead Worker at the Clackamas Office to discuss process with Request Computer. Determine if delays are a office issue or a statewide issue.

•5/23/11 : **Twyla Olson, District Business Manager to follow up with the Clackamas Branch .**

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
16	**3/25/11**	**Orientation issues around inconsistent information, overcrowding, clients being delayed because of limited space at orientation**	**Create an online orientation that would have a minimal information referral process for the nearest branch**	**Sandy Cooper** **Sandy Dalsing**	**COMPLETE 12/1/11**	**Tony Morgan Washington County Branch**

STATUS

- 12/1/11: Lean Leader met with Washington Co. and went over data, which does not reflect a statewide issue and will be looked at in more detail on an office level. Branch will determine future process in house.
- 10/27/11: Lean Leader met with Washington Co. and got background information. Process mapping will be done at Washington Co. office to determine if this is a statewide or office issue on 12/1/11. Data is being collected statewide regarding this issue.
- 4/18/11: Lean Leader will work with the Washington Co. Branch during the Metro Area LDMS coaching April-Sept. Data to be gathered, problem solve with the staff to get to the root cause. Data will be used to determine if this is a statewide issue/Branch issue.
- 4/5/11: Executive Team meeting scheduled for 4/12/11
- 3/28/11: Continuous Improvement sheet emailed to the Executive Team.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
15	**3/21/11**	**Job developer survey is a requirement. We need an ORCA letter to go with the form. Second page should be JD survey.**	**Add new letter to ORCA**	**Terry Fletcher**	**COMPLETED 12/14/11**	Saideh Sharif-Kazemi Clackamas Branch

STATUS

12/14/11: A letter is in ORCA that will accompany the Job Develop Survey. A letter was drafted, the Group responded with their ideas. This letter will auto fill the date and the participant info. You will need to fill in the phone number of where the participant can call if they have questions and your name and title. Since more than just the counselors could be sending this letter, we set it up this way.
The letter is called Job Developer Survey Letter and will be located in the Service Category.

- 12/6/11: Letter is being edited prior to being entered in ORCA.
- 9/1/11: Letter is to be put in ORCA.

- 8/9/11: Current letters are still being inputted into the system. New letters will wait until current letters are complete.

- 3/22/11: We will add the survey form and letter to ORCA but it will not be added to ORCA until after

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
14	**3/15/11**	**Lack of feedback from Branch Managers and Field Service Managers. Unknown expectations. What is information being used for/how?**	**Add a "Corrective Action Plan" section to the Business Review Summary form.**	**Business Managers**	**COMPLETED 4/12/11**	**Francine Roelle-Davis** **District Business Managers**

COMPLETE

- 4/12/11: A Corrective Action Plan section has been added to the Business Review Summary Form. Branch Manager will complete the action plan which will be forward to Field Services Manager for their follow-up.

- 4/5/11: The next scheduled Executive Team meeting with Lean Leader is scheduled for 4/12/11.

- 3/22/11: Continuous improvement action sheet was forwarded to the Executive Team.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
13	**3/9/11**	**ORCA still uses the outmoded term "mental retardation" instead of the more accepted term "intellectual disability".**	**Change the code in ORCA disability page drop down menu from "mental retardation" to say "intellectual disability".**	**Peter Fox**	**COMPLETED 8/9/11**	**Jessica Atalla** **Clackamas Branch**

STATUS

•8/9/11: ORCA disability page drop down menu has the term "intellectual disability"

•5/24/11:The ORCA team is aware that the change needs to be input into the system however the old term is still in place. They need to investigate a bit and find out where/how to implement the change.

- 4/20/11: There is a bill out there to make the change in state law....so we have the authority.

There may be an in issue with the feds. Intellectual disability may be broader than mental retardation. We need to check the specifics of the law.....something that Peter Fox can do as well as check with RSA which is something else that Peter can do.

