

# *Using Registry Data to Improve Registry Operations and Customer Service*

The National Workforce  
Registry Alliance Conference,  
Englewood, CO,  
Thursday, September 8, 2016

# *Objectives*

- To increase awareness of and inform workshop participants about alternate uses for registry data—not simply for reporting purposes, but for improving internal operations
- To provide concrete examples of data analyzed and how it was used to improve registry operations
- To demonstrate the relationship between improved registry operations and improved customer service

# Activity

- Before we get started, we'd like to spend a few minutes brainstorming your top issues when it comes to registry operations
- Groups of 3, spend 10 minutes, report out top 2 issues



# *History of the NJ Registry*

- Introduced in 2003 by Professional Impact NJ (PINJ); included Member, Program, and Sponsor (Training) Agency Profiles; PD Provider (Instructor and TA Specialist) Approval; NJ Office of Licensing Approvals; and Training Attendance Tracking
- Funded by NJ Department of Human Services Division of Family Development
- Voluntary **unless** individual was applying for a PINJ-sponsored program, largest of which was the NJ Early Childhood (Abbott) Scholarship
- Paper application that was then inputted into the system by staff
- Majority of members were Abbott Scholarship applicants who did not continue membership once their funded coursework was completed
- Abbott Scholarship initiative ended in 2010, new Registry membership declined
- Staffing: 1 part-time Manager and 1 full-time and 1 part-time Staff Person

# *Evolution of the NJ Registry*

- Moved to a new system with an online application in 2011—major adjustment
- NJ Registry now used by several state initiatives—training enrollment module developed
  - 2013: Grow NJ Kids, NJ’s Quality Rating and Improvement System, rolled out with 55 programs
  - 2014: “Keeping Babies and Children in Mind” post-Super Storm Sandy infant/toddler mental health training initiative funded by the NJ Department of Children and Families
  - 2015: 18 Resource and Referral (R&Rs) Agencies serving 21 NJ counties were mandated by Department of Human Services (DHS) to use NJ Registry to list training and track attendance in the NJ Registry

# *Grow NJ Kids (GNJK) QRIS*

- Modules added:
  - GNJK Enrollment Form attached to Program Profile—is completed by a PINJ-approved Program Administrator
  - GNJK Application Processing Module for GNJK administrators at DHS
  - Electronic assignment of Technical Assistance Specialists to accepted programs with automatic application forwarding—cross-department collaboration
  - GNJK Scholarship Module
- GNJK-participating program teachers, assistant teachers, and directors use the NJ Registry to enroll in GNJK training, and their attendance is tracked through the NJ Registry by GNJK

# ***NJ Registry Growth:***



**175%**  
increase in  
membership  
in the past  
year

<b>Date</b>	<b>Number of Active NJ Registry Members (who have updated information in the past year)</b>	<b>Number of All NJ Registry Members</b>
<b>September 2012</b>	1,065	3,639
<b>September 2013</b>	2,518	6,709
<b>September 2014</b>	4,175	12,304
<b>September 2015</b>	6,800	10,600
<b>September 2016</b>	11,904	28,746

# ***Work Load and Issues Identified***

- In January 2016 there were **8,580 active members** served by **eight Registry Specialists = 1,073 files per Specialist**, ***BUT*** there was more to the story...
- **Application types and complicated processing procedures:** “Initials,” “Renewals,” “Maintenance”
- **Types of documentation received to be reviewed and processed; who can enter what?** transcripts (official or unofficial or copies); diplomas, workshop certificates, employment verification, letters of recommendation, other
- **Methods of receiving documentation that had to be recorded as received:** postal mail, email, scans (no faxes)

# *Division of Duties*

- Customer service: answering of phones and emails, working with walk-ins
- Opening and recording of mail in spreadsheet and Registry
- “Add my Employer” emails and accompanying updates to Member Profiles
- Reviewing documentation for validity and fraud
- Data entry of college transcripts
- Data entry of workshops
- Specialized approvals (Scholarships, Administrator, Office of Licensing, PD Provider, Sponsor Agency, etc.)
- Technical assistance: GNJK, Super Storm Sandy training, regular, etc.
- Quality control
- *Etc.!*

# Staffing and Processing Time

## Current staff makeup:

- 1 full-time Manager
- 1 full-time Registry Coordinator
- 5.5 full-time Registry Specialists
- 2 full-time Registry Temporary Staff
- 1 full-time Scholarship Coordinator
- 0.5 full-time Scholarship Specialist



By mid-2015 we were approximately 4 months behind in processing applications

# Where We Were...

- Member satisfaction was low
- Sponsor Agency and DHS feedback was unfavorable
- Staff morale was low
- Various fixes were tried
  - Assigning specific telephone hours to each staff person
  - Overtime
  - Offering workshops throughout the state for Sponsoring Agencies to enter their own training attendance into the NJ Registry, to reduce NJ Registry staff workload
  - Number of programs in GNJK soared to **200+** in 2014, and **400+** in 2015....



