

New Jersey Bankers Streamlines COVID-19 Protocol with OnTask Health Tracking

CASE STUDY

Overview

Although the COVID-19 pandemic forced NJBankers to work remotely, the association remained as busy as ever, helping its members to navigate the complex legislation surrounding Paycheck Protection Program (PPP) loans and mask requirements in bank locations. When the team finally returned to the office and resumed planning for in-person events in the fall of 2021, it quickly became apparent they would need to implement a policy for managing COVID risks. After careful deliberation, NJBankers decided to require proof of vaccination or a negative test result in order to attend an event.

Challenges

But once the policy was in place, there remained the logistical challenge of gathering and tracking that information from association members and other event attendees. For the first event, the team used a combination of Excel spreadsheets, email, and phone calls to manually track the health status of more than 200 people. Even after the information was gathered, it still had to be manually verified when attendees arrived for the event.



As the sole association representing the interests of the New Jersey banking industry, the New Jersey Bankers Association (NJBankers) has provided support, advocacy, and education for its members for more than 115 years. Each year, the association runs over 30 events, including conventions, training seminars, and awards dinners, to help members network and learn about the latest trends and regulations affecting the industry.

“

The software itself is very easy. I tested it multiple ways with my team. I tested every document under the sun to upload and I thought it was flawless.

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— Jennifer Zorn, Senior VP and Director of Education and Business Development at NJBankers

Challenges (Continued)

“That’s what solidified it for us at the event,” said Jennifer Zorn, Senior VP and Director of Education and Business Development at NJBankers. “We had to look for a better solution. We didn’t want to house it on our system, and we didn’t want to keep doing the manual work anymore.”

With the clock ticking to implement a new solution before their annual Rising Star Awards Dinner in November, Zorn began her search and quickly discovered OnTask Health Tracking. The web-based platform was particularly attractive because it didn’t require attendees to download anything, and its powerful workflows could streamline vaccination tracking into a simple “Yes/No” question. “That’s really what I was looking for,” Zorn said. “Something easy that everyone can understand.”

Results

Once OnTask was in place, NJBankers got to work preparing to roll out the Health Tracking features for the Rising Star event, which was less than a month away. The process began with internal testing to ensure the experience would be as seamless as possible for attendees. This included adding brand elements on the website portal and sending out instructions to attendees well ahead of the actual launch.

The OnTask support team helped make the process even easier by quickly tweaking workflows and making other minor changes to better support event tracking. In most instances, changes were implemented same-day to keep the project on schedule. Whenever Zorn had a question, she was able to send a quick email to get the answers she needed “immediately.”

When the time came to launch the new vaccine and test tracking program, everything was ready to go. “It was so seamless that we made our deadline for when we wanted to send out everything. I don’t think it could have been any more simplistic, from a user side, as well,” Zorn said.

After receiving a notification email, attendees were able to click on a sharable link that took them to the NJBankers-branded COVID Health Tracking page. Once there, all they had to do was answer a simple “Yes/No” question regarding their vaccination status and let the automated workflow guide them through the necessary steps to provide their information. Overall, the process proved faster and easier for event organizers and attendees alike.

Results (Continued)

By eliminating the manual work NJBankers once relied upon for COVID vaccine and test tracking, the association could spend more time focusing on delivering a memorable event experience for attendees. The solution couldn't have arrived at a better time. "We're excited to be in-person," Zorn said. "We've been having this event for five years and it's our highest attended event this year."

With one successful event in the books, NJBankers is already looking ahead to managing vaccine and test tracking for future gatherings. From workflow changes that allow attendees to submit information for multiple events to making it even easier for them to access the health tracking portal, they're exploring new ways to make health tracking as seamless and non-intrusive as possible with OnTask.



"(Implementing OnTask) is probably one of the fastest things we've ever done."



About New Jersey Bankers

Founded 116 years ago, the New Jersey Bankers Association (NJBankers) is a trade association representing 76 banks and 185 service providers. NJBankers provides a variety of services to members including government relations at both the state and national levels; education and professional development, and employee health and welfare insurance benefit programs through its licensed insurance brokerage facility, Bankers Cooperative Group.

About OnTask

OnTask is a workflow automation solution that can be used to create, collect, track, and verify digital documents and forms. Entirely web-based with a mobile-friendly interface and eSignature support, OnTask allows anyone to upload files and records for authorization without any complicated registration or downloads. OnTask's Health Tracking solution also makes it easy to track all associated COVID-19 paperwork, including vaccination records, test results, and more to keep organizations in compliance with changing mandates. For more information, visit ontask.io.