

The Payoff

- Improves application processing with quick access to related information
- Accelerates business with automated application routing and customer letter creation
- Increases visibility into workloads with improved task management

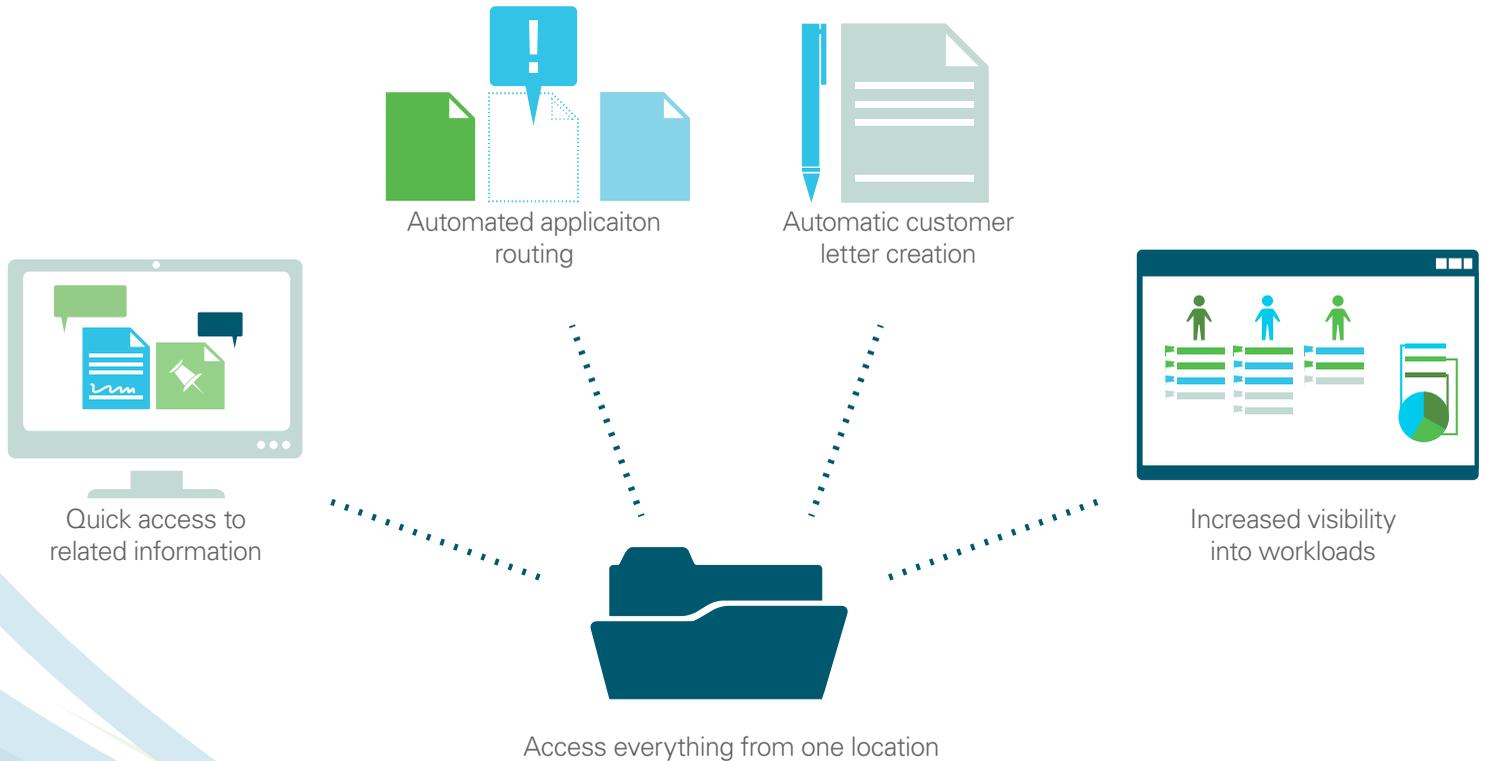
Improve and accelerate life insurance new business processing

With OnBase, management no longer needs to worry about getting the right application to the right employee and employees no longer have to manually track critical tasks in spreadsheets. OnBase gives appropriate employees the information they need, when they need it and includes centralized task management to increase visibility for all personnel involved and keep the process on track for accelerated and more accurate processing.

Improves application processing with quick access to related information

OnBase gives staff a consolidated view of all the content surrounding a specific account.

As employees review a new account, they access the application and any supporting documents in a single view, eliminating the need to jump between applications or physical storage space to find the information they need. As employees collect information from the potential client, OnBase shows which critical documents, such as medical records and background checks, are still missing from the file, ensuring the employee collects all necessary information. Not only can employees access information surrounding a single application but they can also simultaneously retrieve information surrounding other policies under the applicant's name. This holistic view of the account holder's file gives employees immediate access to all the information they need to accurately review the new application.



Accelerates business with automated application routing and customer letter creation

OnBase ensures that the correct personnel have access to the correct application and improves communication with the applicant throughout the review process.

Once a completed application enters into the system, OnBase automatically routes the form to the employee who specializes in the type of policy or has specific pertinent knowledge, ensuring the appropriate personnel can begin work right away.

As employees review the application, OnBase automatically creates a routine letter, for instance a letter requesting a birth certificate or Attending Physician Statement (APS) from the customer, allowing employees to spend less time crafting correspondences and more time working with the application.

Increases visibility into workloads with improved task management

OnBase gives employees the tools they need to quickly complete their work from one place. With improved task management, employees make sure they complete all their work accurately and in a timely manner.

From the same consolidated view of information and documents, employees get a list of critical tasks to complete to assess the application accurately. They easily add to this list, assigning task ownership, due dates and even priority. As employees assess multiple applications, they quickly access a combined list of all of their owned tasks – by priority, policy type or due date. They even view their work in a calendar, allowing them to better see the work they have ahead and plan accordingly. With increased visibility into their own workload, employees ensure they process new business in a timely manner.

Built using OnBase Case Manager, a new business processing solution accelerates and improves life insurance application processes to ultimately provide better customer service from the very beginning of the relationship.

To learn more, visit Hyland.com.

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