# *Time to Try Something Different...*

- In January 2016 we conducted a work analysis
- We spent two full days sitting with each NJ Registry staff person to observe them performing their specific job duties...to examine **first-hand** how the NJ Registry was functioning in relation to those job duties
- We also examined existing NJ Registry data and found there was information stored which could be analyzed to help us
  - Who performed what activity?
  - When activity was completed?

# *Third Party Observations*

- Number of times one piece of documentation was handled by multiple people
- Scanned documentation was being printed for data entry, then scanned again, then shredded
- Number of phone calls during particular time periods: phones were busiest first thing in the morning, during lunch and nap times, and at end of the day
- Receipt of incoming documentation was being recorded twice, into Excel spreadsheet and into Registry
- Number of repetitive “Notes” being entered by staff into Member Profiles
- Differentiation of duties created lag time
- Multiple levels of approval for Scholarships

# Data Analysis: Examples

## Task Overview



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Efficiency Report (08/01/2016 - 08/26/2016) [Excel Download](#)

User Name	<a href="#">Transcripts</a>	<a href="#">Courses</a>	<a href="#">Scholarships</a>	<a href="#">Role Requests</a>	<a href="#">User Notes</a>	<a href="#">Uploads</a>	Total
Employee 1	0	0	59	0	49	61	169
Employee 2	463	111	0	0	107	221	902
Employee 3	2	0	0	0	2	0	4
Employee 4	361	75	0	11	57	129	633
Employee 5	0	0	2	0	0	0	2
Employee 6	409	113	0	0	1	783	1,306
Employee 7	9	3	3	0	53	3	71
Employee 8	71	8	0	47	17	83	226
Employee 9	480	82	0	1	73	262	898
Employee 10	19	1	137	0	17	53	227
Admin Total	1,814	393	201	59	376	1,595	4,438

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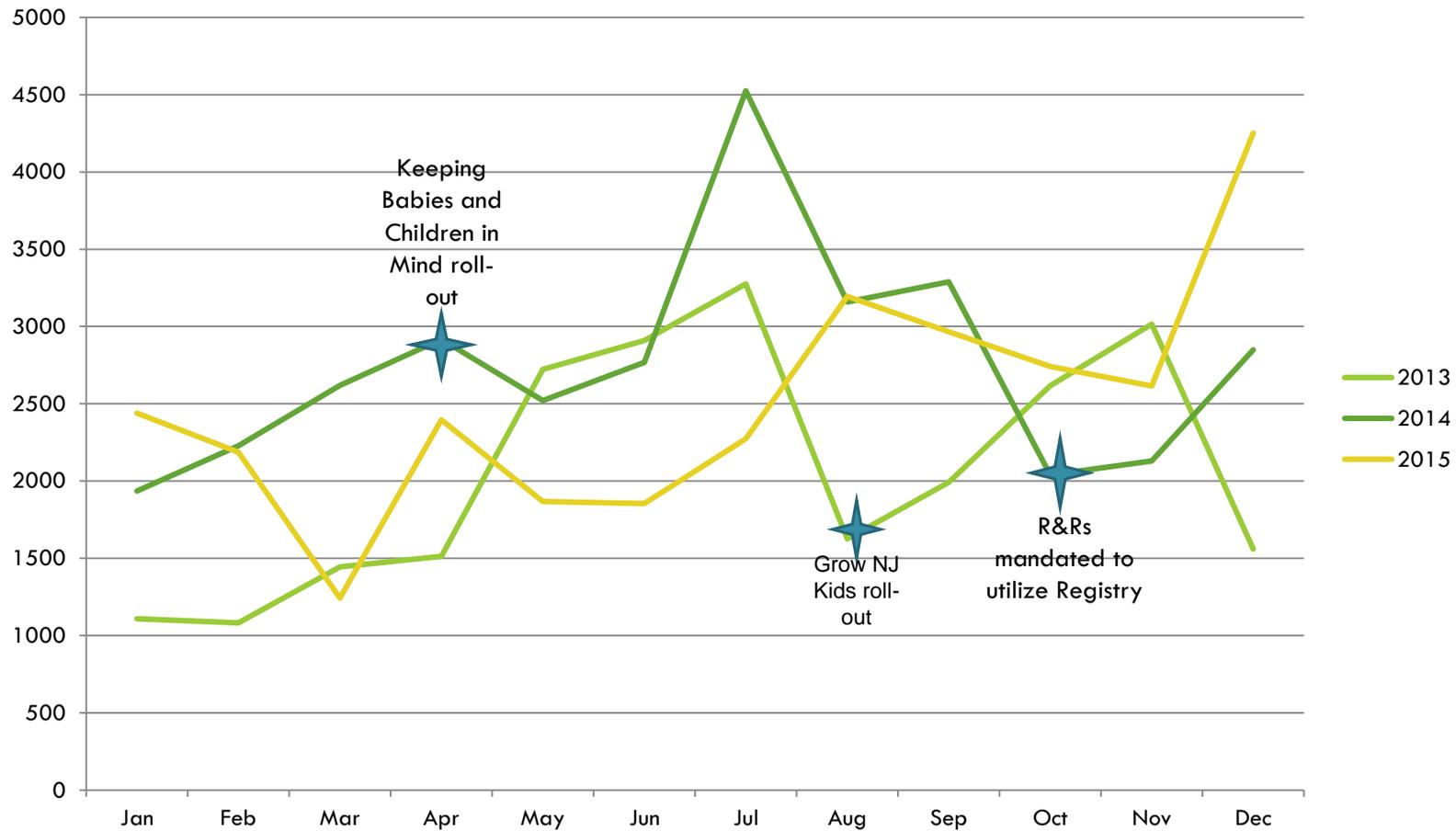
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**Transcript Entry Report (08/01/2016 - 08/26/2016)** [Excel Download](#)

