



# **Improve Productivity of Appeals Claim Process**

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Six Sigma Service Process Project Example

# Background Information for Six Sigma Problem

- Company A provides Medicare Advantage plans. Medicare requires Company A to have a process where appeals to denied claims are examined for to ensure that Company A's response to the claim was based on Medicare guidelines for acceptance and denial of services. The expectation of Medicare is that certain claims which are processed by Company A will be closed within 72 hours of receipt. These claims are called "expedited appeals" and processed by the Expedited Claims Department. Medicare monitors Company A's compliance to the 72 hour closure metric on a monthly basis. If Company A does not close a minimum of 95% of the appeals claims within 72 hours each month, then Medicare will perform an audit of Company A. The results of the audit can negatively affect Company A's STAR rating, a measure of performance that is used in consideration of future contract awards. Medicare can also potentially levy penalties and fines against Company A for lack of compliance.
- Production metrics are not being met on the Expedited Claims Department team based on a normal 8 hour shift. Using Industrial Engineering studies of the process made in the first quarter of 2021, the number of cases that should be processed per coordinator (known as "touch cases") in an 8 hour shift should be 14-24 (based on 420 available minutes and 17-29 minutes takt time. The current number of appeals being processed per day range between 6-8 cases per 8 hour shift, per coordinator. The department has compensated for the lower production numbers by offering overtime to employees. Leadership asking the Expedited Claims Department to achieve 10-12 touch cases in an 8 hour shift.
- Company A management expects that the Expedited Department will meet the production goals without use of overtime.

# Facts about the Appeals Claim Process

- The appeals claim department consists of several different groups
  - Leadership
  - Appeal coordinator
  - Clinical personnel
- The appeals claim department processes only one type of Medicare appeal – Expedited appeals
  - Other groups process other types of Medicare appeals
- Appeal coordinators work 8 hours, including one 30 minute lunch period and two fifteen minute breaks
  - Each appeal coordinator has 420 available work minutes per 8 hour shift
- Previous time studies for appeals claim processing indicate the the work performed by the claims coordinator should be completed within 17 to 29 minutes.
- Portions of the process that are not under the control of the appeals coordinator are not counted against the appeals coordinator
- Given the available minutes and the minimum and maximum takt time, an appeal coordinator should be able to process between 14 and 24 expedited claims per shift

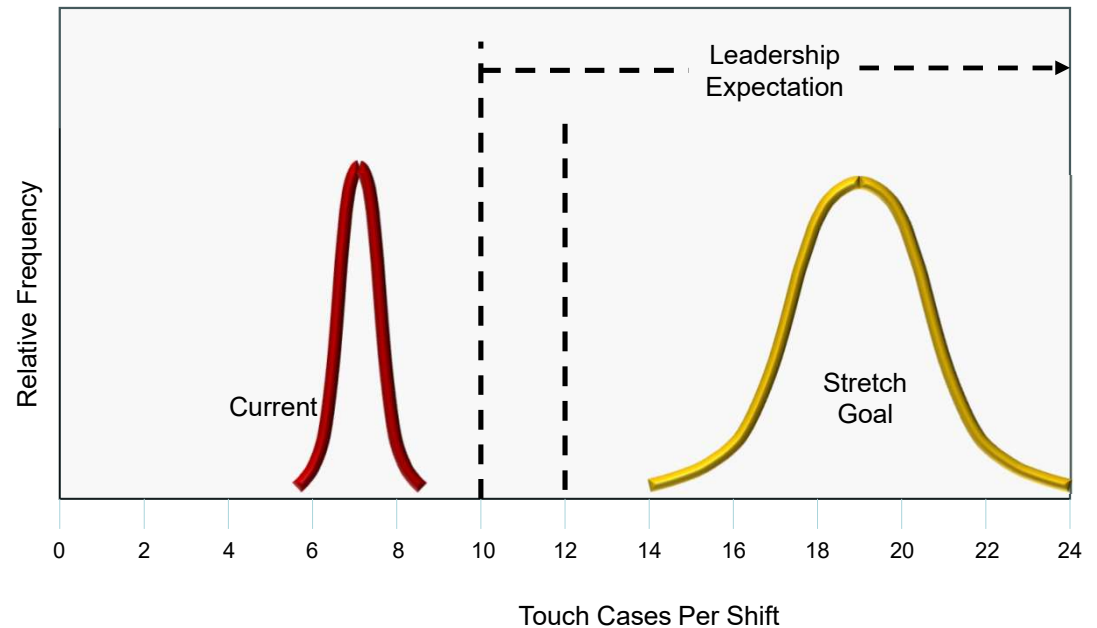
# Problem Statement and Project Goal

## Problem Statement:

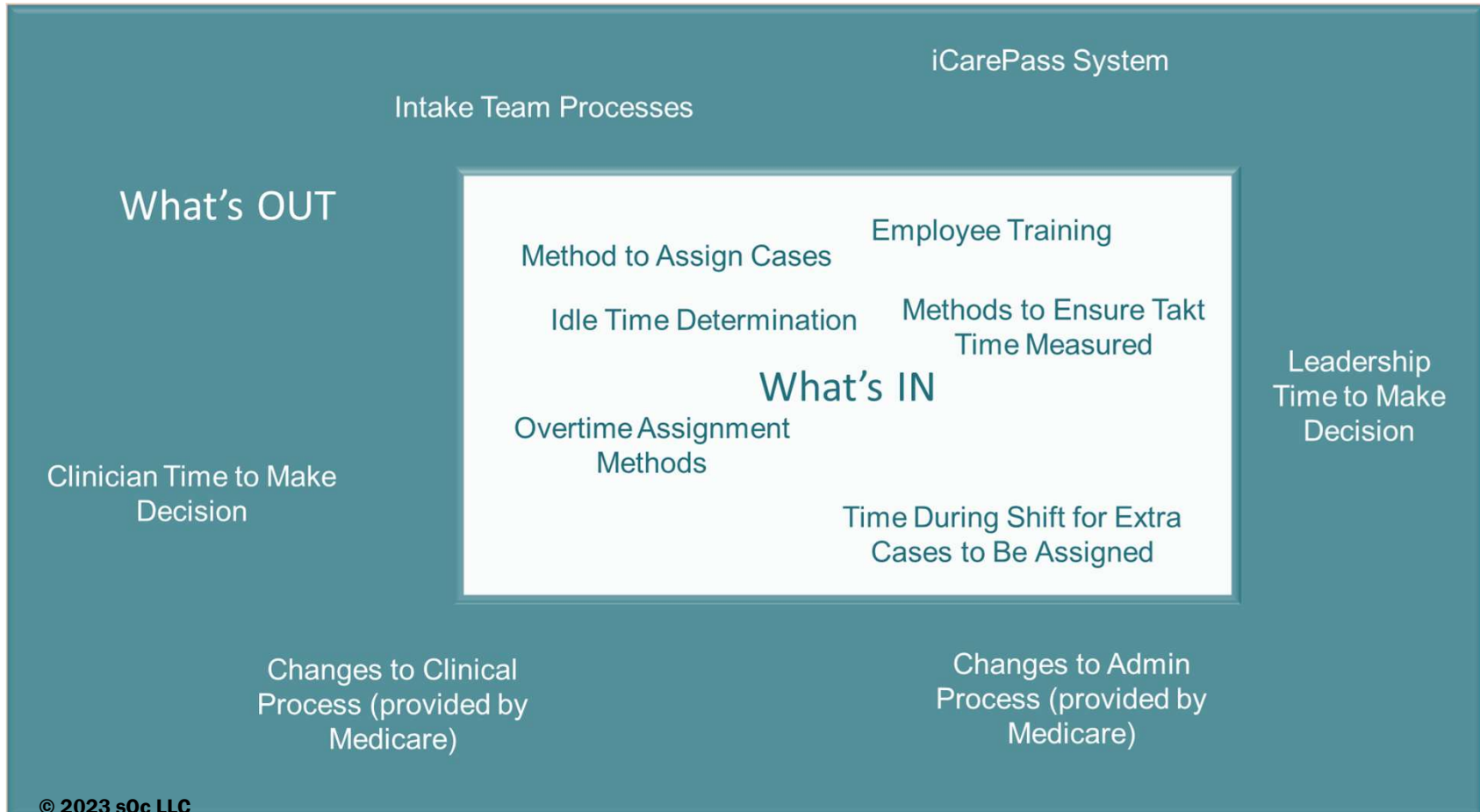
Current average production is 6-8 touch cases per shift per coordinator

