

NORTHERN INDIANA LEAN TRAINING PROCESS

SOP 00QSRI-01-23

Northern Indiana Healthcare System
VA NIHCS

Service Line(s):
Quality Management

Signatory Authority:
Jennifer Hiester, DNP, BSN, RN, MBA,
CNOR, RNFA, CPHQ

Effective Date:
January 3, 2023

Responsible Owner:
Chief, NIHCS Quality Management

Recertification Date:
January 3, 2028

1. PURPOSE AND AUTHORITY

a. The purpose of this standard operating procedure (SOP) is to establish procedures on the VA Lean training process within Northern Indiana HCS. This SOP must be followed by any employee that desires certification in the VA Lean methodology who participates in Change Management at Northern Indiana HCS.

b. This SOP sets forth mandatory procedures and processes to ensure compliance with VA Directive 1026, Systems Redesign and Improvement Program, dated 12/12/2019. The SOP establishes the procedures for individual requirements for each stage of training (Attachment A).

2. PROCEDURES:

Northern Indiana has a Lean training regimen that gives the trainee the best availability for their training needs. NIHCS uses MID CON (Midwest Consortium) and our Local NIHCS training, virtual or face to face.

a. For MID CON training:

(1) MID CON has an application process stated on their sharepoint with instructions to enter the appropriate level of training. Follow all of MID CON's instructions.

(a) Approval is needed by trainee's supervisor with the understanding that the trainee needs to be out of the workflow for the entire training session. 3 days out of workflow with Yellow and Green Belt and 5 days out of workflow for Black Belt. MID CON tracks attendance and trainee will need to attend all 24-hours for Yellow and Green Belt and 40 hours for Black Belt to be considered as trained by MID CON.

(b) MID CON is all virtual training and trainee will need a webcam and headset or the capacity to be in a room with a webcam and open audio to participate. Participation is mandatory.

(2) MID CON Calendar of Lean Training and Application: [MIDCON Lean Training Application \(sharepoint.com\)](#)

(3) MIDCON Trainees will receive a welcome package prior to the training date selected.

(a) **Complete all Pework requirements** and obtain all licensure for alternate mapping programs as needed.

(b) **Complete all MID CON Virtual Training.** Entire attendance of training required in order to receive MID Con training. If training is interrupted by direct patient care, a makeup session will need to be scheduled to conclude lost time from the MID CON session with NIHCS Systems Redesign and Improvement Coordinator (SR&IC) / Systems Redesign and Improvement Specialist (SR&IS) POC.

(c) **Complete the Talent Management System (TMS) Exam** for the appropriate Lean Belt after Lean Belt Training. The TMS module will be assigned, and trainee will have 3 attempts to achieve an 80% within 30 days of Lean Belt Training Completion.

(4) **Return to NIHCS Systems Redesign and Improvement Coordinator (SR&IC) / Systems Redesign and Improvement Specialist (SR&IS) for development or assignment** to an appropriate level Lean Belt Project and consider pathways to completion and sustainment. Process Owner Hand off should be 60-90 days into project sustainment and trainee can be certified for Lean Belt after this has occurred. Must show project has hit Sustainment in Quality Improvement Tracking Tool (QuITT). Black Belt requires that trainee mentor a Yellow or Green Belt and also teach Lean Training for at least 1 class of Yellow or Green Belt to earn certification.

(5) **Complete the QuITT entry into Sustainment** and then submit QuITT entry link to SR&IC/SR&IS for Grading with the A3 National Rubric. Trainee will have 3 attempts to achieve a passing grade from the rubric. [Request New User Access](#)(if you are currently not a user): [Login User Acceptance \(salesforce.com\)](#)

b. For NIHCS Lean Training. At Northern Indiana SR&I offers adaptive Virtual or Face to Face Lean Training. SR&I can tailor the training to suit availability and offer it to as few as 6 people to justify the training session with modifications.

