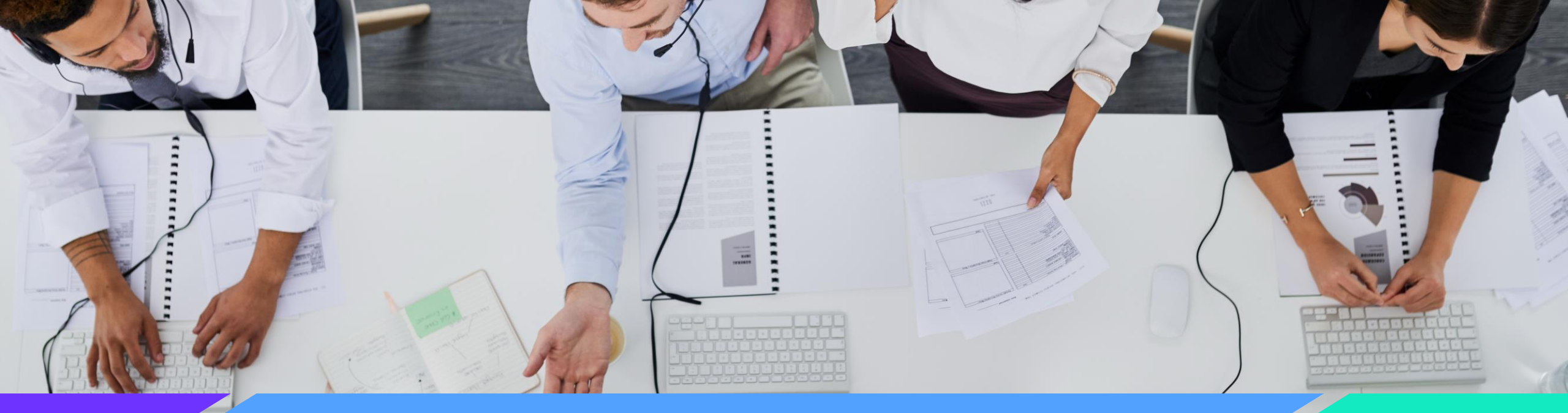# Process Automation with Hyland

Capabilities Overview

*" *

***88%* of organizations are active, or expect to be active within 6 months, in the planning of intelligent automation**

Direct Benefits of Automation

- Process efficiency improvement

- Cost reduction

- Business cycle acceleration

- Error reduction

Indirect Benefits of Automation

- Opportunity for innovation

- Continuous improvement

- Regulatory compliance

- Improved information security

READY TO ACCELERATE YOUR AUTOMATION JOURNEY?

HYLAND™

Automating
Document Capture and Processing

Efficient <u>and</u> **accurate** document capture and processing are prerequisites for:

- Information availability and findability
- Data security and compliance
- Artificial intelligence

Document Capture & Processing

Optical character recognition (OCR)	Separation and classification	Data extraction and validation	Continuous learning	Document analysis	Systems integration

