

# Automated Policy Description Docs Generation and Management | Allied Benefit Systems, United States

## CASE STUDY



### Key Takeaways



Low-code Docs Builder Solution with templates & modular content blocks for easy edit



Over 90% time savings to generate Policy Descriptions in MS Word/PDF



Methodical generation & creation of 200-page documents, organized in sections



560+ parameters, SLAs & biz rules within the app, automating Policy Data mapping & validation



Instantly duplicate existing files & modify them to renew Policy or create new Doc in few clicks



Single source of truth to store 5000+ Policy Descriptions

## Client Summary



Allied Benefit Systems is a national healthcare solutions company. Founded in 1980, they have grown to be the largest, independent third-party insurance administrator in the United States.

They customize self-insurance benefit solutions for their customers (small-mid size companies). These solutions are designed to align their customers' organizational needs and insurance plans that best support their employees' needs.

Upon each health insurance enrolment by Allied, they need to customize summaries of health benefits and provide them in a document for their clients (groups).

These 200-page policy covers information related to benefits & exclusions, outpatient labs, facility services, etc. Additionally, it also includes specifics about insurance cost sharing like copay, coinsurance, deductible, and more.

## Challenges

The business process to create 'Policy Description Documents' used to be manually driven by spreadsheets, printouts, and emails, which resulted in:

- Time-consuming, labor-intensive for data entries, information validation, and custom formatting.
- Human errors leading to discrepancies in the generated policies, customer dissatisfaction and potentially compliance issues
- Risk of data breaches - unauthorized access to customer data that contains sensitive policy information
- Difficult to keep up with changes in insurance regulations and incorporate them into each policy descriptions
- Limited in its ability to customize policy Docs based on unique coverage needs and customer's preferences
- Inefficient and delayed review & approval process, especially during peak enrollments period

## Solution

- In 3 months, Mokxa assessed Allied's as-is process in generating policy descriptions; subsequently built & delivered a cost-effective solution that generates documents with speed, accuracy, and efficiency.
- Built on low-code Joget, the solution simplifies thousands of policies creation without disrupting the existing business process. Input customer data, review in sections, and weave them into presentable documents in MS Word/PDF.
- Allied was able to customize policy descriptions & validate them 90% faster. Leveraging easy-to-edit templates with biz rules in place, documents produced were error-free & precisely aligned with customers' specific needs.

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## Capabilities

- ✔ Enabled a 45x faster process in producing 200-page MS Word/PDF policy descriptions, each one dynamically created to fulfill Allied's needs for its extensive customer base of over 800.
- ✔ By drawing new enrollment data from Allied's database into the solution, all data entries seamlessly synced with the app and are updated on a daily basis.
- ✔ Based on unique needs of each customer, Allied's team was able to harness the solution and instantly organize data in progression of 10 sections on the app, pertinent to their coverage needs. Within minutes, a precisely structured policy description (in MS Word/PDF) was generated.
- ✔ The solution included templates that can be dynamically modified based on customer's requirements and coverage preferences. Modular content placeholders with automated formatting removed manual adjustment task.
- ✔ Built a culture of rule-based document generation for Allied, through 560+ predefined business rules with automated validation checks. The solution improved their customer satisfaction through precise creations of policy descriptions that consistently comply with industry standards and regulations.
- ✔ Business users can easily duplicate, update & renew policy descriptions for their customers in a few button clicks. Renewal documents are equipped with a unique document ID for easy identification, version controls, and a seamless audit trail.
- ✔ With permission controls in place, only authorized Allied staff can gain instant access to retrieve specific documents from a centralized, reliable source - guaranteeing the security of confidential customer data.
- ✔ The solution is designed to facilitate the migration of 1800+ manually-created documents into the system. It is also projected to handle the creations and renewals of 5000+ future policy descriptions, while maintaining existing content and formats.

The image displays two overlapping screenshots of a web application interface for 'SPD AUTOMATION'. The main screenshot shows 'STEP 1 - GROUP AND PLAN INFORMATION' with a form for 'Plan Information & Client Address'. Fields include Effective Date (MM/DD/YYYY), Plan Endorsement Number (YY), Plan Year Month (dropdown), Group Number, Group Name, EIN (XXXXXXXXXX), Plan Number, and Plan Description. A note states: 'NOTE: Please make sure not to enter P.O. Box in address line.' Address fields (Address Line 1, Address Line 2) and a State dropdown menu are also visible. The second, smaller screenshot shows 'STEP 2 - MEDICAL CARE BENEFITS' with fields for Group Number, Group Name, Plan Information, Medical Care Benefits, Out of Network (OON), Network & Plan Information, and Deductible.