Date	Admin Total	Other Total	Total
08/01/2016	123	32	155
08/02/2016	121	137	258
08/03/2016	99	72	171
08/04/2016	80	30	110
08/05/2016	0	48	48
08/06/2016	0	0	0
08/07/2016	0	0	0
08/08/2016	140	276	416
08/09/2016	116	92	208
08/10/2016	150	69	219
08/11/2016	117	140	257
08/12/2016	0	145	145
08/13/2016	0	0	0

# Data Analysis

## Total Number of Trainings Entered by Year



# Data Analysis

## Documentation

- As of 2/3/16, there were **10,800 pieces of back-logged documentation** to be processed
- The average number of pieces of documentation processed by a high-performing staff member was 40/day, going as high as 60-70/day
- After implementing system modifications to make processing easier, assume a staff person could readily process **60 pieces/day**
- $10,800/60 = 180$  business days for one person to get through the back log
- If 4 people were assigned to the back log,  $180/4 = 45$  **business days for 4 people to get through the back log**

***We set our goal date using this formula.***

# *Process Analysis*

We also did the following:

- Assessed time spent on other activities, like “Staff Notes”
- In this timeframe, Notes were made on 4,946 Member Profiles, some of which didn’t seem necessary:
  - That an account was made active
  - That something was received and entered into the transcript
  - Approved Administrator Access
  - Approved a Scholarship



- *Which processes needed to be addressed to increase efficiency and decrease processing time?*
  
- *What technology upgrades to the system could realistically be financed and completed to decrease processing time?*



# *Processing Fixes*

- Became more “Member-centered” rather than “User-centered”
- Simplified Registry “statuses” and got rid of several that we weren’t using—we are using “Active,” “On Hold,” “Pending,” and “Expired”
- Implemented technology shortcuts to perform tasks more easily, with the goal of eliminating “clicks” and duplicate work
- Spread the workload more efficiently
- Cross-trained—everyone does everything with the exception of specialized approvals

# *Technology Fixes and Upgrades*

- The system automatically searches for the required number of renewal hours based on the member's job title on a regular basis, **and** changes the member's profile status appropriately, so that this doesn't have to be completed manually
- System produces additional automatic "Notes" to reduce staff time in entering them
- Added a column for which staff member completed which "Role Request"
- Simplified "Add my Employer" screens for Members
- Added links to Registry staff member screens to make navigation quicker and easier, i.e. added one at the bottom of Member "Personal Profile" that says "Return to Search Results"
- Added "Date Range" filter to reports

# *Technology Fixes and Upgrades*

- Simplified process for training data entry
  - Staff can now enter attendance for multiple staff members at one particular training
  - Staff can easily schedule another date for a particular training
- Automated the quality control process for manager and coordinators of checking staff members' efficiency and accuracy



# Quality Control Reports

*Efficiency Report—see slide 14*



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## Efficiency Reports

- ▶ [Efficiency Report](#)
- ▶ [Data Entry Accuracy Report](#)



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### Data Entry Accuracy Report

Start Date  End Date

Entered By Name:

Entered By Name	# Records Entered	# Records Checked	% of Records Checked	100%	90%	80%	% Less
cccc reg admin	1464	348	23.77%	38.51%	59.48%	1.72%	0.29%

# Summary

- The NJ Registry stored data elements that we didn't realize would help us with operational efficiency
- Many things could be automated that we were doing manually
- The work could be streamlined and distributed differently once we knew more about it
- Data about what we were doing added validity to our staff needs and made it easier to get approvals from our funder
- We are currently caught up, entering transcripts, trainings and employment as we receive them, despite the fact that there are 600+ programs now participating in GNJK, our participation numbers have increased 175% in the past year, we ha two staff members out on maternity leave, and temps come and go!
- Both customer satisfaction and staff morale have improved!
- We are now gearing up to track the CCDF Mandated Health & Safety trainings!

# ***QUESTIONS***



# ***THANK YOU!***

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