easy.forward™
Managed Capture Services

The Player with the Best Data Wins.

Taking the Lead with Managed Capture.

For: Enterprise End Users

- CFO, CIO
- Shared Services
- BPO operations
- Business Unit Execs
- Government Agencies

The player with the best data wins

Each decision and every action your organization makes relies on data; so it stands to reason then that having accurate, actionable data is essential to your success. Without it, critical operations can suffer, decisions may be ill-informed, and market share can be lost. The company with the best data wins, yet inaccurate and inefficient data collection is widespread. It's a huge problem for companies today, especially given the extraordinary speed with which business is being conducted.

Many companies already have the information and business intelligence needed to give them a leg up on their competition, but the ongoing effort, cost, and aggravation associated with transforming information to usable data prevents them from addressing the challenge. As a result, they operate their business at a disadvantage, still relying on outdated capture methods. In doing so, they compromise on, or even ignore, the consequences for not taking action:

Accuracy.

Did you know that in 2011, there were 20,000 pregnant men in Great Britain? At the same time, 3,000 children and teenagers required geriatric services that year, according to the UK National Health Service. Why wasn't this headline news? Because it was data entry error. Having inaccurate data is actually worse than not having any at all. An average data-entry staff has 92% accuracy before quality checks. However, it is estimated that companies relying upon manual data entry may see accuracy rates as low as 65% due to multi-purposed staff, training, and turnover. Without a reliable capture system with quality checks and data verification in place; mistakes get made, information is missed, misfiled, often does not reach its final destination, and can be highly suspect even when it does.

Timeliness.

In business, late loses. Being first relies on having accurate data that is actionable –meaning it's readily available not only where you need it, but when you need it. Information changes quickly yet, as a manual process without accountable Service Levels (SLA) in place to measure turnaround, what should be done in hours may take days or weeks. You can't effectively manage your operations or serve customers who are demanding more, when you are waiting for your data.

Staffing Flexibility.

Being nimble is a beneficial business attribute especially when staffing for fluctuating workloads. In the time it takes to adjust, opportunities are missed and customer satisfaction, productivity, and cash flow are negatively impacted. Despite best intentions, company HR policies, unions, and labor laws can make timely labor-force adjustments difficult to achieve.

Labor Risk.

Hiring high-turnover labor is labor intensive. HIPAA compliance, training, background checks, benefits administration…there is a lot involved in acquiring and onboarding personnel. Shortcuts and expediency may expose the business to expensive risks. Effectively managing a variable labor force takes focus off of core business activities.

Document Liability.

Every business is subject to its own industry regulations, legal requirements, and policies. Adherence to document-retention policies with transparent data-audit trails is critical to conform to auditing standards.

The first step to winning is optimizing your data.

Managed capture service (MCS) makes it possible for you to have all the information you want to retain collected, regardless of whether it's in paper or electronic form. It is converted into the data you need within the application you use, allowing you to access it easily and utilize it effectively. Let's explore what it takes to successfully capture document and forms data and integrate it into your business applications.

Managed Capture — What's Involved?

The data an application needs may be on paper or in digital form (PDF, image or digital data). The data may be found on an organized, repeatable, structured format like an application or claims form. Or it may be found in similar, but different, semi-structured forms like an invoice. It can also be hand-written on a piece of paper like tests and surveys. The few types of forms just referenced require many different technologies to capture their data.

The first step in the managed capture process is to apply technology to get the document ready for capture by using sophisticated image enhancement software on images or by converting a PDF to a readable image for OCR.   Next, a suite of recognition tools including optical character recognition (OCR) and artificial intelligence (AI) are deployed to capture the data from the prepared image. However, before the document can be read using recognition tools, it must first be identified enabling the correct recognition engine to be applied. Document or 'form id' may be done using OCR, Bar Code reads, AI, or by visual identification.

After recognition is complete, 85-95% of the data is reliably captured from an image or form. Most customers want close to 100% of the data. More work needs to be done.

Next step is to key the missing data and correct errors that occurred during the recognition process. The work must be done by trained people who are highly skilled in customer applications and HIPAA compliance. Often times knowledge workers need to oversee the process to assure quality of results. Accuracy reaches more than 99% after this step.

If accuracy approaching 100% is required, double-key-verify processes are implemented to assure the results. Once data is verified, it must be prepared for transmission to the target application. Another quality step is applied — checking validity of data values. Finally the data is transformed into the desired format and transmitted. The application confirms receipt and compares checksums or record counts to be sure the transmission was completed as intended.