> We have **51 data fields**, and more than **90 percent** of them are extracted without manual intervention."
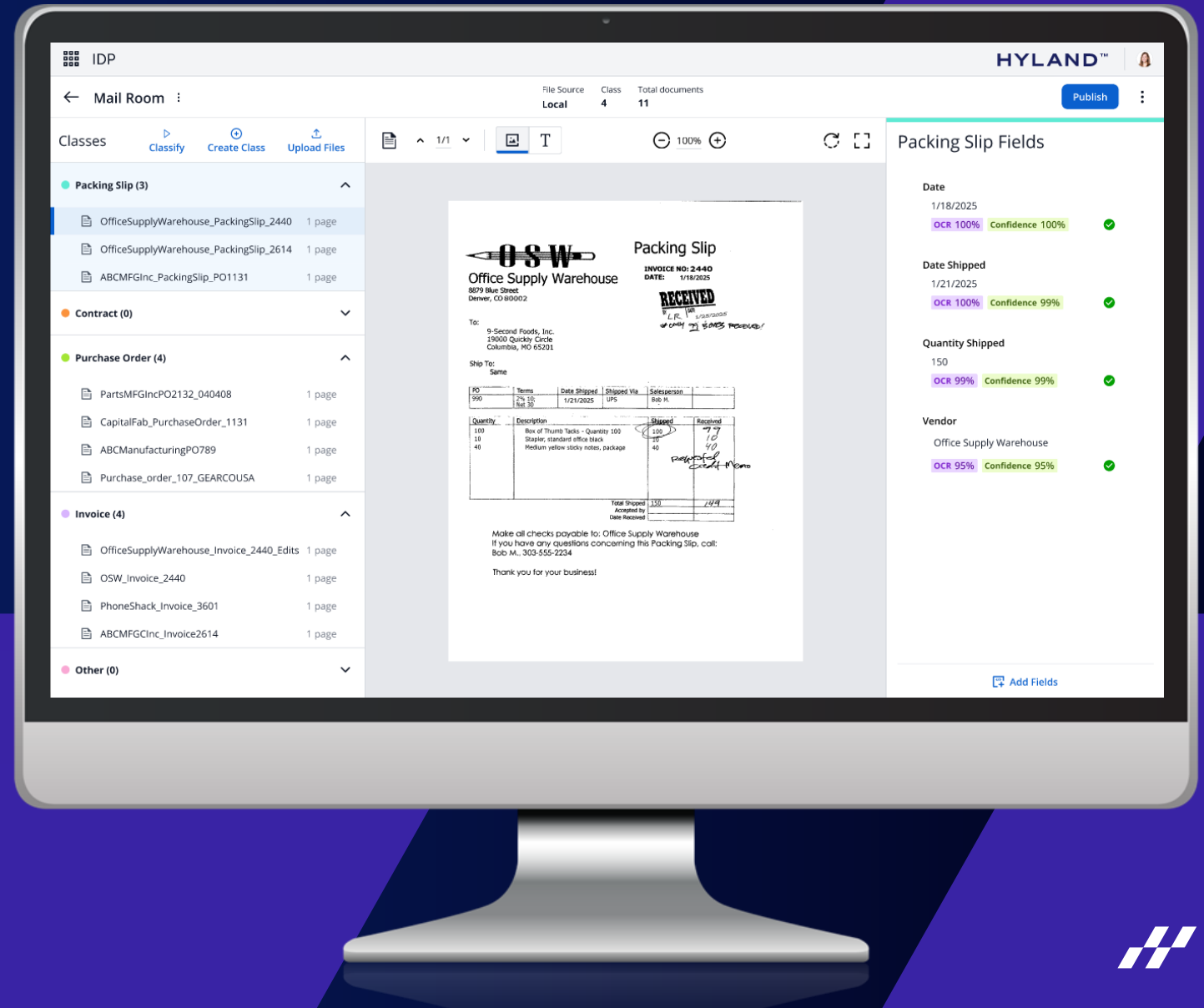
Ninja Kobor
Global Solution Owner
Siemens

