

Onboarding Process Improvement Storyboard

December 2016

Team Members:

Karen Hyers, Health HR Director
Shontae Burgess, Administrative Services Supervisor – Confidential
Diane Hodges, Clerk 3
Sylvia Jarvis-Mack, Administrative Technician
Cambridge Raynor, Clerk 3
Naomi Mirowitz, Director of Accreditation, PM, & QI
Emily Turturici, Performance Management Analyst



Philadelphia Department of Public Health

Philadelphia, Pennsylvania
142.6 Square Miles
1.6 Million Residents

Plan

Identify an opportunity and Plan for Improvement

1. Getting Started

The Philadelphia Department of Public Health's Human Resources Office (PDPH HR) hires an average of 30 new employees per month. Both new hires and interdepartmental transfers are considered new employees and are required to attend appointment processing at the PDPH HR Office, managed by a Clerk 3. It was estimated that a Clerk 3 spends approximately two hours per appointment. With an average of 30 new employees per month, this process could consume up to 60 hours per month of a Clerk 3's time. In addition, each new employee received a significant amount of paper at the appointment including benefits information, executive orders, and HR related policies and procedures.

The Onboarding Process Improvement project was initiated in April 2016 with a strong interest to reduce the amount of time and paper used at appointments. A project team was created and the Plan-Do-Check-Act process was used to guide this project's implementation.

2. Assemble the Team

The Onboarding Process Improvement project team included PDPH HR staff from all levels. The PDPH HR Director worked with the Director of Accreditation, PM, & QI to facilitate meetings with all PDPH HR staff involved in onboarding. Included on the team was the Administrative Services Supervisor – Confidential, the Administrative Technician, and two Clerk 3s. The project team collaborated to create a plan to understand the problem, develop project goals and objectives, and determine measures of success.

3. Examine the Current Approach

Prior to initiating this project and collecting any baseline data, staff anecdotally estimated that appointment processing lasted 2 hours. After gathering one month of quantitative baseline data it was determined that the median appointment processing time was 1.13 hours. Additionally, a Clerk 3 counted that 136 pages were distributed at each appointment.

Based on this baseline data, two project objectives were developed:

- Reduce the time spent processing a new employee by 50%; and
- Reduce the amount of paper used in the process by 25%.

By using a flowchart exercise, the project team identified the amount of documents distributed, reviewed, and completed at the appointment was the root cause of why it took 1.13 hours (median time) to process a new employee.

4. Identify Potential Solutions

To reduce time by 50% and the amount of paper distributed, multiple project team meetings were held to understand the processes of all HR staff involved in onboarding. A plan was developed to provide new employees with required documents prior to their appointment. The team reviewed the large amount of paper that was distributed and determined what could be eliminated, made available electronically, and what needed to remain given in person.

A Google Drive site was deemed as the best available solution to meet the project objectives.

5. Develop an Improvement Theory

The theory was that by supplying new employees with documentation in advance of appointment processing, there would be reduction in the length of time and paper. The team understood that some paper, such as benefit forms, still needed to be provided in person and that there would be paperwork to complete at the appointment. It was also theorized that time would be reduced if the PDPH Confidentiality Training was completed online prior to the appointment, instead of at the appointment.

Do

Test the Theory for Improvement

6. Test the Theory

Prior to testing the theory for improvement, preparation steps were taken including:

- Create three Google Drive folders since each union and non-represented employees had different paperwork requirements;
- Revise and update documents to be placed onto Google Drive; and
- Edit existing welcome letters to include a list of documents and required steps prior to appointment processing.

Feedback on the welcome letter and Google Drive was collected by the project team prior to the pilot launch. Beginning in June 2016, all new employees scheduled for appointment processing received the revised letter and checklist.

Study

Use Data to Study Results of the Test

7. Study the Results

To measure the impact of using Google Drive on appointment times, data was collected from June through September 2016 by the Clerk 3 administering these appointments. HR staff calculated that paper consumption was reduced by 88.2%, far exceeding the initial goal of 25%. After collecting 4 months of test data, the median time per appointment was reduced by 8.8% to 1.03 hours. The table below displays baseline data compared to test data.

	Baseline data	Test data	Reduction
Pages per employee	136	16	88.2%
Median time per employee	1.13 hours	1.03 hours	8.8%

In addition to measuring improvements in paper use and time, the project team wanted to assess customer satisfaction with the new process. 26 out of 33 new employees who had a processing appointment during the test period responded to the anonymous survey. 88.4% of respondents indicated that accessing the policies and procedures online was easy or very easy and 84.6% agreed or strongly agreed that reading materials via Google Drive provided all the necessary information.

Act

Standardize the Improvement and Establish Future Plans

8. Standardize the Improvement or Develop New Theory

A meeting was gathered to discuss the results with relevant HR staff including the project team. Based on the customer satisfaction survey responses and the measured paper reduction, utilizing Google Drive to provide new employees with required paperwork is both effective and efficient and should be fully implemented. However, the utilization of Google Drive did not impact appointment processing time. To reduce time, staff suggested that the current approach be re-examined to identify potential solutions and theories to reduce time.

9. Establish Future Plans

HR will work to develop protocols on how to maintain the Google Drive, after realizing the project's success.

To continue the attempt to reduce appointment processing time, a Plan-Do-Check-Act process will be reinitiated with HR staff.