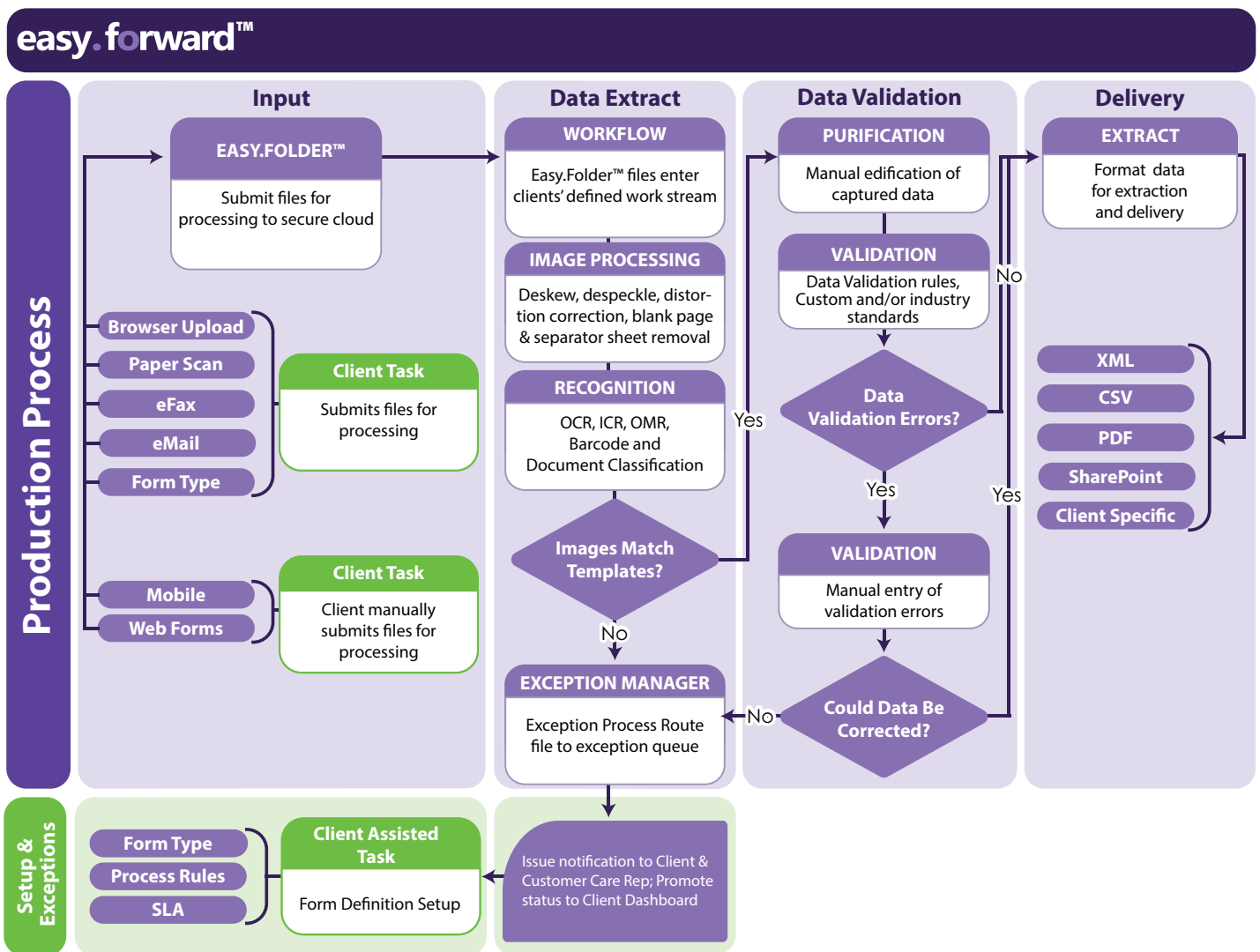## *Figure 1 - Managed Capture Processes*
