

# PROCESS IMPROVEMENT EVENT



UNIVERSITY OF  
**SOUTH CAROLINA**

## Benefits Enrollment Process

July 25-29, 2016

# The eTeam



Left-to-right: Nick Elzy, Lesley Nussbaum, Becky Padgett, Ro Kelly (Team Leader), Jennifer McKay, Belinda Ogorek, Kelli Gowder, Felecia Paxton, June Lewis

# GOALS



## Process Improvement Project Charter

Use this fillable/savable charter to plan and communicate all key elements of your process improvement project. Start by entering the information you know right now. Add more info as your planning unfolds.

Date this charter was created  Date of most recent revision   
mm/dd/yyyy mm/dd/yyyy

### 1. BACKGROUND

What process is this project aiming to improve?

Benefits Enrollment for FTE, RGP and TL employees.

Why is this project being undertaken?

Current benefits enrollment process has many delays and impacts customer satisfaction.

What are the top three goals for this project?

1. Streamline processes and reduce the amount of time it takes to enroll a new employee in State insurance and retiree benefits.
2. Create efficiencies and avoid duplication of efforts.
3. Reduce idle periods in the process.

### 2. KEY CONTACTS

| Name | Title and Div-Dept-Office | Email | Phone |
|------|---------------------------|-------|-------|
|------|---------------------------|-------|-------|

**Project Sponsor(s)** – Establishes the need for the project, ensures that it aligns with top priorities, clarifies the scope, communicates with other areas, provides ongoing support and needed resources, and removes barriers

|                 |                                                       |                       |              |
|-----------------|-------------------------------------------------------|-----------------------|--------------|
| Caroline Agardy | Associate Vice President for HR Programs and Services | agardy@mailbox.sc.edu | 803-777-7550 |
|                 |                                                       |                       |              |

**Session Facilitators** – Guide the team during all of its improvement sessions

|           |    |                            |              |
|-----------|----|----------------------------|--------------|
| Tom Terez | -- | tom@NextLevelWorkplace.com | 614-571-9529 |
|           |    |                            |              |
|           |    |                            |              |

**Logistics Contact** – Handles operational details and logistics relating to the project and team sessions

|                     |                          |                         |              |
|---------------------|--------------------------|-------------------------|--------------|
| Christina McCormick | Administrative Assistant | mccormid@mailbox.sc.edu | 803-777-7550 |
|---------------------|--------------------------|-------------------------|--------------|

**Data Lead** – Takes the lead in gathering, analyzing, and compiling data in advance of the project (see page 3)

|                |                  |                       |              |
|----------------|------------------|-----------------------|--------------|
| Jennifer McKay | Benefits Analyst | jmckay@mailbox.sc.edu | 803-777-3526 |
|----------------|------------------|-----------------------|--------------|

**Project Manager** – Immediately following the team's improvement sessions, this person coordinates implementation, ensures that the project stays on track, tracks baseline measures and projections against actual results, and so on

|                |                  |                       |              |
|----------------|------------------|-----------------------|--------------|
| Jennifer McKay | Benefits Analyst | jmckay@mailbox.sc.edu | 803-777-3526 |
|----------------|------------------|-----------------------|--------------|

- Streamline processes and reduce the amount of time it takes to enroll a new employee in State insurance and retiree benefits
- Create efficiencies and avoid duplication of efforts
- Reduce idle periods in the process



# SCOPE

**First step  
in the process:**

Benefits is notified  
of new hire via PBP  
document



**Last step  
in the process:**

PEBA processes  
transaction



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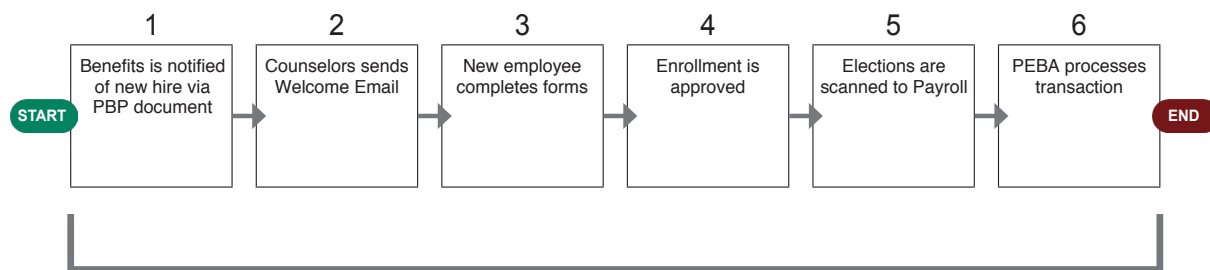
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# SIPOC

## PROCESS OVERVIEW

A **SIPOC diagram** provides a high-level, beginning-to-end view of the process – and it shows the relationships between suppliers and inputs, and outcomes and customers. When developing a SIPOC, start by developing a macro flowchart with a maximum of six steps, with each step phrased as a verb-noun action statement. (Use the template below.) Next, identify the outputs, customers, inputs, and suppliers – in that order. (Again, type directly in the boxes.) This early “define” step will help scope the project while uncovering many of the factors that feed into and flow out of the process. The team will review this SIPOC in detail at the start of its improvement event.



...and the suppliers **fourth**

Identify inputs **third...**

Identify outputs **first...**

...and customers **second**

### SUPPLIERS

Who provides the inputs?

New FTE, RGP and TL Employees  
HR Liaisons  
Salary Administration  
Office of Employment, Recruitment  
Payroll  
SC PEBA

### INPUTS

What materials, resources, services, information, and data feed into the process?

PEBA Transfer Document  
NOE from new employee (Notice of Election)  
Proof of dependent relationships (from new employee), such as marriage license, tax/dependent info, etc.  
Additional forms for specific types of employees

PROCESS

### OUTPUTS

What services or other outputs result from the process?

Employee gets coverage:  
Retirement  
Health  
Long-term care  
Dental  
Vision  
Optional life  
Supplemental products  
Cards  
Vendor mailing  
Deductions begin

### CUSTOMERS

Who are the people, offices, and organizations that receive the services?

