THE Ames Laboratory
Creating Materials & Energy Solutions
U.S. DEPARTMENT OF ENERGY

Quality Issue: Forms Routing and Workflow **Date:** 8/30/2013 **Group Lead:** Den Adel

Team Members: DeShong, R; Elsner, S; Joiner, S; Larrance, L; Tehan, A; Torrence, D; Boot, J; Reints, T; Den Adel D.

Issue Description:

1. Develop forms routing specifications. 2. Standardize roles. 3. Identify routing features. 4. Prioritize forms.

Countermeasures:

Categorize forms based on web applications, people, projects, or documents/records. Develop in-house web applications for processes requiring moderate level data. Use Sharepoint software for forms routing including workflow.

Goal:

The goal for the forms routing team was to evaluate forms routing processes at the laboratory and identify a path forward.

Root Cause Analysis:

Identify all roles/titles noted on forms to eliminate duplicates and consolidate the remaining roles/titles used. Numerous roles/titles listed on various forms were unnecessary. In many cases a generic role "requestor" can replace specific roles/titles, e.g. visitor, employee, host, associate, etc. In some cases, the form owner reviewed the form and determined another process could be developed to accomplish the same task. Replace the individual authorization level concept with the role-based authorization levels. Identify which forms should be processed first.

Implementation:

Item #:	Description	Who	When
1	Team meeingts to discuss and resolve each assigned task.	Forms Team	May-Oct 20
2	Prepared forms routing and workflow analysis document.	Forms Team	10/1/2012
3	Submitted forms analysis, recommendations, and next steps to Chief	Forms Team	11/1/2012
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