PRODUCT SPOTLIGHT
Hyland IDP

- AI-powered document capture, classification, separation and data extraction

- Prompt-based interface with intelligent field suggestions

- Pre-built connectors and APIs for easy integration

Automating
Business Tasks

Hyland RPA

- Easily deploy software bots to handle repetitive data tasks

- Use an intuitive low-code design studio to build and modify automations

- Manage processes and bots in real time with a web-based dashboard
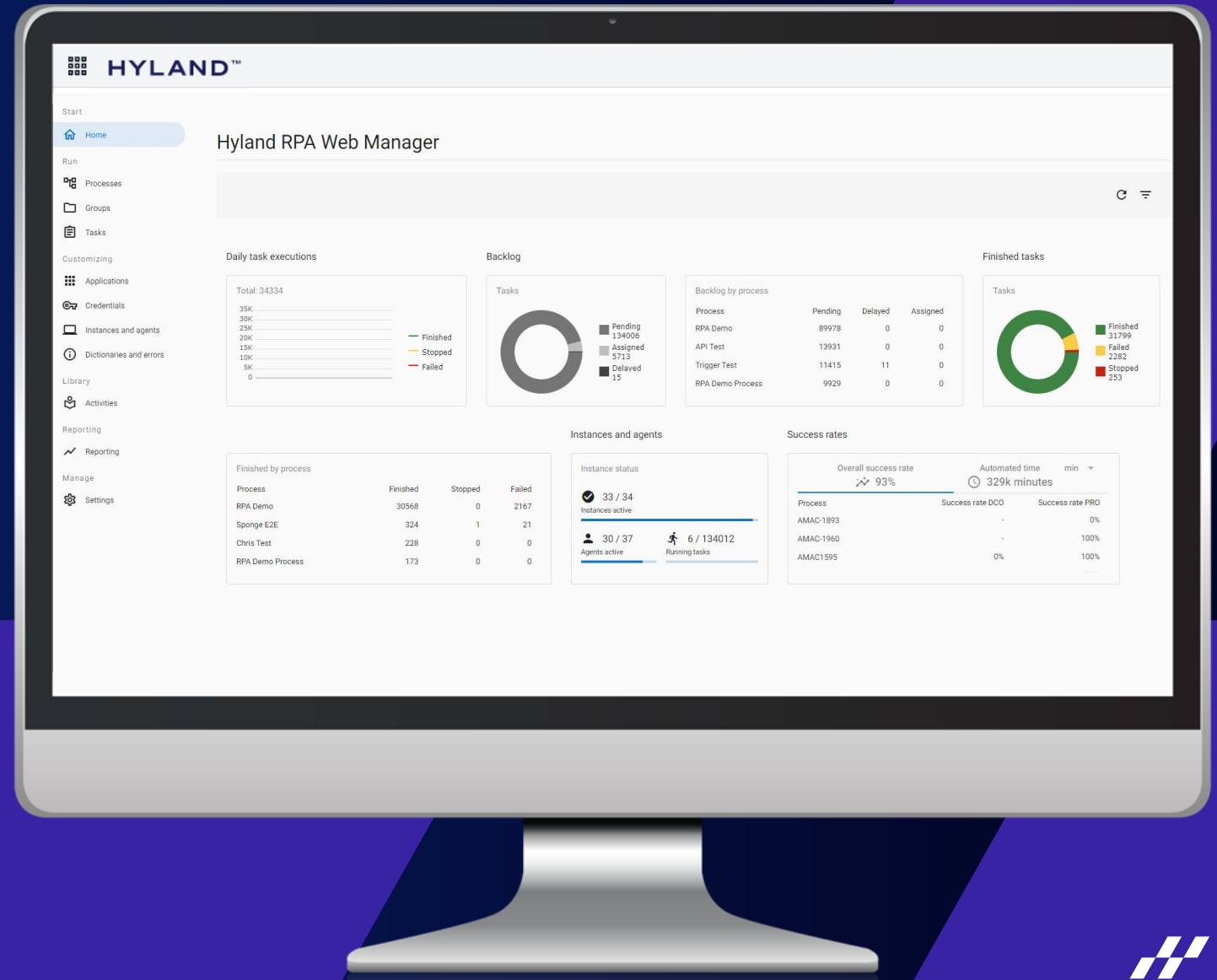
PRODUCT SPOTLIGHT

Hyland RPA

3-Yyear ROI
174%

5-year ROI
227%

Payback
~1 Y

Net benefits
$13.8M

Decreased
COSTS

Decreased
ERRORS

"Switching to Hyland RPA from Blue Prism was a no-brainer, thanks to Hyland RPA's tight integration with OnBase. The icing on the cake was that Hyland RPA also proved to be a lot easier to configure than Blue Prism."

Timothy Oliver
CIO
Horry County

Data from an ROI study conducted by Deep Analysis for Hyland

Automating with
Pre-Built Solutions

EDUCATION

Admissions

Financial aid

Transcript processing

Student affairs

Enrollment management

Registrar's office

INSURANCE

New business and underwriting

Claims processing

Regulatory compliance

Policy cancellation

3rd party administrators

HEALTHCARE

Health information management

Clinical and medical imaging

Enterprise imaging

Revenue cycle

Health insurance

GOVERNMENT

Survey and census processing

Information requests

Justice and public safety

Health and human services

Planning and public works

Finance and administration

FINANCIAL

Compliance reporting

Customer onboarding

Loan processing

Wealth management

Know Your Customer (KYC)

Anti-money laundering

HYLAND™ Industry solutions and expertise

TRANSPORTATION AND LOGISTICS

Inventory management

Order scheduling and tracking

Quote and invoice management

Work order management

Returns processing

Freight management

OTHER INDUSTRIES

Manufacturing

Retail

Food and beverage

Oil and gas

Construction

and more

HUMAN RESOURCES

Employee file management

Employee onboarding

Employee relations

Employee offboarding

Policies and procedures

Employee file governance

ACCOUNTING AND FINANCE

AP integration

Sales order management

Order-to-cash

Procure-to-pay

Record to report

Collections

Building your own
Automation Solutions

CRITICAL CAPABILITIES
Building Automation Solutions

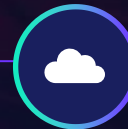Prompt-based, low-code platform

Modularity and reusability

Platform extensibility

Speed and scalability

Flexible integration options

Automated deployment

> **It just takes us minutes** to build something that might have taken weeks, if not months."

