

Industry
Insurance

Solutions Implemented
Reform Enterprise, Tag Doc

Processes Automated
Printing, Archiving



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AFPD

FabSoft's Reform and Tag Doc automate the archival of AFPD's documents

Administrators for the Professions of Delaware, or AFPD, provide marketing, underwriting, billing, collections, and data processing services to insurance companies. AFPD processes thousands of forms from their UNIX system on a daily basis. These forms include client policies and insurance quotes. AFPD was printing them on multi-part, pre-printed forms and using dot matrix printers. The costs associated with using this method were extremely high and AFPD was looking for a way to eliminate using these expensive forms. Additionally, AFPD needed an easy and efficient method to archive the documents from two different workflows: one generated from UNIX and the other from scanned insurance policies. Previously, these documents were being stored to file cabinets. AFPD quickly realized that manually filing and retrieving documents was time consuming and unreliable. By implementing FabSoft's Reform Enterprise and Tag Doc, AFPD was able to solve all of their document management issues and improve productivity and efficiency.

In order to replace the multi-part, pre-printed forms, FabSoft's Reform was used to recreate their insurance policies and quotes. Using Reform's easy to use Form Designer, AFPD was able to replicate all of the forms that they had to purchase in the past. Now, when a form is printed from the UNIX system, Reform captures the print stream, overlays the data on the newly created form and prints it to a high speed color printer. With this process, multi-part, pre-printed forms and dot matrix printers are no longer needed and forms are printed on plain paper at a faster rate.

The other major issue that AFPD was facing was the need to archive documents more efficiently. FabSoft's Reform has the ability to automatically route documents to major archive systems. In order to do this, AFPD provided FabSoft with the index fields that they wanted to use for archiving. When documents are sent from the UNIX system, Reform captures the print stream, extracts the text, and indexes it accordingly to the archive system. With Reform, all of AFPD's documents are immediately archived upon processing without any intervention from the user. If the document needs to be referenced in the future, AFPD can use the index information to perform searches and quickly and retrieve the document.

AFPD also needed to archive the documents that were being scanned and used FabSoft's Tag Doc to manage this process. Tag Doc is a solution that automates the archival of scanned documents by using barcode tagging. For AFPD, cover pages are generated that are tagged with Tag Doc's proprietary barcode. This barcode is associated with all of the text of the insurance policy. The insurance policy is distributed as needed to be signed by clients and when the signed policy is returned to AFPD, it is scanned using an MFP. Upon scanning, Tag Doc recognizes the barcode on the cover page, retrieves the actual document text, and uses it to intelligently archive the document to AFPD's digital archive system. Since Tag Doc is not an OCR process and the actual document text is archived, AFPD can perform full text searches on their documents for immediate retrieval. So far, AFPD has successfully scanned and archived over 4,000 signed policies with Tag Doc without a single failure.

The combination of Reform and Tag Doc provides AFPD with a system that allows them to automate their workflow. In turn, AFPD was able to cut costs and increase productivity and efficiency. Additionally, AFPD can assist clients more confidently since they have an extensive archive of document information that can be quickly referenced whenever needed.