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KaiNexus Training: Basics 102

Improvements

WELCOME



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This presentation covers the information presented the KaiNexus Basics 102: Improvements video series. This may differ slightly from your organization's KaiNexus configuration, but the general principles and functionality are the same.

IMPROVEMENTS

Key Characteristics:

- Used for small scope improvement efforts
- Driven from the bottom-up
- Can contain nested Tasks and Charts
- Can be nested under Projects
- Typically measure the impact once work has been finished

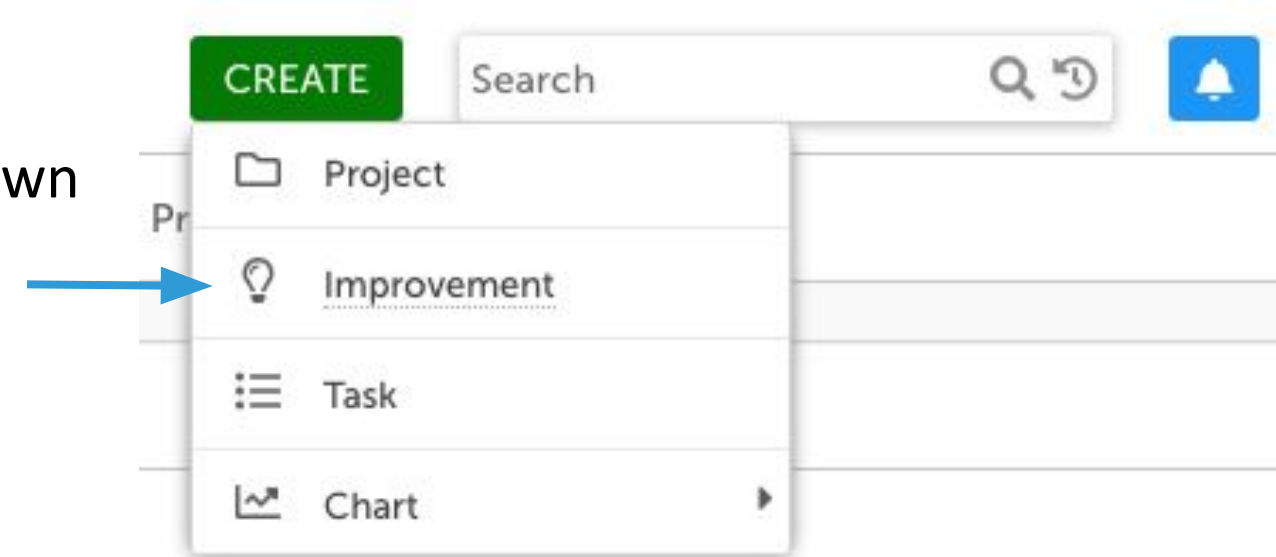
Common Examples:

OIs, Opportunities for Improvements, Fix What Bugs You, Quick Wins, and Just Do Its.

Creating a New Improvement:

1. Click the green Create button

2. Select Improvement from the dropdown



3. Fill in the Required and Optional fields as needed. This will populate all of the information for your Improvement (note that the available fields shown here may differ from those of your organization).

Start with a short summary of your Improvement - often called a Title, Summary, or Theme. Make it unique, so it's easily searchable.

If there are similar items in KaiNexus, a blue icon will appear - hover over or click that and review the items to ensure you're not submitting a duplicate.

You'll be able to complete Optional fields later, if you don't know the answer now.