CIO
Liberty Mutual Insurance

Hyland Automate

- AI-powered automation and process orchestration

- Built-in prompt-based tools and AI agents

- Low-code, BPMN-compliant design studio

- Prebuilt connectors and APIs for the enterprise

- Reusable components and form elements
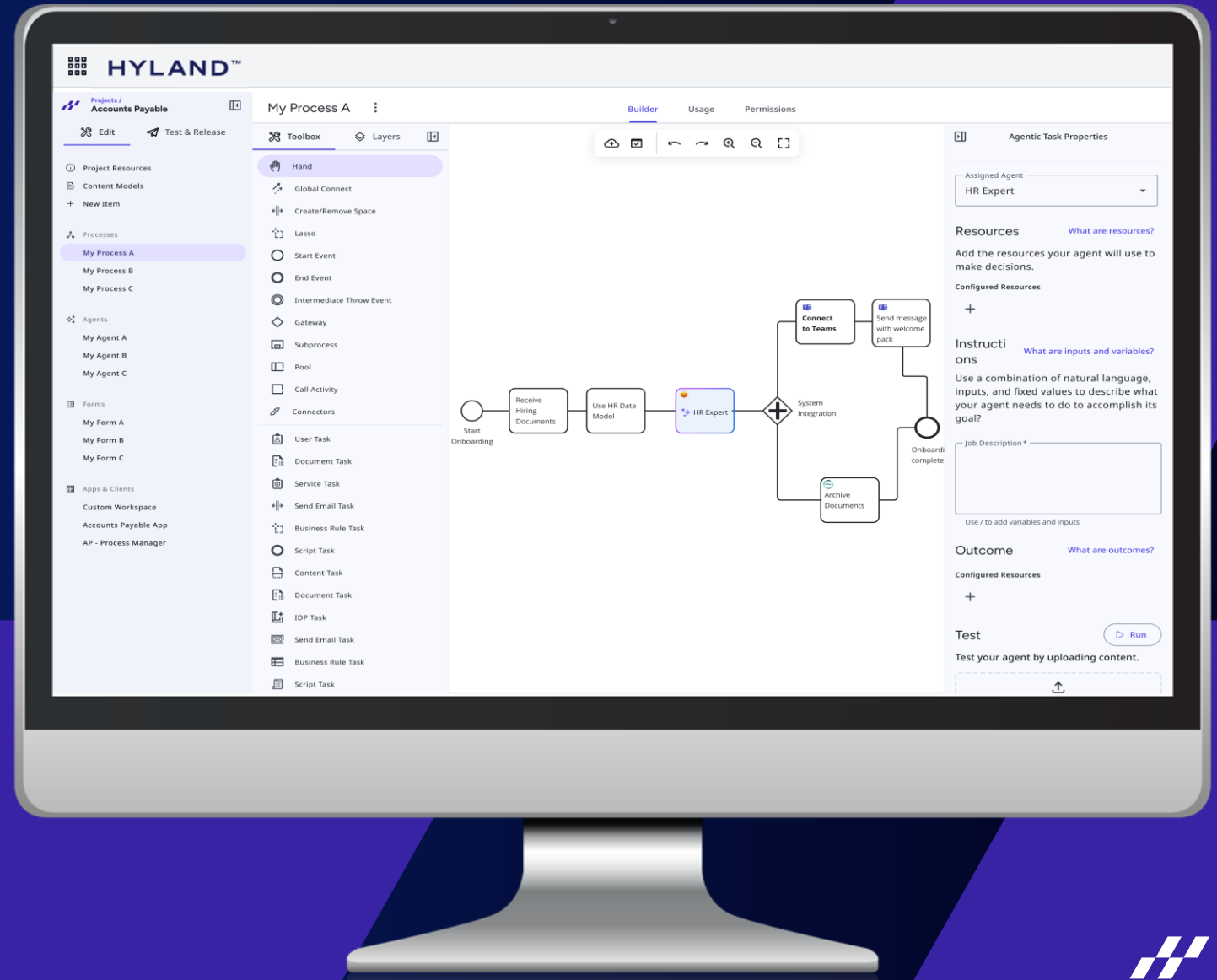
Process automation
is not just about technology

The success of automation projects requires consideration of many other factors, including:

- Upstream and downstream systems and processes
- Regulatory requirements
- Industry best practices
- Information security
- End-user buy-in

Hyland Enterprise Advising Services

1 **Planning**
Work with an industry expert to define scope and goals and establish an action plan for automation preparedness.