Primary customer:  
New employees  
  
Other customers:  
Employees' families  
Departments, Divisions  
Payroll  
PEBA  
HR Liaisons

Suppliers • Inputs • Process • Outputs • Customers



**KEEP  
CALM  
AND  
LEAN  
ON**

# **LEAN**

Customer focus

Process perspective  
(thinking horizontally)

Optimizing the flow

Eliminating inefficiencies

Preventing problems

Standardization



**KEEP  
CALM  
AND  
LEAN  
ON**

改善

**KAIZEN**

change for the better

**KAIZEN BLITZ:**

5 intense days

Action-focused

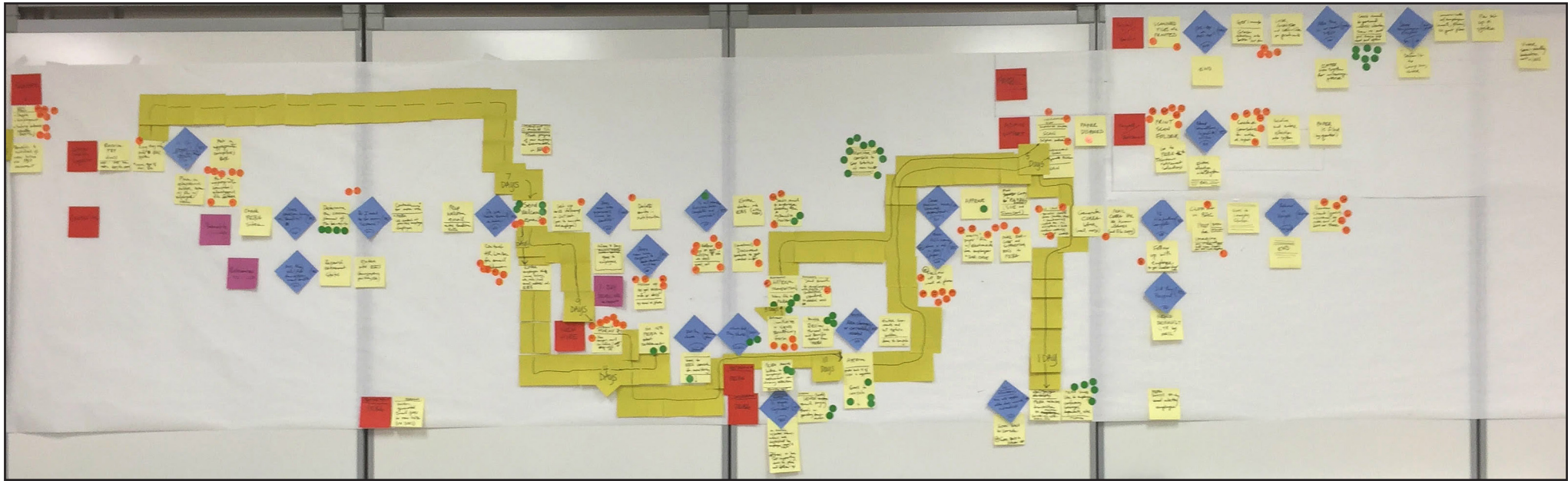
Real improvement

# KAIZEN EVENT OVERVIEW

| DAY 1<br>Discovery                                                                                                                       | DAY 2<br>Possibility                                                                                                                                                                                    | DAY 3<br>Building                                                                                                                                   | DAY 4<br>Planning                                                                                                                                                                       | DAY 5<br>Planning and Presentation                                                                                                     |
|------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
|                                                         |                                                                                                                                                                                                         |                                                                                                                                                     |                                                                                                                                                                                         |                                                                                                                                        |
| <ul style="list-style-type: none"> <li>• Goals</li> <li>• Customers</li> <li>• Suppliers</li> <li>• Current-state process map</li> </ul> | <ul style="list-style-type: none"> <li>• Current-state process map (continued)</li> <li>• Waste, value-added</li> <li>• Standardization and other Lean concepts</li> <li>• Improvement ideas</li> </ul> | <ul style="list-style-type: none"> <li>• Improvement ideas (continued)</li> <li>• Prioritizing</li> <li>• Draft future-state process map</li> </ul> | <ul style="list-style-type: none"> <li>• Draft future-state process map (continued)</li> <li>• Discovery + consensus</li> <li>• Future-state process map</li> <li>• Planning</li> </ul> | <ul style="list-style-type: none"> <li>• Planning</li> <li>• Measures</li> <li>• <b>Presentation</b></li> <li>• Celebration</li> </ul> |



# Mapping the current-state process



|                        |     |
|------------------------|-----|
| <b>Steps</b>           | 100 |
| <b>Handoffs</b>        | 28  |
| <b>Loopbacks</b>       | 12  |
| <b>Decision Points</b> | 22  |
| <b>Delays</b>          | 15  |

