

PAAB Tags and CEI 2023

QUARTERLY REVIEW

A quarterly review of the eFiles Customer Experience Index (CEI)

The CEI Survey launched on February 13, 2023. This review of the CEI data accounts for the early data captured between

141

Completed Surveys

February 13 and March 31,
2023.

Averages of the CEI question survey results by question:

1. Staff connected with this eFile (e.g., file coordinators, reviewers, senior reviewers, etc.) were helpful and responsive	4.5/5 Indicating an average response between “Agree” and “Strongly Agree”
2. Comments and suggestions in response letters, calls and messenger were clear and actionable.	4.4/5 Indicating an average response between “Agree” and “Strongly Agree”
3. I felt the review was: 1. Highly inconsistent 2. Somewhat inconsistent 3. Somewhat consistent 4. Highly Consistent 5. I don’t know	3.7/4* Indicating an average response between “Somewhat consistent” and “Highly Consistent”
*This average rating is calculated from Responses 1-4 as including ratings of 5 (or “I don’t know”) would have skewed the average upward. There was 1 rating of “I don’t know” in this data set.	
4. Please provide any other feedback specific to this file: [optional open text field]	No responses provided
5. Please rate your overall experience with this particular review 1 – highly negative experience 10 – highly positive experience	8.9/10 Indicating a positive average overall experience.

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Key Takeaways:

- Survey Completion Rate is 16%, with this data capturing 141 responses out of 886 surveys sent. Data should be interpreted with this in mind, as this does not capture the full quarter and is a relatively low sample size.
- Ratings for all question, on average, have been positive. As this data is reflective of an incomplete quarter, we will continue tracking for trends through Q2 and provide actionable items at that time.

Have your voice heard! Help us in continually improve by completing your CEI surveys. You can find them in the "My CEI Surveys" Tab in the top navigation bar in eFiles. This helps us identify trends and implement quality improvement initiatives both internally and externally.

We received a low amount of actionable, open-text feedback. In order to best understand your experience with PAAB and create a meaningful action-plan to improve or disseminate best practices, detailed, specific feedback is very important.

How to make your feedback count!

**Management provided variations on comments received to ensure no identifiers*

1. Be specific!

🚫 "All staff involved were very responsive. However, the reviewer assigned to the file was not very helpful during the review."

TIP: Add detail! If you were happy with most of the staff, but didn't find the reviewer particularly helpful, tell us what happened. What made you feel that way? What part of the review was unhelpful?

🚫 "N/A" or similar (accompanied by a rating with an asterisk denoting a lower score)

TIP: Put yourself in our shoes. If you received a low score on your performance rating, but were not told why, would you know how to improve to better your score in the future? CEI scores are part of our team's performance evaluations and are used to guide company-wide process improvement and best-practice sharing. The more detail we have, the better we can guide these initiatives!

Continued...

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How to make your feedback count: *continued...*



Most of the staff involved in my eFile were very responsive. The file coordinators noticed A PM update was missing and worked with me to quickly get the proper file uploaded and into the queue. However, in the second round of review, I requested a call with my reviewer to discuss Comment 2 of their letter, and the only availability they provided was 4 days after my initial request. It's my understanding that reviewers are to at least provide options for a return-call within 24 hours, so I was disappointed by this as it impacted my overall timeline.

- **Why this works:** It's detailed! We now understand what the issue is that caused the responder to feel that the reviewer was not helpful and can dig into why this ticket call took so long to book and return.
- Both positive and constructive feedback was provided. We appreciate that not all cases will have both positive and constructive feedback, but this was particularly helpful to understand the ranking and identify areas for improvement. Where there is positive feedback, it helps us amplify these best practices since we know what is helpful to you. Constructive feedback helps us understand what the challenges were and improve on an individual level and a systems level.

Confidence in confidentiality

As a reminder, client tags trigger internal audits for validation by PAAB's Director of Pre-clearance Services, Yin Man. Any tags pertaining to Yin are validated by the Commissioner and removed from the report provided to Yin. No Reviewer or Senior Reviewer is EVER aware of tags generated by clients. The CEI Surveys follow the same processing flow. You can be confident in the confidentiality of the tagging system and CEI Surveys. For additional reassurance, the tagging system, tag assessments, and documented actions taken will periodically be reviewed by an external auditor.

If you'd like to learn more about the client tagging system, check out the [Client Tagging System Advisory](#). You'll also find links to useful videos on [tagging a review](#) and [tagging phone calls](#).

If you'd like to learn more about CEIs, see [Customer Experience Index](#).

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A quarterly review of the eFiles tag report

Total number of submissions

QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4
2969			

Total number of client tags (prior to validation)

QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4
0			

Therapeutic area distribution

QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4
0			

Total number of tags deemed valid following internal review

QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4
0			

Validated tag breakdown

QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4
0			

Q1 PAAB action taken:

Not tags reported in Q1 of 2023. As a reminder, both CEI and Tags are important and serve different but complimentary purposes. Additional details can be found in the [PAAB resource Client Tagging System Advisory](#)

Is there more information you would like to know and see in the next quarterly update? Let us know on the [Forum](#).