

Industry Profile

Insurance agencies are flooded with paperwork – applications, policies, claims, appraisals, and more. Without a way to effectively manage the sheer volume of paper involved in doing business, staff productivity and speed of claims processing can suffer. Agencies need instant access to information in order to deliver superior customer service and achieve high retention rates in this competitive market. What's more, agencies must effectively store, track, and manage all claims-related documentation to prove compliance in the event of an audit.



Solution

Unity Document Suite is a complete desktop document management solution that transforms tedious, costly paper-based processes into highly efficient digitized workflows. This powerful, intuitive software works with the document capture capabilities of an integrated bizhub multifunction printer (MFP), enabling agency employees to convert, edit, organize, combine, search and share scanned documents as well as Microsoft® Office and PDF files like never before.

Unity Document Suite provides a user-friendly interface between MFPs and desktop applications. It optimizes the way users capture, manage, work with, and share documents while eliminating common concerns about file compatibility or security. By enabling users to scan and convert paper documents into editable, searchable PDF documents right from the MFP, Unity Document Suite helps insurance agencies to increase productivity, reduce costs, and improve customer service.

Addressing Key Industry Challenges:

Challenge:

A single insurance claim may involve hundreds of supporting documents which must be physically stored and managed. This takes up valuable office space and makes it difficult and time consuming to access the information needed for providing excellent customer service.

Solution:

With Unity Document Suite, insurance agency employees can scan and/or convert all claim-related documentation to editable, searchable PDF files and store them in a digital archive. Depending on the type of document being processed, employees can define a personalized workflow – complete with scan-to destination, conversion format, and routing instructions – that is executable at the MFP with a push of a button. These workflows will automatically scan, convert and route PDF documents to all specified locations and/or recipients. A simple search by text or alphanumeric pattern provides instant access to information.

Challenge:

Insurance agencies must store and maintain fast, easy access all claim documentation to prove compliance in the event of a regulatory audit.

Solution:

With Unity Document Suite, all claim-related documentation can be automatically indexed and stored in a designated location within any digital archive – whether it be a desktop folder, a Windows® network folder, or an enterprise document management system like Microsoft® SharePoint®. In the event of an audit, authorized agency employees can simply search the archive by alphanumeric pattern or text to find any requested information.

Ideal for capturing, converting, editing, combining, and sharing policy and claim-related documents including:

- Applications
- Quotes
- Policies
- Medical records
- Accident reports
- Risk assessments
- Underwriting forms
- Contracts
- Correspondence
- Photos
- ...and much more

Challenge:

Insurance agencies need a consistent process for securely managing and disclosing information during policy creation to minimize risk of potential legal disputes.

Solution:

Unity Document Suite enables agencies to protect scanned and/or converted documents with secure encryption and permission controls. That way, information can be shared electronically while protecting confidential client data.

Challenge:

Every claim file includes all sorts of documentation—forms, accident reports, appraisals, photos, and more. Some of these documents may be supplied in hard copy, others as electronic files in various formats. Managing and assembling all these documents can be a time-consuming process that slows claims processing and impacts office productivity.

Solution:

With Unity Document Suite, agency employees can instantly create 100% industry-standard, universally viewable PDF files — including all PDF and PDF/A versions — directly from the MFP or from virtually any PC application. They can combine scans and photos with word processing, spreadsheets and other files for automatic conversion to the PDF format. And they can assemble PDF documents by simply dragging and dropping individual pages or complete files. For added convenience, agency employees can also convert to PDF from within Microsoft® Office documents or create PDF files of any document with a single click while browsing with Windows. What's more, support for Windows 7 Jump Lists provides quick access to recent files and common PDF creation and conversion tasks.

Challenge:

Insurance agencies deal with countless types of forms, many of which have traditionally been filled in by hand. As a result, the information on these forms often has to be re-typed into an online system, wasting valuable time and administrative resources.

Solution:

Unity Document Suite features Logical Form Recognition™ technology which makes it easy to turn static paper forms into electronic PDF or Microsoft Word forms that can be filled out online.

Challenge:

Insurance agencies need to control operational costs in order to stay competitive in a crowded market.

Solution:

Providing integrated tools for capturing, converting, editing, assembling and electronically sharing paper and digital documents, Unity Document Suite saves insurance agencies money by reducing dependence on paper, faxing and overnight delivery services. In addition, it enables agencies to streamline workflows — initiated right at the MFP — to boost office productivity, speed claims processing, and improve customer service. All these benefits contribute to achieving a strong competitive advantage.

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