Production expectation by Company A Leadership is 10-12 touch cases per shift per coordinator

The Team Stretch Goal is to meet Takt Time from 1<sup>st</sup> Quarter 2021 time study = 14-24 touch cases per shift



# What's In? What's Out?



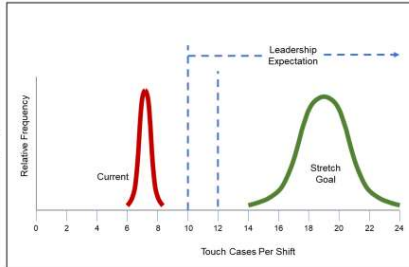
## Problem Roadmap for Expedite Team

Initial Problem Statement: Metrics of 10-12 touches per day are not being met

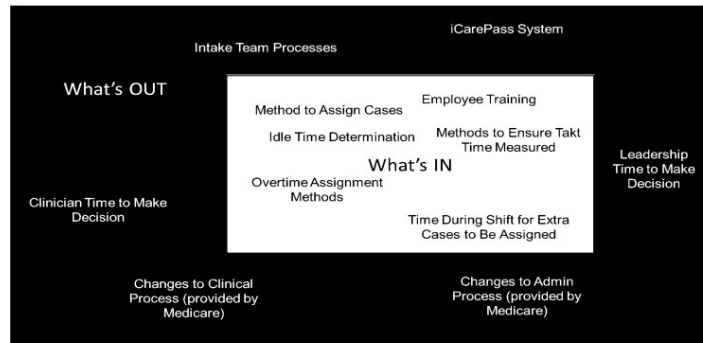
Team Members: John Doe, Mary Smith, Tom Jones

Measurement System:  
Number of cases "touched"  
per day as recorded in log  
system

Project Goal:  
Increase "touched" cases to  
10-12 per day



Containment: No discrepancies. Containment not needed.



Final Problem Statement: The number of cases processed per coordinator per 8 hour shift is currently 6-8, and should be 14-24, based on takt time. Project goal is to improve to 10-12 cases "touched" per day

Project Champion Agreement: Electronically signed by  
I. M. Theboss

# Project Roadmap

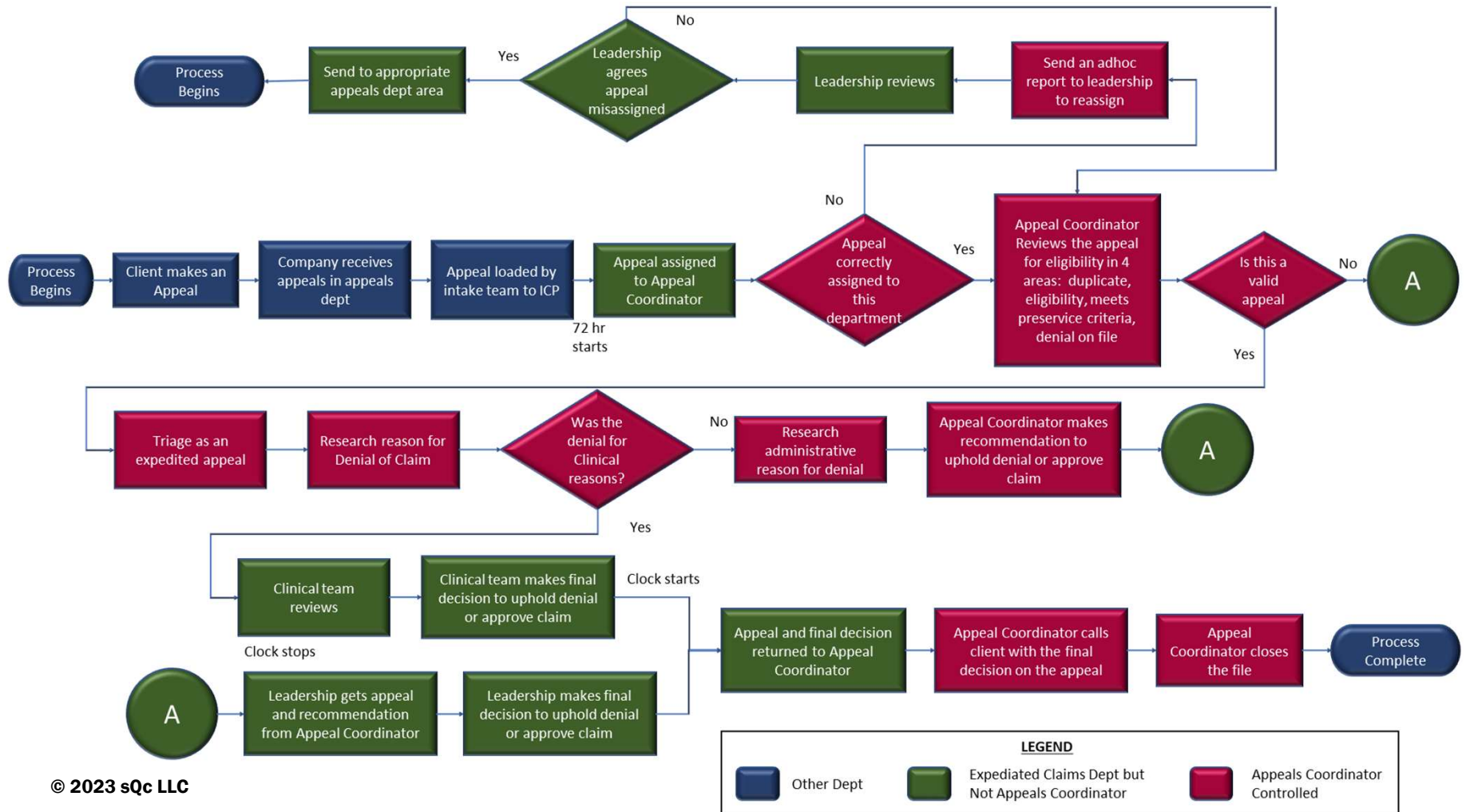
- Acts as Project Charter
- Documents problem and team goal
- Explains what the team is working on and what the team is not working on
- Used by Project Team as a working document
- Sent to others for updates
- Filed for future reference

