

Elantis Solutions Inc.

Automating the Rebate Process for Clean Energy Vehicles



Client Profile

In 2011, the British Columbia provincial government launched the Clean Energy Vehicle (CEV) Program, a visionary initiative aimed at fostering the widespread adoption of electric vehicles (EVs) and other zero-emission vehicles (ZEVs) offering significant environmental and economic advantages.

The resulting CleanBC Program was instituted to administer provincial incentives at the point of sale.

As the program grew rapidly, the escalating complexities of rebate processing led our client to partner with Elantis Solutions Inc. for an ingenious solution.

The Challenge

With a meteoric surge in rebate reimbursement claims from a manageable 100 per month to a staggering 5,000 per month, the pre-existing process became unwieldy.

Our client, in search of a streamlined approach, envisioned a more efficient process for claim application reviews and approvals.

The imperative was clear: establish a single source of truth for claims, eradicate duplicate data entries, and institute a centralized communication system with automotive dealers province-wide.

The ultimate goal was to reduce follow-up and turnaround times dramatically.

The Solution

Elantis, with its proven track record in the successful implementation of business process automation for many clients, took charge of the challenge. In a meticulously planned two-phased approach, Elantis rolled out an automation solution to fortify the foundation without overwhelming the workforce and introduced checkpoints to enhance efficiency and viability.

Phase 1: Automating Claims Processing with Power Automate and Nintex

Elantis implemented an automated workflow using Power Apps and Nintex to streamline claim submissions from car dealerships. Upon submission, emails are triggered to notify the program coordinator and support team, providing a direct link to the claim form. Reviewers can update claim statuses, including "Cancel" or "Require Follow-up," with detailed notes for clarity. Adjustments trigger emails back to dealerships for necessary updates. Approved claims are moved to the "Completed Applications" SharePoint list via Nintex Automation Cloud (NAC).

Additionally, Elantis developed a real-time dashboard for tracking claim statuses, ensuring a centralized data source, eliminating redundancy, and enhancing communication with dealerships. This integration optimizes claims processing, data management, and user interface functionality.

Results

- Established a centralized claims management system.
- Eliminated redundant data entries.
- Streamlined and secured the claims submission process.
- Improved communication channels with dealerships.



Phase 2: Integration for Enhanced Functionality

Building on the success of Phase 1, Elantis proposed a comprehensive integration of data from Microsoft Dynamics, Acro Media, and ChamberMaster in the next phase. This integration provides a holistic solution by seamlessly capturing and processing data from various sources, thereby optimizing the claim review and approval processes.

Results

- Developed comprehensive data integration from multiple sources.
- Enhanced functionality for internal and external users.
- Improved processing times further.

“Managing 100 to 5,000 rebate claims monthly manually was overwhelming.

We were looking for a streamlined solution that eliminates duplication, centralizes communications, and significantly cuts processing times.”

Highlights

- **Electric Vehicle Rebate Application:** A robust, customized system that accepts rebate applications through digital forms, undergoes a meticulous multi-stage review process, and archives approved claims for future reference.
- **Dealer Dashboard:** The central hub for dealers to monitor the status of applications and submit new claims.
- **Enhanced Functionality:** Empowered our client with varied tasks at different times through the claims' portal, including user management for dealerships. The integration of multiple platforms creates a single source of truth, improves the user experience, and tracks the budget and payments of incentives.