Renewal Process Streamlining Report
May 1 – May 11, 2006
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EXECUTIVE SUMMARY

Each year, between January and April, CRNBC processes over 30,000 RN, LGN and NP registration renewals. Maintaining current registration is a legal requirement for all practising nurses, and ensuring practising nurses meet registration requirements is a core regulatory function of CRNBC. An inefficient, ineffective process has real negative impacts on registrants, employers of nurses, and the citizens of BC.

The current renewal process is cumbersome, convoluted, error prone and time consuming. The Process Streamlining Team examined the current renewal process, identified major issues, and made recommendations for streamlining the process.

Reduce Exceptions – The best way to streamline the renewal process is to eliminate/reduce exceptions up front because tracking and resolving exceptions creates additional complexity and is labour intensive. Many exceptions arise from both completing and submitting the form, so improving these processes will benefit the renewal process as a whole. Overall, the most effective approach will be to transition registrants away from using the paper form to using online renewal.

Online Renewal – Online renewal is the most efficient and least error prone method of renewal. Efforts to increase the number of registrants renewing online will maximize all proposed streamlining strategies. Increasing online usage will require making the process as convenient and user friendly as possible.

Customer Service – Customer service is an essential component of renewal. Poor or inadequate customer service creates frustration for both registrants and staff. As renewal creates an increased demand for customer service that stresses our current resources, it is essential to build a new approach that is more effective and efficient. The key to improving customer service is to provide more self-service options and to maximize the effectiveness of CRNBC staff who respond to registrants’ inquiries. To provide good customer service, CRNBC should develop an organizational definition of “customer” and a customer service philosophy.

Payment of Fees – Payment of fees creates a large number of exceptions that require a lot of CRNBC staff time to resolve. Unpaid fees mean unregistered nurses. Streamlining this portion of the renewal process was identified as a high priority by the team and solutions were carefully considered to achieve this end. Accepting only “guaranteed funds” will eliminate almost every payment problem that arises during renewal.

Communication with Registrants – Effective communication with registrants is an essential component of a streamlined process. Currently, communication with registrants is time consuming, frequently confusing, and inefficient both in terms of staff resources and end
results. Decreasing exceptions within the renewal process will decrease the number of registrants that need to be contacted. However, implementing communication strategies that maintain the balance between CRNBC’s responsibility to registrants and registrants’ personal responsibility is integral to the management of exceptions that do arise.

**Workflow** – Currently during renewal, a form moves through a minimum of five stations before it is completely processed. Any exceptions requiring resolution will add additional layers to the processing. The more people that handle form, the more potential for staff error, including misplacing forms or payments. Multiple hand-offs of the form also make it difficult to determine who has the form and where it is in the process at any one time. Rather than streamlining the work for each station, the team concluded that expanding the work done at fewer stations was more logical. Decreasing the number of steps and staff required to process a form from start to finish is essential to streamlining the renewal process.

**Late Renewals** – Processing renewals after March 1 presents many challenges. Once registration has officially lapsed, a real pressure exists for both staff and registrants to complete a renewal as quickly as possible. This increased pressure leads to increased demands from registrants who often become angry and hostile if they perceive that their renewal is being unduly delayed. This pressure increases when employers become aware that a nurse scheduled to work is not registered. It is crucial that the renewal process is able to accommodate the time-sensitive nature of this transitional period. An effective process will ensure that staff can accurately inform registrants/employers of a registration status, that exceptions can be resolved quickly, and that a balance is maintained between CRNBC and registrant responsibility.

**Leveraging Technology** – Most solutions presented involve better leveraging of technology to automate more parts of process. Processing a paper form needs to utilize the same technology used to process an online form. Providing CRNBC staff and customers with up to date service tools can enhance customer service.

**Marketing/PR to Change Registrant Behaviour** – Most registrants submit an exception-free renewal form and payment by March 1. However, the registrants who do not create a lot work for staff. Rectifying the source of some of the errors, such as poorly designed/worded forms, clearly falls within CRNBC’s responsibility and control. Other causes, such as not renewing on time or providing inaccurate information are more directly linked to individual registrant responsibility. Some registrants do not understand that maintaining registration is a legal and professional responsibility. Others do not understand or appreciate the purpose and value of the licensing process. This lack of understanding can result in late renewals and unregistered nurses continuing to practise. Therefore, changing registrant behaviour is an important consideration in the reduction of exceptions up front. (Note that late renewals are defined as an exception in this report.) The other component important to the success of this streamlining project will be registrant “buy in” to changes in the renewal process (e.g., changes to payment options). Effective marketing and PR will be necessary to achieve these goals.
In summary, CRNBC’s renewal process should model the behaviour we expect from registrants. Implementing the suggested changes will create a renewal experience for CRNBC customers that is transparent and easy to understand, efficient, accountable, responsive and fair; utilizes resources responsibly; and maintains the trust that the public places in CRNBC to regulate the practice of nurses.
**PROJECT PARAMETERS**

**Case for Action**

The Case for Action outlines the compelling reasons for undertaking this Process Streamlining projects and highlights what will happen if no change are made.

**Process Not Efficient for Registrants or CRNBC** – The process is complex, convoluted and not intuitive for registrants and staff. The process is time consuming (the individual steps and overall), especially when there are exceptions, and communication between CRNBC and registrants can be challenging and create delays. The process does not work the way registrants normally work, especially online. In addition, the process can be stressful (emotionally and physically draining) for staff given the volume of processing required during a limited period and tight deadlines.

**Process is Unclear/Error Prone** – Registrants do not always understand the renewal process or make errors while completing it. They sometimes submit incomplete or inaccurate information or renewal forms; choose wrong options; or pay the wrong amounts. In addition, some registrants do not meet regulatory requirements as they have not read or do not fully understand what is required. Errors can also occur during processing with information being keyed incorrectly or forms being inaccurately sorted. In addition, there is limited preventative error proofing through the entire renewal process (paper and online processes).

**Process Does Not Accommodate Exceptions / Not Adaptable** – If there is an exception because errors are made during the process or a registrant has a non-standard renewal, the resolution process is extremely manual. Exception tracking is tedious and time consuming and does not leverage the capabilities of technology.

**Process Not Well Coordinated Among CRNBC Departments** – While CRNBC departments are all working toward the same goal of renewing registrants, work is not well integrated across the organization. Needs and tasks completed differ by department and the impacts of various actions are not always understood across the process.

**Ineffective Process Has Real Negative Impact on Registrants and BC** – If a registrant cannot successfully renew, it has a huge, real life impact by preventing a nurse from continuing to work. That limitation, in turn, has an impact on BC residents requiring healthcare. It is not uncommon for CRNBC to receive calls from nursing managers when a registrant is having a problem with renewal saying the registrant is essential to a healthcare situation.

**Start and End of Process**

**Process Start** – A registrant can start the renewal process (online renewal enabled / registrant has paper renewal form).

**Process End** – Non-renewed registrants marked as inactive.
End Results

Streamline the current Renewal process to make it simple, effective and efficient for registrants using it and staff administering it. Opportunities for error by registrants and staff, which lead to exceptions, should be reduced.

Registrants should have a simple, intuitive process to renew their registration. The streamlined process should help them understand the steps, requirements and information needed; leverage information already known about them; and reduce errors. Registrants should be able to renew when and where they choose as well as start and stop the process over a period of time. They should also be able to determine the status of their renewal in a timely manner. Public and employers are customers too.

Renewal processing should be streamlined to reduce complexity; decrease processing time; and minimize the staff time involved so it can be reallocated to value added activities. The process should minimize errors that occur during processing and streamline interaction among staff and between staff and registrants when exceptions occur. Staff should be able to easily determine the status of an individual registrant’s renewal and assess the overall status of renewal processing at any given time.

Constraints

- The streamlined process must adhere to provincial regulations.
- The streamlined process must adhere to CRNBC bylaws. However, the team is encouraged to make additional recommendations that may require bylaw changes with the caveat that the changes might be adopted in the future due to the time required to change bylaws.
- Processes relating to notification about renewal and mailing or otherwise obtaining paper renewal form are excluded from the scope of this process as they are part of the Renewal Planning process.
- The streamlined process cannot eliminate the collection of statistical data. This streamlining applies only to renewal by existing registrants (vs. first-time registrants).

