

ROC-P

UNLOCKING SUCCESS:

Application Checklist for Professional Excellence



As an organization committed to empowering professionals through rigorous certifications, we know the journey begins long before they step into their role. Whether you are working with seasoned experts or aspiring newcomers, it all starts with your organization's application process—a pivotal step that shapes their entire experience. It is crucial that you get this phase right to build the long-term trust and loyalty of certified professionals.

WHY DOES THE APPLICATION PROCESS MATTER?

- **It Formalizes the Relationship:** Your application isn't just paperwork—it is the handshake that initiates a potentially long-term partnership. Candidates may have explored your website and read the brochure, but the application is where they commit to the process.
- **A Glimpse into the Journey:** Imagine the application as a window into their future. What will their experience be like within your organization? How seamless, transparent, and supportive will it be? There are clues in the application process, and candidates are paying close attention.

FOR CANDIDATES: A USER-FRIENDLY EXPERIENCE

- **Clarity and Expectations:** Candidates crave simplicity. When they apply, they need to know what's expected of them, how long it will take, and which documents to submit. A well-structured application sets the tone for their entire journey.
- **Timelines and Next Steps:** Waiting in uncertainty is nerve-wracking. Candidates appreciate knowing when their application is accepted, what comes next, and the overall timeline. A smooth process reassures them that they are in capable hands.

FOR ORGANIZATIONS: EFFICIENCY AND INSIGHTS

- **Completeness Matters:** You want your candidates to complete the application promptly and thoroughly. An incomplete application delays the process and creates unnecessary back-and-forth. Streamlining this process can save hundreds of hours of time.
- **More Actionable Data:** Your application data provides valuable insights, including demographics, trends, and key metrics. An optimized application can make this data easier to segment and analyze, leading to more informed decisions and better resource allocation.

Ready to transform your application process?

Start with these 20 tested recommendations that will elevate your credentialing experience, and then reach out to our expert team to optimize and automate your entire credentialing lifecycle.

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YOUR COMPLETE APPLICATION CHECKLIST

Whether you're building your application process from scratch or looking for ways to squeeze more performance out of your existing workflow, follow this 20-point checklist will optimize your application process for candidates and your team.

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- Consider the User:** Your credentialing management software needs to be intuitive and easy to use. Ensure your teams can set up the correct mechanisms to guide candidates through the application process, and that candidates can navigate them easily.
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- Simplify Your Language:** Seek to eliminate ambiguity in your messaging, and avoid jargon or abbreviations that can confuse applicants. For example:
 - Instead of saying "Please provide details," say "Enter your relevant experience."
 - Specify required information rather than using generic labels like "Additional information."
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- Break Down Each Step:** Break down the application into manageable sections, each with a clear purpose. Consider providing a progress indicator, so candidates know where they are in the process.
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- Group Items Logically:** Structure your question flows logically, and group related questions together to create a cohesive narrative. Use clear section labels, such as:
 - Contact Information
 - Qualifications and Experience
 - References
 - Supporting Documentation
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- Edit for Relevance and Specificity:** Tailor your questions to each section of the application. While it can be tempting to gather all possible information, limit your application requests to what is directly relevant to the credentialing process.
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- Create Sequential Validation:** Ensure applicants complete each section in a predetermined order before progressing, guaranteeing all required information is provided.
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- Validate As You Go:** Prevent applicants from advancing with incomplete fields, and validate mandatory information before allowing progression through the application.
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- Highlight Critical Fields:** Use visual cues such as asterisks or bolding to emphasize mandatory fields.
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- Add Instruction with Critical Fields:** Provide clear explanatory text to emphasize the importance of these fields.

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- **Use Words Carefully:** Just as the wording of the test questions on your exams matter, pay careful attention to the wording of questions on your application. Always foster clarity and inclusivity, and consider the use of positive framing:

Positive: “Please describe your educational background and qualifications.”	Negative: “Avoid leaving any sections blank regarding your educational background.”
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- **Open-Ended vs. Closed-Ended Questions:** Consider these two options:

Open-Ended: “Please describe any additional professional development activities or training you have undertaken in the past two years.”	Closed-Ended: “Have you participated in any of the following professional development activities in the past two years? (Select all that apply)”
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In this scenario, the open-ended question allows for a more comprehensive exploration of an applicant’s professional development activities. Providing valuable insights into their initiative, dedication, and breadth of learning experiences. However, it also requires applicants to invest more time and effort in formulating their responses and can result in varied response formats, making analysis challenging.