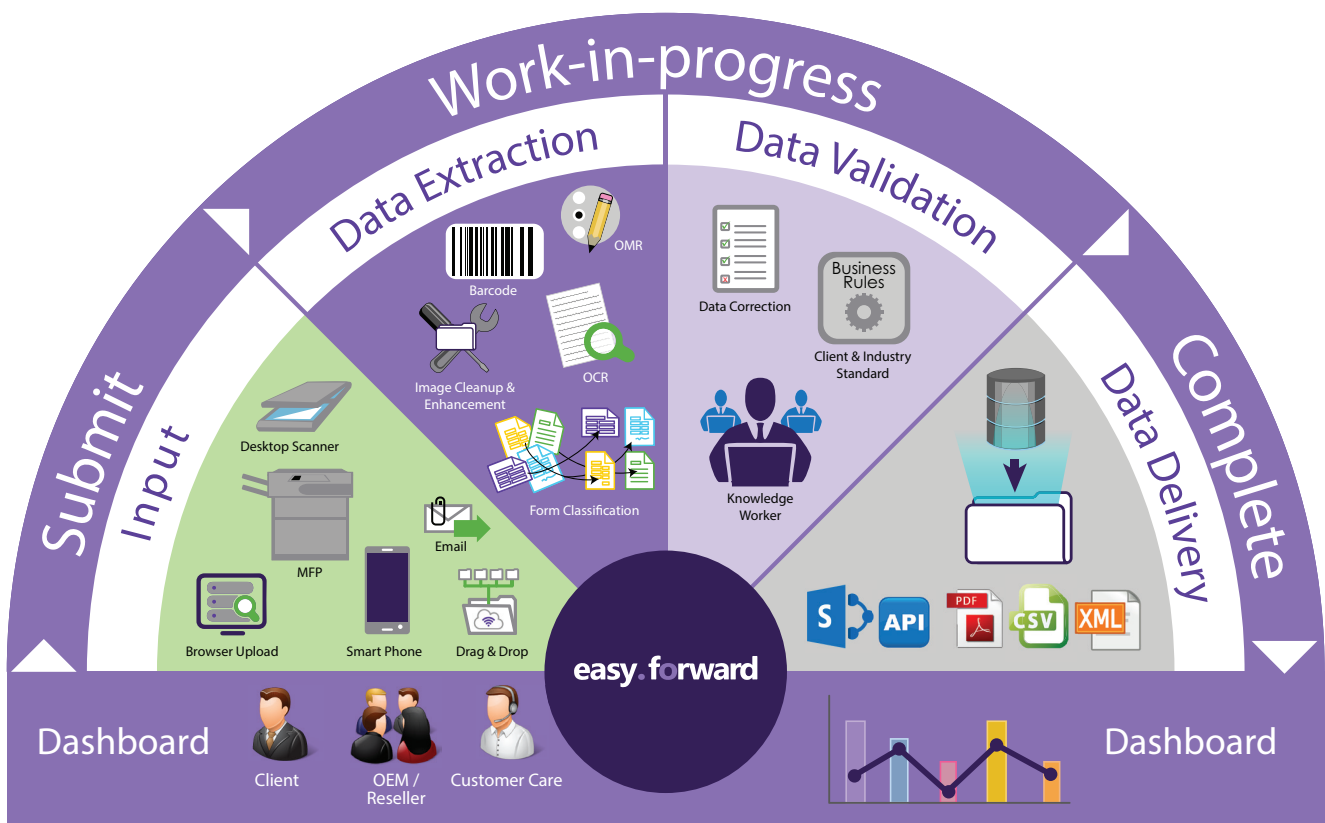
Becoming a managed capture expert is not your core mission.