Project Sponsors, Team Members and Roles

Project Sponsors
- Nancy Eld, Director, Finance & Corporate Services
- Cynthia Johansen, Director of Regulatory Services

Team Members and Roles
- Kevin Ciotta: Team Leader
- Linda Carlyle: Process Owner
- Debbie Benson, Juli Marsh, Erika Neumayer: Start, Internal to, and End of Process
- Mike Drummond: External
• Dana Aldom
  Technologist
• Jana Anderson
  Scribe
PROJECT APPROACH

The team met for eight days, full time, over two weeks, from May 1 to May 4 and May 8 to 11, 2006, and followed a structured process streamlining methodology:

Week 1
- Train team leader, process owner, scribe and team members (Day 1 AM)
- Review and verify mapping of current process and plan external research (Day 1 PM / Day 2 AM)
- Identify attributes of each step of process (Day 2 PM / Day 3 AM & PM)*
- Brainstorm and do external research (Day 4 AM & PM)*

Week 2
- Brainstorm and do external research (Day 5 AM & PM / Day 6 AM & PM)*
- Design new process (Day 7 AM & PM)
- Finalize design and plan report and presentation (Day 8 AM & PM)

* Attribute identification and brainstorming were done together for each sub-process so both activities occurred over the six days. External research was done throughout the two weeks as topics arose and appointments could be scheduled.

After the two weeks of team work was complete, the process owner drafted the core sections of the report with support from the team leader. Team members reviewed initial and final report drafts and created the skit for the sponsor presentation. The team presented the recommendations to the sponsors on July 20, 2006.
We examined the current renewal process and identified major issues. The current process is cumbersome, convoluted, error prone and time consuming. Tracking and resolving exceptions creates additional complexity and is labour intensive. This section groups the major issues with the current process and outlines recommended solutions and the benefits derived from those solutions. Eliminating/reducing exceptions is the goal of almost every solution presented.

A visual mapping of the current process (pre-streamlining) is available in Appendix 2.

**Customer Service**

Customer service is an essential component of renewal. Poor or inadequate customer service creates frustration for both registrants and staff. As renewal creates an increased demand for customer service that stresses our current resources, it is essential to build a new approach that is more effective and efficient. The key to improving customer service is to provide more self-service options and to maximize the effectiveness of CRNBC staff who respond to registrants’ inquiries.

**Self-service**

**Problems**
- Limited options currently
- Available technology not well leveraged
- Contacting CRNBC during business hours not convenient for registrants doing shift work
- Lack of self-service options creates need to contact CRNBC staff
- Staff answer the same questions or send out the same material (e.g., renewal form) over and over

**Solutions**
- Offer comprehensive online information about frequently asked questions by utilizing IntelliResponse (i.e., registrant types question and question is answered in plain language with website links to related information)
- Provide renewal form online as a pre-populated PDF that registrants can print off
- Provide registrants with the ability to check the status of their paper-based or online renewal (e.g., form received, in process, renewal complete, card issued etc.)

**Benefits**
- Staff spend less time answering/responding to common questions/requests and spend more time providing value added services
- Answers/information provided by IntelliResponse system is consistent for every registrant, thereby reducing misinformation
- Registrants are provided with a real time assessment of their renewal status
• Registrants can interact with CRNBC 24x7

**Single Point of Contact for Registrants**

**Problem**

- During Renewal, an increased call volume results in many registrants being placed on hold or leaving a voice mail message which then requires staff time to clear and return calls.
- Voice mail messages lead to “telephone tag,” resulting in a backlog as more calls are unanswered as staff are clearing messages or returning calls, and as calls are being returned more messages are created as registrants call again.
- Two-thirds of Renewal telephone staff are casual and do not have the knowledge required to answer complex questions. This results in a need to refer the call to another staff member or in wrong or incomplete information being provided to the registrant.
- Registrants trying to resolve issues with the renewal process are often referred to multiple staff members (e.g., accounting, renewal officer, etc.) leading to frustration and errors.
- Telephone staff has to look at multiple iMIS screens to understand a registrant’s renewal status or outstanding issues. This takes time and leads to errors.
- Telephone staff is not provided with customer service training.
- CRN CBC does not have an organizational definition or defined philosophy regarding customer service that results in inconsistent messages/approaches being used (see Registrant Communications for more discussion).

**Solutions**

- Leverage the telephone system to better manage queue line so that callers know how long the estimated wait time is and what their options are.
- Provide waiting callers with messages that encourage self-service by visiting website (e.g., IntelliResponse system for FAQs, online renewal status checking, PDF of renewal form, etc.) and that answers to commonly ask questions, and have telephone staff encourage these options for future inquiries.
- Provide telephone staff with tools, such as IntelliResponse, that allow them to answer a broad range of questions accurately and consistently, including other types of registration inquiries.
- Decrease need for referral to other staff members by having single screen in iMIS that displays registrant’s renewal status.
- Use call display technology to automatically pull up registrant’s iMIS record if incoming phone number matches in record database.
- Dedicate more staff to single point of contact customer service to ensure that a live person answers most calls and that front line staff trained to respond to general inquiries pertaining to all CRNBC departments can deal with most inquiries.
- Consider expanding customer service (telephone) hours to better accommodate registrants’ work hours (e.g., 7 am to 9 pm in two shifts or after hour calls answered by staff working remotely and paid per call).
• Increase number of staff dedicated to customer service all year long. This would eliminate or decrease need for casual staff during renewal, thereby having inquiries answered by experienced and fully trained staff. Customer service reps should be considered for all types of CRNBC inquiries, across all divisions.
• Provide ALL staff with customer service training.

Benefits
• Staff spend less time responding to inquiries that can be dealt with via self-service options
• Staff answer more calls personally and provide all information required by the registrant
• Volume of voice mail messages is reduced
• Information provided by staff is complete and thorough, eliminating future “unraveling” of problems created by misinformation
• Registrants are able to resolve renewal issues in a timely manner, often at the time of their choosing.
• Registrants are not transferred from person to person throughout the organization to receive the requested information.

Other Customer Service Options

Problems
• In-person customer service is limited to those registrants who live in the lower mainland
• Registrants are busy and some delay or forget to renew

Solutions
• Utilize work place reps and/or regional staff to directly assist registrants with online renewal via Renewal Kiosks (similar to ATMs) or other portable systems at their workplace
• Provide the above service at CRNBC as well

Benefits
• Registrants outside of the lower mainland can benefit from personalized customer service
• Registrants who may otherwise delay or forget to renew are assisted to renew at their workplace
• Registrants who are reluctant to renew online due to limited computer skills can be shown the process step-by-step.
• CRNBC is viewed as providing more personalized and friendly service

Online Renewal

Online renewal is the most efficient and least error prone method of renewal. Efforts to increase the number of registrants renewing online will maximize all proposed streamlining strategies.
Market Online Renewal

Problem
• Currently only 19% of registrants renew online
• Many registrants are reluctant to make a payment online
• Online renewal is not available after March 1, which is when many late registrants need a timely method of renewal
• Some registrants have limited access to a computer and/or limited computer skills.
• Registrants accustomed to a paper renewal form need a reason to move to online renewal
• Currently online renewal does not support all kinds of renewals (e.g. conversion to practising, low hours, LGNs, etc.)

Solutions
• Offer incentives for online renewal (e.g., surcharge for paper renewal, discount for online renewal, online renewals are automatically entered in a prize drawing to win a free or discounted CRNBC continuing education course, etc.)
• Clearly outline and communicate the security features in place to protect credit card numbers
• In early January, send all registrants with an email address a reminder about online renewal that lists all its advantages (e.g., immediate confirmation of renewal, card is issued faster, available 24x7, eliminates delays/issues with Canada Post, registrant can control timing of payment, etc.)
• In the fall, send a postcard to all registrants asking them to indicate if they will be renewing online and if not, to list their reasons for not doing so (i.e., transition to concept that if you renew online one year, you will receive renewal information next year via email and will not receive a paper form unless requested)
• Use work place reps and regional staff to encourage online renewal
• Expand online eligibility to include all types of registrants

Benefits
• Over time, increased usage of online renewal will reduce the staffing level required to process renewals.
• Online renewal is less prone to human error and therefore creates fewer exceptions.
• Online renewal provides a means for late renewals to be processed immediately, thus providing better customer service and greater protection to the public.