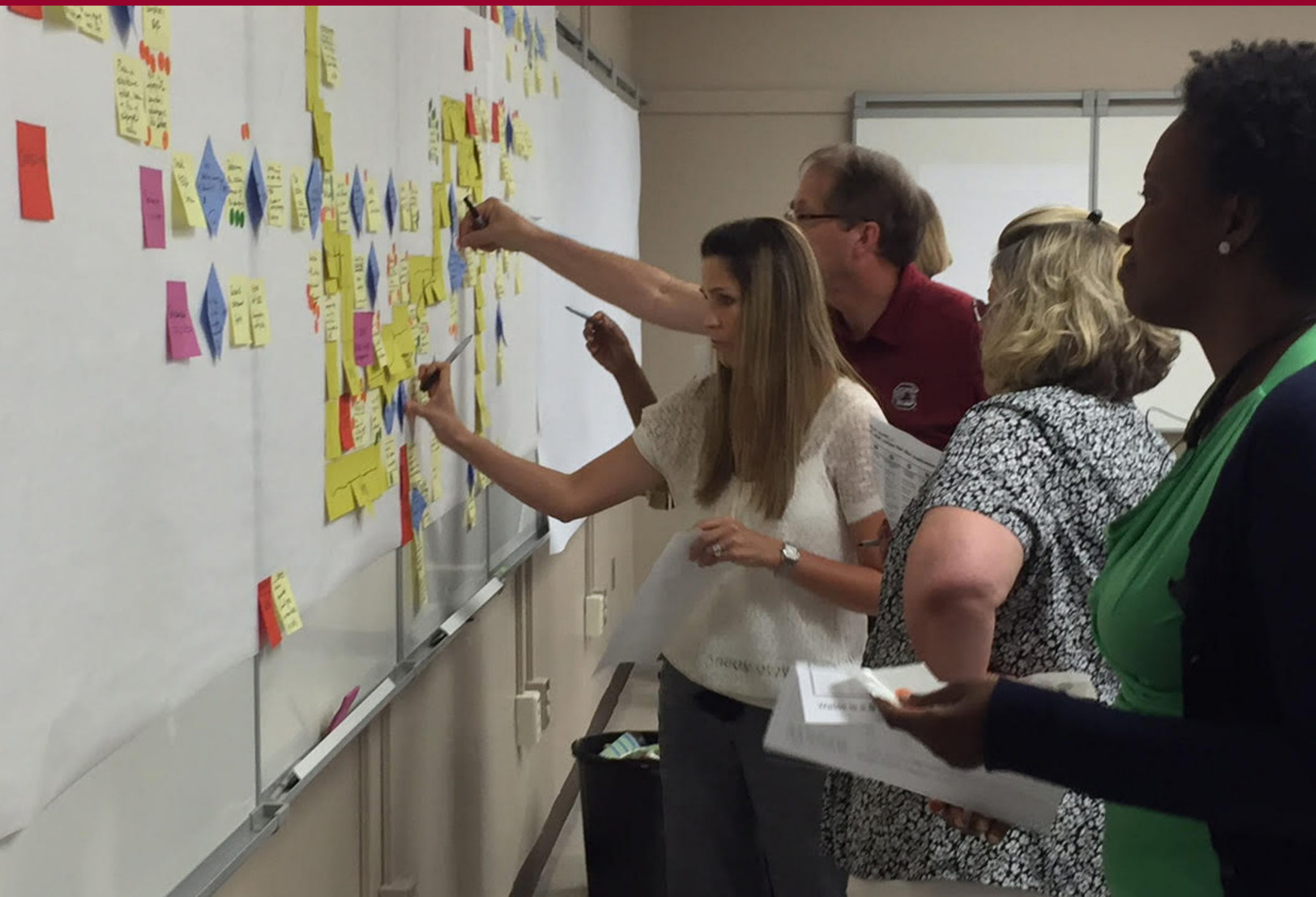
|                                                |                |
|------------------------------------------------|----------------|
| <b>Time</b><br>Start-to-finish<br>process time | <b>32 Days</b> |
|------------------------------------------------|----------------|

# Identifying occurrences of waste

| <b>T</b>                                                                                                                                                                                                               | <b>I</b>                                                                                                                                                                                                | <b>M</b>                                                                                                                                                                                                                                                                   | <b>U</b>                                                                                                                                           | <b>W</b>                                                                                                                                                                                                                                           | <b>O</b>                                                                                                                                                                                                                                                   | <b>O</b>                                                                                                                                                                                                                                                             | <b>D</b>                                                                                                                                                                                                                                |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| TRANSPORTATION                                                                                                                                                                                                         | INFORMATION, INVENTORY                                                                                                                                                                                  | MOTION                                                                                                                                                                                                                                                                     | UNDERUTILIZATION                                                                                                                                   | WAITING                                                                                                                                                                                                                                            | OVERPRODUCTION                                                                                                                                                                                                                                             | OVERPROCESSING                                                                                                                                                                                                                                                       | DEFECTS                                                                                                                                                                                                                                 |
| <ul style="list-style-type: none"> <li>• Transport from office to office</li> <li>• Transport from floor to floor</li> <li>• Transport from building to building</li> <li>• Other transportation and travel</li> </ul> | <ul style="list-style-type: none"> <li>• Storage</li> <li>• Printed in advance</li> <li>• Work in process</li> <li>• In the warehouse</li> <li>• Requiring unnecessary information on a form</li> </ul> | <ul style="list-style-type: none"> <li>• Inter-office movement</li> <li>• Office to office</li> <li>• Cubicle to cubicle</li> <li>• Going to the copier or scanner</li> <li>• Going to the fax</li> <li>• Going for files or to a storeroom</li> <li>• Reaching</li> </ul> | <ul style="list-style-type: none"> <li>• Employees</li> <li>• Talent</li> <li>• Office space</li> <li>• Technology</li> <li>• Equipment</li> </ul> | <ul style="list-style-type: none"> <li>• Nonproductive time</li> <li>• Waiting for:</li> <li>• Copier</li> <li>• Scanner</li> <li>• Delivery</li> <li>• Catchup</li> <li>• Person up-stream</li> <li>• Mail/shipper</li> <li>• Computer</li> </ul> | <ul style="list-style-type: none"> <li>• Making too many</li> <li>• Making in advance of requests</li> <li>• Throwing away the excess</li> <li>• Things getting outdated</li> <li>• “We have to be ready”</li> <li>• Not cautious, but wasteful</li> </ul> | <ul style="list-style-type: none"> <li>• Adding things nobody wants</li> <li>• Bells and whistles</li> <li>• Reports that nobody reads</li> <li>• Trying to achieve “the best”</li> <li>• Better than good enough</li> <li>• Beyond customer expectations</li> </ul> | <ul style="list-style-type: none"> <li>• Mistakes</li> <li>• Broken</li> <li>• Inaccurate</li> <li>• Difficult to read</li> <li>• Forms, instructions difficult to understand</li> <li>• Wasted materials</li> <li>• Returns</li> </ul> |