Create Improvement

Title: Required

Description: Required

Current State: Optional

Proposed Solutions: Optional

Effort: Required To Complete

Impact: Required To Complete

Strategic Initiative: Optional

Priority: Optional

Parent: Optional

Make Private

Thanks for your idea! Check out the process flow here: <https://showroom.kainexus.com/#link/b/392>

Create Save as Draft Cancel



Creating a New Improvement:

Create Improvement

Title:
Required

Description:
Required

Current State: ⓘ
Optional

Proposed Solutions:
Optional

Effort:
Required To Complete

Impact:
Required To Complete

Strategic Initiative:
Optional

Priority:
Optional

Parent:
Optional

Make Private

Thanks for your idea! Check out the process flow here: <https://showroom.kainexus.com/#link/b/392>

Create Save as Draft Cancel



1. Text Fields: Type or copy & paste
2. Adhoc Fields: Click to type, add rows and columns as needed
3. Number Fields
4. Date Fields: Choose a date and a time, if available
5. Attribute Fields: Choose from a dropdown list

Creating a New Improvement:

Parent:

Make Private

▼ Status & Team

New Planned Active Deferred

Author(s):

Collaborator(s):

Follower(s):

Originating Location(s): ⓘ

Thanks for your idea! Check out the process flow here: <https://showroom.kainexus.com/#link/b/392>

- ← 1. Parent: Choose which Project (if any) to nest this Improvement under
- ← 2. Edit privacy settings to restrict viewing of this project if available / desired
- ← 3. Select the Status of new Improvement:
 - **NEW**: No identified start date
 - **PLANNED**: Item has been evaluated and work has been scheduled to begin later
 - **ACTIVE**: Makes today the start date
 - **DEFERRED**: Prompts you to enter a review date so you can revisit and reevaluate later
- ← 4. Fill in your Improvement team:
 - Author: Originally created the Improvement
 - Responsible: Responsible for working on the improvement
 - Assigner: Assigned the Responsible to work on it
 - Collaborators: Responsible for contributing to the objectives and team deliverables
 - Followers: No formal responsibility, but are kept in the loop with notifications
- ← 5. Add Attachments or Links if needed
- ← 6. Click Create (to enter it immediately) or Save as Draft (to come back and add to it later before submitting)

Pro Tip: With some improvement types, you'll be able to Resolve the Improvement when you create it. If that's an option, a button will appear next to the Create button.


Activating an Improvement:

If you select Active when creating a new Improvement, you'll be required to give it a Due Date and a Responsible person. Once you click Create on that Improvement, it'll automatically be activated and today will be the Start Date.





If you Created the Improvement in New status and now want to activate it, search for it in the top search box or find it on one of your Boards (location depends on your custom configuration and will look different for all organizations).






▼ Status & Team

New Planned **Active** Deferred

Due Date:
Required 

CREATE Search   

 (115) To Do   

-  Blue Jean Friday
Status: New Created On: Apr 03, 2020 Author: Showroom Master
-  Central Line, Pneumonia and Ventilators bundles
Status: New Created On: Apr 03, 2020 Author: Showroom Master
Priority:  Medium
-  Emergency Throughput Issues
Status: New Created On: Apr 03, 2020 Author: Showroom Master
Priority:  High

Activating an Improvement:

Central Line, Pneumonia and Ventilators bundles

NEW

Click to Assign to start activating the Improvement

- Assign
- Plan
- Resolve
- Defer

Description
Bundles have been developed to prevent these hospital-acquired infections and to provide the best possible care.

Effort
Low

Impact
None

Strategic Initiative
 Quality

Priority
Medium

State
None



Assign Improvement



Responsible:

Required

Due Date:

Required

Leave a comment:

Optional

Require Resolution Approval ⓘ

Collaborator(s):

None

Follower(s):

Showroom Master (Myself) X

Description:

Bundles have been developed to prevent these hospital-acquired infections and to provide the best possible care.

Current State: ⓘ

Optional

Proposed Solutions:

Optional

Effort:

Thanks for your idea! Check out the process flow here: <https://showroom.kainexus.com/#link/b/392>

Assign

Cancel

To activate an Improvement, you must assign a Responsible person and a Due Date.

The Responsible person can be anyone with an active KaiNexus account.

By default, today is the start date. By making the start date sometime in the future, the Improvement will move into Planned status.

If you're assigning it to someone other than yourself, leave a comment to give that person more context on the Improvement.

You may have the option to Require Resolution Approval, which allows you as the Assigner to sign off on their Resolution before it's final.