Enhance User Friendly Features

Problems
• Registrants frequently confused and frustrated by need for security word and password as they do not understand the difference between them
• Registrants who are having difficulty renewing online have limited real time resources available to them for problem solving, resulting in abandoned or incomplete renewal attempts
• Some registrants do not find process intuitive
• Registrants may be renewing online without referring to renewal brochure and therefore do not have question-by-question explanations available to them
• Registrants begin online renewal process without understanding what will be required to complete process
• Registrants without email accounts do not receive automatically generated confirmation or communication about exceptions

Solutions
• Professionally analyzed and designed online renewal site for usability and flow
• Provide multimedia options for explaining how to renew online (e.g., online video explaining process)
• Provide integrated answers to questions including contextual help (e.g., hovering over text brings up more information about that question on the form)
• Provide answers to registrants’ questions immediately via online-chat or automatic callback technology (e.g., registrant clicks button and enters phone number; a CRNBC staff member calls the registrant)
• Eliminate need for security word (e.g. login would require registration number and password only)
• Enable registrants to create/reset their own password 24x7 without need for CRNBC staff involvement
• If password forgotten, ask other security questions to identify registrant and confirm identify by comparing with previously submitted answers
• Create pre-logon page that clearly explains what is required for online renewal so registrants are fully prepared before beginning (i.e., checklist)
• Eliminate need for registrant to have email account in order to renew online by allowing registrant, once registration is complete, to view and print a page with a confirmation number for future reference

Benefits
• Registrants who find the online process easy to use and understand are more likely to try online renewal in subsequent years
• If registrants are able to get their questions answered quickly and easily by themselves, CRNBC will not have to respond to as many emails or telephone calls
• Number of incomplete or abandoned online renewals will be reduced
• Registrants will have a better online experience
• An increase in the number of online renewals will decrease the number of paper form and resulting exceptions that need to be processed

Submission of Online Form/Payment

Problems
• Registrants can inadvertently be double billed if they hit submit payment button more than once
• Registrants answer “yes” to criminal conviction question even when they mean “no”
• Registrants do not understand the information in emails regarding exceptions (e.g., low hours)
• Registrants complain they do not get confirmation of amount paid
• Registrants submit form online but then submit payment separately, leading to delay and errors in processing their registration
• Registrants submit a paper form even though they have renewed online creating unnecessary work for registrants and CRNBC staff
• Online renewal does not currently allow registrants to save their partially completed form if they stop part way through the renewal process
• Registrants cannot go online to review their completed form
• Registrants submit online forms without reviewing them and may have entered incorrect information
• Registrants can submit an online renewal form even if their credit card payment does not process correctly

Solutions
• Revise back end so that registrants cannot pay twice or submit an online form twice or submit an online form if a paper form has been received
• Reduce errors by requiring registrants to confirm a “yes” response to the criminal record question and by adding a verification step that encourages registrant to double check all answers before submitting form
• Link submission of form and payment. Do not allow registrants who owe fee or whose credit card payment does not process correctly to submit form without payment
• Confirmation email of successful renewal should clearly indicate that registrant’s renewal is complete, verify amount of payment received, and provide a confirmation number
• Emails regarding exceptions (e.g., unsuccessful renewal) should be in plain language, provide explanation of why renewal was unsuccessful, and outline how issue can be resolved (next steps).
• Allow registrants to save partially completed online renewal forms and complete them later

Benefits
• Reducing errors prior to the completion of an online renewal decreases processing delays and staff time spent following up on exceptions
• Clear communication about renewal status decreases registrant confusion and reduces customer service requests
• Allowing registrants to save partially completed renewal forms improves convenience and contributes to better customer service

Payment of Fees for Paper Form Process

Payment of fees creates a large number of exceptions that require a lot of CRNBC staff time to resolve. Unpaid fees mean unregistered nurses. Streamlining this portion of the renewal
process was identified as a high priority by the team and solutions were carefully considered to achieve this end.

**Cheques**

**Problems**
- Cheques create multiple exceptions that must be resolved before the cheque can be cashed (e.g., body and figure do not match, not signed, wrong dollar amount, wrong date, etc.) thus delaying processing of registration.
- A percentage of cheques go NSF
- Due to bank processing time, notification of NSF cheques often occurs after registration has been issued
- Resolution of NSF cheques is labour intensive (see mapping) so even a small number of NSF cheques involve a lot of staff time
- Resolution of NSF cheques often inserts CRNBC into registrants’ personal financial issues and can result in conflict and stress for both staff and registrants
- Postdated cheques must be sorted and handled separately from other cheques requiring a lot of staff management and intervention
- Multiple cheques written for one registration fee must be returned or sorted and handled separately

**Solutions**
- Accept only certified cheques in order to:
  1. Reduce number of incomplete/incorrect cheques (certified cheques are prepared by bank)
  2. Eliminate post-dated cheques (certified cheques cannot be postdated)
  3. Eliminate NSF cheques (certified cheques guarantee funds available)

**Benefits**
- Reducing or eliminating the exceptions created by problem cheques removes many steps from the renewal process, thereby freeing up staff to dedicate more time to processing error free payments more quickly
- Accepting only certified cheques will align CRNBC with the policies of many other institutions
- Eliminating the possibility of NSF cheques places the onus of maintaining registration on individual registrants, which is in keeping with CRNBC’s professional standards

**Credit Cards**

**Problems**
- Credit card information is frequently incorrect on renewal form (e.g., incorrect number, expiry date) requiring staff time to resolve, thereby delaying processing
- Declined credit cards add multiple steps to the renewal process and require staff time to resolve (see mapping)
- Repeatedly declined credit cards present problems similar to NSF cheques
• Some registrants are concerned about security of writing credit card number on form, resulting in phone calls to CRNBC to provide credit card number, adding additional steps to processing and sometimes creating situation of form received with no money

Solutions
• Accept only preprocessed credit card payments (e.g. registrants phone a third party – either an automated system or a person – to make a credit card payment and receive a confirmation number to be written on the form before submission) to eliminate all exceptions created by problem credit card payments
  • Preprocessed credit card payments guarantee funds. This is the same principle as used for the online process in that an online credit card payment is not accepted until authorized by Verisign. This eliminates declined credit cards.
  • Only confirmation number would be required on the form reducing potential errors of incorrect credit card number or expiry date
  • Registrants do not need to provide credit card number on form thus eliminating concerns about security of credit card information

Benefits
• Reducing or eliminating the exceptions created by problem credit cards removes many steps from the renewal process, thereby freeing up staff to dedicate more time to processing error free payments more quickly
• Eliminating the possibility of declined credit cards places the onus of maintaining registration on individual registrants, which is in keeping with CRNBC’s professional standards
• Eliminating the need to record a credit card number on the form provides better security for registrants

Other Methods of Payment

Problems
• Current payment options if registrant is mailing in form are limited to cheque, money order, credit card or CRNBC’s preauthorized payment (PAP) plan (monthly or bimonthly)
• Registrants are unable to utilize other convenient electronic payment methods
• Some registrants object to PAP as it is monthly

Solutions
• Enable registrants to use online banking so registrants can pay via their bank’s online bill payment service on the web or at an ATM.
• Allow registrants to pay at major bank branches (similar to utility or property tax payments).
• Allow registrants to enroll for annual PAP.
• Allow registrants to call a third party to preprocess a payment from their chequing account (using their routing and checking account number or their debit card) and record a confirmation number on their paper or online renewal form before submission.
• Add debit card option to online renewal.
• Accept PayPal payments
• Accept E-Post payments
• Accept additional credit cards (only MasterCard and Visa currently accepted)

**Benefits**
• Offering registrants as many payment options as possible that are still in keeping with a guaranteed funds philosophy is good customer service
• A variety of options to choose from should enhance registrant acceptance of guaranteed funds approach
• A guaranteed funds approach should increase usage of online renewal

N.B. – The team has left PAP as payment option as it is an established program but note that PAP does not guarantee funds as PAP payments can go NSF. This requires a lot of staff time to manage but NSF payments can usually be resolved during the year, before renewal. Consideration should be given to phasing out PAP option.