(1) *Complete the NIHCS Lean Training Application.* Applications for NIHCS Lean Training can be found here:

[VANIHCS Systems Redesign - Belt Training for Systems Redesign \(sharepoint.com\)](#)

(2) **Process for Applying to NIHCS Lean Training** (Attachment B):

(a) "Click on the Appropriate belt color to DOWNLOAD, FILL-OUT and SIGN the application."

(b) “Save the application to your desktop with your name in the title along with the document title. Email the application to your immediate supervisor for approval and signature.”

(c) “Once your supervisor has emailed it back, SAVE OVER old desktop copy and add -1 to the name after the signature has been installed.”

(d) “Come back to the link above and click on the picture of the Dojo to Enter the Dojo, where a file library is located and DRAG your SAVED application from your desktop to the [Dojo File Library](#).”

(e) “Wait for a response to your application by SR&I staff for the NIHCS training event located on this calendar: [HRO and SRI Events Calendar - Calendar \(sharepoint.com\)](#)”

1. If the response has not been received in 1 week, send an email with trainee application forward to NIHCS SR&I staff.

(3) **Complete the Lean Belt Training.** Attend the entire training to be considered trained.

(4) **Complete the Talent Management System (TMS) Exam** for the appropriate Lean Belt after Lean Belt Training. The TMS module will be given, and trainee will have 3 attempts to achieve an 80% within 30 days of Lean Belt Training Completion.

(5) **Return to NIHCS Systems Redesign and Improvement Coordinator (SR&IC) / Systems Redesign and Improvement Specialist (SR&IS) for development or assignment** to an appropriate level Lean Belt Project and consider pathways to completion and sustainment. Process Owner Hand off should be 60-90 days into project sustainment and trainee can be certified for Lean Belt after this has occurred. Must show project has hit Sustainment in Quality Improvement Tracking Tool (QuITT). Black Belt requires that trainee mentor a Yellow or Green Belt and also teach Lean Training for at least 1 class of Yellow or Green Belt to earn certification.

(6) **Complete the QuITT entry into Sustainment** and then submit QuITT entry link to SR&IC/SR&IS for Grading with the A3 National Rubric. Trainee will have 3 attempts to achieve a passing grade from the rubric. [Request New User Access](#) (if you are currently not a user): [Login User Acceptance \(salesforce.com\)](#)

(7) **Participate in 1 CPI per fiscal year to remain active as a Certified Lean Belt.**

3. ASSIGNMENT OF RESPONSIBILITIES

a. **Systems Redesign and Improvement Coordinator (SR&IC).**

(1) To assist in the coordination of Lean Training at NIHCS.

b. **Systems Redesign and Improvement Specialist (SR&IS).**

(1) Train NIHCS Staff in Face to Face or Virtual Lean training and assist in the Completion of Lean Belt Training.

(2) Ensure Completion of Lean Belt Exam. Set up 30-day post training meeting.

(3) Support the CPI project selected by or delegated to the LEAN Belt Trainee out to completion for Lean Belt Certification.

(4) Ensure Project is entered into Quality Improvement Tracking Tool (QuITT) VHA Database.

(5) Ensure Project is graded with National A3 Grading Rubric.

(6) All items tracked in TMS:

(a) Lean Training.

(b) Lean Exam.

(c) Lean Project.

(d) QuITT (Quality Improvement Tracking Tools) entry verified to sustainment.

(e) Graded with the National A3-9 Box Rubric with a passing score, up to 3 attempts.

(f) Certification for the appropriate Lean Belt will be awarded by NIHCS.

(7) Assignment to appropriate mail group for Lean Certified staff.

(a) Assignment to appropriate level of access on Systems Redesign and Improvement share point.

(b) Assignment to appropriate level open office hours.

(c) Assignment of Mentor within the Green Belt or Black Belt pool.

c. Any Lean Trainee.

(1) Complete Lean Training.

(2) Complete appropriate TMS Lean Belt Exam within 30 days of being trained. 3 attempts to pass the Exam will be afforded.

(3) Complete appropriate level project to completion and 60-90 days sustainment with entry into the Quality Improvement Tracking Tool (QuITT). QuITT will email a notification when the entry hits sustainment.

