SEFAS
A DOCAPOSTE COMPANY

Create Electronic Forms For Inbound Automation
Rapid Digital Transformation

Digital transformation driven by COVID-19 has largely been focused on outbound communications leaving many inbound processes performed manually.

Business documents such as medical claim forms, loan applications and many local and federal government applications still require physical signatures on documents that are mailed back to facilities for digital scanning. This has presented multiple problems due to delays in postal and courier services and the impact of contaminated materials on employees and facility safety.

Many business processes have been converted to electronic media and are available through digital interfaces like mobile and web applications, however there are still many legacy systems that have not been converted. Form redesign, applications development and lack of backend processing systems to handle digital data collection are common barriers preventing the transformation of these manually intensive processes.

The effort to remediate an application from start to finish is time consuming and costly. The issue is generally not with the originating form or the backend data collection process but rather the inbound remittance and scanning process. Our approach to the problem is to convert the outbound document to an electronic form to allow consumers to digitally fill it out and submit the results.

A replica of the physical form is created that enables users to enter data, digitally sign and insert systematic date and time stamps to record and memorialize the activity. The edited images and related metadata are then stored in a digital archive for compliance auditing and future retrieval by self-service and customer service applications.

The key to resolving this issue is to minimize the impact to upstream and backend systems while accommodating regulatory guidelines and customer preferences. An email notification containing a link to an electronic form or a redirect to a digital application is the preferred method, however in the absence of the customer's consent, lack of a valid email address or cell phone number it may not be possible to digitally engage a consumer. In this instance a physical document with a QR code can be substituted to link to an electronic document that can be accessed via a smartphone or computing device.

Sefas Solution

Sefas offers the following capabilities to enable the rapid conversion of physical forms into digitally editable forms:

• Post-composition services to convert physical forms to editable digital forms, insertion of QR codes on printed forms and composition services to compose email and SMS notifications.

• Data archive services to store form images, data elements, electronic signatures and metadata for reporting and digital e-presentment.

• Electronic Delivery Gateway (EDG) services to integrate with print to mail, email and SMS distribution service.

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• Electronic Digital Signature services to authenticate users and insert digital signatures into trusted and secure forms.

• Workflow automation services to drive conversion and distribution, audit processes and integrate with upstream and back end data collection systems.

Improve Inbound Automation and Reduce Inbound Scanning

Sefas' Omnichannel CCM solution can help modernize and automate business processes and significantly improve your inbound data collection processes. We can reduce the need for inbound scanning operations while minimizing the impact on your business applications and consumers. Our approach significantly reduces operating costs, decreases business delays and enables a rapid, risk averse migration strategy.

By addressing the problem post-composition we can develop two key assets that can be reused for years to come. The electronic form that can be digitally edited on any platform and the data extraction routine to normalize form data and feedback end data collection systems. Both assets can be reused for future applications regardless of the form design tool or data collection technology currently in use.

Contact us today to learn more about how Sefas can help digitize your manual business processes, drastically reduce operating costs and improve the overall customer experience.