**Communication with Registrants**

Effective communication with registrants is an essential component of a streamlined process. Currently communication with registrants is time consuming, frequently confusing, and inefficient both in terms of staff resources and end results. Decreasing exceptions within the renewal process will decrease the number of registrants that need to be contacted. However, implementing communication strategies that maintain the balance between CRNBC’s responsibility to registrants and registrants’ personal responsibility is integral to the management of exceptions that do arise.

**Communication about Exceptions**

**Problems**
• A percentage of registrants do not respond in a timely manner (or at all) to communication from CRNBC about renewal exceptions
• Registrants complain that they never received the communication sent or messages left for them
• A percentage of mail sent to registrants is never received even when address is correct
• Mail sent to registrants is returned as the address on record is not current
• Phone calls to registrants are time consuming
• If registrants are not home when called, multiple steps and delay are added to the renewal process as “telephone tag” can develop
• Email is not always a reliable method of communication as many registrants do not check email regularly and like postal, addresses can be out of date
• Registrants receive mail from CRNBC but do not open it assuming that it contains their registration card
• Non-response from registrants cause repeat of attempts to contact registrant
• Timely resolution of exceptions close to or after March 1 is difficult to achieve
• CRNBC staff feel conflicted and stressed when communication is ineffective as it results in unregistered nurses
• Internally, staff do not have clear written guidelines regarding CRNBC’s responsibility toward renewing registrants (related to the need to define customer service) which contributes to an inconsistent communication approach and handholding
• Correspondence/communication with registrants is laborious to track/record as currently relies on notes in each iMIS record, handwritten problem sheet and/or lists of names
• Poorly tracked/recorded communication creates confusion and contributes to delay in resolution of exceptions
• Ineffective/inefficient communication strategies by CRNBC result in registrants not taking responsibility for their own renewal difficulties

Solutions
• Add section to paper form asking registrant to select preferred method of communication regarding renewal exceptions (and other CRNBC communications throughout the year)
• When communicating with registrants, send information once (no reminders) using at least two methods (e.g., mail and email)
• Automatically generate letter/email that outlines and explains all exceptions noted (see workflow changes for more detail) when paper form is data entered
• Implement alternative means of resolving exceptions that do not require mailing form to/from registrant (see workflow changes for more detail) such as providing missing information by phone or fax
• If exception can be resolved over the phone, attempt to contact registrant one time. If not home, leave message that advises registrant to expect correspondence via email or mail rather than requesting that they call back
• Automate tracking/recording of registrant communication in iMIS
• Use easy-to-understand language in communication with registrants and clearly outline registrant responsibility
• Envelopes/subject lines should clearly indicate that communication is regarding an urgent renewal matter so that correspondence is not ignored
• CRNBC should create a consistent and reasonable organizational philosophy regarding customer service to support staff in providing service to registrants and the public

Benefits
• Communication that is effective and efficient results in timely resolution of exceptions and reduces number of unregistered nurses after March 1
• A defined organizational customer service philosophy helps staff communicate with registrants in a way that models the behaviour CRNBC expects of registrants

Other Renewal Communication

Problems
• Registrants do not provide CRNBC with correct postal/email address
• Registrants who renew online without updating their email address do not receive confirmation of renewal or communication about exceptions
• Registrants who do not receive a renewal form in the mail may forget to renew
• If a registrant has moved and has not notified us of new address, the phone number is often wrong as well, which results in CRNBC being unable to contact registrant

Solutions
• When registrant mail is returned as undeliverable, send an email to registrant (if possible) requesting new address. This could be applied to every registration process
• Track undeliverable email (automated) for online renewals and send confirmation/communication about exceptions via post.
• Send a renewal reminder in early January to every registrant with an email address to try and reach those who have not updated postal addresses
• Have staff utilize registrant-initiated contact with CRNBC throughout the year as opportunity to update demographics
• If registrant logs on to website, always present demographics and encourage updating

Benefits
• By being proactive in dealing with incorrect demographic information, CRNBC is fulfilling Bylaw responsibility to inform registrants about renewal
• All efforts to maintain current registrant demographics facilitates the renewal process

Paper Form

The best way to streamline the renewal process is to eliminate/reduce exceptions up front. Many exceptions arise from both completing and submitting the form, so improving these processes will benefit the renewal process as a whole. Overall, the most effective approach will be to transition registrants away from using the paper form to using online renewal (see Online Renewal section for details).

Completion of Form

Problems
• Registrants make errors on all parts of the form (e.g., do not update demographics, do not answer all questions, do not sign form, sign wrong place, do not provide address of employer, etc.)
• Registrants do not understand how to answer questions on form
• Registrants submit wrong fee or wrong payment type with form
• Registrants do not follow completion instructions in brochure
• Registrants complain that print is too small
• Registrants do not understand and/or like choices for CIHI employment classification questions
• Incomplete forms create exceptions that require follow up and cause delay in registration
Solutions

- Have form professionally evaluated and redesigned to ensure it is intuitive and reduces completion errors. Specific suggestions would be to have a single signature area with registrant having to select P or NP; update/redesign CIHI questions; revise employer information/address section; eliminate need for brochure by putting more instructions on form; move to booklet style form; give PPR questions more emphasis and detail; design PDF version with faxing/scanning in mind; eliminate perforation and organize payment in one place; and reword/redesign all questions on the back page.
- Eliminate any questions that do not have to be asked
- Continue to pre-populate as much information as possible including PAP status (e.g., listing that registrant is on plan and that no money is owing or a particular amount of money is owing)
- In redesigning form, ensure that staff who process forms are consulted
- List last year’s status on form to aid in identification of conversions

Benefits

- A fully completed, error free form facilitates the timely processing of renewals
- Eliminating errors on the registrant’s end will greatly reduce the number exceptions requiring staff time to resolve
- A clearer, easier-to-complete form creates a better registrant experience

Submission of Form

Problems

- Current form is hard to read when faxed due to size (i.e., bottom of form often cut off) and background colour. Fax forms often entirely black
- Fax forms take a long time to get from mailroom to backroom. Often up to 24 hours.
- Time consuming to track down a faxed form
- If a faxed form is illegible, it is difficult to determine who faxed form
- Volume of faxed forms increases just before and after March 1, increasing workload of staff at a peak renewal time
- Registrants mailing or faxing form want confirmation that their form has been received but current system accommodates very little real time tracking (e.g., form might be in the building but not yet entered in iMIS)
- Some forms that registrants insist they have mailed are never received by CRNBC
- Registrants are confused by February 1 administrative deadline vs. March 1 deadline, resulting in a flurry of anxious inquiries just before and after February 1 as registrants think they have/will missed renewal deadline

Solutions

- Encourage use of online renewal as alternative
- Keep online renewal open after March 1 so that late registrants have timely option
- Have registrants complete a pre-populated, typeable PDF renewal form and encourage them to return by email to a dedicated renewal email address
• Design a fax friendly form
• Faxed forms should be received directly into back room on dedicated renewal fax machine or electronic fax server to both reduce time waiting/searching for faxes and to facilitate immediate response to unsuccessful faxes
• Form tracking should begin immediately upon receipt of form (see Workflow section for more details).
• Eliminate February 1 administrative deadline

Benefits
• By providing more alternatives, volume of faxes is reduced
• When faxing is the best option, a fax friendly form will reduce problems resulting from illegible forms
• A dedicated renewal fax machine/server located in the back room will greatly increase the efficiency of receiving faxed forms
• Being able to tracking forms as soon as they arrive in the building will reduce registrant anxiety/frustration and will reduce the number of duplicate forms mailed or faxed “just in case”

Workflow

Currently during renewal, a form moves through a minimum of five stations before it is completely processed (see mapping). Any exceptions requiring resolution will add additional layers to the processing. The more people that handle form, the more potential for staff error, including misplacing forms or payment. Multiple handoffs of the form also make it difficult to determine who has the form and where it is in the process at any given time. Rather than streamlining the work for each station, the team concluded that expanding the work done at fewer stations was more logical. Decreasing exceptions that enter the system and decreasing the number of steps and staff required to process a form from start to finish is essential to streamlining the renewal process. The following section does not list problems encountered at each station as they are too numerous. Rather, the information is presented more generally according to broad processing stages.