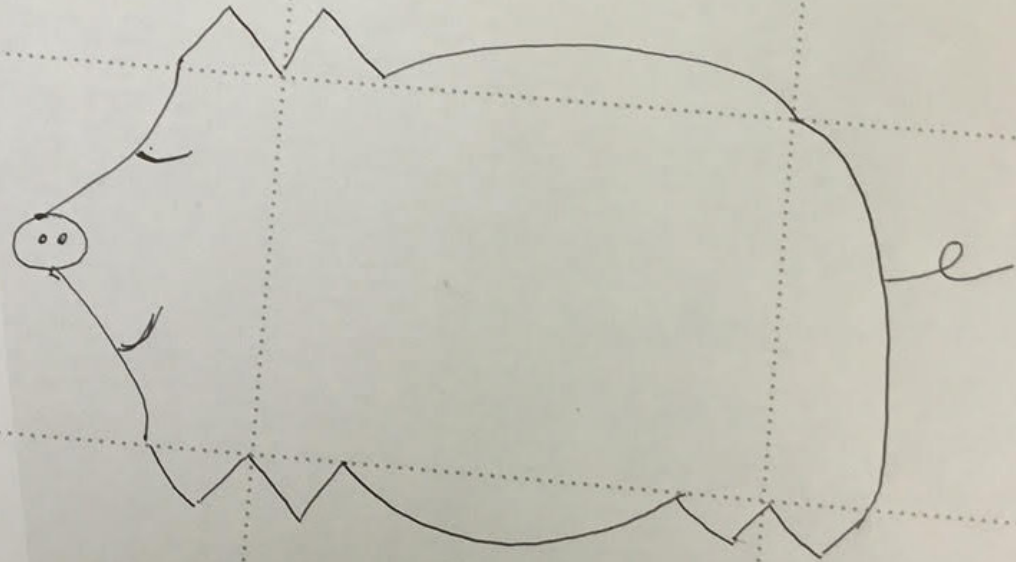
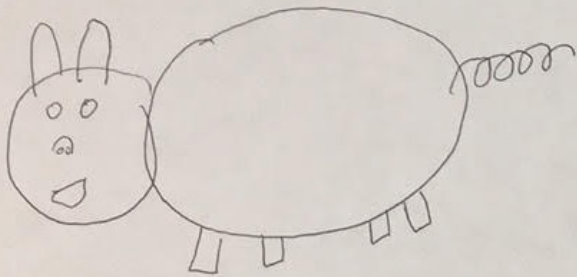
Waste is a **SYMPTOM** of a problem (rather than a root cause)