# Stakeholder Analysis

## Stakeholder Analysis (Advanced)

Stakeholder	Impact Level	Level of Support	Reason for Resistance or Support	Proposed Actions to Address (as Needed)	Contact
<b>Manager - Jennifer</b>	Decision Authority	Supporter	Implemented the current production expectation of 10-12 touched appeal cases per day.	Meet and maintain the 10-12 appeal cases per day using overtime to reach production goal	Jennifer
<b>Appeals Supervisor - Kassy</b>	Will Be Affected	Supporter	Enforces and monitors the production expectation of 10-12 appeals per day	Provider of daily appeals inventory to ensure cases are issued to make daily goals of 10-12 appeal cases touched	Kassy
<b>Appeals Lead</b>	Will Be Affected	Supporter	Responsible for meeting daily production with her team	Support needed process changes to incent increased production	Lynn
<b>Appeals Staff</b>	Will Be Affected	Resister	Currently not meeting the production of 10-12 cases per day	Monitor the daily production assigned to identify why the expected 10-12 cases per day are not being met	Person A Person B Person C Person D

# Expedited Appeals Claims Process Flow Diagram





# Data Collection Plan

Data Collection				
Measurement	Data Description	How Collected	Collection Period	Responsible
Daily production log of touched appeals	Number of cases that an appeals coordinator "touches" during a normal work day. Touch cases are a combination of closed cases, causes routed to clinicians and cases routed to leadership for various reasons shown in the process flow diagram.	by day by person	Month of April	Appeals Lead
Daily number of hours worked	Regular hours paid - (lunch and breaks) + overtime hours paid	by day by person	Month of April	Appeals Lead
Time to process order	New computer system replacing icareprocess will provide accurate takt time data per touched appeals case	by case, by person	Will sample 1 month for 4 people once system is fully implemented and validated. Expectation is for data to be collected prior to end of the year.	Appeals Lead

# Raw Data

Person A							Person C						
Date	Cases Assigned	Cases Worked	Hours Worked Per Day	Average % Processed	Takt Time	Hourly Production Average	Date	Cases Assigned	Cases Worked	Hours Worked Per Day	Average % Processed	Takt Time	Hourly Production Average
4/1/2022	13	11	10	0.846154	49.09091	1.22222222	4/1/2022	10	9	10	0.9	60	1
4/4/2022	13	12	10	0.923077	45	1.33333333	4/4/2022	10	9	10	0.9	60	1
4/5/2022	12	11	10	0.916667	49.09091	1.22222222	4/5/2022	6	4	10	0.666667	135	0.4444444
4/6/2022	14	11	10	0.785714	49.09091	1.22222222	4/6/2022	8	6	10	0.75	90	0.6666667
4/7/2022	14	11	10	0.785714	49.09091	1.22222222	4/7/2022	8	7	10	0.875	77.14286	0.7777778
4/8/2022	14	11	10	0.785714	49.09091	1.22222222	4/8/2022	8	7	10	0.875	77.14286	0.7777778
4/9/2022	12	10	10	0.833333	54	1.11111111	4/9/2022	0	0	10	#DIV/0!	#DIV/0!	0
4/11/2022	12	9	10	0.75	60	1	4/11/2022	8	6	10	0.75	90	0.6666667
4/12/2022	10	7	10	0.7	77.14286	0.77777778	4/12/2022	6	5	10	0.833333	108	0.5555556
4/13/2022	18	16	10	0.888889	33.75	1.77777778	4/13/2022	8	6	10	0.75	90	0.6666667
4/14/2022	18	16	10	0.888889	33.75	1.77777778	4/14/2022	10	8	10	0.8	67.5	0.8888889
4/15/2022	20	18	10	0.9	30	2	4/15/2022	15	11	10	0.733333	49.09091	1.2222222
4/16/2022	16	14	10	0.875	38.57143	1.55555556	4/16/2022	0	0	10	#DIV/0!	#DIV/0!	0
4/18/2022	15	12	10	0.8	45	1.33333333	4/18/2022	10	8	10	0.8	67.5	0.8888889
4/19/2022	15	13	10	0.866667	41.53846	1.44444444	4/19/2022	0	0	10	#DIV/0!	#DIV/0!	0
4/20/2022	15	14	10	0.933333	38.57143	1.55555556	4/20/2022	12	11	10	0.916667	49.09091	1.2222222
4/21/2022	18	16	10	0.888889	33.75	1.77777778	4/21/2022	18	17	10	0.944444	31.76471	1.8888889
4/22/2022	18	17	10	0.944444	31.76471	1.88888889	4/22/2022	16	14	10	0.875	38.57143	1.5555556
4/23/2022	0	0	10	#DIV/0!	#DIV/0!	0	4/23/2022	0	0	10	#DIV/0!	#DIV/0!	0
4/25/2022	12	9	10	0.75	60	1	4/25/2022	10	10	10	1	54	1.1111111
4/26/2022	12	11	10	0.916667	49.09091	1.22222222	4/26/2022	12	11	10	0.916667	49.09091	1.2222222
4/27/2022	16	13	10	0.8125	41.53846	1.44444444	4/27/2022	12	12	10	1	45	1.3333333
4/28/2022	16	15	10	0.9375	36	1.66666667	4/28/2022	18	15	10	0.833333	36	1.6666667
4/29/2022	0	0	10	#DIV/0!	#DIV/0!	0	4/29/2022	15	13	10	0.866667	41.53846	1.4444444

