



Customer Success Story | Insurance

# Mobile Medicare Enrollment

## Medicare Advantage provider transforms enrollment with OnBase

### The Challenge

An OnBase customer since 2008, a leading Medicare HMO and Medicare Advantage provider in Puerto Rico was using OnBase enterprise content management (ECM) in multiple departments to automate workflow. But it was still handling Medicare enrollment with paper forms. The slow process of collecting and manually entering information led to lost forms, data errors and a complex experience for enrollees.

The provider needed a flexible, process-driven solution that could improve speed and transparency, while making compliance a seamless part of the system. That's where the OnBase Mobile Medicare Enrollment solution came in.

### The Solution

In three months, the provider completely transformed its Medicare enrollment process and began reducing operational costs – as well as compliance risks. By integrating with the provider's current core system, Mobile Medicare Enrollment leverages OnBase's electronic data capture capabilities and the mobility of a tablet device to create a paperless, efficient enrollment process.

### Modernizes data capture

Sales representatives access electronic versions of forms, even when they're offline, allowing them to electronically capture customer information while in the field. Auto fill and electronic signature functionality save enrollees from having to fill out redundant information on multiple paper forms, modernizing and speeding the process.

Electronic forms improve accuracy and security of enrollee information, while reducing processing from days to hours. Completed forms are

#### INDUSTRY

Health Insurance

#### SIZE

Serving 78 counties  
1,200 employees

#### LOCATION

Puerto Rico

#### INTEGRATIONS

EZCap  
TriZetto Facets  
Market Prominence  
CSA (Customer Service Application)  
Great Plains  
RightFax

#### DEPARTMENTS

Marketing  
Telemarketing  
Sales  
Enrollment  
Appeals and Grievances  
Claims  
Pre-authorization  
Provider Contracting  
Clinical and Mental Care

One platform **Unlimited potential**

**OnBase**<sup>®</sup>  
by Hyland

## The Medicare enrollment process was reduced from six days to less than eight hours.

uploaded into OnBase and routed through an automated workflow that prompts the appropriate users to review and resolve questions. Bottlenecks and delays caused by paper processing have become a thing of the past.

### Adheres to industry requirements

Complying with insurance and healthcare industry regulations is expensive using manual processes. Denials from Centers for Medicare and Medicaid Services (CMS) often plague insurers due to missing information in applications. Mobile Medicare Enrollment changes all that through automatic processes that identify missing information, letting staff collect better quality data.

Smart forms mitigate inaccurate data at the point of enrollment by letting insurers define and set rules for capturing necessary customer information. Now, the provider proactively ensures data is complete before it is electronically submitted to CMS.

Enrollment activity and history are stored in a secure, central database, making the audit process significantly easier and faster.

### Empowers staff to drive enrollment

During enrollment, field sales reps carry tablets and leverage front office scanning to complete a dynamic e-form. The Statement of Appointment work item feeds the creation of the CMS-approved application forms. Electronic signatures are captured directly on the tablet through integration with signature technology.

Tablet devices hold nearly unlimited reference documents – such as FAQs and presentations – to engage and inform customers and help to ease the

stress of the enrollment process. By automating the process, less training is required of sales representatives, empowering them to get into the field much quicker. A formerly unpredictable process is streamlined and simplified.

### The Difference

**Increases sales and reduces costs:** Sales representatives collect better quality information during enrollment, while reducing the time spent with each enrollee, resulting in lower costs per call. Now, five employees are required for data entry – down from 40 – leaving staff available for more strategic work.

**Improves process control:** Once forms are uploaded, managers have greater transparency into where applications are in processing. Approvers can access OnBase from anywhere so they are always connected and ensure required procedures are being followed.

**Simplifies deployment:** OnBase Mobile Medicare Enrollment was deployed in just three months. The solution centralized data in main line-of-business applications and integrated with third-party software, letting staff work in familiar interfaces and use OnBase with minimal training.

**Enforces compliance:** Configurable workflow tools allow the provider to set form requirements and reduce the risk of human error. Through greater visibility into the progress and accuracy of applications, managers validate documentation before it is electronically submitted to CMS, further mitigating denials.

Learn more at [OnBase.com/Insurance](https://OnBase.com/Insurance) »