



success story: client files

challenge:

Intac Actuarial Services provides full-service plan administration and consulting to employer-sponsored retirement plans for over 1,500 clients, and had been growing at a rate of 10% per year. The sheer volume of paper generated by client forms and legal documents was growing as well, to the point that the company was running out of office space.

In addition, about 20% of the staff were telecommuters and frequently took client files with them—which made it difficult to locate information when customers called in with questions or requests for documents.

solution:

Digiscribe developed a document management solution that was easy-to-use and quick to implement. Intac would scan new client files going forward, but outsource the capture of their massive legacy files to Digiscribe. All documents would be stored off-site on ImageSilo®—a secure, fully-redundant Web-based repository.

Digiscribe handled the pickup of 500,000 pages of client files, scanned and indexed them at their facilities. Documents were indexed by type and client number and then enhanced with client name, plan name, and consultant name from Intac's existing customer database.

Once completed, Digiscribe uploaded the legacy files to ImageSilo, where they are accessible by Intac's staff from their office or home computer, 24x7. ImageSilo was integrated with Intac's Customer Resource Management (CRM) system, enabling consultants to instantly access client files from within the CRM system with a simple keystroke, for real-time access to information.

As Intac would manage new client files in-house, they purchased from Digiscribe a Kodak™ i260 scanner and PaperFlow™ capture software. Documents are scanned with barcode sheets produced from the CRM system, with index fields populated automatically and comments captured using OCR (optical character recognition) technology. Intac now scans and uploads an average of 15,000-20,000 pages of new client files—correspondence, tax forms, legal documents, etc.—directly to ImageSilo each month. During periods of increased volume, these services are outsourced to Digiscribe on-demand.

benefits of this digiscribe solution:

- Instant access to client files by computer from any location—home or office—24x7.
- Improved employee efficiency as files can be retrieved in seconds.
- Enhanced customer service as client inquiries are handled immediately.
- Clients can be e-mailed requested documents instantly for more responsive service.
- No more lost or misplaced documents.
- Audit trails, security logs and utilization reports to ensure data security and regulatory compliance.
- Less clutter as office space used for 20 filing cabinets was put to better use.

For information on how Digiscribe can customize a solution for your business, call 800-686-7577 and speak to Mitch Taube at x103 or email info@digiscribe.info.

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“ Our sales were growing but so was the amount of customer paperwork in our office. We were running out of office space and, with so many people working from home, it was hard to find information quickly when customers called in to ask questions.

Thanks to Digiscribe, we don't have to waste time hunting for the files we need. When customers call, we can bring up their information immediately from ImageSilo®, and with a few clicks, email what they need—we can literally press the “SEND” button while the client is on the phone! We save a lot of time and our clients love us for it.”

- Bill Waller
Manager of Pension Services
Intac Actuarial Services, Inc.
Ridgewood, NJ



services

Capture

Document Scanning
Data Entry & Indexing
Full Text OCR
Forms Processing
E-Forms
Scanning Software Sales & Support
Large Format Scanning
Mailroom Services

Store, Manage, Retrieve & Distribute

Secure Web-Repository Hosting
Box & Vault Media Storage
Workflow Management
ECM Software Sales & Support

Professional Services

System Integration
Software Training
Project Management
Data & Image Conversion

Litigation Support Services

Electronic Document Discovery
Litigation Scanning & Coding
Full-Text OCR
High Volume Printing
Litigation Software Sales & Support