- 4/5/11: Executive Team Meeting with Lean Leader scheduled for 4/12/11.

- 3/9/11: Lean Leader forwarded the continuous improvement action sheet to the Executive Team.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
12	**3/9/11**	**Refund letter is upgraded occasionally. If it was in ORCA we would always have the current version and it would be in ORCA.**	**Add the refund letter to ORCA letters.**	**David Ritacco**	**COMPLETED 3/9/11**	**Dawn Teeter** **Clackamas Branch**

COMPLETED

COMPLETED 3/9/11

The Refund letter is in ORCA under misc. letters.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
11	**3/9/11**	**The process to Add/Delete/Change ORCA access for staff can be confusing and too many people involved**	**Streamline the process.** **Create 1 Form to use.**	**David Ritacco**	**COMPLETED 8/9/11**	**Dawn Teeter** **Clackamas Branch**

STATUS

•8/9/11: The updated forms are on the OVRS Staff Tools page.

•5/23/11: A request has been sent to add the updated forms to OVRS Staff Tools Page.

• 4/18/11: Templates have been developed and will be sent to All Staff when available on the OVRS Staff Tools page.

• 4/5/11: Stakeholders met on 4/4/11.
Removed 10 information fields from the ORCA Access Form.
Rearranged, rephrased, added bold content to the Forms.
Next step: Caroline Tresidder to create the draft forms for the group to review.

• 3/21/11: A group of stakeholders are scheduled to meet on 4/4/11. Lean tools will be used to assist group to confirm a statewide process and develop an updated form for field use .

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
10	**2/14/11**	**Confusion in regard to Business Manager and Branch Manager duties and responsibilities.**	**Suggest we use a Continuous Improvement event with all stakeholders involved. This could include program techs also.**	**Joe Miller** **Sandy Cooper**	**Completed 9/14/11**	**Patrick Foster for Branch Manager Group**

STATUS

•9/14/11: Branch Managers were provided with the Business Consultants Job Description.
•8/9/11: The Business Consultants job description is complete. Branch Managers duties and responsibilities is in DRAFT . Branch Managers have requested time to review before finalizing.

•4/26/11: Meeting with Branch Managers...Done by Joe and Sandy C
Meeting with Business Managers..Done by Davis R
Meeting Scheduled with David to discuss Duties and Delegation..Joe and Sandy C, May 16th.

• 4/18/11: Field Services Managers will continue to work on the development of Manager's duties at the next monthly Manager meeting in April.

• 4/5/11: Awaiting Executive Team decision. Next scheduled meeting is 4/12/11.

• 3/8/11: Lean Leader Executive Team meeting was canceled.
Next scheduled Lean Leader Executive Team meeting is scheduled for 4/12/11.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
9	12/23/10	Personal Information Form is not available statewide in Spanish/Russian	Create Form in Spanish/Russian. Form to be accessible to All Staff.	Joe Miller Sandy Dalsing	COMPLETED 4/18/11	Lorene Arias Clackamas Branch

STATUS

COMPLETED

- 4/18/11: The Personal Information Form in Russian is being added to the OVRS Staff Tools Page.
- 4/5/11: Russian translation was approved and ordered with DHS Forms on 3/24/11.
- 3/22/11: Request sent to DHS Forms to translate into Russian.
- 2/22/11 – Travis Wall to inform Sandy Dalsing of vendors who can translate the form to Russian.
- 2/22/11 - The Personal Information Form in Spanish will be added to the Staff Tools Page by Sheila Hoover.
- 1/21/11: A Personal Information Form in Spanish has been created.
- 1/11/11: CI sheet was presented to the Exec. Team. Lean Leader to contact recommended staff who might have the translated Form. Discussed the option of placing VR Forms on the DHS Forms site for easy access for all VR Forms. VR Forms Warehouse is not being updated.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
8	12/22/10	Check Refund Process. Office requirement to fill in PCA, OBJ codes is time consuming. Errors and rework being done.	Check with stakeholders about changing the process to eliminate the need for codes.	Sandy Dalsing	COMPLETED 1/7/11	Dawn Teeter Clackamas Branch

COMPLETED

1/7/11 – An e-mail was sent to All Lead Workers by Francine Roelle. The e-mail included the statewide process and letter template to be used. To be added to Office Procedure Manual.