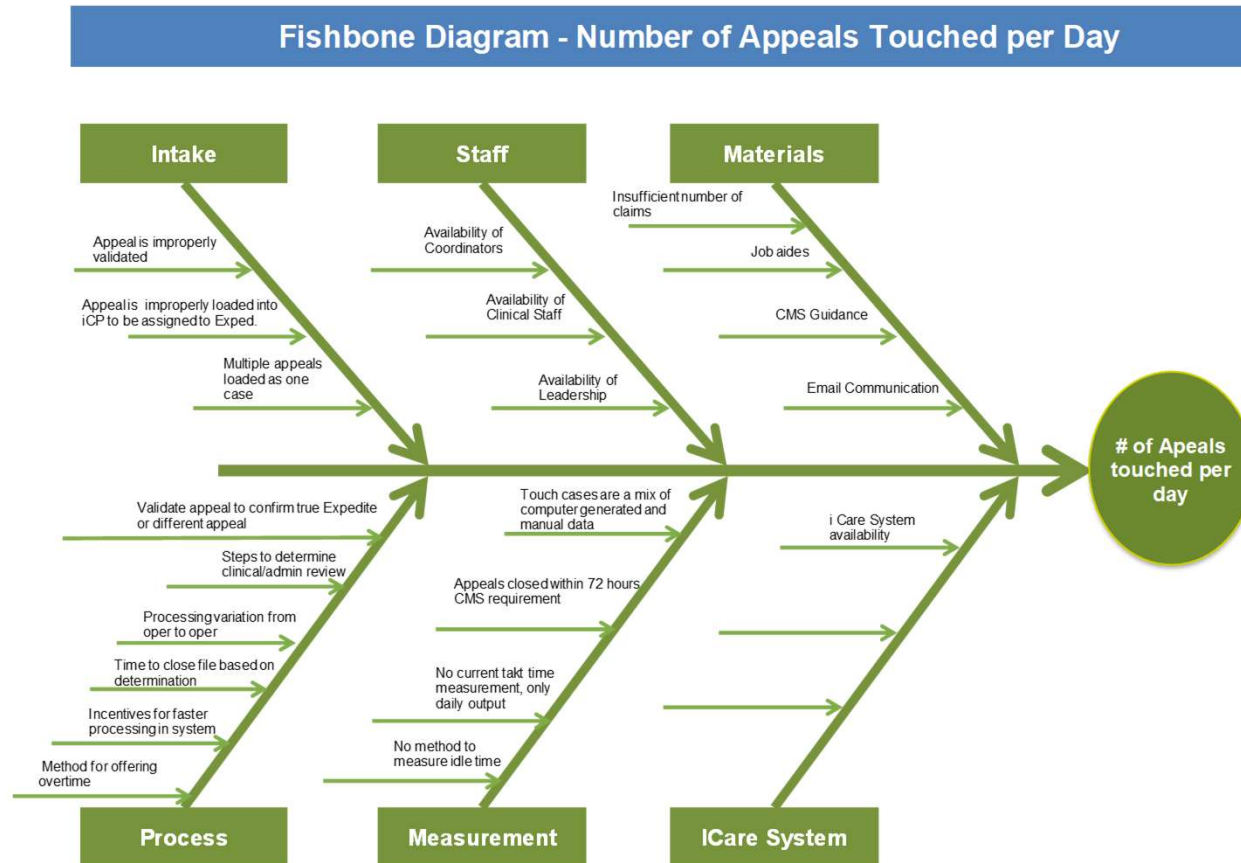
# Raw Data

Person B							Person D						
Date	Cases Assigned	Cases Worked	Hours Worked Per Day	Average % Processed	Takt Time	Hourly Production Average	Date	Cases Assigned	Cases Worked	Hours Worked Per Day	Average % Processed	Takt Time	Hourly Production Average
4/1/2022	6	5	9	0.833333	96	0.625	4/1/2022	0	0	8	#DIV/0!	#DIV/0!	0
4/4/2022	8	6	9	0.75	80	0.75	4/4/2022	8	6	8	0.75	70	0.8571429
4/5/2022	4	3	9	0.75	160	0.375	4/5/2022	6	2	8	0.333333	210	0.2857143
4/6/2022	0	0	9	#DIV/0!	#DIV/0!	0	4/6/2022	6	2	8	0.333333	210	0.2857143
4/7/2022	0	0	9	#DIV/0!	#DIV/0!	0	4/7/2022	8	4	8	0.5	105	0.5714286
4/8/2022	0	0	9	#DIV/0!	#DIV/0!	0	4/8/2022	10	10	8	1	42	1.4285714
4/9/2022	0	0	9	#DIV/0!	#DIV/0!	0	4/9/2022	0	0	8	#DIV/0!	#DIV/0!	0
4/11/2022	7	6	9	0.857143	80	0.75	4/11/2022	10	7	8	0.7	60	1
4/12/2022	8	6	9	0.75	80	0.75	4/12/2022	8	6	8	0.75	70	0.8571429
4/13/2022	0	0	9	#DIV/0!	#DIV/0!	0	4/13/2022	12	13	8	1.083333	32.30769	1.8571429
4/14/2022	8	6	9	0.75	80	0.75	4/14/2022	10	7	8	0.7	60	1
4/15/2022	0	0	9	#DIV/0!	#DIV/0!	0	4/15/2022	12	10	8	0.833333	42	1.4285714
4/16/2022	0	0	9	#DIV/0!	#DIV/0!	0	4/16/2022	0	0	8	#DIV/0!	#DIV/0!	0
4/18/2022	8	7	9	0.875	68.57143	0.875	4/18/2022	7	5	8	0.714286	84	0.7142857
4/19/2022	8	7	9	0.875	68.57143	0.875	4/19/2022	8	5	8	0.625	84	0.7142857
4/20/2022	12	10	9	0.833333	48	1.25	4/20/2022	12	10	8	0.833333	42	1.4285714
4/21/2022	12	10	9	0.833333	48	1.25	4/21/2022	15	14	8	0.933333	30	2
4/22/2022	12	9	9	0.75	53.33333	1.125	4/22/2022	0	0	8	#DIV/0!	#DIV/0!	0
4/23/2022	10	9	9	0.9	53.33333	1.125	4/23/2022	0	0	8	#DIV/0!	#DIV/0!	0
4/25/2022	8	7	9	0.875	68.57143	0.875	4/25/2022	0	0	8	#DIV/0!	#DIV/0!	0
4/26/2022	8	5	9	0.625	96	0.625	4/26/2022	0	0	8	#DIV/0!	#DIV/0!	0
4/27/2022	9	7	9	0.777778	68.57143	0.875	4/27/2022	8	6	8	0.75	70	0.8571429
4/28/2022	10	8	9	0.8	60	1	4/28/2022	12	11	8	0.916667	38.18182	1.5714286
4/29/2022	15	13	9	0.866667	36.92308	1.625	4/29/2022	0	0	8	#DIV/0!	#DIV/0!	0

# Notes on Raw Data

- Hours worked per day was adjusted to eliminate break times and lunches
  - True productive time was used
- Hourly Production Average and Takt Time excluded days not worked
- Takt Time calculations exclude days where the appeals coordinator processed 100% of the claims assigned
  - Could skew the values, since amount of resulting idle time is unknown