# Identifying occurrences of waste





# Learning Lean concepts



# Generating and prioritizing improvements





# Generating and prioritizing improvements

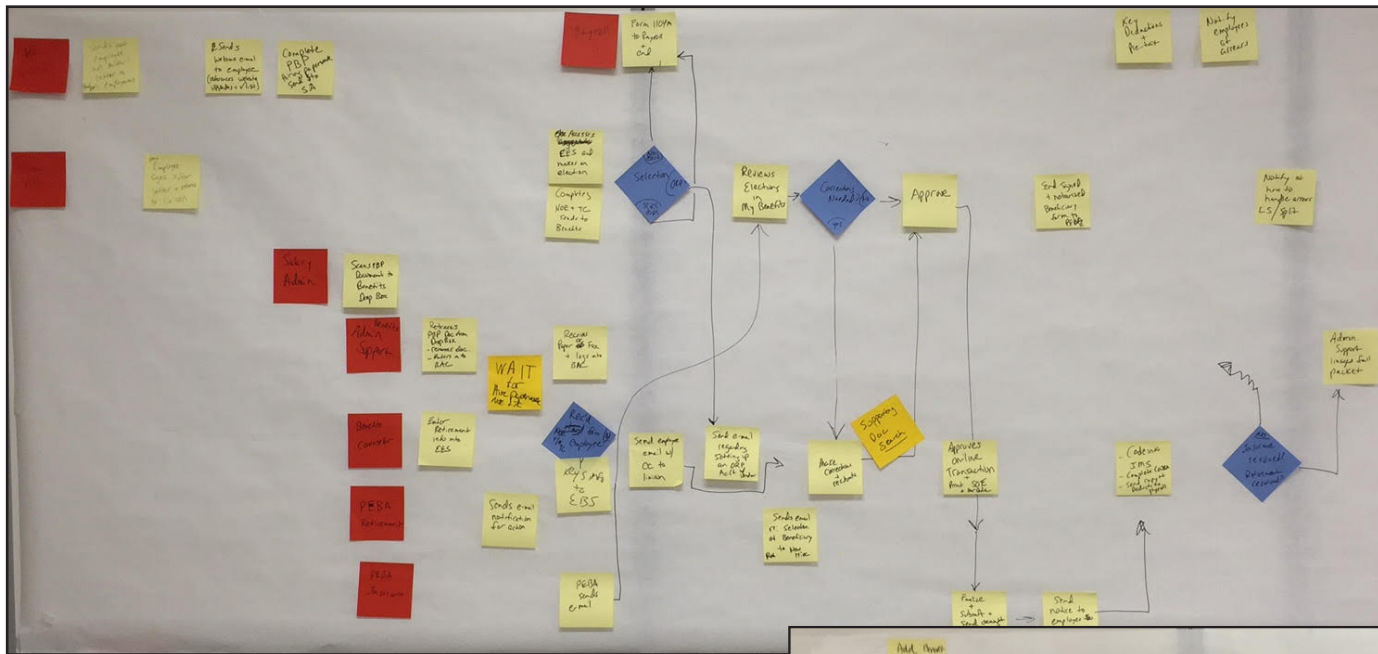


# Drafting clean-sheet redesigns

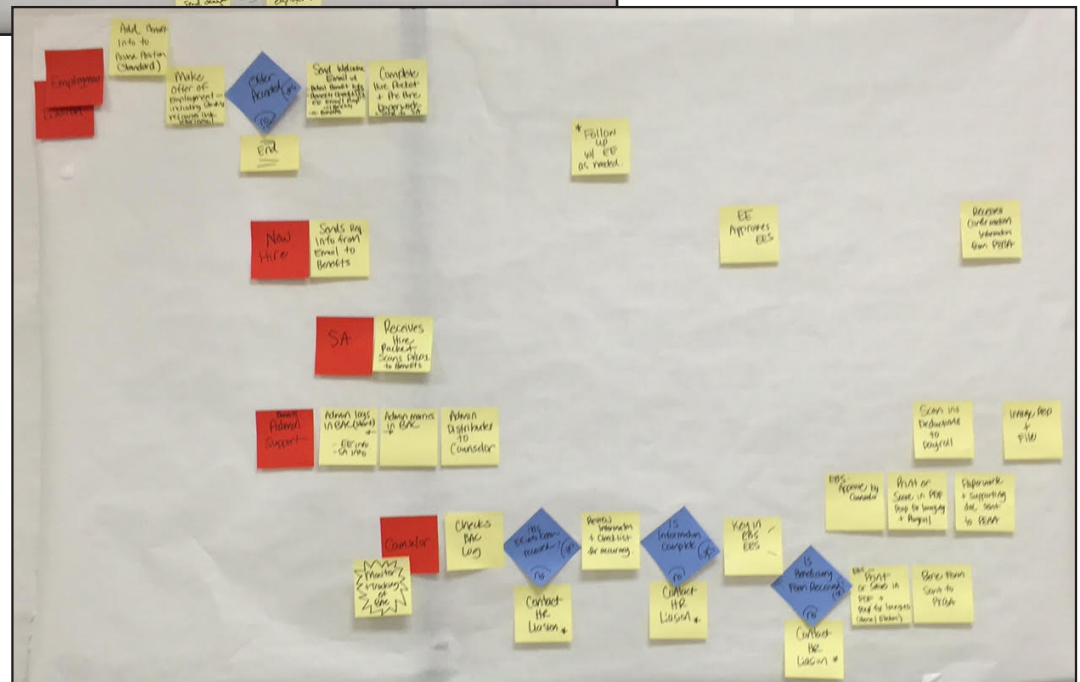




# Drafting clean-sheet redesigns



Developed  
in two  
subgroups

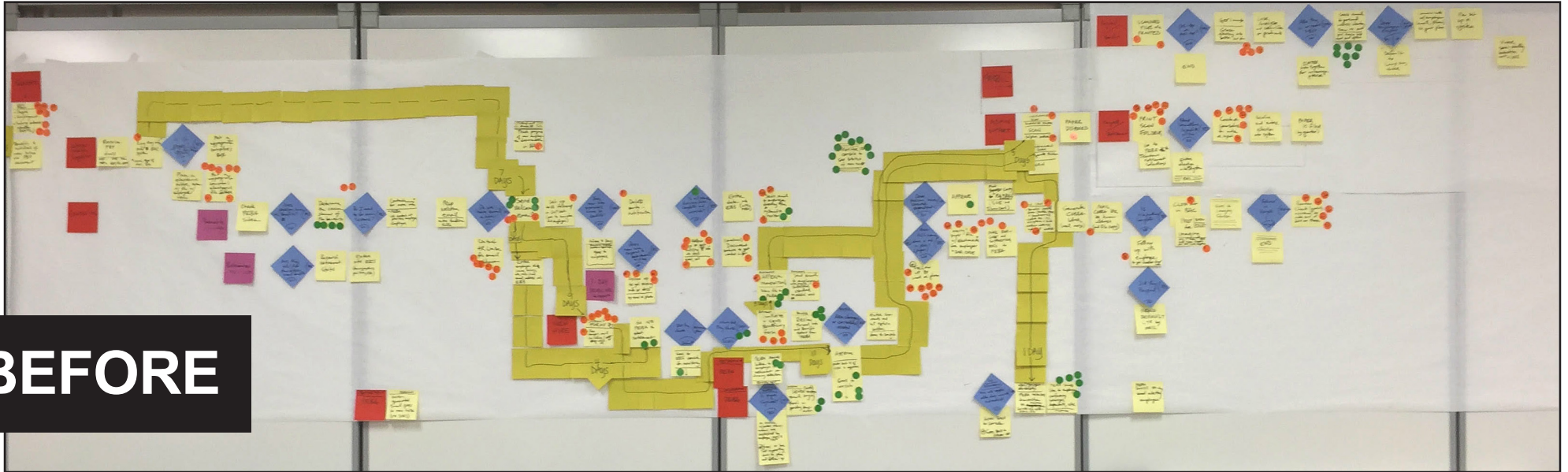


# Discussing clean-sheet redesigns



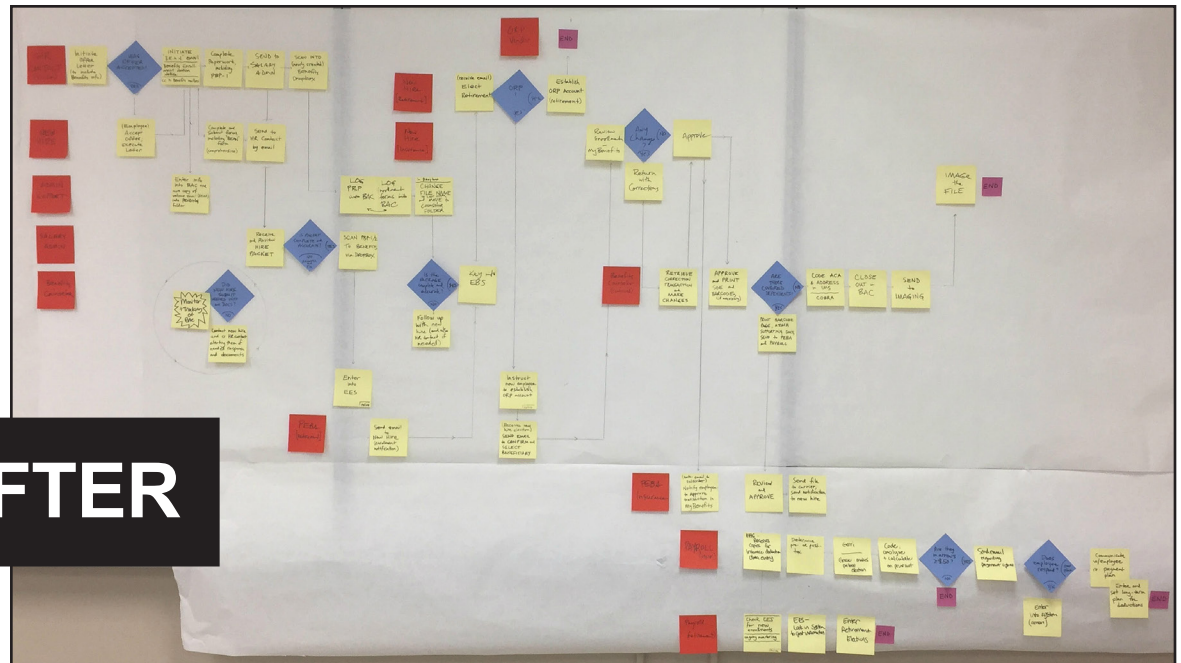