Add the rest of the team, and click Assign.

Working on an Improvement:

Edit Details

Details of Improvement

Description
Bundles have been developed to prevent these hospital-acquired infections and to provide the best possible care.

Effort
Low

Impact
None

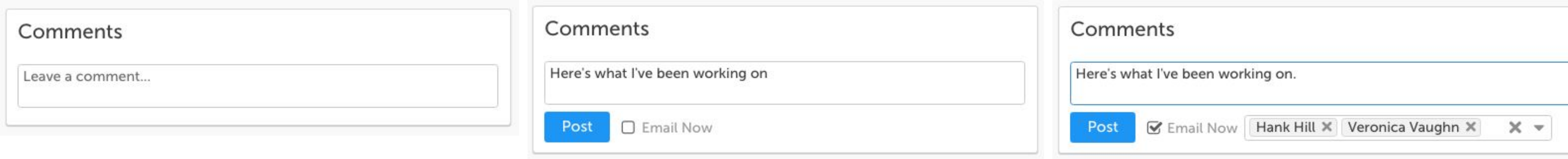
Strategic Initiative
 Quality

← Edit Any Panel

Click to edit the details of an Improvement. The fields available here depend on your organization's customization settings.

Working on an Improvement:

Comments



Comments facilitate communication and collaboration.

Use them to record updates and to ask or answer questions. Using Comments cuts down on the need for calls and emails, and speed up communication so that you don't have to wait for meetings to get the information you need.




Click on the box and type in comment. When you click Post, KaiNexus will send an in-app notification to everyone on your Improvement Team. Click Email Now if you want to send an immediate email to specific people.

Working on an Improvement:



Timeline

Timeline


Wednesday
Apr 22, 2020

- 4:02 PM  Greg Jacobson updated the Facilitator(s).
- 4:02 PM  Greg Jacobson updated the parent.
- 4:02 PM  Greg Jacobson submitted this.

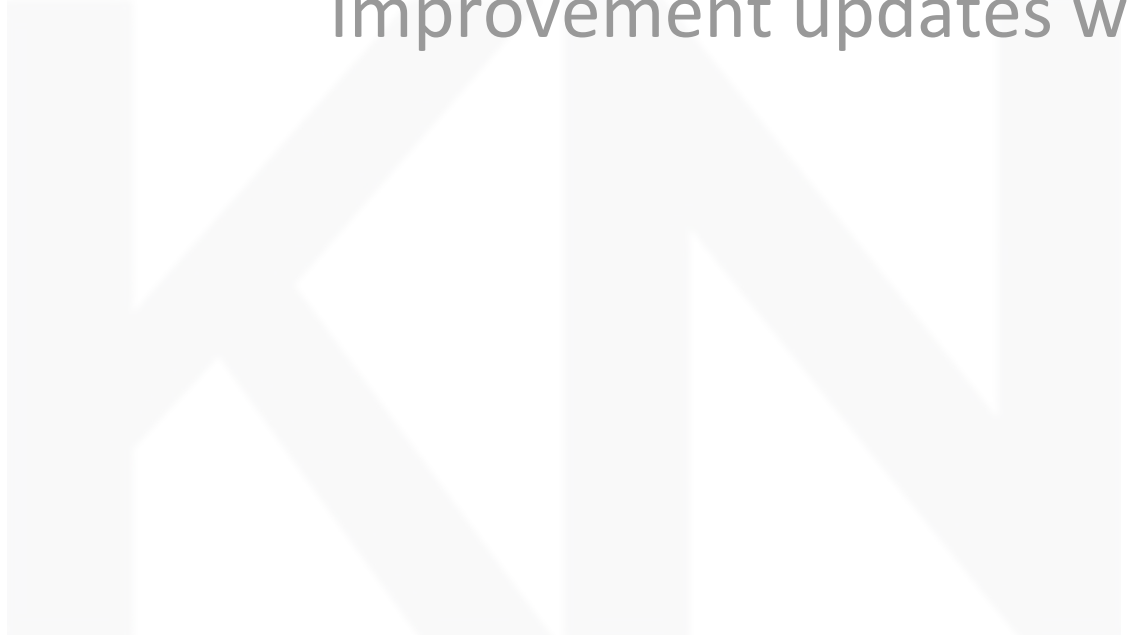
Tuesday
Apr 21, 2020

- 10:09 AM  Greg Jacobson updated the Title.
- 10:09 AM  Greg Jacobson updated the Class Topic.

