PICA
Treated Fairly

Trinisys is one of the key technologies transforming document management at Podiatry Insurance Company of America.

Application entry: From 30 minutes to 5

In 2005, Podiatry Insurance Company of America (PICA), the leading provider of professional liability insurance for podiatric physicians in the US, undertook a major effort to streamline its forms processing system. The two technology pillars of its plan were the Trinisys™ Data Entry System and Hyland's OnBase® for document management.

PICA installed the OnBase imaging system first. They found that, though searching for document images in the Enterprise Content Management (ECM) system was

much more efficient than pulling paper files from cabinets, imaging alone did not improve the data entry process. In many instances, business processing from images

was more cumbersome than working from paper. PICA needed a way to streamline data capture and automate the associated manual procedures.

Processing applications, renewals, and claims required many steps – all manual.

- Data entry into the line-of-business application
- Generating correspondence
- Updating the marketing database

Renewals: From 20 minutes to 2 minutes using Trinisys On-Image Data Entry™

Policy renewals processing was the first thing Trinisys helped PICA transform. Each policy has to be renewed annually, and entering the data from the renewal questionnaire took 20 minutes per insured. Because there are seasonal surges in renewal volume, trained policy owner services personnel had to work overtime during busy seasons.

The Trinisys On-Image Data Entry™ interface lets PICA capture data from scanned or faxed renewal forms. The data is then passed to the integration engine, which automatically updates the line-of-business application (Oasis).

This change has had three important benefits:

- Eliminating manual entry into Oasis reduced the time to enter a renewal questionnaire from 20 minutes to 2 minutes.
- Renewal processing is much more consistent now, and data integrity has been improved.
- Entering the renewals using the On-Image Data Entry™ interface is simple enough to be performed by unskilled workers, freeing up skilled employees to focus on customer service.

"Not only has Trinisys helped us gain efficiencies in our process," said PICA Senior Project Manager Beth Hoeg,

"they have also enabled PICA to implement consistent processes. The same rules are now applied to all policies during the renewal verification process, helping PICA validate that our policyholders have the correct coverage."

BENEFITS

- Increased efficiency
- Decreased training costs
- Increased process consistency and flexibility
- Increased data integrity

TRINISYS FEATURES USED

- On-Image Data Entry™
- Patchless Form Recognition
- OCR/OMR
- Web Forms
- Microsoft® Word and Adobe® PDF Document Generation
- OnBase® Integration

INTEGRATIONS WITH THIRD-PARTY SOFTWARE

- Delphi Technology Inc. OASIS
- insurance processing software
- Front Range Solutions USA Inc. GoldMine® Marketing Management Suite
- Hyland Software OnBase® Enterprise Content Management software

PICA saves 30 minutes per claim with Trinisys Web Forms

The Claims department was one of the first areas to transition to imaging. When a claim was reported to PICA, a claims coordinator would gather information from the insured and fill out an Incident Report, which was physically moved from desk to desk. The first phase of transitioning the claims reporting process was to implement the existing process using the imaging system (OnBase). The Incident Report and associated documents were scanned and accessed electronically instead of being physically moved from user to user. This created immediate benefits, but scanning and indexing the Incident Report actually increased the total turnaround time.

In the second phase, the Incident Report was turned into a Trinisys Web Form. This eliminated scanning and indexing, and streamlined the process of gathering the claim information from the insured. The Trinisys Integration Engine eliminated two data entry steps, automated the creation of a form letter, and sent email notifications to the claims personnel assigned to the claim. This saved 30 minutes per claim while improving the consistency of the process and the quality of the captured data.

Application entry: From 30 minutes to 5 minutes with Trinisys Integration Engine

Processing new applications required manual entry into a marketing database (GoldMine®) and the line-of-business application (Oasis), the generation of an underwriting worksheet, and typically one or more calls to the applicant to clarify information on the app. The process involved complicated rules that varied depending on the issue state. Training personnel to enter applications was time-consuming and the processing, inconsistent.

In March of 2006, PICA automated the entry of new applications using the Trinisys system. An unskilled, part-time worker now enters the applications using the Trinisys On-Image Data Entry™ interface. The Trinisys integration engine inserts the data into the two line-of-business applications, generates the underwriting worksheet, and creates a list of any inconsistencies or questions that the new business team might need to address with the applicant. This frees up the new business team to focus on customer support. Because the process is now automated, all applications are processed in a consistent manner.

"The right solution for every business problem."

The flexibility of the Trinisys system and the technical team's skill and grasp of client business problems have made for a good partnership with PICA. Mike Sole, Senior Project Manager at PICA, said, "No matter the business need, Trinisys is always there to help us with a solution. They have a high level of technical talent with an ability to help form the right solution for every business problem. Trinisys has truly been a value-added partner for PICA."

Trinisys revolutionizes the way businesses collect and process information. Clients have drastically reduced the time and cost involved in acquiring data from paper and the web with Trinisys' innovative data capture software. The Trinisys integration engine enables companies to automate complex business processes and get data to the systems they use every day.