# Current-state process



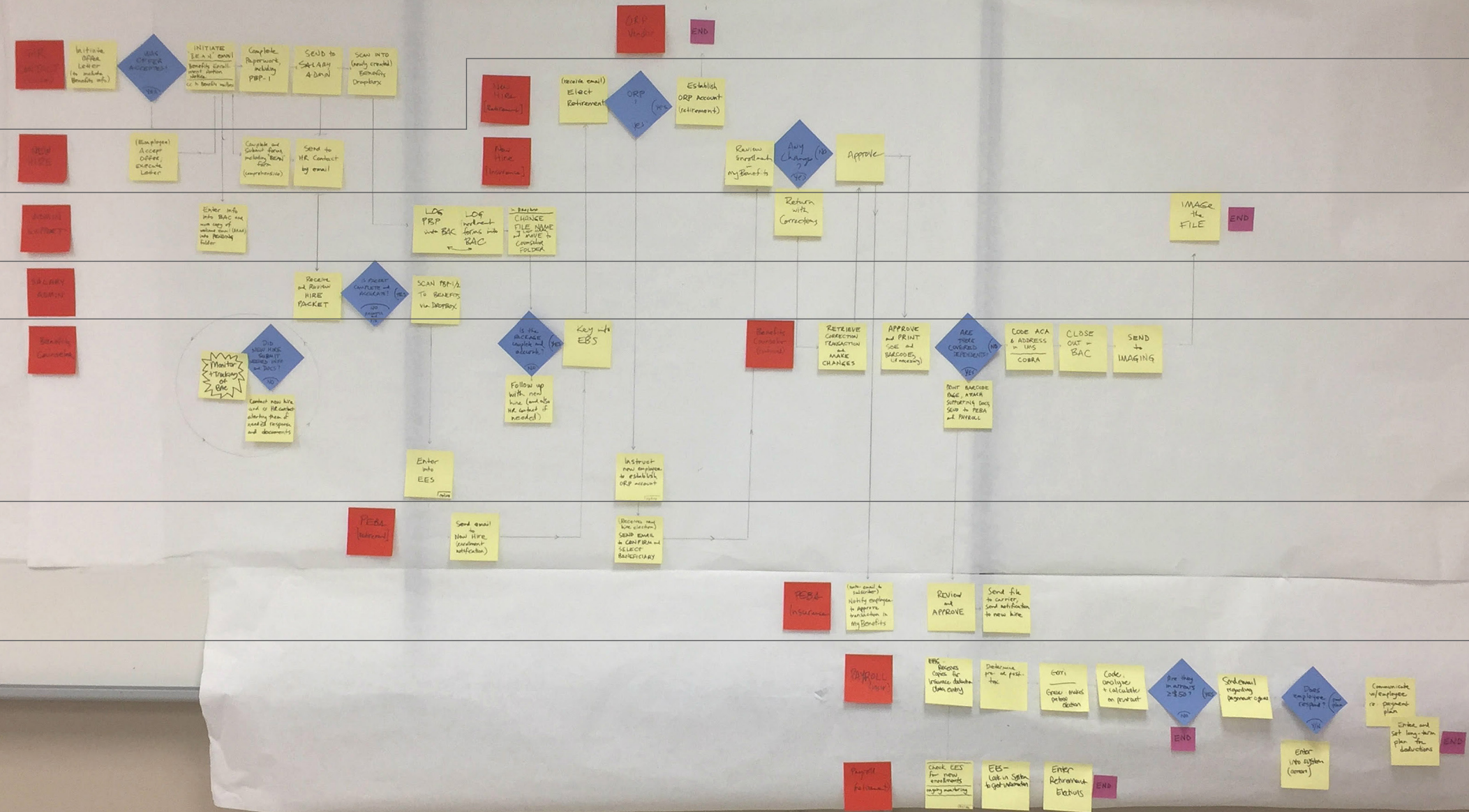
## Future-state process ≈ 90-day

**AFTER**





# Developing the future-state process



# Key Improvements

## Communication improvements

- Build out web pages/resources for new hires, to include clear guidance and additional information, documents, links all about benefits and enrollment
- Develop benefits verbiage to include in job postings
- Update standardized offer-letter templates to include benefits information