(4) Submit QuITT A3 Link for Grading with the National Rubric. Trainee will have 3 attempts for a passing score.

(5) Lastly, as a Certified NIHCS Lean Belt, there will be assignment to an email group with monthly open hours meeting. Given access to the Systems Redesign and Improvement sharepoint to store project materials within and participate in NIHCS Change management effectively. Certified Lean Belts will attend regular meetings with assigned mentor during employment at VANIHCS

4. DEFINITIONS

None.

5. REFERENCES

- a. VA Directive 1026.01, Systems Redesign and Improvement Program, dated December 12, 2019, [LINK](#).
- b. [VHA Lean Requirements FAQ](#).
- c. [NIHCS SR&I Lean Requirements FAQ](#).
- d. MIDCON Calendar of Training: [MIDCON Lean Training Application \(sharepoint.com\)](#)
- e. NIHCS Calendar of Training: [HRO and SRI Events Calendar - Calendar \(sharepoint.com\)](#)
- f. NIHCS Lean Application: [VANIHCS Systems Redesign - Belt Training for Systems Redesign \(sharepoint.com\)](#)
- g. NIHCS Lean Dojo: [VANIHCS Systems Redesign - Systems Redesign Form Submission Library - All Documents \(sharepoint.com\)](#)
- h. Quality Improvement Tracking Tool (QuITT): [Login User Acceptance \(salesforce.com\)](#)
- i. Request QuITT access (*if you are currently not a user*): https://vacommunity.secure.force.com/helpdesk/VA_Help_Desk_New_User_405.
- j. A3-9 box National Rubric: [Lean Belt Scoring Rubric V3.docx \(sharepoint.com\)](#)

6. REVIEW

Required review, at minimum during recertification, when there are changes to the governing document, and any regulatory requirement for more frequent review.

7. RECERTIFICATION

This SOP is scheduled for recertification on or before the last working day of **January 2028**– 5 years from effective date. In the event of contradiction with national policy, the

national policy supersedes and controls and will force a recertification to be current with national policy. Any other updates will be addressed and entered as needed.

8. SIGNATORY AUTHORITY

X

Jennifer Hiester, DNP, BSN, RN, MBA, CNOR, R...
Chief, NIHCS Quality Management

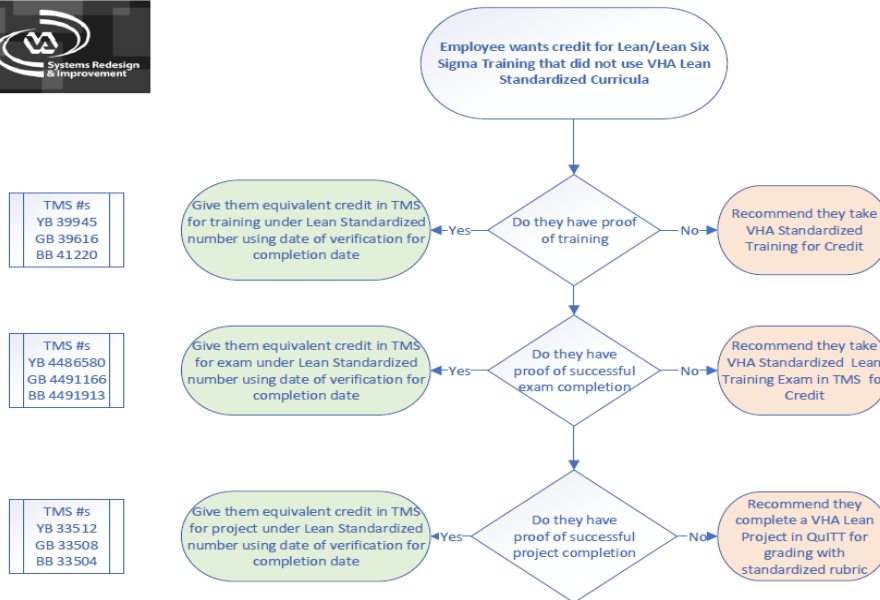
NOTE: *The signature remains valid until rescinded by an appropriate administrative action.*

DISTRIBUTION: Email Distributed to VHANINQM@va.gov and stored at this LINK.

