

# Ephesoft Transact

## Health Care Provider Finds an Automated and Cost Effective Document Capture Lifeline

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The Washington State Health Care Authority (HCA) purchases health care coverage for more than 2 million Washington residents through two programs – Apple Health (Medicaid) and the Public Employees Benefits Board Program. As the largest health care purchaser in the state, they lead the effort to transform health care, helping ensure Washington residents have access to better health coverage and better care at a lower cost.

### The Challenge

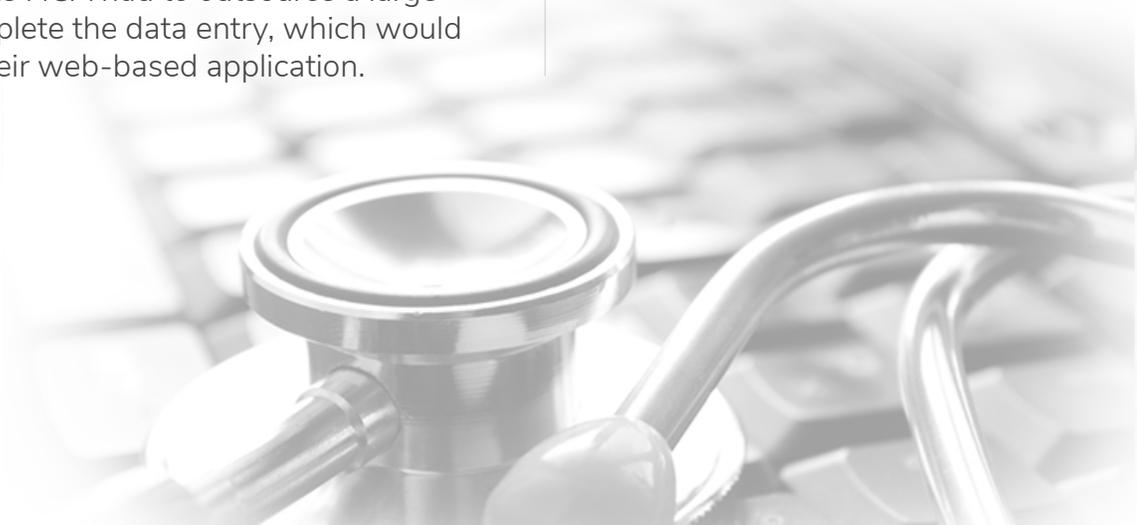
Washington State HCA generates a tremendous amount of paperwork and insurance forms from its many interactions with resident customers. To manage the process, they had dedicated six Kodak i5200 scanners as well as miscellaneous desktop scanners throughout the enterprise. Their multifunction peripheral (MFP) device fleet is 100% Ricoh equipment. Previously, they had been using Kofax Capture for many years to onboard paper documents and indexes for their Application Xtender (AX) document management system, but the process was still very labor intensive. They had 19 Kofax Capture licenses and had a restriction to 7,000,000 documents per year that they could process. Due to the high volume of paper, document preparation and data entry, Washington State HCA had to outsource a large temporary staff to complete the data entry, which would then be entered into their web-based application.

### Washington State Health Care Authority

- Customer: Washington State Health Care Authority (HCA)
- Industry: Healthcare Insurance
- Application: Administrative Accounting
- Partner: Ricoh Americas Corporation

### Results

- 5-year cost analysis with full enterprise rollout showed savings of \$4.5 million dollars with Ephesoft
- ROI achieved in 6 months if labor costs were considered, or 3 years if labor savings were not considered
- Document preparation efforts decreased by 50%
- Document indexing efforts decreased by 75%
- Eliminate the dual entry of index values
- Met tight deadline for implementation



## The Analysis

The team at Washington State HCA turned to Ricoh for a solution to their inefficient and manually demanding capture processes. “We had a great relationship with Ricoh and knew they could steer us in the right direction – and they did with Ephesoft,” said Charles Hooper, Systems Administrator at Washington State HCA. “The more we learned and familiarized ourselves with Ephesoft, along with doing due diligence with an ROI comparison between Ephesoft and Kofax, we realized that their platform would be the best solution for our client,” explained Jim Terrell, Enterprise Client Engineer at Ricoh.

Ricoh’s ROI comparison painted a picture of tremendous benefits, fast ROI and labor savings for the entire enterprise. In contrast to Kofax Capture, Ephesoft offered unlimited users, unlimited scans and validation stations, uncapped document throughput, a browser-based platform for users and administration, faster and more accurate processing, more advanced tabular data capture and the best OCR recognition results. After crunching the numbers, Ricoh determined ROI could be achieved in 6 months if labor costs were considered, or 3 years if labor savings were not considered. Looking at a 5-year cost analysis with a full enterprise rollout, the savings were well over a staggering \$4.5 million dollars by selecting Ephesoft.

In the selection criteria, the analysis also focused on time savings found for document prep, indexing and data entry. Ricoh’s comparison estimated that by using Ephesoft, the document preparation efforts would decrease by 50% and document indexing efforts would decrease by 75%. In certain departments, future data entry and document upload of paper documents would both be expected to decrease by 95% while there would be no time savings using the competing product.



## The Solution

Ricoh enlisted Ephesoft's Professional Services (PS) team to configure and customize the software starting with one of the Accounting department's applications. The PS team set up the environment and configured the system to import documents through monitoring a shared Universal Naming Convention (UNC) folder and an email address. Ephesoft Transact classifies three types of forms, each of which has 20 variations. Further, the system was customized to extract 10 header/footer fields from two of the document types along with performing three database lookups to populate three fields: first, middle and last names. The platform automatically recognizes the document type and extracts the necessary information or metadata so Washington State HCA could minimize manual data entry and indexing. "The software learns and routes documents to the right department," said Hooper.

"Our primary goals were to reduce paper handling, reduce indexing efforts and eliminate the dual entry of index values to Kofax, AX and other line of business applications. Ephesoft's innovative solution with its patented, machine learning capabilities was configured to learn the many different document types we have as well as populate fields, which make our lives easier," explained Hooper. "Ricoh has been a great technology partner and had experience working with Ephesoft's platform, so it was an easy decision." Now, the process is simplified and the documents are classified and indexed with minimal errors and effort. Hooper reported that the system is gradually processing more and more throughput due to the machine learning functionality.



"Ephesoft and Ricoh partnered really well on this project. We met Washington State HCA's deadline working together. Plus, they were so happy with it, they have already scheduled the next phase of the project to incorporate Ephesoft throughout their enterprise," Terrell proudly stated. With a streamlined, intelligent document capture platform in place, the Washington State HCA has the tools to prove the concept and expand throughout the enterprise.

"With the help of Jim and Ricoh and the team at Ephesoft, we pulled off meeting a tight implementation deadline. The staff at Ephesoft was very responsive and without them, we wouldn't be here. I appreciate their support," complimented Hooper. "I'm really happy with the results so far."

## The Future

Washington State HCA is already planning its rollout for the next project. In the Health Plan Finder application, the team will eliminate manual indexing and document uploading. This will be the most impactful part of the project due to reducing the temporary staff. Full time employees will stay intact as demand for services increases, but now they will be able to better manage their time with simpler document prep, no sorting and automated classification.

Other projects such as the Public Employees Benefits Board are planned, and eventually there will be 10 to 12 programs migrating over to Ephesoft. Washington State HCA also plans to implement dual scanning into the systems, which would eliminate more than 50% of the document preparation. "Ephesoft is a powerful system that adds value, productivity and improves our processes. And Ricoh is a partner of choice whose MFPs help to get the information into Ephesoft," said Hooper.



# RICOH

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