2 **Discovery**
Evaluate processes, information and technology, identifying gaps and goals to solve business challenges.

3 **Recommendation**
Receive a comprehensive report including findings, approach, best practices, recommended investments and a tactical roadmap.

"

The assessment really helped outline for all of the executive team and the people on this project really what were the pain points that we were all incurring, but at the same time where we could start."

Senior VP
Strategic Projects
Major Financial Institution

Customer Success Stories | Hyland RPA

HYLAND RPA
Funeral Directors Life Insurance Company

Innovative insurer embraces intelligent automation and realizes an 88% return on its Hyland bot investment.

The Challenge

- Rapid growth of business overtaxed employees
- Only had 8 people to process 2,000 contracts per week
- Needed to accelerate processing cycles of 27,000 claims per year
- Insurance admin system was slowing down due to heavy "settling" at EOD

The Solution

- Hyland RPA bots process and settle 95% of all contracts
- Admin system no longer slows down
- Saves new business team 900 hrs of processing a year
- Saves claims team 20,000 hours in manual processes over a two-year period

> " The **integration** between OnBase and Hyland RPA has helped us design the perfect claims and new business system."
>
> **Kyle Swearingen**
> Vice President of Development
> FDLIC

HYLAND RPA

Horry County, South Carolina

Local government agency uses Hyland RPA to process 30,000 property tax returns without human interaction.

The Challenge

- Received over 90,000 personal property tax returns every year
- Considerable effort and time to manually extract, verify and key in important data
- Lack of integration across multiple disconnected applications
- Staff of 6 needed almost six months to complete processing
- Costly data entry errors

The Solution

- In its first year, Hyland RPA successfully processed one-third of the 90,000 returns without human interaction
- Reduced data entry errors
- Easy integration with other business applications
- Frees Auditor's Office staff for higher value work
- Logs of every transaction provide a full audit record

" **Switching to Hyland RPA from Blue Prism** was a no-brainer, thanks to Hyland RPA's tight integration with OnBase."

Timothy Oliver
CIO
Horry County

HYLAND RPA

Redstone Federal Credit Union

Automation improves fraud management and enhances member service.

The Challenge

- Over a few years, the number of debit card disputes almost doubled
- Manual dispute resolution process overwhelmed staff
- Backlog created poor member experience, with members having to wait for their money
- Increased risk of not recovering funds within the required time frame for chargebacks

The Solution

- Digitized form submission and processing saved 2,000 hours per year.
- Went from five or more business days to just minutes to issue a provisional credit
- A cumulative annual wait-time reduction of 33,557 business days for Redstone's members
- Funds recovered went up 325% over a three-year period

" **Hyland RPA** enables me to be able to almost always say yes, and that's extremely important when we're trying to automate, streamline and improve processes."

Chris Appleton
Technology Integration Manager
Redstone Federal Credit Union

HYLAND RPA

Baptist Health Union

Health system relies on Hyland to support enterprise content management needs for nine hospitals and 400-plus points of care.

The Challenge

- Managing information and processes across multiple systems for 9 hospitals, 400 + points of care, 23,000 employees, 1,500 providers, plus a network of over 2,000 independent physicians
- Multiple manual processes
- Manual data look up and entry
- Lack of system integration

The Solution

- Hyland RPA looks up patient data on a military payer portal, saving staff 68 days per year
- Bot updates the quality assurance level, generating significant time savings for managers and IT staff
- Saved 20 hours migrating disk groups to cloud
- Has reduced outage times by 25% for HL7 configuration

"We've done a lot of things with **Hyland RPA** bots, and we've saved time."

Mitzie Dodge
Corporate IT Manager
Baptist Health Union

Customer Success Stories | Hyland IDP

Siemens

Global powerhouse was on a mission to improve accounts payable (AP) and gained efficiencies with intelligent capture.