# Fishbone Diagram for Number of Appeals Touched per Day

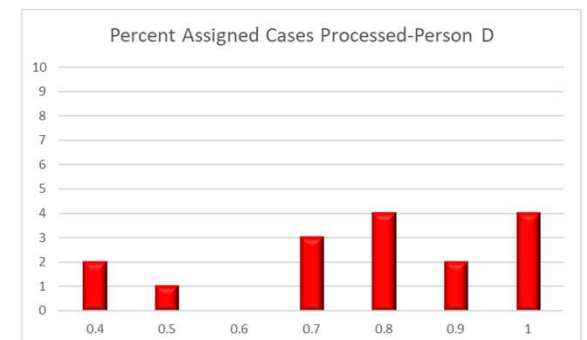
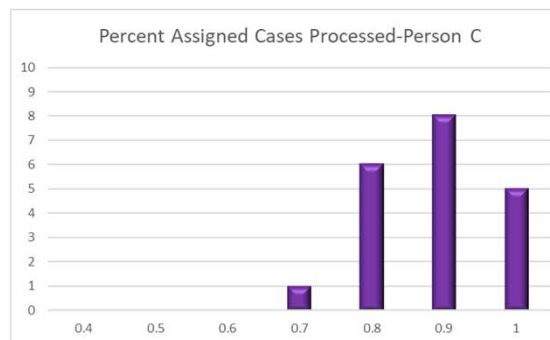
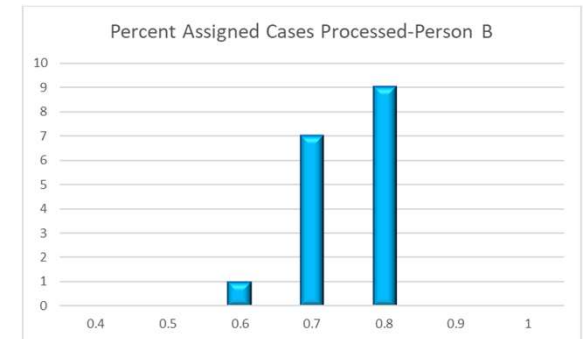
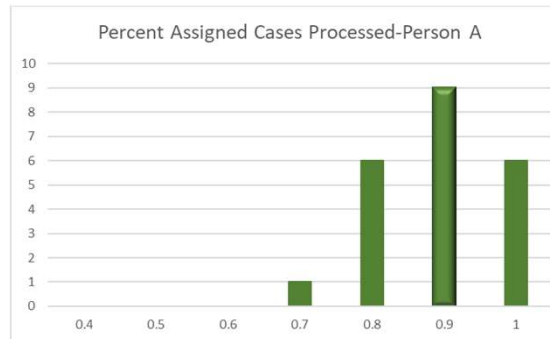


# Analysis of Percent Processed

- Minimum amount processed was 33% of daily assignment
- Maximum was 100% of assignment
  - Excluded from Hourly Production and Takt Time calculations
- Levene's Test of Homogeneity of Variances
  - Ho: Variances Equal
  - Ha: At least one pair of variances is different
  - Fstat = 2.75, pvalue=0.0006
  - Reject Ho in favor of Ha
    - There is a difference in the variances
    - Need to resolve person-to-person variation

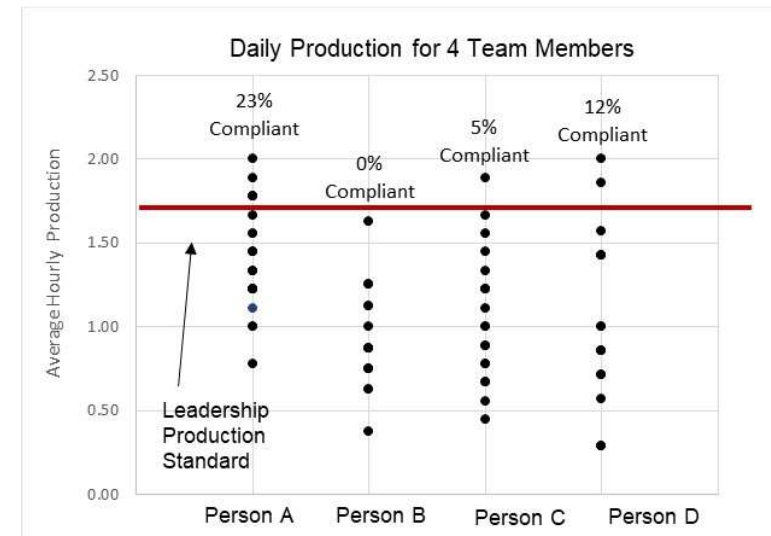
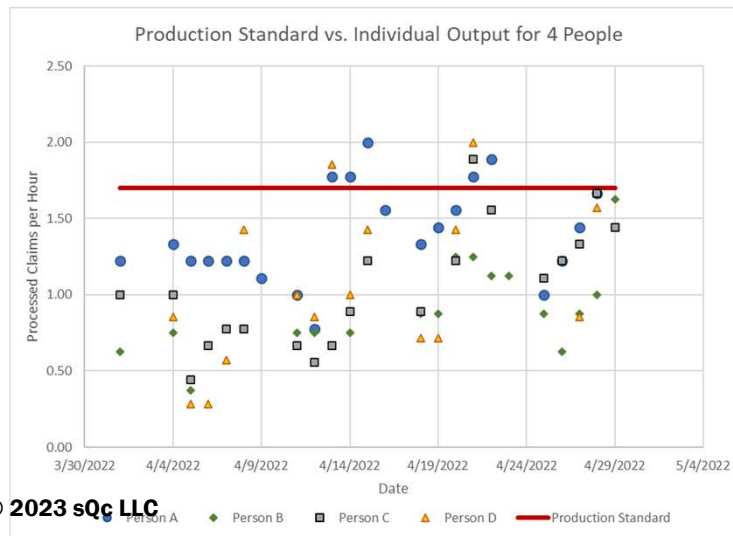
Statistics for Each Person's Average Percentage Processed

	Person A	Person B	Person C	Person D
Average	0.85	0.81	0.85	0.73
Std Dev	0.07	0.07	0.09	0.21
Min	0.70	0.63	0.67	0.33
Max	0.94	0.90	1.00	1.08
Count	22	17	20	16



