Insurance Solution Guide

Transform your insurance business with OnBase.

OnBase by Hyland

matricia™ SHARED PURPOSE

Empower your Insurance Business with OnBase

- Core: One-Step Paperless

Insurance-Specific Solutions

- Policy and Client Approval & Management
- Claims Processing
- Broker & Customer Portals
- All Insurance Solutions

General Backoffice Solutions

- Contracts Management
- HR Management & Flows
- Acquisitions Management with Budgeting
- Vendor Review, Fleet & Property Management Project Management

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One Solution: All Documents, All Processes, All Tasks.

The Nucleus: Tasks

Tasks are the core of 1-Step Paperless. They are **anything that needs to get done in the company**. They can be contracts with additional documents, they can be simple internal requests for acquisitions. They can even be just an employee asking another employee for advice on a certain project.

The Process

1. Any employee can generate a Task. They fill in the name of the task, all the information, upload any necessary documents and select its type.

2. The solicitor can then select the appropriate department or specific person the Task needs to go to. They can add a specific message for that person and make a list of subtasks that must be completed by that person before sending it to the next person.

3. The person is notified and can see that Task in their tasklist, alongside all the other Tasks they are working on. They can see all relevant information and act upon it. They can comment or modify the document (with track changes), give formal approval or simply reply with their own comments and opinion on it. Then they can send it back to the Solicitor or to another employee for assistance. All from the application interface.

4. The Solicitor can always see the Tasks they have created and are therefore responsible for. They can see who is currently working on them to be able to follow-up. Once the work is complete, the Solicitor can either close the task by marking it Done, or send the resulting work (a finalised document, for instance) for approval on preset flows. The Solicitor can change the responsible person for the Task if that is required.

Core: One-Step Paperless

No more email threads, no more lost attachments, no more document searching.

- **Documents**
  - Are digitally stored, easy to find.
  - Have full change history, comments and even digital sticky notes.
- **Processes**
  - Have full history and decision traceability.
  - Gain transparency, providing you with an overview of what is happening now.
- **Employees**
  - Know what to do with a clear list of tasks.
  - Don't waste time searching for documents and doing administrative tasks.

Use Cases

Creating a Contract: A sale is made, and the company must create a new contract. The account manager creates a task called "Contract Customer x", filling in all the information. They send it to the legal department from the app. Employees from the legal department see the request as a task. Based on the details, they compose the contract, upload it and send it back. The account manager sees the task, verifies the contract and sends it to be signed by their superior via the app. The superior sees the task, signs it, and sends it back to the account manager. The account manager uses the 'send-to-mail' button, and sends the contract to the customer. The customer sends it back with changes, and the account manager adds it back to the task with the add-from-mail function. OnBase automatically identifies the customer's changes and displays them. The account manager checks it, approves them, and sends it back to be signed. They receive it back signed from the customer, and can now mark the task as done. The contract is archived intelligently with expiration date to be easily retrievable.

Managing a Customer Request: The customer service representative receives a customer request for a certain document relating to their account. The customer service representative cannot access that document. They create a Task in OnBase, fill in the details, and send it to the person who has access to the specific document in the loan management department. An employee in the department sees the task, accesses it, uploads the required document, and sends it back to the customer service rep. The latter receives the request, sends the document to the customer and marks the task as done.

Acquisition Request: The radiologist in the hospital needs to buy medical equipment. They create an acquisition request Task in OnBase, and send it to the Hospital Manager. The latter sees the task, checks the budget, and approves it. If the price would have been higher, they would have sent it to the financial department for approval in the same way the radiologist did. The radiologist can then place the order and add the invoice to the acquisition request.

Insurance-Specific Solutions

360° View of customers and their insurance contracts.

Automated approval flows with traceability & visibility.

Automate claims processing with on-field broker portal, images & documents.

Client Management

To open an account with the insurer, the client can request it at a physical office, at a broker or via an online portal. They or the insurance employee create an onboarding request in the application, and they upload all the necessary documents in order. The folder is then placed on an approval flow depending on the type of insurance requested. Once receiving all approvals, the client is notified and the insurance is created in the company's Core Insurance Management System.

Broker Management

All brokers have access to the broker portal and are able to create new policies, manage claims and generally respond to their customer's needs. The insurance company gains a complete overview of their brokers.

Policy Management

Customer service employees gain a complete overview of the customer's profile, their insurance contracts, and claim history with all the associated information. They can, upon the client's request, cancel the insurance, modify it, extend it, and add new products.

Compliance

By having all documents in one location, easy to find, and processes with complete decision-history and traceability, compliance is ensured. Audits are quick and seamless, and fraud is easy to identify.

Claims Processing

The customers, brokers or insurance employees can fill in the insurance claim and start the process. They are walked through all the necessary document uploads and the system ensures that the claim goes through all approval stages. The broker or customer can add pictures and videos from the location.

System Integration

OnBase seamlessly integrates with any core insurance system, retrieving and uploading, and matching customer and policy information to the system. They work together in tandem to ensure efficiency and responsiveness.