Receipt and Routing of Paper Form

Problems
• Date stamping and sorting form into payment and registration type is very labour intensive
• Sorting forms creates opportunity for error if form placed in wrong basket
• Passing a form from station-to-station, accounting-to-backroom, etc., leads to many areas of potential backlog and extends the overall time required to process even a form without exceptions.
• Narrow responsibilities within staff roles create excessive handling of one form by multiple people
• Faxed forms received in the mailroom are hard to track and are slow to get to the backroom
• Every exception that is accepted into the system then requires effort by staff to resolve
Solutions
• Eliminate date stamping of individual forms and have mail room stamp only top form in a bundle delivered to the backroom
• Do not accept forms without payment (or incorrect method of payment such as non-certified cheque) into the process. Immediately return these forms to the registrant. This eliminates an exception requiring staff follow up
• Reduce number of form processing stations from five to two (see Data Entry subsection below) by expanding/broadening role of renewal staff working in the backroom
• Implementing the guaranteed payment options previously outlined will eliminate almost all payment exceptions
• Using a dedicated fax machine/server to receive renewal forms directly into the backroom will eliminate staff time spent locating faxed forms and will allow faxed forms to be entered immediately into process

Benefits
• Reducing the number of processing stations through which a form must pass eliminates backlogs, reduces sorting errors, and results in one day processing for forms without exceptions.
• Reducing the number of exceptions that enter the system up front results in staff resources being used to process error free forms in a more timely manner.

Data Entry/Exception Detection

Problems
• Having data entered by different people (e.g., received date and payment type at station 2 and all other data at station 5) creates unnecessary steps in processing one form and can lead to significant delays and confusion if multiple exceptions are detected at different stations
• Payment issues and form issues are detected at different stations, which can result in multiple staff contacting registrant about separate issues
• The process of receiving, sorting, identifying exceptions and data entry of forms is labour intensive and becomes very convoluted when multiple exceptions are identified
• Identifying and tracking exceptions is a manual process requiring multiple handwritten notices and data entry into different screens
• Multiple stations create unnecessary delays; even forms without errors can take up to three days to process
• The manual batching system is error prone and requires double checks of count resulting in duplication of work
• Batched forms need to have batch labels filled out and attached, then be placed in boxes for storage for one year. Full boxes then have to be moved to the storage cupboard.
• Some exceptions are assigned to registration officers for resolution or decision making when no value is added by including them in the process.
Solutions

- Data enter all information on a form immediately regardless of exceptions
- Automate exception detection using backend scripts (e.g., once all information on a form is entered, scripts are run that pick up all exceptions such as low hours, missed questions etc.)
- Automated system would then generate standard letter and/or email to registrant outlining exceptions and how to resolve them
- Incorporate some accounting functions into data entry role (e.g., combine the work of stations 2, 3, 5 and accounting)
- Alternatively, continue to separate payment and form processing but have form processing done at one station
- Create single renewal screen for data entry
- Automate batching system (e.g., iMIS automatically counts and assigns batch number)
- Consider alternatives to storing processed paper forms in boxes such as electronic imaging

Benefits

- Immediate data entry of forms ensures that error free forms are handled by one person in the backroom
- Automating exception detection and registrant notification reduces human error and significantly decreases staff time required per exception
- A single renewal screen for data processing would cut the time required to enter each form as it eliminates the need to open and close multiple windows
- An automated exception detection process allows for an integrated tracking system (e.g., a registrant’s iMIS record would indicate exceptions detected, date notification sent and which exceptions remain unresolved).

Resolving Exceptions

Problems

- Currently, renewal registration officers and/or backroom staff follow up on 11 types of exceptions. Accounting staff follows up on other payment exceptions, then refer them to renewal officer if unresolved
- Each exception generates the need to contact a registrant
- More than 560 initial notices were mailed to registrants and many of these registrants were sent follow up notices. Note that 560 should be considered a low estimate and is not reflective of all exceptions, such as incomplete business addresses
- Renewal officers answered more than 4,600 telephone calls about renewal, most having to do with exceptions. This does not reflect the number of outgoing calls made.
- Many exceptions involving unanswered questions or unsigned forms are dealt with by returning the form to the registrant (by mail) for completion and then having the registrant return the form to CRNBC when completed. This approach requires weeks to resolve exceptions.
• Some exceptions with objective criteria, such as conversion to practising (less than a year), are sorted in the backroom and referred to renewal officer for processing/sign-off and then returned to backroom for data entry, increasing handling of form and delaying processing.
• The process becomes confusing and error prone when registrants resolving multiple issues are being followed up with by multiple staff members who may not be aware of other staff involvement.
• Efforts to avoid issuing conditional registration to registrants who do not answer or answer no to personal practice review questions (i.e., trying to resolve before March 1) require a lot of staff time. If not resolved by March 1, much of the same work is duplicated (see mapping)
• Positive answers to criminal convictions on a paper form are referred from backroom to renewal officer to PCR, resulting in multiple handoffs for one form and one problem

Solutions
• An unsigned form is an extremely common exception so determining whether or not this is truly a legal requirement is an important question to answer. The team was not able to research this sufficiently. If a signature is required, see solutions below for alternative method of resolution.
• Instead of mailing form back for missed questions, automatically generate a letter/email based on automated exception that includes a template of missed questions
• If received by email, registrant can use template to provide missing information electronically
• If signature is missing, allow registrant to affirm electronically that all information on form is true and correct
• Allow registrants to provide missing information verbally via telephone
• Eliminate excessive handling of form for positive response to criminal conviction question by automatically generating task list to PCR for follow up
• Once missing information is provided by registrant, it is data entered and exception codes are removed from record, automatically triggering printing of card
• Eliminate need for renewal officer to deal with most exceptions by expanding authority of backroom staff
• A single renewal screen will allow assigned customer service staff to respond accurately to questions about outstanding issues and eliminate the need to speak with multiple staff members (i.e., all necessary information to answer questions is in one place – on a single screen)
• Automate processing of conversions using backend script that applies objective criteria used in manual process (e.g., practice hours, PPR, etc.). If criteria not met, report would flag form as needing verification by staff
• If personal practice review questions are not answered or are answered “no,” and no other problems exist, issue conditional registration immediately rather than treating as an exception
• Issue only one notice to registrants regarding outstanding issues
• Eliminate affiliate refund completely and shift onus for refunds to CNA (requires organizational action).
Benefits

- Each exception creates a need to contact a registrant and immediately delays the processing of a renewal for an unpredictable period of time. Reducing the number of exception types that must be resolved ensures that staff time is allocated to only essential activities.
- Providing registrants with the option of providing missing information electronically or verbally will greatly reduce the time required to resolve exceptions.
- Consolidating information on one renewal screen facilitates the single point of contact customer service model and improves communication between staff members and with registrants.
- By issuing conditional registration immediately to registrants who have not completed their PPR, many hours of staff time will be saved. The practice of trying to have registrants resolve this prior to March 1 was intended to capitalize on an opportunity to inform registrants about this requirement without creating an adversarial situation. However, renewal is not the most appropriate or effective time to educate registrants about this requirement. Improving registrant understanding of the PPR program is an organizational responsibility. Strategies to address this knowledge deficit are currently being developed. Issuing conditional registration when this requirement is not met is congruent with Bylaws and policy.

