Improves processing speed and accuracy

Automates application routing

Creates better 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. Centralized task management increases visibility for all personnel involved, keeping the process on track for accelerated and accurate processing.

Automated application routing

Automatic customer letter creation

Quick access to related information

Increased visibility into workloads

Secure, centralized storage
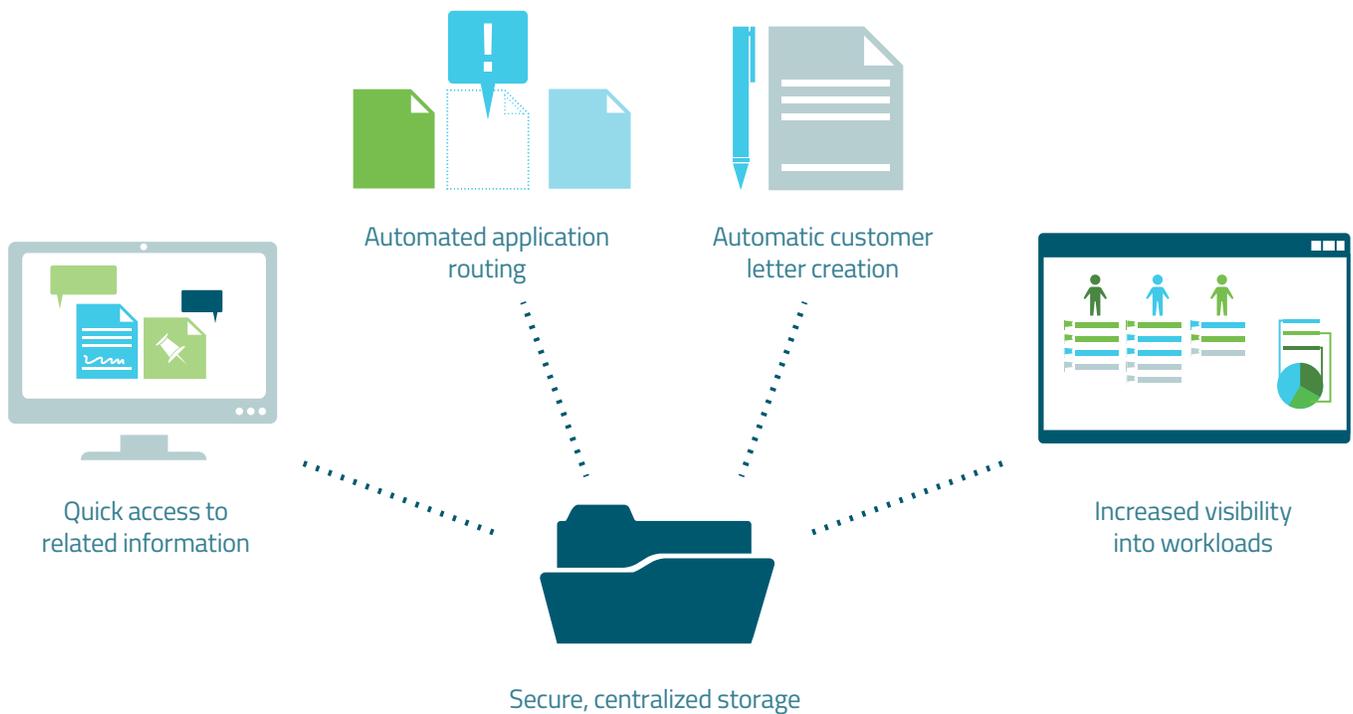
OnBase®
by Hyland

Provides quick access to all account 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 systems or physical storage files 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.

Not only can employees access all content surrounding a single application, but they can also simultaneously retrieve information related to 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 routing

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

OnBase even automates communication with the applicant during the review process. 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. Employees spend less time crafting correspondences and more time working with the application.

Increases visibility into workloads

OnBase gives employees the tools they need to complete their work faster and more accurately – from one place.

From the same consolidated view of information and documents, employees see the critical tasks they need 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 – customizing their view by priority, policy type or due date. They even view their work in a calendar, allowing them to better see what's 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, this new business processing solution accelerates and improves life insurance application processes to ultimately provide better customer service from the very beginning of the relationship.

Learn more at **OnBase.com/Insurance »**

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