All Insurance Solutions

All of the solutions are fully configurable to your needs. They are meant to work in any Insurance company, with your exact processes and structures, requiring minimal adaptation from your side.

Property & Casualty

UNDERWRITING

Guidewire CalimCenter

ACCORD New Business Processing

New Business Processing

Underwriting Workbench

Reinsurance MarketPlace

Loss Control Field Solution

Accenture Duckcreek Integration

Guidewire Billing Integration

Premium Audit

CLAIMS

Claims Management Integration

First Notice of Loss

Claims Processing & Adjudecation

Claims Case Management

Mobile Field Adjuster

Litigation

Document Packaging

EXTERNAL ACCESS

Policyholder Portal

Broker Portal

Claimant Portal

Life & Annuity

INDIVIDUAL LIFE

Core System Integration

ACORD Application Processing

New Business Field App

Underwriting Workbench

New Business Processing

Cash with APP

Evidence Management

MIB Integration

Facultative Reinsurance

Amendments & Exclusions

Contract Packaging

Client Services

Claims Processing

WEALTH

Client Onboarding

Portfolio Management

Client Management

Product Development

Advisory Portal

Litigation

Document Packaging

Health

ACCOUNTS & MEMBERS

Account/Group Management

Account/Group Member Inquiries

Member Appeals & Grievances

Membership Management

Mobile Open Enrolment

PROVIDER

Provider Appeals

Provider Contract Agreements

Provider Credentialing

Provider Network Management

CLAIMS

Care & Disease Management

Claims Adjudication

Claims Processing

Utilisation Management/ Medical Review

General Backoffice Solutions

Starting from the 1-Step Paperless Core, pre-defined flows and functions can be added.

These can address a variety of additional specific process-related needs.

With one platform, you can manage every information-related process.

HR Management & Flows

Gain an overview over all employees and their documents from one dashboard. Manage leave requests, vacation days, bonusing and the company's employee structure. Employee onboarding and offboarding is performed from the system, gathering all the information and documents, and integrating with any existing ID management software. Use online employee portals to communicate processes and receive Leave Requests, Performance Appraisals, and any other desired interactions.

Contracts Management

Expand 1-Step Paperless with with functions such as send-to-mail, digital signature, supplier and third-party portals as well as advanced-decision tracing and versioning. All contracts and additional documents are in one place, connected, easy to find, empowering your company's Legal department.

Acquisitions & Budgeting

Extend the system to set clear processes for Acquisitions Requests and Management. Set and approve budgets that guide the acquisition approval flows. When employees make acquisition requests, the system places them on the appropriate approval flows depending on the acquisition's details.

Invoicing

All invoices entering the organisation are uploaded to OnBase which understands them and organises them accordingly. Gain an overview over all invoices' status and history all integrated with accountants' software.

Vendor Review

Automate the vendor evaluation process and keep all vendor-related documents in one place. Gain an overview of all vendor interactions.

Property Management

From one dashboard visualise and manage all of the company's property (vehicle-fleet, machinery, buildings, sofware licenses), with all documents in one place. Gain an overview of property-related tasks – insurance & license renewal, maintenance, conformity expiration dates...

Project Management

Manage projects through a dashboard of tasks, stakeholders, documentation, calendars, and timelines. Visualise all ongoing projects and their status.

One Platform, All Solutions

The OnBase Platform

Robust & Secure: A Solution that You Can Use for Decades

Hyland, the maker of OnBase, updates the solution systematically in order to fix emerging issues and to **improve existing functionalities**.

Flexible to Your Changing Needs

Through **intuitive point & click configuration** and without requiring risky and lengthy coding and custom development. We will be there to make sure that it responds to each of your emerging needs, adapting to your organisation's growth.

Integrates with Your Software

OnBase integrates with any core business solutions ranging from Insurance-specific solutions to CRM, ERP and EMS. It can integrate natively or through robust APIs.

Ever-Expanding Capabilities and Functions

Hyland releases large suite updates twice per year, constantly expanding the product's capabilities range and adopting the newest technologies.

A Variety of Interfaces

Mobile, Web, Desktop, Portals or even directly from your ERP or Core application for **absolute ease of use.**

Extend & Improve

RPA: Hyland RPA

Leverage the power of RPA, training digital robots to perform repetitive tasks across multiple interfaces and applications with OnBase at the core.

Digital Signature

Any **eIDAS certified** e-Signature solution can be directly implemented in OnBase to embed no-friction qualified electronic signatures on digital documents within the company's processes.

Chatbots: DRUID AI

Use AI Chatbots to facilitate interactions between people and company, be it employees requesting leaves or asking compliance questions or customers asking for help or going through the onboarding process.

Customer Portals with eiD

By using **Electronic Identification (eId)** solutions alongside chatbots and digital signature, the entire process of customer onboarding can be managed through a **convenient online portal or mobile application**, offering customers absolute convenience.

We are your loyal partners.

We are a team of Certified OnBase consultants with over 12 years of experience in implementing complex IT platforms in large companies.

We are your long-term partners. Your purpose is our purpose.

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Visit us at www.matricia.ro