Sunday
Apr 19, 2020

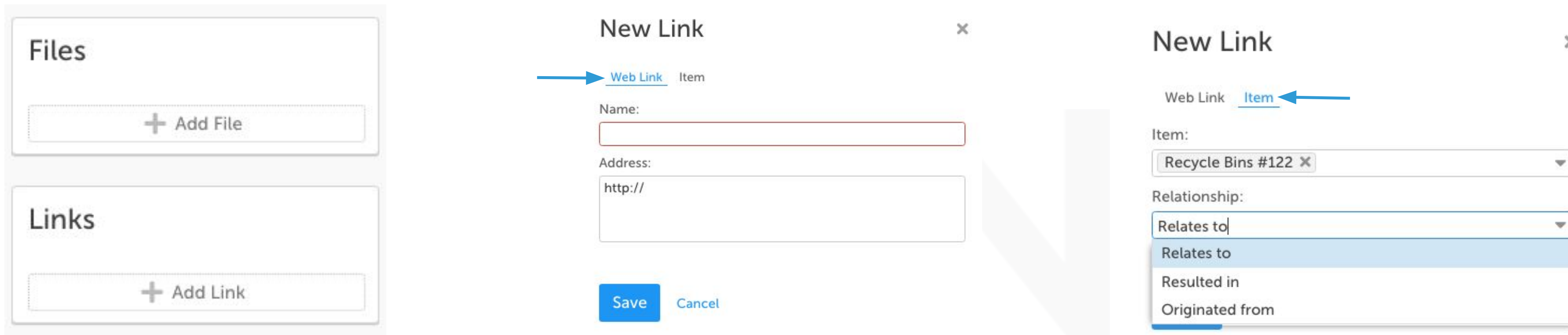
- 2:33 PM  Greg Jacobson updated the Category.

The Timeline is an audit trail that keeps track of everything happening on an Improvement, showing who did what and when they did it. All Improvement updates will appear here.



Working on an Improvement:

Links and Files



Files: Attach an image, PDF, or Word, PPT, Excel, etc. directly from your computer.



Links: Add two types of links:

- Add a web link (website pertaining to the Project, a Google Drive link, etc.)
- Add an item link (for example, link two similar Projects in different departments to visualize how things are progressing and jump back and forth).

Working on an Improvement:

Dates


Dates


Created	Apr 22, 2020
Start	Apr 23, 2020 
Due	Apr 30, 2020 
	<input type="button" value="Complete"/>
Last Updated	Apr 23, 2020


The Dates panel shows when the Improvement was created, when it started, when it's due, and when it was last updated. When you complete the Improvement, that date will show up here too.


Working on an Improvement:

Team

Team 

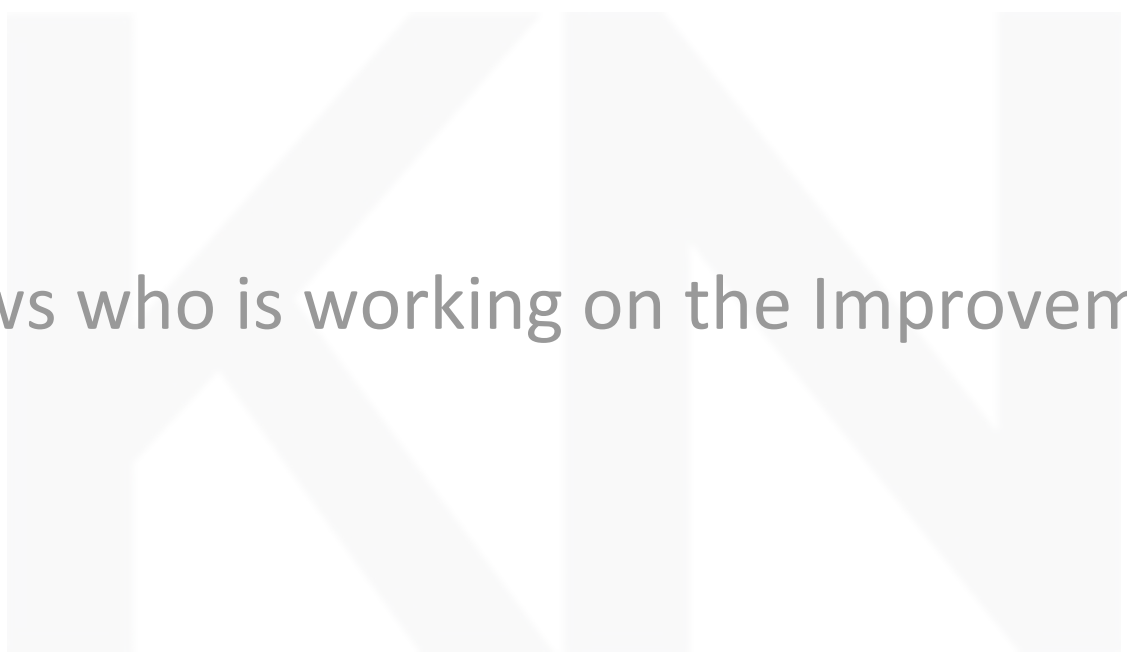
Responsible
 Walter Mann

Assigner
 Sungo-ho Kim

Author
 Showroom Master

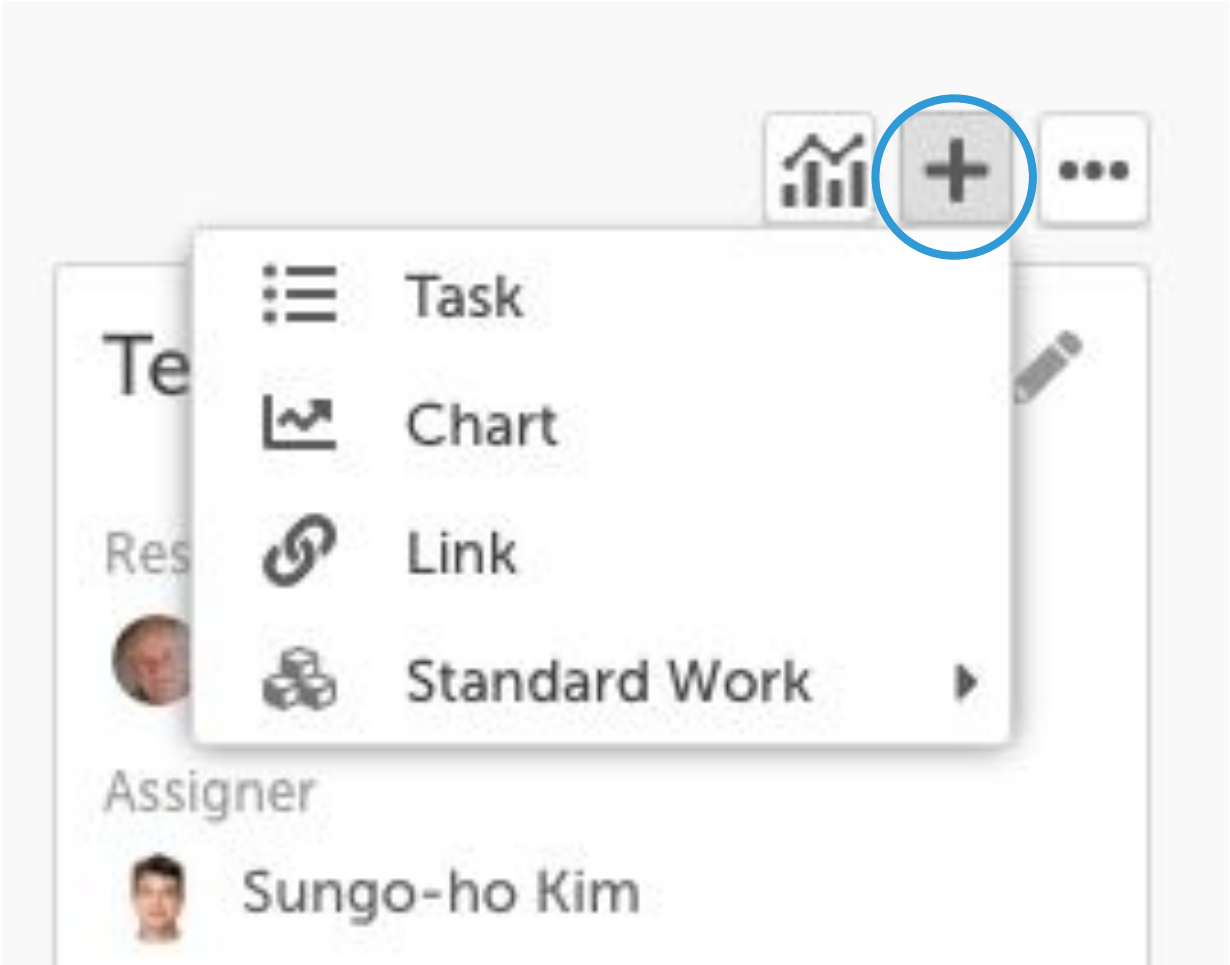
Follower
Showroom Master

This panel shows who is working on the Improvement.



Working on an Improvement:

Nested Workflows



Nest Tasks or Charts within your Improvement to show their relationship and make them visible in one place.

Resolve an Improvement:

Central Line, Pr
ACTIVE
Make New
Plan
Resolve
Defer
Description
Rundles have been developed to never

OR



Dates