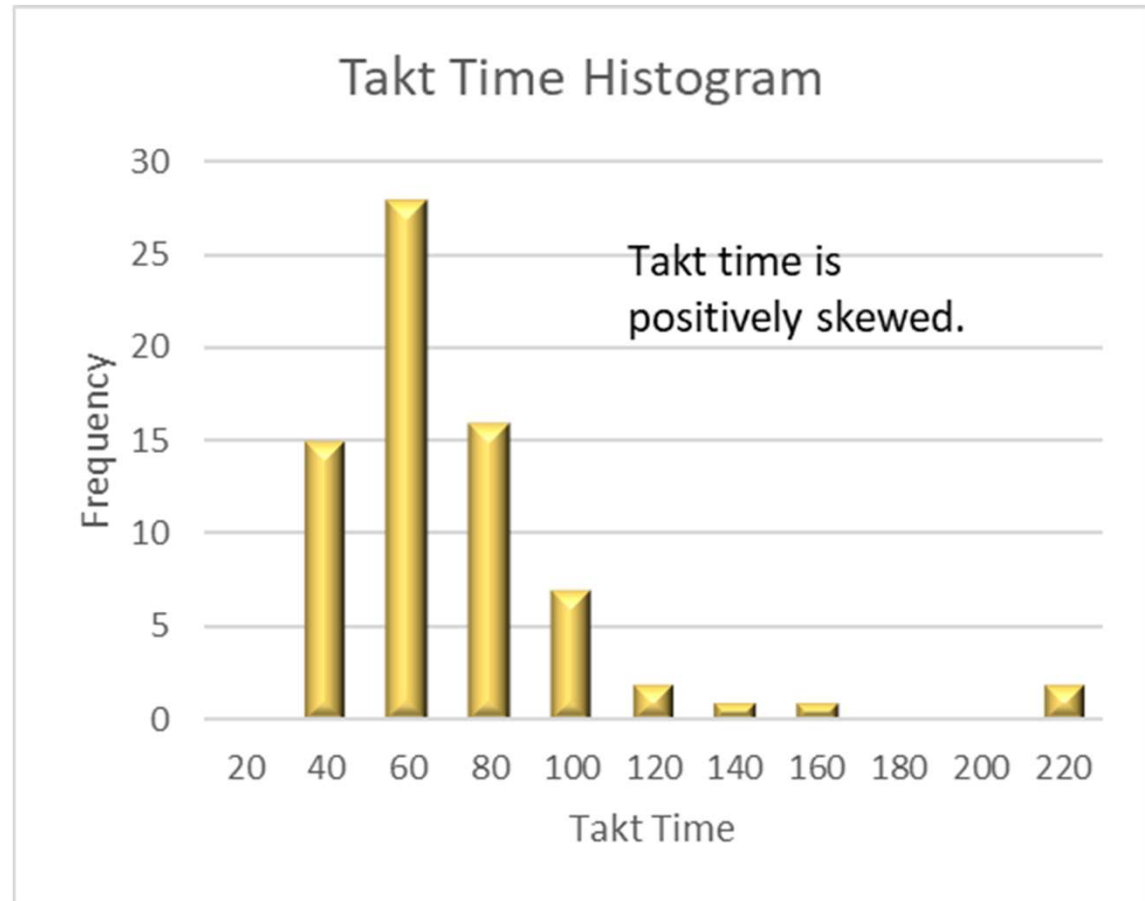
# Hourly Production Average

- Days absent excluded
- Only productive time included
- Production standard from Leadership Group = 12 touched/7 hours=1.7
- Overall compliance is 11%
  - Indicates compliance is possible, but overall compliance, as given by the overall average, needs to improve
    - Training needed to shift mean for all appeals coordinators
- Percentage compliance ranged from 0% to 23%
  - Training needed to reduce person to person variation
- 95% confidence interval for overall compliance is given by  $\pi\text{-hat} \pm z_{\alpha/2} \cdot \sigma_{\pi\text{-hat}}$  = .11  $\pm$  1.96 (sqrt((.11\*(1-.11)/75)) yields (4%, 18%)
  - Provides an indication that the overall variance between people is too large, since both 0% and 23% fall outside the overall population confidence level



# Takt Time

- Takt time was studied in the first quarter of 2021
  - Estimated at 17 to 29 minutes to process a claim
- Takt time could not be calculated directly from data
  - Estimated as productive time/number of claims touched
- Current measurement does not consider idle time
  - Appeals coordinators work from home
  - Not possible to monitor if they are working or actually idle
- Current processes do not reward those with higher productivity
  - Overtime award to all who want it without question
  - Overtime awarded based on outstanding claims
  - Dis-incentives increased productivity, since it will decrease worker's income
- New system will come on-line in Fall that can capture takt time per claim at a process-by-process level
  - Takt time study will be performed prior to year's end to determine largest potentials for improvement





# FMEA Scoring Rubrics and Action Required

- Scoring Systems
  - Use Scoring Rubrics provided on this page to help reduce variation among scorers
- Action Required
  - Take action required for any RPN in excess of 100 or any severity of 9-10
  - Take action on Top 3 RPN issues

Severity		
Failure to Meet Safety and/or Regulatory Requirements	Client Death	10
	Client Severe Medical Complication	9
	Client Medical Complication	8
Results in Fines or Penalties to Centene	High Fines/Penalties and Impact to STAR	7
	Fines/Penalties and Impact to STAR	6
	Impacts STAR rating only	5
Results in Audit	Multiple Audit	4
Customer Annoyance	Warning from Medicare	3
	Impacts Centene profitability	2
No effect	No discernable effect	1

Occurance		
Very High	Greater than 1 in 5	10
High	Greater than 1 in 10	9
	Greater than 1 in 20	8
	Greater than 1 in 50	7
Moderate	Greater than 1 in 100	6
	Greater than 1 in 500	5
	Greater than 1 in 1000	4
Low	Greater than 1 in 10,000	3
	Greater than 1 in 100,000	2
Very Low	Greater than 1 in 1,000,000	1

Detection		
No Detection Opportunity	Cannot be detected	10
Small Detection Opportunity	Very small chance of detection by luck	9
	Very small chance of detection by luck	8
	Small chance of detection	7
Detected Later	May be detected after the occurrence	6
Equal Chance	Equal chance of detector or no detection	5
Likely to be Detected	Will likely be detected	4
	Will always be detected	3
Cannot Leave the System	Will always be prevented from moving forward in process	2
	System Error Proofing Prevents	1

