

IPERS “Lockapella”

1

**QUALIFYING QDRO’S
PART 1
REPORT-OUT
MAY 21ST TO MAY 24TH, 2018**



Why Are We Here?

2

- Staff have expressed concerns that its an inefficient process
- As a paper process
 - Tracking status was cumbersome,
 - Not transparent, and
 - Subject to risk of loss.

Sponsors

Donna Mueller, Chief Executive Officer and David Martin, Division of Benefits, Chief Benefit Officer
IPERS



“Lockapella”

Vicki

3

- Melinda McElroy, IPERS
- Vicki Walsh, IPERS
- Jan Hawkins, IPERS
- Cheryl Vander Hart, IPERS
- Gregg Schochenmaier, IPERS
- Tena Parish, IPERS
- James Norman, IPERS

Facilitators:

- Joy Harris, IDPH
- Lisa LaVigne, DHS

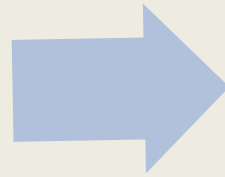


Event Scope

James

4

This event addressed QDROs from the time IPERS is first notified



until the QDRO is qualified and becomes ready for processing of payment.

Baseline – Where We Are Today

James

5

Current State

- Paper process
- Lacks transparency for internal IPERS staff
- No standard for locking accounts
- No communication with members

Goals for future state

- Streamline process
- Improve transparency of the process
- Develop a standard for locking accounts
- Better communication with members

How Do We Get There?

Gregg

6

1. Streamline the process.
2. Improve transparency of the QDRO process so any appropriate IPERS staff member can know where it is in the process this may include building a tracking system.
3. Examine how we give feedback/educate external attorneys about the process.
4. Clarify points in the process where and how the member should be made aware of QDRO status.
5. Make the hard copy QDRO documents an electronic process.
6. Develop a standard process for when a member's account should be locked.
7. Make suggestions for what changes can be incorporated into the update of IQUE.
8. Make suggestions for what changes could be made to Iowa Code and Iowa Administrative Code.

What is Kaizen?

Tena

7

- Kai = “Change”
- Zen = “for the better”

- Continuous Improvement
- A rapid approach to improvement

KAIZEN

改善

Kaizen Event Schedule

Tena

8

Pre-event
Planning

Follow-up &
Implementation

**Kaizen
Overview**

**Review
Charter**

**Map Current
Process**

**Map Current
Process
(Cont.)**

**Analyze
Current
Process
Performance**

**Brainstorm
Improvement
Ideas**

**Prioritize and
Select
Improvement
Ideas**

**Design New
Process Map**

**Analyze New
Process
Performance**

**Identify What
Needs to be
Done to
Implement
New Process**

Report Out

Celebrate!

Current State

Cheryl



Discussion & Consensus

Gregg

10

- Identified waste
- Value added discussion
- Brainstorming of improvements
- Deselection of ideas

Future State Map

Gregg



Current vs Future State Data- QDRO

Gregg

12

	CURRENT	FUTURE	CHANGE
Total Steps	98	48	-50
Decisions	7	8	+1
Handoffs	11	11	0
Loop Back	3	2	-1
Delays	12	8	-4
Delay Time	1868 days	744 days	-1124
Value Added Steps	4	4	0
Cycle Time	6 hr 40 min 35 sec.	2 hr 51 min 51 sec	-3hr 48 min 44 sec

Current vs Future State Data- Hold Report

Melinda

13

	CURRENT	FUTURE	CHANGE
Total Steps	26	16	-10
Decisions	2	2	0
Handoffs	1	1	0
Loop Back	0	0	0
Delays	1	1	0
Delay Time	4 days	1 day	-3
Value Added Steps	0	0	0
Cycle Time	21 min	24 min	+ 3 min

Simpler – Faster - Better

Melinda

14

- Made the process electronic from the beginning
- Let the member know the status of the QDRO
- Revise correspondence to highlight action items
- Sending out more concise feedback to attorneys, members and alternate payees
- Providing more transparency to benefits
- Came up with a process to unlock accounts

Major Milestones

Vicki

15

7/18/18

- Standardization of locking criteria

8/1/18

- Documents scanned upon arrival

8/1/18

- Improve transparency for benefits staff

Communication Plan

James

16

WHAT	WHO	WHEN
Update on outcomes to Jan	Vicki	By June 1, 2018
Update on outcomes to Rick	James	By May 25, 2018
Update on outcomes to Judy	Melinda	By June 1, 2018
Update on outcomes to Martin and Sharon	Tena	By May 29, 2018
Overview at IPERS All Staff meeting	Gregg	TBD

Team Member Experience

17

- Tena
- Gregg

LEAN

State of Iowa
Continuous Improvement