Created Apr 22, 2020
Start Apr 23, 2020
Due Apr 30, 2020
Complete
Last Updated Apr 23, 2020

Resolution

Outcome:
Optional

Did this result in a change? Yes No

Review in the future? Yes No

Effort:

Impact:

Investment

Details

Complete Submit for Approval Save



Enter whether it resulted in a change. A list of options will appear, contents will depend on your organization's configuration and whether you select that it DID or did NOT result in a change.

Did this result in a change? Yes No

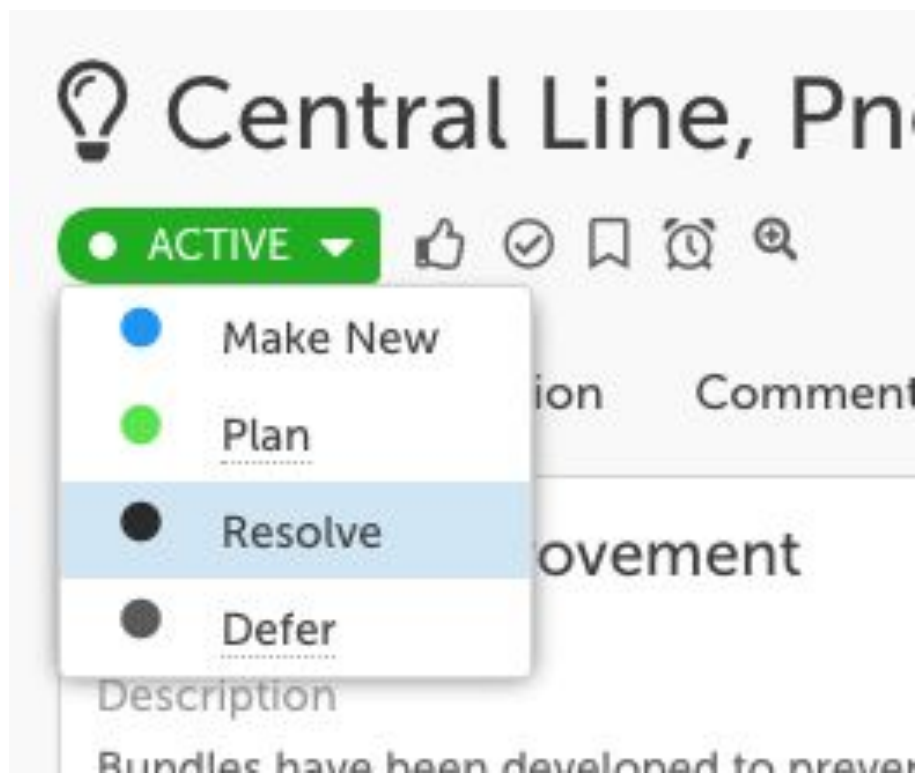
Reason(s):

