MIDDLE TENNESSEE STATE UNIVERSITY

Continuous Improvement and Problem-Solving

MGMT 6760

Before (and After) Flow Charts

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**Narrative:**

The **current** process is as follows:

1. A physician identifies a "need" for the specific drug.

2. The physician's office (as a customer) contacts ServierOne (the vendor) to obtain an ordering code.

3. The drug code is approved and allotted with specifications.

4. The customer calls Optimal Health's customer service line to place an order.

5. An Optimal Health employee checks: if the ordering customer is currently eligible, if the ordering code is still valid, and if the fulfillment won't exceed the designated allotment given by the vendor.

6. If the requirements are met, the drug is sent. If not, the customer is advised accordingly, and the order is canceled.

* The “current” process map has one large flaw, which is the numerous checks and verifications that a single team member must do for each order via numerous Excel spreadsheets. Due to the numerous checks that are required, the cycle time for each order is poor. As a result, increased Excel functionality is needed to increase order cycle time.

The **future** process is as follows:

The new process includes a system that will notify agents of an order’s eligibility through new Excel functions. To identify errors, the agents need only monitor changes in cell colors, which represent the prior errors. This model benefits both agents and management as the Excel document tracks the total number of errors on the sheet by both number and color. Furthermore, the new method is beneficial for customers as it increases productivity and reduces processing time, resulting in faster drug delivery.

* By using Xlookup, the agent can now quickly determine if the customer is eligible.
  + If the customer is not eligible, cells A to G are highlighted in red.
* By using Xlookup, the agent can now quickly determine if the Ordering code is valid.
  + If the order code is not valid, cells A to G are highlighted in yellow.
* By using new Excel functionality, the agent can determine the “running total” of the customer’s weekly allotment.
  + This figure is auto populated in cell E when the order code in input in cell C. If the running total equals the maximum allotment the two cells are highlighted purple and cell G will read “NO MORE ORDERS.”
* *[Picture of the spreadsheet would have been attached, but this was too similar to a project that was done at work.]*

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| **Current** State Process Map | |
| Customer Office | Calls management with order code.  Calls ServierOne for order code. |
| Management | Uploads new eligible and approved order data for customers. |
| CSR Portal Team | No  No  No |
| Yes  Yes  Add order to spreadsheet, place order with vendor.  Yes  Is amount req. > amount allotted?  Is order code valid?  Is customer approved?  Imports Orders to Excel  Receive daily order code list. |
| Vendor | No  Yes  Is order approved? |

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| **Future** State Process Map | |
| Customer Office | Calls management with order code.  Calls ServierOne for order code. |
| Management | Uploads new eligible and approved order data for customers. |
| CSR Portal Team | Yes |
| Add order to spreadsheet, place order with vendor.  No  Is error code present?  Imports Orders to Excel  Receive daily order code list. |
| Vendor | No  Yes  Is order approved? |