1/7/11 – There was a recent updated process and letter which no longer requires staff to enter codes. Some staff had not received this information.

1/7/11 – Sandy Dalsing sent an e-mail to Financial Services regarding current process and new process idea.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
7	12/9/10	Some ORCA Service Categories do not match AFP Categories	All Service Categories match between Plan Service and AFP service provided.	David Ritacco	COMPLETED Forwarded to ORCA User group	Kim Garrett Washington Co. Branch

COMPLETED

12/16/11:A work-session for the services and subcategories has been scheduled for the ORCA User Group for February 23, 2011. We will be working on appropriate, useful, well defined services and subcategories to present to executive staff.

•4/5/11: There is a misunderstanding in the field that anyone in a self employment plan can only receive self employment services. This misunderstanding is being corrected and will be addressed in ORCA training. All services available to anyone in plan are available to a person in self employment. There is no need to label all services to someone in self employment as self employment services. In fact, the only specific self employment service is business plan development and consultations. This matter is considered resolved.

•3/8/11: Executive meeting with Lean Leader was canceled.

•2/22/11: Self Employment Service will not allow an AFP to be issued to some vendors. David will resolve and report to the field.

•2/14/11: Per Field the only issue currently is with Self Employment.

•2/1/11: Executive Team awaiting further information from the field.

•1/25/11 : ORCA Service Categories and Sub-Categories available to status document was e-mails statewide to Branch Managers and Lead Workers by Sandy Dalsing.

•1/24/11: A second e-mail sent to request a meeting to follow up with improvement idea. Washington Co staff has been asked to identify examples of Plan service categories that will not match with AFP service categories.

•1/14/11: E-mail sent to the Lead Worker and Interim Branch Manager of the Washington Co Branch. (no response)

•1/11/11: Lean Leader presented improvement idea at Exec. Team meeting. Lean leader to contact Washington Co. Lead worker to follow up on examples the branch can provide on what exact categories are not matching for Field use.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
6	**11/8/10**	**Work history on Personal Information form does not focus on skills or why the client cannot perform skills because of disability.**	**Ask client in work history section what duties they have difficulty performing because of their disability. Retraining to focus on impediments to specific job rather than function limitations**	**Personal Info. Branch Managers** **ORCA Flow – David Ritacco**	**COMPLETED 12/20/11**	**Patrick Foster** **Clackamas Branch Manager**

STATUS

12/14/11: Decision was made at Manager's meeting that staff will begin using the new form January 1, 2012. The Service Questionnaire is on the DHS Forms site (DHS 1277) and is being added to the VR Staff Tools Page.

11/30/11: Per Joe Miller, the form was sent to the printer and will be passed out at the next branch manager meeting on 12/13/11.

10/5/11: Per Stephaine, The form was reviewed by her with some minor edits. It's at forms and then will be sent for printing.

9/14/11: Branch Managers provided the Exec. Team with the Draft Personal Information Form.
8/9/11: The Branch Managers to add this to their monthly work group time.

4/12/11: Sandy Cooper to send out an e-mail for Branch Manager feedback.

4/5/11: Next scheduled Executive Team meeting with Lean Leader is 4/12/11.

3/8/11: Executive Team meeting with Lean Leader was canceled.