# Example of Benefits Fingertip Guide

## University of South Carolina Benefits Fingertip Guide

### Health Insurance:

| Plan                           | SHP Savings Plan                                                                                                                                                                      |                                                                                                                                                                                       | SHP Standard Plan                                                                                                                                                                           |                                                                                                                                                                                             |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                | In-Network                                                                                                                                                                            | Out-Of-Network                                                                                                                                                                        | In-Network                                                                                                                                                                                  | Out-Of-Network                                                                                                                                                                              |
| Availability                   | Coverage worldwide                                                                                                                                                                    |                                                                                                                                                                                       | Coverage worldwide                                                                                                                                                                          |                                                                                                                                                                                             |
| Annual Deductible              | <ul style="list-style-type: none"> <li>• Single - \$3,600</li> <li>• Family - \$7,200</li> </ul>                                                                                      |                                                                                                                                                                                       | <ul style="list-style-type: none"> <li>• Single - \$445</li> <li>• Family - \$890</li> </ul>                                                                                                |                                                                                                                                                                                             |
| Coinsurance                    | <ul style="list-style-type: none"> <li>• Plan pays 80%</li> <li>• You pay 20%</li> </ul>                                                                                              | <ul style="list-style-type: none"> <li>• Plan pays 60%</li> <li>• You pay 40%</li> </ul>                                                                                              | <ul style="list-style-type: none"> <li>• Plan pays 80%</li> <li>• You pay 20%</li> </ul>                                                                                                    | <ul style="list-style-type: none"> <li>• Plan pays 60%</li> <li>• You pay 40%</li> </ul>                                                                                                    |
| Coinsurance maximum            | <ul style="list-style-type: none"> <li>• Single \$2,400</li> <li>• Family \$4,800</li> <li>• Excludes deductible</li> </ul>                                                           | <ul style="list-style-type: none"> <li>• Single \$4,800</li> <li>• Family \$9,600</li> <li>• Excludes deductible</li> </ul>                                                           | <ul style="list-style-type: none"> <li>• Single \$2,540</li> <li>• Family \$5,080</li> <li>• Excludes deductible</li> </ul>                                                                 | <ul style="list-style-type: none"> <li>• Single \$5,080</li> <li>• Family \$10,160</li> <li>• Excludes deductible</li> </ul>                                                                |
| Physician's office visits      | <ul style="list-style-type: none"> <li>• No copayment</li> <li>• Plan pays 80%</li> <li>• You pay 20%</li> <li>• Chiropractic payments limited to \$500 a year, per person</li> </ul> | <ul style="list-style-type: none"> <li>• No copayment</li> <li>• Plan pays 60%</li> <li>• You pay 40%</li> <li>• Chiropractic payments limited to \$500 a year, per person</li> </ul> | <ul style="list-style-type: none"> <li>• \$12 copayment</li> <li>• Plan pays 80%</li> <li>• You pay 20%</li> <li>• Chiropractic payments limited to \$2,000 a year, per person</li> </ul>   | <ul style="list-style-type: none"> <li>• \$12 copayment</li> <li>• Plan pays 60%</li> <li>• You pay 40%</li> <li>• Chiropractic payments limited to \$2,000 a year, per person</li> </ul>   |
| Hospitalization/emergency care | No copayments for outpatient facility services or emergency care                                                                                                                      |                                                                                                                                                                                       | <ul style="list-style-type: none"> <li>• Outpatient facility services: \$95 copayment</li> <li>• Emergency care: \$159 copayment</li> <li>• Plan pays 80%</li> <li>• You pay 20%</li> </ul> | <ul style="list-style-type: none"> <li>• Outpatient facility services: \$95 copayment</li> <li>• Emergency care: \$159 copayment</li> <li>• Plan pays 60%</li> <li>• You pay 40%</li> </ul> |
| Prescription Drugs             | Participating pharmacies and mail order: You pay the State Health Plan's allowed amount until your annual deductible is met for out-of-network                                        |                                                                                                                                                                                       | Participating pharmacies only (up to 31-day supply) <ul style="list-style-type: none"> <li>• Tier 1 (generic-lowest cost)</li> </ul>                                                        |                                                                                                                                                                                             |

# Example of **Benefits information**

## **Benefits for State Employees**

State Employees may be eligible for a variety of benefits associated with their employment. From a comprehensive health and dental insurance program, to generous annual and sick leave policies, to a solid and secure retirement system, the State of South Carolina offers a competitive benefits program for state employees. To learn more about the benefits of state employment, please explore the links below:

### **Healthcare Benefits**

The State offers its employees a comprehensive health and dental program, along with a wide array of supplemental insurance programs. South Carolina has long been committed to providing its employees the best possible insurance benefits at the greatest possible value. We've maintained that commitment, too, even in the face of healthcare costs that continue to soar.

### **Retirement Benefits**

In addition to our health and dental insurance programs, state employees are offered a generous pension program with options that can be tailored to meet employees' needs. South Carolina offers a traditional pension program, as well as the Optional Retirement Program in which employees have more control over their retirement investments. These

## Web pages and other informational resources

### Pre - Entry

- Link under HR home page
  - Why be a Gamecock?

New employee Guide - revamp "Explore Your Benefits" - Separate page from Benefits - Current employee page - Short & to the point.

- Hyperlink to other benefits broken down <sup>→ w/short explanations</sup>
- Hyperlink to B.E.A.N.
- Total comp calculator "Big Picture"
- Explanation of deadline - 7 days/31 days
- Additional
  - Benefits ¶ on Job Postings
  - 2 ¶'s added on offer letters
  - Expand Interviewing Selection training to include Benefits overview
  - Include quick overview in BUSC Orientation



# Key Improvements continued

## Benefits Enrollment Roadmap

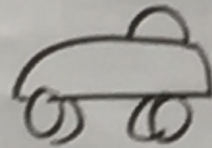
- Engages HR Contact and informs new hire at the very start of the process
- Information and checklist – Identifies key players in the various steps of the process
- It sets expectations and prompts action
- Action-oriented and interactive
- All-in-one collection tool – makes clear what info and docs new hire needs to provide, and by when

# Benefits Enrollment Roadmap

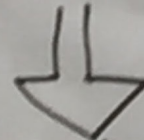
Subject line: New Hire Name - ~~Action Required~~ -  
~~Benefit Enrollments~~ Connect to Carolina benefits  
Cc: Benefits@mailbox.sc.edu

Body:

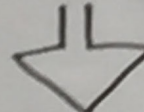
Roadmap to Enrolling in <sup>Insurance</sup>~~Health~~ Benefits



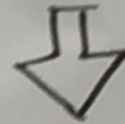
Connect to the New Hire...