It's a distraction. Your business applications are great. Except they need data. Why is getting data off of a piece of paper or a digital document so difficult?

You need to partner with an expert who can help guide you through the process of getting the most from the specific assets you have. With an assessment of your existing assets, the identification of the data needed from them and the format required for your enterprise applications, you and your provider will be able to design the best solution.

Figure 2 - Document Production processes

easy.forward™ — Production Process / Setup & Exceptions flowchart

Input
- EASY.FOLDER™ — Submit files for processing to secure cloud
- Browser Upload, Paper Scan, eFax, eMail, Form Type — Client Task: Submits files for processing
- Mobile, Web Forms — Client Task: Client manually submits files for processing

Data Extract
- WORKFLOW — Easy.Folder™ files enter clients' defined work stream
- IMAGE PROCESSING — Deskew, despeckle, distortion correction, blank page & separator sheet removal
- RECOGNITION — OCR, ICR, OMR, Barcode and Document Classification
- Images Match Templates? — No → EXCEPTION MANAGER — Exception Process Route file to exception queue

Data Validation
- PURIFICATION — Manual edification of captured data
- VALIDATION — Data Validation rules, Custom and/or industry standards
- Data Validation Errors? — Yes → VALIDATION — Manual entry of validation errors
- Could Data Be Corrected? — No → EXCEPTION MANAGER; Yes

Delivery
- EXTRACT — Format data for extraction and delivery
- XML, CSV, PDF, SharePoint, Client Specific

Setup & Exceptions
- Form Type, Process Rules, SLA — Client Assisted Task: Form Definition Setup
- Issue notification to Client & Customer Care Rep; Promote status to Client Dashboard

easy.forward™ - the Scan-Optics MCS Solution

easy.forward™ Managed Capture Service is a cloud based paper to paperless solution, enabling the capture, classification, storage and retrieval of documents using browsers, scanners, MFPs and mobile devices anytime, anywhere. MCS transforms paper and electronic forms into data that flows into your software application.

The end user no longer has to do data entry!

Customer Captures > **Scan-Optics Does theWork** > **Customer Gets the Results!**
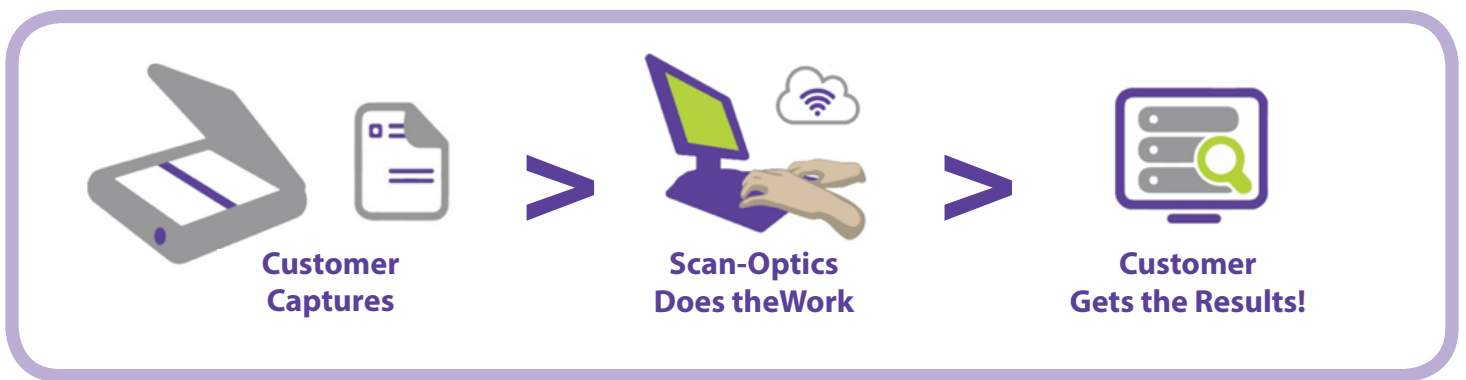
How does easy.forward™ work?

• Customer scans, e-mails, or drops electronic documents into an 'easy.folder™'

• easy.forward™ processing captures the application specific data from the documents

• The data is quality assured, formatted and sent to your software application or enterprise content management (ECM) system

• Enterprise application imports the data

• Customer has immediate access and may use the data as application permits

• If ECM capabilities are incorporated, customer has immediate access to their documents as well

• It's really that easy!

Make or Buy?

The first consideration is make or buy for the enterprise user.
Why consider easy.forward™ versus licensing & implementing
a document management system?

- With easy.forward™ there is no software to license, implementation fees, or maintenance costs
- Unlike other 'as a service tools' that are just licensed through the cloud;' all classification, keying
  and indexing is done through easy.forward™
- easy.forward™ is secure, compliant, scalable and fast
- Simple APIs and flexible output makes integration into your applications easy
- Time to market is measured in weeks; it's really easy and fast to bring value to your organization
- And you only pay for what you use

Is easy.forward™ right for your organization?

To see if easy.forward™ is right for your organization, take our self-assessment survey at www.easy-forward.
com. To arrange your FREE consultation, please visit www.easy-forward.com or call us at 800-745-6001.

About Scan-Optics

Scan-Optics is the "paper to paperless" company providing document management solutions and document
processing outsourcing services. easy.forward™, our manage capture service platform enables the capture,
classification, storage and retrieval of documents using browsers and mobile devices anytime, anywhere.