# Initial FMEA

Process Under Study - Appeals Claim Process

FMEA Number - 2023-1524

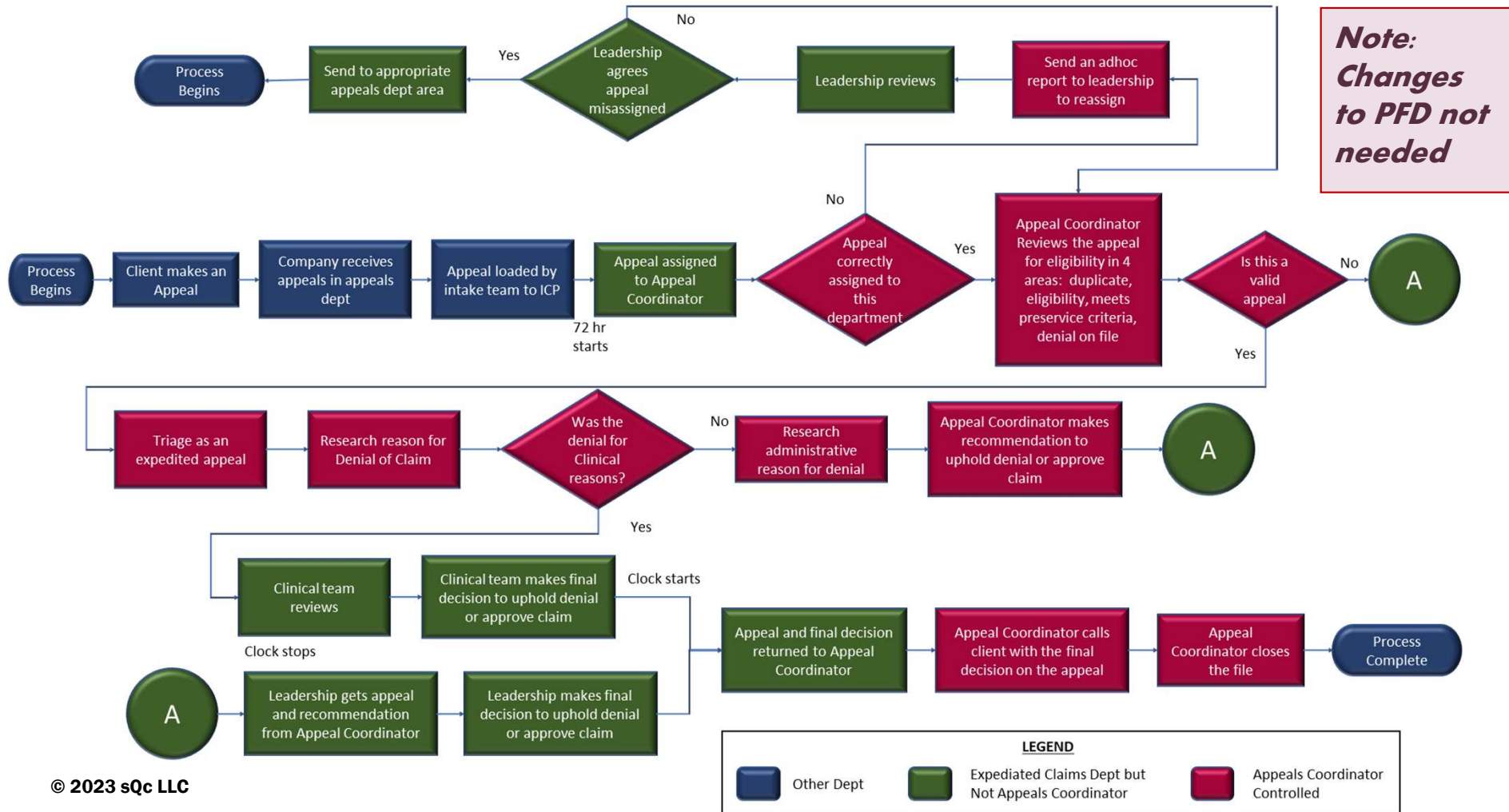
12/27/2023

FMEA ID	Action/Function	Potential Failure Mode	Potential Failure Effect	Sev	Occ	Current Control	Det	RPN	Corrective Action	New Occ	New Det	New RPN	Assigned to	Due Date	v
1	Determine if appeal is correctly assigned to Expedited Claims Dept	Correctly assigned, but labeled as incorrect	Time wasted in processing	3	8	Leadership review	2	48							
2		Incorrectly assigned, but not determined as incorrect	Time wasted in processing	3	8	Leadership review	2	48							
3	Review appeal for duplication	Duplicate exists but not found	Claim paid in excess of Medicare guideline	3	5	Leadership review	1	15							
4		Rejected for false duplicate	Time wasted in processing	3	5	Leadership review	1	15							
5			Customer health impacted	8	5	Leadership review	1	40							
6	Review appeal for eligibility	Eligible, but called ineligible	Time wasted in processing	3	2	Leadership review	1	6							
7			Customer health impacted	8	2	Leadership review	1	16							
8		Not eligible, but called eligible	Claim paid in excess of Medicare guideline	3	2	Leadership review	1	6							
9	Review appeal for preservice criteria	Meets criteria, but denied	Time wasted in processing	3	7	Leadership review	1	21							
10			Customer health impacted	3	7	Leadership review	1	21							
11		Doesn't meet criteria, accepted	Claim paid in excess of Medicare guideline	3	7	Leadership review	1	21							
12	Review for Denial on file	Missed denial on file	Claim paid in excess of Medicare guideline	3	8	Leadership review	1	24							
13		No denial, but claim falsely rejected	Time wasted in processing	3	8	Leadership review	1	24							
14			Customer health impacted	8	8	Leadership review	1	64							
15	Route to Clinician	Should not be routed to Clinician	Time wasted in processing	3	7	Leadership review	2	42							
16		Should be routed to clinician, but deemed admin reason for denial	Time wasted in processing	3	7	Leadership review	1	21							
17	Call client with decision	Doesn't make call	Customer health impacted	8	1	Leadership review	1	8							
18		Calls wrong person	Customer health impacted	8	1	Leadership review	1	8							
19	Determine if appeal is correctly assigned to Expedited Claims Dept	Correctly assigned, but labeled as incorrect	Time wasted in processing	6	5	Leadership review	1	30							
20		Incorrectly assigned, but not determined as incorrect	Time wasted in processing	6	5	Leadership review	1	30							

# Solution Matrix

Solution Prioritization Rubric Project Number - Name															
Reference Number	Date: 12/27/2023														
	Prepared by: D. Jones														
	Criteria Weight		Addresses Problem	Capital Cost	Variable Cost	Time to Implement	Impact to Customer	Impact on Other Parts of Business	Cost Savings	Cost Avoidance	TOTAL SCORE	Solution Selected	Champion	Solution Leader	Due Date
	Project Number	Potential Solution													
1	ACP-1	Retrain appeals coordinators in critical process steps including claim denial	3	5	5	5	3	5	1	3	180	Yes	Jones	Cook	4/1/2024
2	ACP-2	Retrain intake team on which appeals are expedited appeals and which are not	3	5	5	5	3	5	1	3	192	Yes	Jones	Cook	4/1/2024
3	ACP-3	Post daily production metrics for all appeals coordinators using his/her name	4	5	5	5	3	4	1	2	196	Yes	Stabler	Cook	3/1/2024
4	ACP-4	Limit overtime to individuals who meet target levels of productivity	4	5	5	5	4	4	3	3	201	Yes	Stabler	Cook	3/1/2024
5		When new system in place this fall, study takt time for each process step to determine largest area of loss	5	5	4	2	4	5	3	3	193	Yes	Stabler	Jones	TBD
6		Brainstorm ways the new system can accurately measure idle time	4	5	4	2	5	5	1	1	177	No			
7		Implement ways the new system can accurately measure idle time (Hold until brainstorming complete)	4	3	2	1	5	3	3	1	133	No			

# Expedited Appeals Claims Process Flow Diagram



# Final FMEA

Process Under Study - Appeals Claim Process

FMEA Number - 2023-1524

12/27/2023

FMEA ID	Action/Function	Potential Failure Mode	Potential Failure Effect	Sev	Occ	Current Control	Det	RPN	Corrective Action	New Occ	New Det	New RPN	Assigned to	Due Date	✓
1	Determine if appeal is correctly assigned to Expedited Claims Dept	Correctly assigned, but labeled as incorrect	Time wasted in processing	3	8	Leadership review	2	48	Provide additional training to properly identify expedited files faster	5	2	30	Lead Coordinator	Training to occur by August 1	
2		Incorrectly assigned, but not determined as incorrect	Time wasted in processing	3	8	Leadership review	2	48	Provide additional training to properly identify expedited files faster	5	2	30	Lead Coordinator	Training to occur by August 1	
3	Review appeal for duplication	Duplicate exists but not found	Claim paid in excess of Medicare guideline	3	5	Leadership review	1	15							
4		Rejected for false duplicate	Time wasted in processing	3	5	Leadership review	1	15							
5			Customer health impacted	8	5	Leadership review	1	40							
6	Review appeal for eligibility	Eligible, but called ineligible	Time wasted in processing	3	2	Leadership review	1	6							
7			Customer health impacted	8	2	Leadership review	1	16							
8		Not eligible, but called eligible	Claim paid in excess of Medicare guideline	3	2	Leadership review	1	6							
9	Review appeal for preservice criteria	Meets criteria, but denied	Time wasted in processing	3	7	Leadership review	1	21							
10			Customer health impacted	3	7	Leadership review	1	21							
11		Doesn't meet criteria, accepted	Claim paid in excess of Medicare guideline	3	7	Leadership review	1	21							
12	Review for Denial on file	Missed denial on file	Claim paid in excess of Medicare guideline	3	8	Leadership review	1	24							
13		No denial, but claim falsely rejected	Time wasted in processing	3	8	Leadership review	1	24							
14			Customer health impacted	8	8	Leadership review	1	64	Provide additional training to properly identify denied files faster	6	1	48	Lead Coordinator	Training to occur by August 1	
15	Route to Clinician	Should not be routed to Clinician	Time wasted in processing	3	7	Leadership review	2	42							
16		Should be routed to clinician, but deemed admin reason for denial	Time wasted in processing	3	7	Leadership review	1	21							
17	Call client with decision	Doesn't make call	Customer health impacted	8	1	Leadership review	1	8							
18		Calls wrong person	Customer health impacted	8	1	Leadership review	1	8							
19	Determine if appeal is correctly assigned to Expedited Claims Dept	Correctly assigned, but labeled as incorrect	Time wasted in processing	6	5	Leadership review	1	30	Provide additional training to properly identify expedited files faster	6	1	36	Lead Coordinator	Training to occur by August 1	
20		Incorrectly assigned, but not determined as incorrect	Time wasted in processing	6	5	Leadership review	1	30	Provide additional training to properly identify expedited files faster	6	1	36	Lead Coordinator	Training to occur by August 1	

