

# Strategic Lean Project Report



**For Reporting Period:** July 1, 2015 through December 31, 2015

## I. General Information:

Lead agency name: Department of Retirement Systems  
Partner agencies:

**Improvement project title: Online Services – Enhance Direct Deposit Options**

**Date improvement project was initiated: 10/28/2015**

**Project type: New Project**

**Project is directly connected to:**

- Results Washington performance measure
- Agency Strategic Plan
- Other

**If applicable, specify the alignment:**

Goal 5 2.1  
OP2a Self Service Transaction Time Savings

**Report reviewed and approved by: Marcie Frost**

## II. Project Summary:

The Department of Retirement Systems improved The Authorization for Direct Deposit process, resulting in expanding online services for our customers.

## III. Project Details:

<b>Identify the problem:</b>	Customers who did not set up direct deposit of their pension payments through their online retirement application were required to submit a paper form to DRS. A paper form was also required for updating direct deposit information. Customers are telling DRS through satisfaction interviews that they want more options for online transactions.
<b>Problem statement:</b>	Currently, 100 percent of post-retirement direct deposit enrollments or changes are made using paper forms compared to our target of 50 percent being made online, which we want to reach by March 31, 2016.
<b>Improvement description:</b>	DRS online services have been enhanced to allow customers to set up or change direct deposit by logging on to their secure online account.
<b>Customer involvement:</b>	Customers were involved through monthly Customer Satisfaction Interviews.

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## IV. Project Details:

<b>Improved process as measured by:</b> <i>(Click those that apply)</i>	<b>Specific results achieved:</b> <i>(Complete the narrative boxes below)</i>	<b>Total Impact:</b> <i>(Actuals; Current Reporting Period)</i>	<b>Results status:</b>
<input checked="" type="checkbox"/> <b>Time</b>	Decreased the amount of time processing paper forms <b>from</b> 100% of direct deposits being processed by an Office Assistant <b>to</b> 80% direct deposits being processed by an Office Assistant, with 138 online updates that required no team member processing from December 10-31 <sup>st</sup> .	This cuts processing time from 4 minutes per form to 0.	Preliminary

## V. Contact information:

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