

Strategic Lean Project Report



For Reporting Period: January 1, 2016 through June 30, 2016

I. General Information:

Lead agency name: Department of Revenue

Partner agencies: List other agencies involved in the project

Improvement project title: Unclaimed Property (UCP) Paper Report Intake and Balancing Process

Date improvement project was initiated: 9/4/2015

Project type: New Project

Project is directly connected to:

- Results Washington performance measure
- Agency Strategic Plan
- Other

If applicable, specify the alignment:

Click here to type in the goal number (s) and performance measure(s).

Click here to type in the goal(s) or performance measure(s).

Internal performance measure.

Report reviewed and approved by: Vikki Smith, Director

II. Project Summary:

The Department of Revenue improved the Unclaimed Property Paper Report Intake and Balancing process, resulting in a reduction of the number of days it takes for a report to go through the process from 92 days to 79 days. They also reduced the number of errors causing rework from 2.61% to 1%.

III. Project Details:

Identify the problem:

In an effort to improve internal controls, the unclaimed property paper holder reporting process was extended across teams in 2009. While this expansion did improve security of source data and increased the separation of duties, it also increased rework, bottlenecks, and unnecessary handoffs.

Problem statement:

Currently, it takes 92 days (average) for a report to go through the current process compared to our target of 74 days, which we want to reach by 1/30/2016.

Improvement description:

As a result of a value stream mapping event, UCP staff revised the process by:

- Eliminating a duplicate scan, pulling dividend statements, and a second preparation step.
- Moving from batch to single report workflow.
- Moving from a physical paper process to an electronic workflow.
- Assigning resources as bottlenecks occur.

The analysis and improvements successfully optimized rigorous internal controls in the process, while increasing the efficiency, flow, and teamwork. UCP staff also achieved these results while experiencing 100% turnover in the key affected positions during this reporting cycle. Therefore, even better results are expected in the 2017 cycle.

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Customer involvement: The customer was defined as the claimant who is waiting for their property to become available to claim. Since claimants are often single time customers who cannot compare the difference between UCP processing times, the team relied on the claims representatives who field claimant phone calls for this aspect of the project. There was a claims representative on the project team and other claims representatives were interviewed about their experience with claimant calls.

IV. Project Details:

Improved process as measured by: <i>(Click those that apply)</i>	Specific results achieved: <i>(Complete the narrative boxes below)</i>	Total Impact: <i>(Actuals; Current Reporting Period)</i>	Results status:
<input checked="" type="checkbox"/> Quality	Decreased number of errors causing rework loops from 3.61% to 1%.	Decreased error rate by 72%	Final
<input checked="" type="checkbox"/> Time	Decreased number of days it takes to process a report from 92 days to 79 days.	20,000 claims were available 13 days faster	Final

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