



Go Paperless to Achieve 90% Cost Reduction While Contributing to a Greener Environment

Client

The client is a leading US-headquartered provider of business process services for government health and human service agencies across the globe. The client focuses on providing services to manage and administer government-sponsored public health and human services programs efficiently and effectively. They offer solutions that lead to efficient public programs to help local governments reach beneficiaries across several states.

Challenges

The client was looking at a solution that would help them address the following issues with manual documents (specific forms):

- ▷ Digitize the document process to take a conscious step toward sustainability.
- ▷ Reduce the operating costs.
- ▷ Decrease the time taken to manually send and receive forms and manually upload them into the system. The client receives anywhere between 1,500-2,000 documents every day. For each form, it would take 15-30 minutes (manually) to scan the form, upload the scanned form to the Document Management System (DMS) and update it to the CRM with form fields (about two to seven days if we include the time taken to send and receive the completed form to and from the customer).
- ▷ Enhance security and legal compliance.
- ▷ Improve the customer experience.

The forms vary across countries (USA, Australia, etc.) and functional departments (HR, Insurance, etc.) right from Onboarding to Program Application forms (as per the client's service offerings) in different languages.

Some examples of the form are as follows:

- ▷ Audit Application Interview Form
- ▷ Nondisclosure Agreement
- ▷ Enrolment Form

Solution

Optteamix conducted a Discovery phase to analyze the existing documents and the data received daily to find the most optimal solution for the client.

After carefully analyzing the findings of the Discovery phase, Optteamix suggested a two-step document digitization approach along with integration with the **Document Management System (DMS)** and **Customer Relationship Management (CRM)** using **AWS SaaS** (upload the completed form to DMS and update the CRM with the data filled into the form using APIs).

The implemented solution included

- ▷ **Guided forms and electronic signature:** By digitizing the document/form using guided forms and e-signature, the form could be shared with the customer by embedding the document to a website or sending an email/text messaging for the customer to fill in the details and sign the document electronically.
- ▷ **Optical Character Recognition (OCR) Based document processing:** OCR-based document processing automates data extraction from handwritten or printed text from a scanned document or image file. If the form identified does not allow the complete elimination of paper, OCR-based document processing comes into play.

Technology Stack

- ▷ Adobe Sign
- ▷ Document Management Systems (DMS)
- ▷ AWS SaaS
- ▷ Vidado.ai
- ▷ CRM

Value Delivered

The Document Digitization solution has resulted in many benefits/advantages for the client. Some of the important benefits that the client was able to achieve are as follows:

- ▷ The time taken to complete a single form has been **reduced from 15-30 minutes** (about **two to seven days** if we include the time taken to send and receive the completed form to and from the customer) **to 10 seconds**.
- ▷ As a result of the client's environment-conscious approach, paper consumption has reduced dramatically for the client, thereby contributing to a **greener environment**.
- ▷ Implementing digital documents provides the client's customers with an **improved UX** as customers can complete the document anywhere, on any device and at any time.
- ▷ **90% cost reduction.**

- ▷ The client is **adhering to new data compliance** requirements such as General Data Protection Regulation (GDPR) by going paperless. The documents are also HIPPA, FERPA and COPPA compliant.
- ▷ The solution has helped eliminate human intervention resulting in **zero human errors**.

About Opteamix

Opteamix is a digital automation technology consulting firm with deep expertise in Application Development, Robotic Process Automation, Artificial Intelligence, DevOps, Enterprise Mobility, and Test Automation Services. We are headquartered in Denver, Colorado with a wholly-owned delivery center in Bengaluru, India.