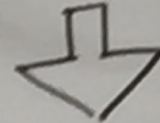
Make a decision



Complete <sup>Insurance</sup>~~Benefit~~ Enrollment Form



Deliver <sup>supp't docs</sup>~~documents~~ to Dept. HR Contact



Approve enrollment in  
MyBenefits



## *Future-state process walk-through...*





# Key Improvements continued

## “High-touch” enrollment track

- A **consultative** approach with a “high-touch” process for new hires who will likely require additional guidance (e.g., international new hires, US citizens working in other countries, other special situations)
- Ensures additional guidance and support through closer **interaction**
- **Collaborative** approach:
  - Interpreters might be needed
  - Working with divisions that might have the needed expertise
  - Collaborating with the International office to initiate actions where this consultative new-hire approach will be needed
- **Outreach** to divisions via site visits

# Key Improvements continued

## Guidance for HR Contacts

- Develop a clear standard operating procedure (SOP) for HR Contacts showing the step-by-step process
- Develop training for HR Contacts

## Technical improvements

- Modify BAC to support new process flow
- Create an enrollment dropbox for docs/forms from new hires
- Get access for Benefits to payroll deductions

# **Key Improvements** continued

## **PEBA Communications**

- Communicate with PEBA on enhancing email correspondence regarding insurance to eliminate duplication
- Communicate with PEBA regarding consolidating retirement communications from 4 emails to 1

## **Additional Communication Improvements**

- Develop verbiage for VIP site to communicate that insurance info is no longer at VIP – is now at MyBenefits
- Eliminate IMS screen (dependents)



# Communication Plan

|                                                                                                                                                          |                                                                                                                                          |                                                          |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| <p>Benefits Standardized Training Process for HR Contacts</p> <ul style="list-style-type: none"> <li>- Live &amp; Webinar</li> <li>- Recorded</li> </ul> | <p>LEAD <u>Jennifer McKay</u></p> <p>INVOLVED <u>Bo Kelly</u> <u>Nick Elzy</u><br/><u>June Lewis</u> <u>Nathan Strong</u></p>            | <p>START <u>ASAP</u></p> <p>COMPLETE <u>Sept. 15</u></p> |
| <p>Benefits Memo</p> <ul style="list-style-type: none"> <li>• HR Contacts</li> <li>• Senior Readership</li> </ul>                                        | <p>LEAD <u>Bo Kelly</u></p> <p>INVOLVED</p>                                                                                              | <p>START <u>9/1/16</u></p> <p>COMPLETE</p>               |
| <p>Develop Sharepoint for Process Improvement Team</p>                                                                                                   | <p>LEAD <u>Jennifer McKay</u></p> <p>INVOLVED <u>John Waters</u> <u>June Lewis</u><br/><u>Jennifer McKay</u> <u>Felicia Parkour</u></p>  | <p>START <u>8/1/16</u></p> <p>COMPLETE</p>               |
| <p>Internal Meetings w/ Benefits &amp; Payroll w/ project plan and deadlines</p>                                                                         | <p>LEAD <u>Bo Kelly</u></p> <p>INVOLVED <u>Benefits Staff</u> <u>Payroll Staff</u>   <u>Initial meeting</u> <u>Senior Readership</u></p> | <p>START <u>8/1/16</u></p> <p>COMPLETE</p>               |
| <p>Communication w/ PEBA about requested changes</p>                                                                                                     | <p>LEAD <u>Bo Kelly / Caroline Agardy</u></p> <p>INVOLVED <u>PEBA</u></p>                                                                | <p>START <u>8/1/16</u></p> <p>COMPLETE</p>               |

# Benefits

## **SIMPLER and FASTER**

- Fewer steps
- Fewer points of entry
- Elimination of multiple approvals
- Less follow-up, less circling back

## **BETTER**

- Benefits information and guidance moved to the front
- Greater up-front accountability among HR contacts and new hires
- Fewer employees being paid late

## **LESS COSTLY**

- Eliminates nearly all paper

# Scorecard

| MEASURE                         | CURRENT | FUTURE  | % REDUCTION |
|---------------------------------|---------|---------|-------------|
| Steps                           | 100     | 56      | 44%         |
| Handoffs                        | 28      | 14      | 50%         |
| Loopbacks                       | 12      | 5       | 58%         |
| Decision Points                 | 22      | 9       | 59%         |
| Delays                          | 15      | 6       | 60%         |
| Start-to-Finish<br>Process Time | 32 days | 20 days | 38%         |



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## Protected: Resources for the University of South Carolina

***Process improvement in action:***  
**Streamlined process for granting access to student information systems will strengthen service, guidance, and controls**

- The new process will have just 14 steps, compared to the current average of 43 steps. (67% reduction)
- Time-consuming loopbacks in the process will go from an average of 7 to a maximum of 2. (71% reduction)
- The new approach eliminates 11 downstream decision points, because needed request info will be received early in the process. (85% reduction)
- The leaner process will free up an estimated 525 staff hours per year for other work.

[Download a one-page fact sheet](#) • [Download the team's presentation visuals](#)



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**Development Timetable** • 1 page • Project Plan, May 2016 through January 2017 (revised version posted July 5, 2016)

**Improvement Project Roadmap** • 1 page • Prep, Project, Implementation

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**Process Improvement Project Charter** • 6 pages • Fillable/Savable PDF

**Process Improvement Project Event Overview** • 1 page

**Process Improvement Project Daily Agendas** • 5 pages

**Recommended Room Layout for Process Improvement Events** • 1 page

**NEW High-Potential Improvements** • 1 page

# THANK YOU

## USC Division of Law Enforcement & Safety

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Jennifer McKay – Project Data

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Pam Young – Darla Moore School of Business