- Already part of our Standard Operating Procedure
- Already part of a current improvement effort
- Duplicate
- Lack of Resources
- No Implementation Deemed Necessary
- Out of our Control
- Other

KaiNexus is a knowledge repository for all of your improvement work. You can revisit any past Improvements from around your organization at any time to learn from or improve upon them. If at some point you want to start working on a completed Improvement again, simply select Reopen from the status picker.

COMPLETE
Reopen
All Comments Projects

Resolve an Improvement:



Resolution

Outcome:
Optional

Did this result in a change? Yes No

Review in the future? Yes No



Notify

Select the people and/or locations that you wish to notify of the completion of this item.
[What happens when I notify?](#)

▼ People

Team Digest

▼ Locations

Select All

ABC Healthcare System Digest Location and Below All Roles ×

KaiNexus Showroom Digest Location and Below All Roles ×

Network Location Digest Location and Below All Roles ×

Complete Back to Resolution Cancel

Complete all required (and any optional) fields.

Do you want to review this in the future?

Schedule a date to confirm that the Improvement still works in six months, or maybe you're planning to implement it in another area in the future. Leave a comment to remind you why this is popping back up on your radar.

To finalize your Improvement's Resolution, click Submit. To store some details but finalize them and submit later, just click Save.

Once you click Complete, select who you'd like to notify. Click Complete again, and your status picker will change to black to show completed status - unless your permissions require your resolution to be approved, in which case it will be sent to the Assigner for final approval.

Resolve an Improvement:

KaiNexus is a knowledge repository for all of your improvement work. You can revisit any past Improvements from around your organization at any time to learn from or improve upon them.

If at some point you want to start working on a completed Improvement again, simply select Reopen from the status picker.

Whether you Completed or Saved your Resolution, a new panel will be added to your Improvement.



The image shows a screenshot of the KaiNexus interface. It features two main panels: 'Resolution' and 'Comments'. The 'Resolution' panel is divided into two sections: 'Employee Time Savings' and 'Revenue Generation'. The 'Employee Time Savings' section lists 'Nurse x5' and '8 Hour(s)', with a calculation basis of 'verified with HR'. The 'Revenue Generation' section lists 'Summary: Revenue Generation' and '\$100', with a calculation basis of 'MATH'. The 'Comments' panel contains a text input field with the placeholder text 'Leave a comment...'. A large, faint 'KN' watermark is visible in the background of the slide.

Resolution	
Impact(s)	Employee Time Savings Nurse x5 8 Hour(s) Calculation Basis: verified with HR
	Revenue Generation Summary: Revenue Generation \$100 Calculation Basis: MATH

Comments

Leave a comment...

Need More Help?

Visit support.kainexus.com to search, browse, or request assistance.

KaiNexus [Submit a Ticket](#) [Sign in](#)

KaiNexus Support

 Search

Coaching

Working with Your Items

Lists of Items and People

The Admin Area

KaiNexus Updates

The Basics

Boards and Cards

Reports

Additional Modules and Customization