The Challenge

- ~10 different invoice processing systems across divisions
- Lack of standardization and visibility
- Integration issues leading to process fragmentation

The Solution

Hyland's IDP solution:

- Provides a single consolidated processing solution to integrate with multiple SAP instances
- Now processing 3.5 million invoices/year globally
- Expanding to processing other document types

"We have **51 data fields**, and more than **90 percent** of them are extracted without manual intervention."

Ninja Kobor
Global Solution Owner
Siemens

PharmaCord

A patient services company uses Hyland IDP to accelerate the patient enrollment process.

The Challenge

- Employees had to classify and separate 2,000-3,000 documents a day
- Over 30 different document types and formats
- Multi-document files required considerable effort to separate
- Annual patient re-enrollment period almost doubled processing volume

The Solution

Hyland's IDP solution provides:

- 40% time savings in the overall process
- Effective automated document separation and classification
- Integration with OnBase repository and the proprietary case management system

> " Complex documents that used to take **20-30 minutes** to process manually, now take around **five minutes with Hyland IDP**."

Aaron Seamans
VP of Information Technology
PharmaCord

Virginia Community College System

A large college system sought a better way to scan and digitize paperwork to streamline processes and expedite answers in enrollment management.

The Challenge

- Fragmented, manual document processing across 40+ locations
- Considerable time and effort to process enrollment documentation for 212,000+ students
- Excessive physical storage requirements for paper documentation

The Solution

Hyland's IDP solution provides:

- Processing over 125,000 transcripts a year, saving time, paper, and storage space
- Unified system and process
- Improved information accuracy and decreased risk

" **We want to expand** the use of Hyland solutions to more departments as well as enhance the workflows that are already in use — and create some that are not."

Michelle Johnson
Software Applications Specialist
VCCS

M Health Fairview

Academic health system selects Hyland Healthcare to automate medical records classification and decrease turnaround times.

The Challenge

- Processing and accessing information across 12 hospitals and 60+ clinics
- Managing classification and entry of 9 million patient documents
- Accelerating information availability in the EHR

The Solution

Hyland's IDP solution:

- Automatically classifies 208 types of paper and digital documents
- Enables barcode reading
- Sends extracted data directly into the EHR

" Now we can even read barcoded forms and send them automatically to our EHR."

Pam Sebesta
IT Applications Manager
M Health Fairview

Asante

Health system was looking to eliminate the document backlog and accelerate patient care and healthcare reimbursement.

The Challenge

- Fragmented processing workflows across 3 hospitals and 40+ clinics
- Large backlog from processing 1.5 million patient documents a year
- Processing delays impacting patient care and healthcare reimbursement

The Solution

Hyland's IDP solution:

- Saves $200,000 per year
- Reduced paper document processing time by 90%
- Reduced fax processing time by 80%
- Completely eliminated the backlog

> " I didn't think we would see the return on our investment as fast as we did. We did it **a lot faster** than planned."

Jeannie Warren
Manager of Health IS
Asante

Customer Success Stories | Hyland Automate

Indiana State University

The university was utilizing a legacy forms and process solution to support their Financial Aid department processes and faced significant support and functionality challenges.

The Challenge

The university encountered substantial support and functionality challenges while relying on Transforms to facilitate processes within their Financial Aid department.

The Solution

Hyland Automate provides:

- Dynamic and responsive forms
- Digital signatures functionality
- Seamless integrations

"**Hyland Automate** stood out as the ideal solution because it not only offered seamless integration with our existing systems, but also provided the flexibility and support we needed to modernize our processes."

Julie Cuffle
Applications Systems Manager

Case Study | **Insurance**

An insurance company encountered a challenge with their claim check process, as it involved syncing across multiple systems and relied on external datasets within WorkView.

The Challenge

Claim check process utilized multiple systems that required syncing and relied on external datasets within WorkView as a presentation layer.

The Solution

Hyland Automate provides:

- Reduced bounce rate
- Streamlined critical revenue generating process

Hyland Automate offers a unified view into content, data, and process, streamlined the process with real-time syncing.

Case Study | **Government**

A government entity grappled with the complexities of managing various OnBase systems and solutions as they sought to enhance the delivery of crucial services to their constituents.

The Challenge

Current process leverages multiple OnBase systems and solutions to support the services they deliver to their constituents.

The Solution

Hyland Automate provides:

- Single view of constituent services
- Streamlined onboarding of new services
- Integration with additional systems

Hyland Automate has revolutionized operations by consolidating constituent services into a single view, streamlining the onboarding of new services, and integrating with additional systems, such as Snowflake.