Issuing Cards/Duplicate Tax Receipts

Problems

- The current process requires that registrant roster and card report run separately.
- Cards are printed by category (e.g., practising and non-practising), which necessitates setting up separate card runs.
- Cards issued to registrants with PPR conditions are run separately and manually stamped “conditions.” PCR condition cards are also run separately and given to PCR. This process is not included in our streamlining and involves only a small number of cards.
- Stuffing cards into envelopes is labour intensive and creates a backlog between the printing and mailing of cards.
- If enclosures are not available (i.e., InTouch), mailing of cards is delayed, creating an influx of inquiries from registrants wondering why they haven’t received cards.
- Human error occurs during stuffing process if cards are inserted in window envelope without address showing (i.e., behind enclosure or backwards) or if two cards are enclosed in one envelope.
- Cards are returned as undeliverable even when address is correct.
- Although not strictly a renewal issue, the volume of requests for duplicate tax receipts peaks during renewal as it coincides with registrants filing personal income tax returns. Responding to these requests puts increased demands of staff during an already busy time.

Solutions

- Run roster and card report together.
• Print multiple member types in one run.
• Send InTouch to registrants via a separate mailing and/or electronically.
• Automatically print PPR conditions on cards.
• If possible, design a card and tax receipt that is combined with an envelope to eliminate need for stuffing (similar to T-4 slips).
• Print one card per sheet to allow for preprinted material to be integrated with card. For example, all cards with PPR conditions could be printed on a sheet that explains why conditions have been applied and how to meet conditions.
• Provide registrants with an online, self-service duplicate tax receipt option to allow them to login and print their own tax receipt.

Benefits
• As each renewing registrant receives a card, all efforts to improve efficiency in this area will reduce staff time required and improve customer service.
• Eliminating the need to stuff cards into envelopes eliminates human error and backlogs.
• Providing a self-service option for duplicate tax receipts greatly reduces the need for staff to be involved in these requests. As preparing and mailing tax receipts involves multiple steps, including the potential of resolving payment problems, an online service will be more cost effective, efficient and customer friendly.

After March 1

Processing renewals after March 1 presents many challenges. Once registration has officially lapsed, there exists a real pressure for both staff and registrants to complete a renewal as quickly as possible. This increased pressure leads to increased demands from registrants who often become angry and hostile if they perceive their renewal is being unduly delayed. This pressure increases when employers become aware that a nurse scheduled to work is not registered. It is crucial that the renewal process is able to accommodate the time sensitive nature of this transitional period. An effective process will ensure that staff can accurately inform registrants/employers of a registration status, that exceptions can be resolved quickly, and that a balance is maintained between CRNBC and registrant responsibility. Many solutions already suggested will achieve this goal. Below are additional issues specific to this period.

Reinstatement Fee

Problems
• When to apply the reinstatement fee is difficult to decide as all forms that are received without a reinstatement fee included become exceptions. Currently, forms not postmarked March 1 or earlier are charged a reinstatement fee.
• Using a postmark to determine whether or not a renewal is late requires extra processing as envelopes need to be examined and attached to forms.
• Even registrants who are clearly submitting a renewal form late (i.e., mid-March or later) frequently omit and/or object to paying the reinstatement fee. Often the lack of
reinstatement fee is the only issue delaying registration. This leads to conflict between registrants and CRNBC staff.

- Applying the reinstatement fee when registrants submit their form/fee before March 1 but do not resolve exceptions by March 1 is especially contentious, generates a lot of complaints, and requires significant staff time to sort out.
- The current practice of giving registrants 10 business days beyond March 1 to resolve exceptions (this refers to forms received just before or on March 1) before applying the reinstatement fee is difficult to track/record and manage. Frequently it results in dragging out the renewal process and gives mixed messages to registrants regarding working while unregistered.
- Using a grace period is ineffective as essentially it is just moving the deadline to a different date. Once the grace period is over the same issues/conflicts arise.

Solutions

- Instead of using postmark, use date form received in building. This eliminates the need for extra processing and is in keeping with other bill payment policies (e.g., Visa payment is considered late and interest applied if not received by due date).
- Use strategies to change registrant behaviour (see Marketing/PR section) to reduce number of late renewals.
- Increase the reinstatement fee significantly to encourage timely renewals and rename it “late fine.”
- Keep online open after March 1, encourage its use, and have billing reflect reinstatement fee after March 1 so that registrants are required to submit the reinstatement fee in order to have their renewal accepted online.
- The team is unable to suggest a better solution that is simple and fair to deal with registrants who have submitted a form/payment just before or on March 1 and have exceptions to resolve, but will be unable to do so before their registration lapses. Efforts should focus on ensuring that registrants in this situation receive very clear communication about the need for immediate action or reinstatement fee will be applied. As many registrants inadvertently miss questions, the team felt taking a hard line (i.e., applying reinstatement fee immediately) would create more problems than it solved. It is hoped that the combination of all other streamlining suggestions will reduce the incidence of this situation.

Benefits

- Reducing the number of late renewals will be cost effective, reduce staff time required and better protect the public.
- Striking a balance between enforcing the March 1 deadline and being able to effectively manage the results of applying the reinstatement fee will decrease staff stress and registrant resistance.
- Increasing the reinstatement fee will convey to registrants that renewing on time is the desired and required behaviour.
- Increasing the overall use of online renewal will decrease the number of late renewals as submitting a paper form has to incorporate mailing time in a registrants planning and allows for more errors. Online renewal is a better option for registrants who have procrastinated.
• Keeping online renewal open after March 1 and automatically changing the billing to include the reinstatement fee is more conducive to registrant compliance and acceptance of the reinstatement fee. Registrants who mail forms late without including the reinstatement fee and are then told it is owing are more likely to react angrily and blame CRNBC rather than take responsibility.

Making Unrenewed Registrants Inactive in iMIS (Rollover)

Problems
• This step can be delayed if there is a backlog of forms/payments received by March 1 but not processed by March 1. Often, rollover is not done until mid-March.
• Inquiries regarding renewal status increase after March 1 from both registrants and employers. A delay in completing the rollover means staff responding to inquiries has to check multiple screens to determine if registrant is in process, is renewed, or has not even started the process. These issues lead to confusion and error, especially regarding those registrants who are in process.
• The rollover script currently only makes those registrants who have submitted neither form nor money inactive. This does not address those registrants who have not yet resolved exceptions and are, therefore, not registered.
• All registrants with outstanding issues after March 1 need to be manually changed to inactive and have P status removed from iMIS record.
• Reinstatement fee is not automatically reflected in “Dues” screen when rollover is done, adding more steps to processing payments received after March 1.

Solutions
• Change rollover script to capture all registrants who have not completed their renewal.
• Other strategies, such as data entry of form upfront and automated exception detection should reduce post-March 1 processing backlog.
• Automatically bill reinstatement fee when rollover script is run.

Benefits
• Strategies that facilitate a timely and accurate rollover provide better customer service to both employers and registrants.

Employer Verification Service

Problems
• Employers want verification of registration status completed immediately after March 1.
• Lists sent to employers need to be accurate and should not indicate that nurses whose renewals have been received but not yet processed are unregistered.
• Delay in completing employer verifications results in nurses working without registration for a longer period of time, which is what employers are trying to avoid.
• A lot of staff time is required to manage and prepare employer verifications.
• The initial list sent to employers results in many follow up requests to reconﬁrm/update a registrant’s status.

Solutions
• Institute a self-service online veriﬁcation system that employers can access whenever and as many times as they wish.
• Create a notice that employers can include with pay cheques, early in the renewal period and just before March 1, reminding nurses to renew.

Benefits
• An online veriﬁcation service requires minimal staff involvement, provides real time information, and is more convenient for employers, thereby providing better customer service.
• An online veriﬁcation service will allow employers to encourage/remind unregistered nurses to renew and will reduce the length of time nurses work without registration.

Use of Technology

Most solutions already presented involve better leveraging of technology to automate more processes. The following section discusses speciﬁc technology issues not covered elsewhere.

