

Insurance Case Study: CAA South Central Ontario Guidewire Integration and Document Composition Module

“Choosing to work with ImageSoft made sense for CAA. We sought a solution that was proven; one that would meet all our needs for accuracy, timeliness and completeness. ImageSoft’s OnBase solution perfectly fit the bill and allowed us to maintain consistency.”

— **Robin Joshua**

Director, Corporate Underwriting
and Risk Management
CAA South Central Ontario

The Customer

The CAA South Central Ontario (CAA SCO) is an automobile club delivering roadside assistance, insurance and travel services. Recognized as a Celent Model Insurer based on best practices for optimizing infrastructure and effective project management, CAA SCO has over 1.9 million card-carrying members.

The Challenge

When CAA chose Guidewire, a global property/casualty core system, to replace its outmoded Claims and Policy Administration system, one area of concern was its ability to maintain production printing of documents. Having previously partnered with CAA SCO, ImageSoft was chosen to orchestrate the integration of the new system with the insurer’s existing OnBase document management solution. CAA SCO had, since 2010, successfully utilized OnBase in several departments to streamline business practices, improve the customer experience and to manage and track claims and policy documents. OnBase works seamlessly with Guidewire by capturing and storing documents electronically and linking them with the associated claims and policy information from the Guidewire core system.

The integration between these two powerful tools lets CAA SCO staff easily access information saved in OnBase without exiting Guidewire. Within a single interface, they can quickly retrieve documents from either system in which they are working, and thereby work faster and more efficiently.

Simultaneous to the Guidewire implementation, CAA SCO also sought a better way to create and print policy declaration pages and other outbound customer correspondence. The process it had been using to print the scores of documents involved in issuing and administering claims was slow and expensive. CAA SCO knew there had to be a better way: Indeed, there was – and it was right under their own roof.

The Solution

Before considering the purchase of a new solution, CAA SCO leadership wisely opted to first explore possible options using its existing technology. They were pleasantly surprised to learn that OnBase, with the addition of a single module, could provide the answer.

The OnBase Document Composition module is designed to handle composition and production of documents by merging data and templates. The solution pulls information from Guidewire to automatically generate precise, reliable documents with minimal staff involvement. As an added benefit, outbound documents are automatically stored as part of the main claims and policy folders, making document retrieval much easier.

In the case of CAA SCO though, the process was complicated by the fact that barcodes needed to be applied and a PCL print format file sent to the mailroom for

printing. Even so, the agility and flexibility of the OnBase Document Composition module enabled it to handle the task. Doing so requires OnBase to first ingest the output from Guidewire and merge the data with the correct forms using Document Composition. Next, the barcodes are added to the documents, which are then sent to the mailroom where they are printed and where Pitney Bowes equipment reads the barcodes and inserts the documents into the corresponding envelopes for mailing.

Their Success

Using OnBase Document Composition, CAA SCO's document creation process is far more resilient than its former method. Previously, CAA SCO used a batch print process which, if a problem occurred with even a single document, the entire batch of documents would be held up. Now, exceptions are worked individually while the remainder of the batch is processed without interruption. OnBase Document Composition has exception handling capability built into the workflow which checks for errors. If found, errors are automatically corrected and documents are reprocessed.

Eliminating such delays has helped significantly speed CAA SCO's document creation process. Beyond saving time, the new process also uses smaller electronic files which require less data storage capacity and make accessing information much faster.

Document printing is further improved with OnBase Document Composition through auto-filled information pulled from Guidewire. Documents, such as declaration pages, cover letters, disclosure pages and other such policy correspondence, are now automatically formatted and printed customized to the individual policyholder. This eliminates the time-consuming step of document collation and assembly. The documents are then automatically saved to file folders that have been formatted by department for easy access by the various internal departments that may need to retrieve them, such as customer service, claims or underwriting.

As an added bonus, the interface in Document Composition is extremely user friendly and enables even individuals without any programming knowledge to make changes to documents or to build new document templates. OnBase Document Composition provides a clean, easy-to-use interface requiring only basic technical aptitude.

These process improvements and resulting benefits have made OnBase the platform of choice for CAA SCO for document management, creation, printing and workflow. Moreover, the flexibility of the OnBase solution provided by ImageSoft means that as CAA SCO expands its business, the system will be able to readily accommodate the company's needs, growing as its business grows, now and into the future.

CAA SCO

The Results

From Guidewire and OnBase Integration:

- Enable staff to capture and store documents electronically in a single central document repository (OnBase) and link them with the associated claims and policy information from its core line of business system (Guidewire)
- Provide fast, easy access to information saved in OnBase without exiting Guidewire

From OnBase Document Composition Module:

- Create precise, reliable documents with minimal staff involvement
- Increase efficiency by automating document generation and centralizing template storage
- Eliminate the costs and overhead of another system to do the same job (leverage existing technology)
- Achieve savings through reduced data storage costs, printing and paper costs
- Eliminate errors and promote data integrity by pulling information directly from key core systems
- Complete error handling solution