

**Meeting Summary**  
**Functional Area: Administer Infrastructure**



**Meeting: Workshop -- Process Mail**

**Date: 07/18/2007**

**Location: Room 505**

**Meeting called by: Jamie Habecker and Cindy Sussan**

**Attendees:**

Morning: Linda Simmons, Jackie Mines, Brenda Patron, Karen Hughes, Princess Williams, Jamie Habecker, Cindy Sussan.

Afternoon: Pat DeLuke, Carol Waller, Karen Hughes, Jamie Habecker, Cindy Sussan.

**Session Goals and Objectives:**

1. To introduce work center/employees to the CSI project plan as it applies to document imaging, and process improvement.
2. To document mail received in the work centers, and what the work centers do with it
  - Types of mail received
    - Volume (approximate!)
    - Time involved in opening, sorting, and distributing the mail (if applicable)
    - Actions taken with the mail (update CSS, for example)
    - Systems updated
    - How much analysis is involved/Level of decision-making involved
    - Is it time sensitive, and if so to what degree and why?
    - Is money or payment involved in any way (credit card, checks, cash)
    - Is there a handoff when you have completed your work?

**Summary**

Karen, Jamie and Cindy interviewed reps to discuss CSI and document imaging in the mail room, discussing the points above, and gathering information regarding the receipt and processing of mail. Much of the discussion centered around CSI in general and why imaging will be beneficial.

To date, interviews have been held with people representing:

- Court Suspension and Restoration
- Conviction Processing
- Centralized Accident Processing
- Correspondence and Judgment
- Commercial License
- CDL/NDR
- Fuels Tax
- Hauling Permit
- IRP/IFTA
- Data Integrity
- Customer Records
- Medical Review Services

- Disabled Placards
- JLIS

### **Results of Meetings With Work Areas**

A number of areas for increased efficiency were identified:

#### **Duplication of Effort -**

- Some areas log their mail into a database or paper log and/or only stamp their mail upon receipt in the work area (all received mail is stamped as well in Mail Services).  
**Process Improvement** - the date and time the item is imaged (along with the person who imaged it) will be recorded as well as the date and time the image queue is opened, or an individual item is accessed via OnBase (as well as who accessed the image).
- Many areas further sort their mail upon receipt from the Mail Room, and hand-deliver it to work stations within work areas.  
**Process Improvement** - A further sort could occur prior to imaging, or the mail can be routed electronically by an individual to work queues that employees can then access directly from their desktop.

#### **Other Observations**

- Mail Services prepares, sorts and delivers mail as requested by individual work areas and administrations. Many of these requests were made some time ago, and revisiting the reasons for the various sorts and customized handling may be beneficial.
- Workflow will need to be designed to be flexible enough to deliver mail expeditiously, but also be kept simple enough that changes are not onerous or labor intensive.
- Some original documents (such as bonds and other legal documents) will need to be retained (a copy will not suffice).
- All of the sessions were extremely useful in that they gave Jamie, Cindy, Bridget and Karen an opportunity to communicate information about CSI in general and the benefits of document imaging more specifically, especially relating to increased efficiencies and better service delivery. All participants had questions and some concerns; however, all left with a much better understanding of how imaging can help them work smarter and more efficiently.

#### **Potential Early Win**

Consider researching the feasibility of implementing imaging of correspondence sent to DMV via fax prior to CSI implementation.

- Images would arrive in work queues, based on the telephone number, with no manual intervention or processing.
- Allows work centers to begin processing work via images at an earlier date.
- Initiates the building of our "customer history sooner rather than later."
- Could provide insight into what works best in terms of processing work via images and what issues may need refinement prior to a wider implementation.
- DMV could encourage customers to use fax as a preferred delivery method to decrease the amount of paper sent to the agency. This would eliminate the need to receive, prep and image the documents.

#### **Possible Broken Process Identified**

- Use of Certified Mail - who determines which mail goes Certified, how is it tracked, what is the process to determine if it gets imaged or not, and how does Mail Services determine who should receive some unidentified returned Certified mail and/or the Certified green receipt? Karen and Bridget should be able to let the team know at our next meeting if this is a process that could be improved or not.

#### **Possible Next Steps for Process Mail**

Based on our sessions with user groups, Cindy and Jamie recommend

- that the team next focus on revising the "As Is" scenarios to incorporate the steps needed to prep and image mail **at a high level**, and
- regroup at a later stage to look at the actual routing and workflow once the other CSI process areas have completed their analysis of the "To Be" for credentialing and transaction processing. Sufficient background has been gathered to enable the team to make high-level informed decisions regarding Mail Processing BPR and imaging incoming mail.
- In the near future, it would be beneficial for discussions to take place between AI and Credentialing and Business Intelligence to talk in general terms about the imaging of incoming and outgoing system-generated mail (how incoming will be received in work areas, how outgoing will need to have bar codes and so on...)

## **Plans for Next Workshop**

1. Overview of Meetings with Work Areas
2. Review scenarios developed to date and add in the steps required to prep and image the mail, to include any business processing reengineering identified.