Status/Exception Reports (Online and Paper Renewals)

Problems
• Reports produced are not built from scripts that utilize all relevant criteria.
• Reports that are faulty give inaccurate information resulting in missed exceptions.
• Data entry processes have to support the criteria used to create the report (i.e., pertinent information has to be entered in/deleted from the correct ﬁeld) and vice versa.
• Reports of name/registration numbers are cumbersome to work with and do not provide sufﬁcient information. The process requires that each name be looked up to read any progress notes (e.g., names appear on list until exception resolved).
• Scripts run overnight and exception codes can take up to 48 hours after resolution to disappear.
• Exceptions are followed up by different staff (i.e., accounting and registration) and the responsibilities for who follow up which exceptions when is not always clear or overlaps.

Solutions
• Devise either a report that prints iMIS notes or an electronic reminder/workﬂow system to eliminate the need to pull up each record to determine if further action is required or if an issue is in the process of being resolved (i.e., information that is stored in the notes ﬁeld).
• Run script multiple times per day to ensure exception codes disappear as soon as possible after resolution (i.e., real time reports).
• Run reports on ﬁeld values not status codes.
• Have staff dedicated to managing exception reports, ideally using single point of contact approach.
• Consult staff who work renewal (especially data entry staff) when designing reports to ensure criteria used is appropriate and will achieve desired result.

**Benefit**

• Using technology to automate more processes is essential to streamlining renewal.
• Ensuring that the technology employed truly captures all criteria and judgment used in the manual evaluation of forms is essential to the success of an automated process and avoids action or inaction based on incorrect information.

**Accounting**

**Problems**

• PAP payments that go NSF in December are not reflected in the iMIS registration window, resulting in these renewals not being flagged as exceptions in the backroom as it appeared that they were paid in full.
• Online payments do not get applied in iMIS until the batch is posted (up to 24 hours later).
• Registrants who convert require manual rebilling of fees, creating additional work for accounting staff.

**Solutions**

• Make backend changes to ensure that incomplete fees due to unresolved NSF PAP payments are reflected in the iMIS registration window.
• Make backend changes to facilitate real time posting of payments into iMIS.
• Automate billing for conversions.

**Benefits**

• Backend changes will reduce staff time required to apply payment and reduce human errors.
• Real time posting of payments will decrease time between submission of renewal and issuing of card.

**Marketing/PR**

Most registrants submit an exception-free renewal form and payment by March 1. However, the registrants who do not create a lot work for staff. Rectifying the source of some of the errors, such as poorly designed/worded forms, clearly falls within CRNBC’s responsibility and control. Other causes, such as renewing on time or providing accurate information are more directly linked to individual registrant responsibility. Some registrants do not understand that maintaining registration is a legal and professional responsibility. Others do not understand or appreciate the purpose and value of the licensing process. This lack of understanding can result in late renewals and unregistered nurses continuing to practise. Therefore, changing registrant behaviour is an important consideration in the reduction of exceptions up front. (Note that late renewals are defined as an exception in this report.) The other component
important to the success of this streamlining project will be registrant “buy in” to changes in the renewal process (e.g., changes to payment options). Effective marketing and PR will be necessary to achieve these goals.

Specific and General Marketing and PR

Problems
• A percentage of registrants submit renewal forms after March 1.
• Some registrants do not understand the importance of renewing on time and do not connect a timely renewal with maintaining the legal right to practise as a nurse.
• Registrants do not understand that renewing is not just submission of fees. They do not realize that an assessment of eligibility is part of the process and therefore, a fully completed form is required.
• Registrants, for various reasons, do not read information sent to them by CRNBC.
• CRNBC is frequently an easy target and registrants are more prepared to expect a difficult experience than a positive one.
• Registrants perceive annual fees as being too high for nothing in return.
• Registrants do not have a clear understanding that renewal is a professional and legal responsibility and working without registration is illegal.
• Registrants often do not understand or appreciate the purpose and value of the licensing process.

Solutions
• Implement a PR campaign aimed at increasing registrant understanding of all of the above issues.
• Use a professional PR person to ensure key messages are delivered effectively and creatively.
• Market changes to the renewal process as beneficial to registrants (e.g., faster renewal time, more effective use of renewal fees, improved customer service, etc.).
• Involve workplace reps in marketing campaign. While at work, nurses are more like a captive audience and getting the message across is not reliant on nurses having to choose to use their personal time to become informed about CRNBC.
• Use a variety of mediums to try and reach those registrants who do not normally read information from CRNBC.

Benefits
• Registrants and employers who value and understand the registration process/requirements are more likely to take renewal seriously and renew on time, and encourage nurses to renew on time, respectively.
• A cohesive marketing plan will maximize success in effecting change in registrants’ behaviour.
COMPARISON OF END RESULTS AND RECOMMENDATIONS

The following table illustrates how the team’s streamlining recommendations address key elements of the end results.

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<td>Streamline interaction around exceptions</td>
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<tr>
<td>Can determine registrant’s renewal status</td>
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<tr>
<td>Staff can assess overall status of renewal</td>
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IDEAS FOR THE FUTURE

During the course of our project we discussed ideas that we decided were out of scope because of the length of time and/or required resources we estimated were needed for implementation. We have included those ideas here for future consideration.

Staggered Renewal Dates – The very nature of undertaking over 30,000 renewals all at one time presents many challenges. The concept of transitioning to staggered renewal dates (e.g., like car insurance or driver’s licenses) should be considered as a long-term goal. This way, the renewal of registrants could be incorporated into the daily work of Regulatory Services instead of requiring a “ramping up” to deal with fee rush. The impact on employers and the public would also be lessened as the numbers of unregistered nurses at any one time would be reduced.

Online Renewal (Reinstatement) Available All Year – The principles and technology used for online renewal could be expanded to accommodate reinstatements (less than one year) all year round. Automating this process would increase customer satisfaction as processing time would be decreased.

Self-Printing of Registration Cards – Technology could support registrants printing their own registration cards by logging on to our secure site. Providing a self-service option would greatly reduce staff resources currently dedicated to this function. Evaluation of the purpose and requirements of a registration card should be undertaken.

Prorated Fees and Conversion to Non-Practising Registration Mid-Year – A prorated fee schedule creates multiples layers of complexity. It is labour intensive and confusing/difficult to explain clearly to registrants. Refunds for conversion to non-practising registration part way through the registration year presents the same challenges. Consideration should be given to eliminating or simplifying these options. The greatest challenge would be maintaining a balance between good customer service (e.g., registrants want this option and in fact express the opinion that even current policies are not fair) vs. the additional work these options create for CRNBC staff.

Conditional Registration for Incomplete Personal Practice Reviews or Outstanding Audit – All aspects of this process, including the guiding principles, should be evaluated. Completion of a PPR/Audit is a mandatory requirement and the bylaws/policies support issuing conditional registration when a PPR/Audit has not been completed. However, communicating with registrants about these situations, monitoring to ensure conditions are met, and taking action when conditions are not met (e.g., conversion to non-practising) is labour intensive and error prone. Efforts to reduce the number of conditional registrations issued should also be a goal. As the continuing competence program is currently under review, the continuing competence committee could address these concerns, in part.
IMPLEMENTATION RECOMMENDATIONS

This final section of our report outlines some thoughts for implementing our recommendations. Based on our recommendations, there are a number of decisions that our sponsors must make to move forward.

Manage the Change – The impact of this PS, in conjunction with those of the other two PSes, will create great change. CRNBC’s leadership needs to be conscious of impacts on people and jobs. Changes need to be managed and supported. Staff need reinforcement to ensure they do not slip back to old way of doing things.

Don’t Sit on Recommendations – Dedicating a team for eight days to streamline the process is just the first step in the success of this project. Implementing the team’s recommendations in a timely manner is crucial to changing the process, changing the overall culture of CRNBC, and to building the credibility of the Process Streamlining approach.

Allocate Necessary Human Resources – To be successful, the right resources (internal and external) with appropriate skill sets (including project management and technology) must be in place. The implementation manager and team(s) must be able to devote full time to the various projects; projects cannot be done “off the side of the desk.”

“We can’t solve problems by using the same kind of thinking we used when we created them.”

