

SAFE, SECURE ENTERPRISE CLOUD-BASED SHARING FOR YOUR INSURANCE ORGANIZATION

On one side of the coin, the proper management of customer and company information, to expedite new business and claims processes, is paramount for insurance companies. On the other, the ability to share sensitive documents with policyholders, agents, third parties and employees – in a method safer and faster than email, via a portal or overnight delivery – is a holy grail everyone is chasing.

In the meantime, collaboration still occurs between employees and agents. More than likely it occurs via unsanctioned public file-sharing tools, inefficient email and USB drives, or IT resource-intensive FTP sites. This leaves gaps in visibility, security, compliance and control.

ShareBase by Hyland is an enterprise cloud-based file-sharing product that enables you to share documents securely with those inside and outside your company while retaining ownership over what is shared.

Read on to discover how ShareBase adds value across your insurance organization and beyond by equipping your employees and external stakeholders with fast, secure sharing capabilities.

1 Annual premium and monthly payroll audits

Eliminate the paper-intensive process of premium and payroll audits by allowing your third party administrator (TPA) to upload documents into a set of pre-populated folders by merely sharing an email containing a secure link to the folders and instructions on how to upload. Once the documents are uploaded, OnBase workflow notifies carrier personnel. Automate everything, with no need to print, scan, or index documents.

2 Claims processing

Rather than rely on email to collect data and documents from third party sources, a process that is rife with security and versioning issues, claims adjusters can collaborate with third parties using ShareBase. Together, they can view files, upload and share documents, maintaining information security and version control. Automated emails alert both adjusters and third parties that documents are available for viewing or need to be uploaded.



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3 Medical claims review

Regain efficiencies lost to third party claims systems by using ShareBase and OnBase in conjunction. OnBase workflow notifies members of the physician claims board via email and a secure link to a ShareBase folder that there are claims files available for review. Board members access the secure folder and review documents without the need to download or print files. They can also upload findings and notes to ShareBase. OnBase, automatically monitoring ShareBase for new content, then notifies the claims adjuster that new content is available. Everyone involved in the process remains in one secure, complaint system.

4 New business trailing documents

Rather than communicate and collect missing documents from agents via email, with all its security and versioning issues, underwriters can send agents a link to a secure ShareBase folder. Create subfolders for agents to upload missing documents or other information. When a document is uploaded, notify the underwriter via OnBase.

For more information visit ShareBase.com »