Attachment A

Attachment A

LEAN BELT REQUIREMENTS QUICK VIEW			
Belt	Yellow Program ID VHA-140	Green Program ID VHA-141	Black Program ID VHA-142
Requirement	<ol style="list-style-type: none"> Evidence of belt level course completion as recorded in TMS 39945. Evidence of Passing online exam with a grade of 80% or higher as recorded in TMS 4486580 within one year of training completion. Submission and passing of A3 Lean process improvement initiative showing proof of facilitation (only one person can certify from the same project) with a grade of 95/115 or higher using the standardized Lean belt scoring rubric found on the Lean Training SharePoint within one year of training completion as recorded in TMS 33512. 	<ol style="list-style-type: none"> Prerequisite of Yellow Belt Certificate. Evidence of belt level course completion as recorded in TMS 39616. Evidence of Passing online exam with a grade of 80% or higher as recorded in TMS4491166 within one year of training completion. Submission and passing of A3 Lean process improvement initiative showing proof of facilitation (only one person can certify from the same project) with a grade of 95/115 or higher using the standardized Lean belt scoring rubric found on the Lean Training Share Point within one year of training completion as 	<ol style="list-style-type: none"> Prerequisite of Green Belt Certification. Evidence of belt level course completion as recorded in TMS41220. Evidence of Passing online exam with a grade of 80% or higher as recorded in TMS4491913 within one year of training completion. Submission and passing of A3 Lean process improvement initiative showing proof of facilitation (only one person can certify from the same project) with a grade of 95/115 or higher using the standardized Lean belt scoring rubric on National SR&I SP within one year of training completion as recorded in TMS33504. Evidence of Teaching or Co-Teaching a Lean Course as verified by Systems Redesign and Improvement Staff within one year of training completion. Evidence of Mentoring one Yellow Belt or Green Belt through a project as verified by Systems Redesign and Improvement Staff within one year of training completion.
Project Description	Simple unit-based project that the supervisor can approve solutions that need to be implemented. The project scope requires 2-6 team members and utilizes basic tools to complete the 9-box A3 (e.g., small section of a value stream to improve one failure area, 5S project, etc.). ROI of (YB-\$5,000) or greater realized within one year to include at least one of the following: cost avoidance, hard or soft savings.	Moderately complex project that is a larger unit-based project or crosses multiple service lines. The service-line chiefs or executive team can approve. The project scope requires 5-9 team members and utilizes additional tools to complete the 9-box A3 (e.g., medium section of a value stream to improve more than one failure area, Rapid Process Improvement Event involving additional services, etc.). ROI of (GB-\$25,000) or greater realized within one year to include at least one of the following: cost avoidance, hard or soft savings.	Strategic facility level project. Requires the executive team approval. The project scope requires 7-12 team members and incorporates advanced improvement tools to complete the 9-box A3 (e.g., larger section of a value stream to improve multiple failure areas, strategically aligned projects, etc.). ROI of (BB-\$100,000) or greater realized within one year to include at least one of the following: cost avoidance, hard or soft savings.



**Department of
Veterans Affairs**

Memorandum

Date: March 8, 2023

From: Employee/Labor Relations, VA Northern Indiana Health Care System

Subj: Northern Indiana, HCS, Lean Training Process SOP 00QSRI-01-23

To: Willie E. Haywood Jr.
President, 6th District AFGE/ NVAC 262

1. On January 11, 2023 the National VA Council #53 formally requested a demand to bargain in response to the Northern Indiana, HCS, Lean Training Process SOP 00QSRI-01-23. The National AFGE met with the agency representative and agreed to the SOP as attached.
2. The SOP is approved for distribution at VANIHCS.
3. Any questions or concerns regarding this Memorandum can be directed to Nina Tiney at phone 260-5431 ext 62208 cell 260-2495025.

Kenneth W. Hill
Senior Strategic Business Partner

Haywood, Willie
President, 6th District AFGE/ NVAC 262