- Albert Einstein
APPENDIX 1: EXTERNAL RESEARCH

Web Sites Reviewed for Customer Service Philosophy
• VanCity
• WestJet

External Interviews about Philosophies, Processes, Technology and Banking
• Chartered Accountants of British Columbia
• College and Association of Registered Nurses of Alberta (CARNA) – Susan Lynch, Registration Manager
• iMIS – Cliff Ashby

Internal Interviews for More Detail about Current Process
• Anita Dolynski, Files/Records Clerk, Regulatory Services
• Jillian Harding, Registration Officer, Regulatory Services
• Sandra Harding, Assistant Controller, Finance
• Nargis Mitha, Registration Secretary, Regulatory Services
APPENDIX 2: CURRENT (OLD) PROCESS MAPPING

The following diagrams provide a visual mapping of the process as it exists today (pre-streamlining).
Old Step 1: Form Receipt

1. Registrant completes form
2. Registrant mails form
3. Canada Post delivers form to mail room
4. Mail room bundles forms
5. Mail room date stamps top of each bundle
6. Mail room opens (slices) envelopes
7. Can bundle be processed today?
   - Yes: Each bundle delivered to back room
   - No: Bundles locked up in records room
8. Renewal officer to answer
   - Yes: Renewal advisor to answer registrant inquiries?
     - Yes: Renewal advisor to answer
     - No: Complete
9. Renewal advisor to answer registrant inquiries?
   - Yes: Renewal advisor to answer
   - No: Complete
Old Step 1: Station 1

- Remove contents from envelope
- Date stamp form above and below registration before March 1?
  - No: Give to Station 2
  - Yes:
    - If form no money:
      - Yes: Give to Station 2
      - No: Continue
    - If record method of payment on form:
      - Before March 1?
        - Yes: Write registration number on back of cheque and highlight incorrect $ on form
        - No: Continue
      - No: Stamp form with "conversion" and stamp payment by cheque
    - Stamp form with post date stamp and date post-dated to post dated after March 1?
      - Yes: Stamped conversion:
        - Yes: Forms sorted by payment type WTO baskets
        - No: Give to Station 2
      - No: Give to Station 2

Give to Station 2
Old Step: Station 3

- PAP basket?
  - Yes
    - Bottom of form goes in correspondence baskets at Station 4
  - No
    - Pull tops off of forms & lay on top of correspondent Q's

- Is Q correct?
  - Yes
    - Accounting open: Dues payments enter iMIS ID#, enter payment
  - No
    - Accounting contacts member re problem cheque by phone

- Accounting contacts member re problem cheque by phone?
  - Yes
    - Form & problem in sort all - await new cheque create an activity (BF File) for 2 days
  - No
    - Notice sent to member with problem cheque to March 1

- Contact made?
  - Yes
    - BF 2 days response to phone call?
      - Yes
        - Notice sent to member with problem cheque to March 1
      - No
        - Notice sent to member with problem cheque to March 1
  - No
    - Notice sent to member with problem cheque to March 1
Old Step:
Station 4

Any Problems?
Station 4
Yes

Forms checked for completeness (calculate hours)

No

Put forms in batches of 50 with a batch header

Batch info entered onto a manual batch log

Attach yellow problem form and identify issue

Put into Reg Officer basket

Station 5

To Form to Reg Officer Exemption Process
Old Step: Reg Officer Exemption Process
(Note: mapping for single problems but some forms may have multiple problems - steps would be combined)

1. Hours Problem?
   - Yes
     - Reg Officer check Educ. Screen for completed low hours portion
     - Contact Reg to ensure hours correct
     - Reg Officer signs off?
       - Yes
         - Form to Station 4
       - No
         - Batch info entered onto a manual batch log
     - Reg Officer signs off?
       - Yes
         - Form to Station 4
       - No
         - Give to Advisor for sign-off

2. No Signature
   - Yes
     - Reg Officer initially phone/leave message to expect form in mail
     - Fill out green problem sheet
     - Give problem and green sheet to Juli
     - Enter problem into reg screen and mail out problem notice and form
     - Put green problem sheet in sort all
     - When form comes back match up to green sheet in sort all
     - Enter date returned in reg screen and sign off green sheet
     - Green sheet to file drawer
     - Form to Station 4
   - No
     - Yes
       - Criminal conviction not answered
         - Reg Officer write up problem notice with response deadline
         - Fill out green problem sheet
         - Give problem and green sheet to Juli
         - Enter problem into reg screen and mail out problem notice and form
         - Put green problem sheet in sort all
         - When form comes back match up to green sheet in sort all
         - Enter date returned in reg screen and sign off green sheet
         - Green sheet to file drawer
         - Form to Station 4
3b. Criminal conviction answered yes

- Registration Officer takes copy of form
- Registration Officer passes copy of form to PCR

Form to Station 4

4. PPR Problem?

- Yes
  - Reg Officer try calling registrant to discuss PPR
  - Reg Officer completes green form and attach to renewal form
  - Form and incomplete PPR's given to renewal secretary
  - Names entered on Excel spreadsheet
  - PPR conditions applied in reg screen
  - PPR completion form mailed to registrant by secretary
  - Detach green form from renewal form and give green form to Reg Officer and renewal form to Station 4
  - Form returned to Station 4

5. Employer Unclear?

- Yes
  - Reg Officer tries to contact registrant X1
  - contact made?
    - Yes
      - R/O write up problem notice and give to Juli
      - enter problem into reg screen and mail out problem notice
      - Form sent to Station 4
    - No
      - write address on form
  - self employed?
    - Yes
      - write address on form
      - Juli to enter address in public address in iMIS
      - Form to Station 4
    - No
      - Form returned to Station 4
6. Approved affiliate Refund?
   Yes
   Reg Officer writes refuns slip
   send refund slip to Accounting
   Write "AFFIL" on top of form
   Initial beside "AFFIL"
   Form to Station 4

7. Online form No Money?
   Yes
   Advisor runs report mid Feb
   Check to ensure letter needed
   Reg Secretary sends letter to each registrant
   Early March another report is run and follow up letter sent
   To After March 1

9. Money No Form?
   Yes
8. Name documentation needed?

Yes

Try phoning registrant (once)

contact made?

Yes

Form to Sort All until proof arrives

Form to Station 4 (when proof arrives on Mar 1)

No

Reg Officer write up name clarification notice and green sheet and give to Juli

Juli enters data in reg screen and mails out notice

Form goes to sort all

name documentation received by Mar 1?

Yes

Enter received in reg screen and match up to form in sort all

Form to Station 4

No

Form goes to Station 4 and gets processed without name change
11. Paper Form Received
No Money

Reg Officer tries to call registrant

resolved?

paid by CC?

paid by cheque?

Yes

No

Yes

No

Form sent to Station 4

Form to Station 4

After March

To

Yes

No

Green form filled out
Give to Juli
Notice mailed out
Advisor runs report mid Feb
Check to ensure letter needed
Reg Secretary sends letter to each registrant
Early March another report is run and follow up letter is sent

Reg Officer writes info on blue info sheet and gives it and form to accounting
When cheque arrives, it is matched to form in sort all and tops removed
Top of form and cheque goes to accounting

Yes

Yes

Yes
 Old Step: Station 5

Station 5

Registrant record pulled up for data entry
Info from forms data entered on 4 different screens
Check entire batch entered into iMIS batch stored in boxes
Batch log signed by data entry clerk
Ad hoc search done to ensure batches & balance according to log

Balanced?

Yes
Tick entered on log
Batch pulled and verified against ad hoc search
Full boxes moved to storage cupboard and stored for 1 year

No

Batch pulled and verified against ad hoc search

problem identified and data entry corrected

Info from forms data entered on 4 different screens
Registrant record pulled up for data entry
Old Step: After March 1

Reg Advisor request that rollover script can be run once all forms and funds received by March 1 have been processed (through Station 2) approximately mid March.

Rollover script makes “unrenewed” registrants inactive in iMIS.

Renewals received after March 1 without reinstatement fee are notified ($32.10 owing).

1st week of April: all registrants with unresolved issues are manually made inactive in iMIS.

Once all registrants made inactive renewal section prepares verification reports for employers.

Reconciliations done money issues to accounting.

Refunds issued to all inactive registrants with money owing.