2/4/11 Work history on personal information form: Sandy Cooper has been collecting suggestions from branches. This collection of suggestions will continue during February 2011.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
5	11/8/10	Files can't be closed until all AFPs are paid	Address field with detailed explanation as to why this is. Is this rule a requirement or can it be changed?	Joe Miller and Francine Davis	COMPLETED Dec. 2011	Lorene Arias Clackamas Branch

STATUS

•12/14/11: Exec Team approved change. January 1, 2012 ORCA will allow cases to be closed with open AFP's. AFP's must be extended or canceled at closure.

• Information is being reviewed to determine which process works best for the state.

•Lean Leader and Business Consultant are gathering data to verify if steps in process and staff time have been reduced or increased since change

• 8/14/11: Letter is complete and ready to be added to ORCA. TAG to be written.

• 8/9/11: Letter is in DRAFT Format

• 4/12/11: New ORCA letter to be written by May 24, 2011

• 4/5/11: Next scheduled Executive Team meeting with Lean Leader is 4/12/11

• 3/22/11: VR Executive meeting to set business practice to resolve the AFP issue.

The new practice agreed upon as follows:

Vendor has 30 days after the completion of VR service to submit their invoice and any accompanying documents to be paid.

At the time the VRC wishes to close the client's case, any outstanding AFPs are identified.

Letter (to be created by Exec. Team) is sent priority mail, to vendor advising that OVRS has not yet received their invoice and necessary documentation that services have been provided. Which will include a 45 day deadline.

Field staff may close client file after 45 days even if no invoice or other documentation is supplied by the vendor(s).

• 3/8/11: Executive Team meeting with Lean Leader was cancelled.

• 3/2/11: Joe Miller met with Erik Wood, DHS Accounting Unit, to determine the DHS business practice on the reasonable time frame for vendor invoices.

• 3/2/11: Jim Russell, Chief Financial Officer for DAS, provided the guidance via e-mail that a reasonable business period needs to be given to vendors with proper written notification that the vendor has not billed OVRS with the past 30 days and that the vendor has a specified timeframe to submit their invoice while client funds are still available.

• 3/2/11: Joe Miller phoned Jim Russell, Chief Financial Officer for DAS, to communicate further on this issue.

• 3/1/11: Linda Gilbert, DAS Budget Manager, responded to Joe Miller that Jim Russell, Chief Financial Officer was reviewing DAS regulations.

• 2/22/11: Waiting for a response back from Linda Gilbert. Joe Miller to send All Staff e-mail with detailed explanation of process.

• 2/4/11: Joe Miller has written a letter to DAS to ask for clarification of state policy on OVRS' legal obligations of unpaid AFP's. No response has been received from DAS yet so Joe will trigger a phone call as a reminder during the first week of February.

• In contact with DAS and researching OVRS' legal obligation of unpaid AFPs.

• In the process of gathering data on workload issue for ORCA Staff.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
4	11/8/10	No e-mail signatures from ORCA Help	ORCA Help team sign all emails so Field knows who they are speaking with.	Caroline Tresidder	COMPLETED 11/24/10	Lorene Arias Clackamas Branch

COMPLETED

OVRS Process :

E-mails sent by the ORCA Help Team are to include the name of the person who sends the e-mail.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
3	11/1/10	Using ORCA has become a time consuming and difficult process.	Process mapping to determine waste. Reduce redundant and unnecessary data entry and screen navigation	Stephaine Taylor David Ritacco	COMPLETED 10/2011 ORCA User Group Formed	Bryan Campbell Eugene Branch Manager

STATUS

• Email was sent out statewide advising of user group process and how to submit suggestions to ORCA help using a continuous improvement sheet. David Ritacco confirmed this item is now complete.

•Stakeholder group has been developed. They are currently meeting to develop a ORCA process.

•September, 2011 ORCA process map to All Staff.

•2/22/11 : David Ritacco will send a current ORCA process map to All staff in September. All staff will be able to provide input on processes that can be changed. Staff ideas for change will be sent to Alliance for response.

•David to advocate to Alliance for one release per year instead of every 6 months.

