# OmniDocs WorkDesk
## for Insurance

Insurers rely on content-heavy processes to generate quotations, create policies, process claims, file regulatory reports, and ensure compliance while mitigating risk. The content includes policy documents, agreements, damage videos, survey reports, invoices, and request forms such as new applications, claims, etc. These documents are often in the form of images, audio and video files, and more. Furthermore, there is a huge dependence on external organizations and third parties, which requires insurers to collaborate, resulting in many versions of large content files in folders, email boxes, printouts, laptops, and shared drives.

## Key Challenges Faced by Insurers

➢ Lack of a single interface for accessing case-related content anytime, anywhere

➢ Difficulty in managing/processing complex documents

➢ Lack of collaboration between stakeholders

➢ Lack of capabilities to integrate the core policy administration system with a content management system

➢ Risk of non-compliance due to poor rights enforcement on critical documents

➢ Disjointed communication across departments and with the customers

➢ Outdated document generation process, leading to high turnaround time

## OmniDocs WorkDesk:

### The End-to-end Solution for Insurance Companies

Newgen's OmniDocs WorkDesk enables comprehensive content management, including creation, processing, maintenance, and long-term archival. It is a configurable framework built on Newgen's OmniDocs - a modern, scalable content services platform that provides insurers with business use case-aligned desktops such as Claims WorkDesk, Policy WorkDesk, and more. It helps insurance companies create policies, process claims, streamline commercial insurance, and even manage human resources or marketing operations. It allows your business users to access and manage the relevant content from a single place. Furthermore, OmniDocs WorkDesk comes with pre-built connectors which can be seamlessly integrated with policy administration systems.

# Case in Point

Let's consider the claims process and see how Newgen's OmniDocs WorkDesk empowers the business users:

## The claims officer can:

➤ Upload all relevant documents, such as claims forms, supporting proofs, and more, to a single location so that they are easily accessible by the claims adjustor and approver based on their roles and rights

➤ Ensure the availability and accuracy of all the required documents

## The surveyor can:

➤ Access all the content uploaded by the claims officer and investigate the claim by capturing, uploading, and assessing the relevant images and videos files

➤ Make notes on the documents, mark points in the videos, write assessments or recommendations, and invite others to add their notes. For example, in case of a motor claim, the surveyor should be able to mark the video with annotations, and the timeline of the video should show various annotations and details of the user who made it

➤ Quickly generate multiple reports and documents, such as a survey report, letter of requirement, etc., and submit them for further processing

## The claims adjustor can:

➤ Retrieve all the case files, including the policy documents and contracts, to cross-verify terms and conditions

➤ Collaborate with multiple stakeholders, such as surveyor, legal team, technical experts, and others, to discuss the damages identified in the video with the help of annotations and notes

➤ Generate documents, such as work orders, and send them to the repairer with the approved scope of work . After completing the work, the repairer sends the invoice to the adjustor, who captures and stores it in his claims file

➤ Compare the received invoice against the work order to ensure that only the approved work is done and generate a final claim settlement sheet that is sent to the approver

## The approver can:

➤ Access all the case-related documents, view all the comments, notes, and annotations made by other stakeholders

➤ Review and share the claim sheet with the finance team for settlement

# Key Features of Newgen's OmniDocs WorkDesk

**Single Window Access to Content:** Allow policy underwriters, claims officers, and other stakeholders to access all case-related information, including large and complex documents, images, audios, videos, MS Office files, and emails, and to add notes or comments using a unified WorkDesk view

**Easy and Quick Document Discovery:** Accelerate key processes like claims review and approvals by locating desired content quickly and seamlessly using the in-built search engine with advanced filters. Furthermore, relevant stakeholders can leverage a dedicated annotation search tool for tracking highlights, comments, and other annotations within a document

**Extensive Document Operations:** Capture documents, apply classification schemes, and set multi-level access rights on folders and documents for persona/role-based access. Furthermore, enable key stakeholders to perform task-specific operations, such as annotating content, including audio and video files, comparing documents with synchronous scrolling and highlighting differences, merging documents, saving PDF renditions, and more
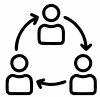
**Seamless Collaboration:** Facilitate collaboration by allowing insurers to add/modify notes and comments on documents. Users can also initiate video calls using MS Teams and Zoom by leveraging the integration capabilities of the WorkDesk

