



# Insuring against COVID-19 at Pacific Life!



## Challenges

- A backlog of mail had been building up at offices in response to COVID-19 and staff working remotely.
- Pacific Life needed a Digital Mailroom Solution that could be implemented quickly and upheld strict security standards.

## Solution

- Pacific Life deployed an EzeScan DMR solution to provide web-based, end-to-end workflow that enabled them to streamline the intake and distribution of mail.
- The DMR solution uses EzeScan's WebApps, in conjunction with EzeScan SERVER or EzeScan PRO to deliver hard copy document and electronic capture, conversion, processing and routing.

## Results

- 52 physical mail stops were converted to digital.
- 300-1,200 pieces of mail can be processed daily in 2 different locations.
- Digital mail is routed and available to employees using 256-bit encryption and access is restricted according to defined roles and permissions of Pacific Life's Active Directory/Azure (users & groups).

**Insurer Pacific Life has expanded its use of EzeScan Capture Technology to establish Digital Mailrooms (DMRs) in response to COVID-19, and digitise and automate many business workflows.**

Pacific Life has been offering insurance products for over 145 years. They provide a wide range of life insurance products, annuities, mutual funds, pension plans and offer a variety of investment products and services to individuals and businesses. With more than 3,000 employees, Pacific Life counts more than half of the 100 largest US companies as its clients.

In the wake of stay-at-home orders meant to slow the spread of COVID-19 in the US, physical mail delivery remained an obstacle to remote work. Pacific Life still needed to periodically send employees to the office in order to collect business-critical mail. This process was proving to be inefficient, mail collection was delayed, and employees were being exposed to unnecessary risk.

A backlog of mail had been building up at offices, so a DMR solution was needed. One that could be implemented very quickly, but also upheld strict security standards. Pacific Life was looking for a solution that could implement a better mail system within days, while also providing chain of custody tracking and full information security.

Pacific Life began deploying an EzeScan Digital Mailroom Solution to provide web-based, end-to-end workflow that enabled them to streamline the intake and distribution of inbound mail. 52 physical mail stops were converted to digital with return to office mail also able to be routed digitally. The volume of documents able to be processed by the new Digital Mailrooms can range from 300-1,200 pieces daily across 2 different locations.

EzeScan technology provides intelligent data extraction and indexing, automates formerly manual processes, and utilises electronic delivery methods to route mail to the correct recipients. Pacific Life utilises a mix of traditional EzeScan Workstations and newer WebApps technology for capture and processing of documents in a number of business areas.

The DMR solution is built on EzeScan's WebApps, powerful business process automation applications designed to be used in conjunction with EzeScan SERVER or EzeScan PRO to deliver hard copy document and electronic file capture, conversion, processing and routing directly to the desired network location or supported line of business applications. EzeScan WebApps include the EzeScan WebApps Server (EWA), a HTML5 web application deployed onto a Microsoft IIS Server.

- Establishing the DMRs has strengthened information security, provided cost savings through the elimination of remailing and means that all mail is accessible anywhere, anytime via the Web.

Records and Information Managers can configure each WebApp to deliver the required business digitisation workflow to their whole organisation. Users can access the EzeScan WebApps from their favourite web browser enabling them to be run from PCs, Apple Macs and mobile devices like tablets and smartphones.

Supervisors can also view various workgroups/workflows to get an overview of users, groups or tasks outstanding and where they are in a particular workflow.

EzeScan WebApps allows workflows to be configured based on established business rules to designate proper delivery routes, user and group-specific delivery methods, and replace physical mail handling procedures.

Automation technology included in EzeScan WebApps enables rapid pickup and processing once scanning has occurred, with data extraction and routing also provided. Faster information processing and simplified information sharing improves decision making.

Physical mail is difficult to keep secure. Now, digital mail is routed and available using 256-bit encryption and access is restricted according to defined roles and permissions of Pacific Life's Active Directory/Azure (users & groups).



**Most DMR workflows were deployable within 10 days after initial questionnaire and design. EzeScan WebApps provides the ability to build on the foundational solution to launch downstream processing using ECM workflow solutions or handoffs to our ERP systems. It links automatically to many of our existing line of business solutions without the need to separate coding or support.**

*Jessica Nilsen, Senior Business Analyst, ECM at Pacific Life*

Jessica Nilsen, Senior Business Analyst, ECM at Pacific Life also said "Establishing the DMRs has strengthened information security, provided cost savings through the elimination of remailing and means that all our mail is accessible anywhere, anytime via the Web. EzeScan WebApps offers an easy-to-use platform that requires minimal training and improves engagement, automates processes while improving insights and reducing risks."

### About EzeScan

EzeScan provides fast, cost effective business process automation solutions including simplified document back scanning, accounts payable, data robotic process automation, forms data extraction, mailroom/correspondence automation and highly integrated EDRMS capture. With thousands of installations in Australasia, North America and the UK, EzeScan is your ideal digital transformation provider.

*Reprinted from Information & Data Manager (IDM) magazine*



#### Australia

T: 1300 EZESCAN (1300 393 722)  
E: sales@ezescan.com.au  
W: www.ezescan.com.au

#### UK

T: +44 20 3535 0645  
E: sales@ezescan.co.uk  
W: www.ezescan.co.uk

#### North America

USA: +1 (323) 990-3740  
Canada: +1 (647) 264-7788  
E: sales@ezescan.com  
W: www.ezescan.com