Continue on next page

3	CONTINUED					

STATUS

STATUS CONT…

•2/1/11 : The ORCA 5.8 and 5.9 releases have been delayed as Alliance has indicated 5.9 is not yet stable.
This will delay subsequent releases of 5.10 and what follows.
When 5.10 is in production some time in 2012, we will seek feedback from the field as to what priorities they have for ORCA improvements. These will be forwarded to Alliance for consideration. Early 2012 should be the next time any update will be available.

•11/15/10 : State Data Center server upgrade completed. Result is an increase in the speed to data transmission of ORCA to field offices.

•Alliance to reduce number of steps and clicks in ORCA and provide Stephaine/David with updates.

•First week in November - Stephaine met with the owner of Alliance and requested that Alliance provide a process map and time study on the number of clicks and how long it takes to complete tasks in ORCA

•2009 ORCA changed from an Internet Program to a Web Based Program. With this increased technology Alliance had to reprogram completely and this is a cause for the extra clicks/steps in ORCA.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
2	10/4/10	We would like a committee with staff reps from around the state to review the JD program and decide on ways to improve the contract. Clarify how we work with developers on special situations.	Organize and facilitate the committee's collaborative communications: meetings and group emails. Counselors and support staff, job developers, admin.	Kris Kennedy Cheryl Furrer	On-Going	Roxanne Nakamura Clackamas Branch

COMPLETED

The OVRS Job Placement Advisory Group will meet on a quarterly basis.

- 12/22/10: VR Executive Team is reviewing contract input.
- 12/15/10: The next OVRS Job Placement Advisory Group meeting is scheduled.
- 12/6/10: Joe Miller, Sandy Cooper, Kris Kennedy, Cheryl Furrer, Sandy Dalsing will meet to discuss training efforts which have already been completed and with who. What additional training planned with field staff regarding the job development process
- 11/16/10: Cheryl discussed the 10/27/10 Advisory Group minutes from at the monthly Managers meeting.
- 10/28/10: Cheryl and Crystal McMann, Center for Excellence, met with the county mental health supported employment program directors to exchange information on what's working and what's recommended for contract changes to improve the process.
- 10/27/10: The Job Placement Advisory Group met.
The Job Placement Advisory Group consists of 4 VRCs, 1 Branch Manager, Lean Leader, 6 Job Developers, 1 Support Staff
- October 2010: Job Placement Advisory Group was formed.

#	Date Received	Description	Idea	Person Accountable	Timeframe	Person who submitted CI Sheet
1	3/2/10 And 8/17/10	Some issues, resources, etc are common to more than one VR office, but our I drive for posting such items are specific to one office only.	Create information sharing system modeled on I drive for communication between (as well as within) offices	Sheila Hoover	COMPLETED 2/14/11	Robert Costello East Portland Branch Manager

COMPLETED

- **2/22/11 - Sheila Hoover is responsible for maintaining the OVRS Staff Tools page. Forms Warehouse has been dismantled and replaced by OVRS Staff Tools Page.**

- 2/14/11 – Staff Tools Page is being used. Sheila Hoover is responsible for maintaining the OVRS Staff Tools page.
- 12/21/10 – DHS service desk staff states it'll take several months of work to get all of OVRS "mapped" to have access on the I: drive and that the request causes a workload issue. Sheila Hoover and Sandy Dalsing are exploring the possibility of establishing a "virtual PVD" on DAS'/DHS' GovSpace server (following the example of the CAF Transformation Unit Trainers). That will take some time to determine feasibility; in the interim, a "LEAN Tools and Resources" section has been created on the OVRS Tools for Staff webpage (http://www.dhs.state.or.us/tools/vr/index.html). Sheila Hoover and Joe Miller will continue to work with OIS Service Desk staff on the I: drive access issue as well.
- 11/19/10 -Sheila sent an e-mail to the DHS Service Desk requesting if it is possible to get a shared drive assigned that will allow all OVRS staff and managers to access.