**Smart Communications:** Generate customer-facing documents, such as policies, proposals, forms, notices, endorsements and renewals, claims, annual and portfolio statements, bills, and more, using the template library while complying with company branding guidelines

**Security and Compliance:** Ensure seamless information flow and collaboration, and intelligent content management while complying with various document security and retention standards
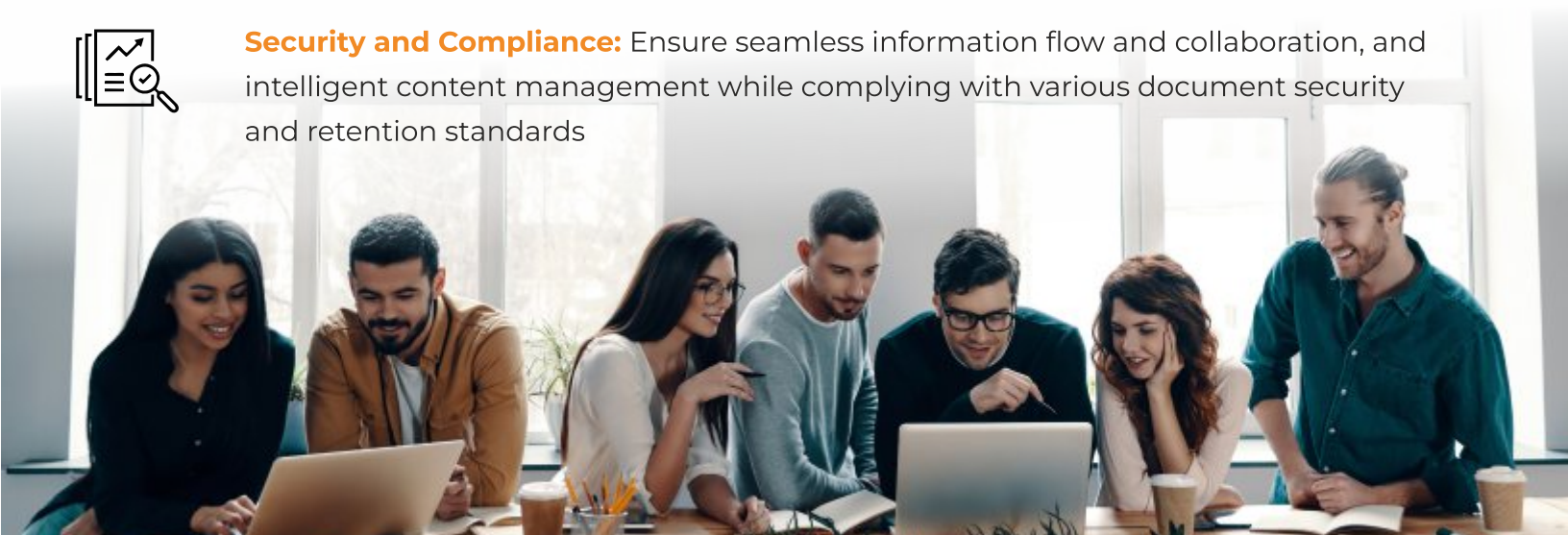
# Key Business Benefits

**Faster turnaround time**
with easy and secure access to information

**Enhanced user productivity**
and better decision-making

**Increased collaboration**
among key stakeholders

**Easy document generation**
throughout the customer lifecycle

**Better compliance**
with regulatory requirements

## About Newgen

Newgen is the leading provider of a unified digital transformation platform with native process automation, content services, and communication management capabilities. Globally, successful enterprises rely on Newgen's industry-recognized low code application platform to develop and deploy complex, content-driven, and customer-engaging business applications on the cloud. From onboarding to service requests, lending to underwriting, and for many more use cases across industries. Newgen unlocks simple with speed and agility.

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