The closed-ended question offers predefined response options, ensuring consistency and facilitating quick data collection and analysis. It provides a structured approach to gathering essential data efficiently.

- **Biased Language:**

Be on the lookout for subtle biases in the application that could influence applicant responses and evaluator interpretations, which could potentially lead to biased assessments of candidates’ competencies and suitability for the credentialing process. It’s crucial to design questions that promote fairness and cultural sensitivity.

- **Example:** “Describe a time when you effectively corrected a less-experienced colleague’s error, ensuring patient safety was maintained.”
- **Bias:** This question subtly suggests that correcting errors is the primary responsibility of more experienced healthcare professionals and that less experienced colleagues are prone to mistakes. It may inadvertently favor applicants who emphasize hierarchical communication patterns over fostering a culture of mutual learning and shared responsibility for patient safety among healthcare teams.

Use Suitable Question Types: Using the correct question types in your application process can streamline data entry and ensure candidates enter relevant, accurate information. Some examples of question types include:

- **Numeric:** Numeric questions allow for precise data entry, and are useful for quantifying experience, qualifications, or other numerical information.
- **Text:** Text questions allow for nuanced responses, and provide applicants with flexibility in expressing their qualifications, experiences, or achievements.
- **Dependent Type:** Dependent questions allow for conditional logic, where subsequent questions depend on the responses to previous ones. This ensures that applicants are prompted to provide relevant information based on their earlier responses, leading to a more tailored and efficient application process.
- **Multiple Choice, Single Answer:** Multiple choice questions with single answers offer structured response options, simplifying data entry and ensuring consistency in responses.
- **Multiple Choice, Multiple Answer:** Multiple choice questions with multiple answers allow applicants to select all the options that apply to them. This is particularly useful for gathering information about diverse skills, competencies, or preferences without imposing limitations on the number of selections.
- **Multiple Choice, Dependent Answer:** Multiple choice questions with dependent answers offer flexibility while ensuring specificity. They allow applicants to choose predefined options while also providing the opportunity to elaborate or specify further if none of the predefined options fully apply to their situation.
- **Table Type:** Table-type questions enable structured data entry in a tabular format, facilitating organization and clarity, especially for complex information such as employment history, academic achievements, or project portfolios.

Add User-Friendly Features: Your certification management or application software should include tools like autofill for repeat information, date pickers for streamlined date entry, and limits on file type uploads to simplify the application process.

Set Deadlines: Your software should allow you to set automated reminders for upcoming deadlines, ensuring participants are well-informed and can plan accordingly.

Help Applicants Finish: Prompt users to correct specific errors in an incomplete application by triggering alerts or emails. Ideally, these alerts are personalized and give the applicant the opportunity to fix specific fields rather than resubmit the entire application.

Make It Personal: Address applicants by their name with a personalized greeting and/or messaging.

Offer Peace of Mind: Schedule and send an automated message that the application has been received by your organization and lay out the timeline and/or process to set expectations.

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- Solicit Feedback:** Create a channel for applicants to provide feedback on the application process, including anonymous feedback. Use their insights to improve your system.
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- Support Your Applicants:** People consume information differently, so offer supplementary resources as part of your application process. Possible options include:
 - A 60-second video of the most common reasons applications are rejected.
 - If an application is rejected, offer a calendar link to schedule time with a team member to walk through the areas that need fixing.
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- Report and Evaluate:** Report on how long applications take to complete and the most common fields that lead to a returned application. Look for ways to improve turnaround time with your application.
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- Test and Iterate:** Your application should be flexible, so that you are able to identify any issues, confusing/illegal questions and continuously improve.

Remember, a well-crafted application process is the cornerstone of credentialing excellence.



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