# Suggestions for Additional Studies

- One of the original goals of the project was to study takt time
- Current system do not allow for takt time to be calculated directly
  - Not possible to study individual processes
- Company A will install a new system this fall to manage Medicare claims
  - The new system should allow for many additional measurements
    - Takt time for individual processes
    - Idle time (possible)
  - These studies will begin after the new system is installed and validated and has been populated with sufficient data

Solution Prioritization Rubric Project Number - Name															
	Date: 12/27/2023														
	Prepared by: D. Jones														
		Criteria Weight	Addresses Problem	Capital Cost	Variable Cost	Time to Implement	Impact to Customer	Impact on Other Parts of Business	Cost Savings	Cost Avoidance	TOTAL SCORE	Solution Selected	Champion	Solution Leader	Due Date
Reference Number	Project Number	Potential Solution													
1	ACP-1	Retrain appeals coordinators in critical process steps including claim denial	3	5	5	5	3	5	1	3	180	Yes	Jones	Cook	4/1/2024
2	ACP-2	Retrain intake team on which appeals are expedited appeals and which are not	3	5	5	5	3	5	1	3	192	Yes	Jones	Cook	4/1/2024
3	ACP-3	Post daily production metrics for all appeals coordinators using his/her name	4	5	5	5	3	4	1	2	196	Yes	Stabler	Cook	3/1/2024
4	ACP-4	Limit overtime to individuals who meet target levels of productivity	4	5	5	5	4	4	3	3	201	Yes	Stabler	Cook	3/1/2024
		When new system in place this fall, study takt time													
5		For each process step to determine largest area of loss	5	5	4	2	4	5	3	3	193	Yes	Stabler	Jones	TBD
6		Brainstorm ways the new system can accurately measure idle time	4	5	4	2	5	5	1	1	177	No			
7		Implement ways the new system can accurately measure idle time (Hold until brainstorming complete)	4	3	2	1	5	3	3	1	133	No			

Additional studies should be considered after completion of #5

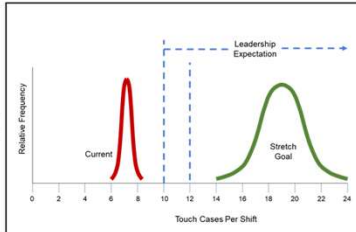
# Project Closure

## Problem Roadmap for Expedite Team

Initial Problem Statement: Metrics of 10-12 touches per day are not being met

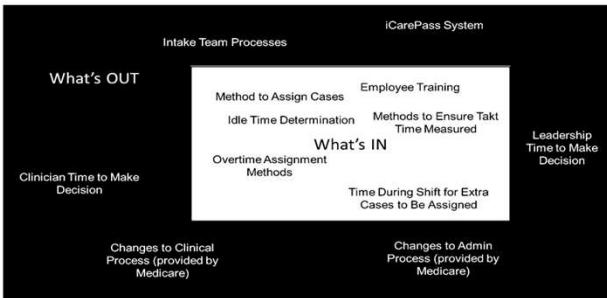
Team Members: John Doe, Mary Smith, Tom Jones

Measurement System:  
Number of cases "touched"  
per day as recorded in log  
system



Project Goal:  
Increase "touched" cases to  
10-12 per day

Containment: No discrepancies. Containment not needed.



Final Problem Statement: The number of cases processed per coordinator per 8 hour shift is currently 6-8, and should be 14-24, based on takt time. Project goal is to improve to 10-12 cases "touched" per day

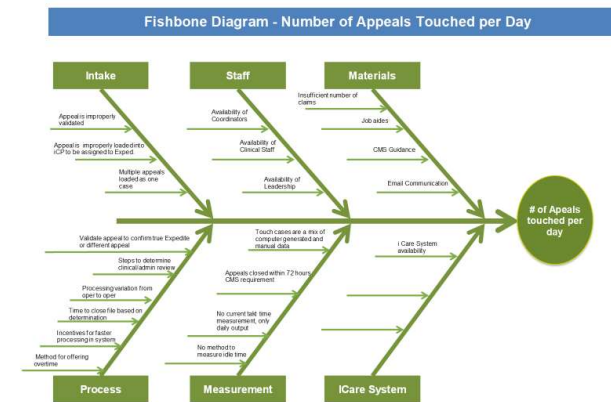
Project Champion Agreement: Electronically signed by  
I. M. Theboss

12/27/2023

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## Problem Roadmap for Expedite Team



Root Cause: Time studies indicate that both the overall mean for average hourly production as well as person-to-person variance for average hourly production are unacceptably high. Direct study of tasks is not possible, due to current system limitations.

ICA: ICA will need to be re-visited once the new tracking system is in place this fall. This will allow for study of different process sub-parts for both the overall process as well as for individuals

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## Problem Roadmap for Expedite Team

Lessons Learned: Remote employees require different mechanisms for ensuring productivity meets expectations. Employees who meet or exceed expectations should be publically recognized.

Overtime should be prioritized to employees who currently meet or exceed standard.

Preventive Action: Ensure systems are in place to support the employee with remote work prior to starting the remote work.

Takt time studies should be performed once the new system is installed. As indicated, further action should be taken as a result of the studies.

## Project Closure:

Final Project Results: Overtime rate is down since overtime is only given to employees to meet or exceed standards. Employees can easily find out how they are performing vs. basic standards. Touch cases have improved by 15% overall from 7 to 8, and variation of highest variable employee has been reduced by 25%.

Team Leader Name/Date: John Doe 10/15/2023

Project Champion Name/Date: I.M. Theboss 10/29/2023

12/27/2023

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# Thank you

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sQcLLC can perform many types of analysis. This is an example of a service-related project.

Let us know how we can work together!

Email: [info@sQcLLC.tech](mailto:info@sQcLLC.tech)