



Case Study:

How Outsourcing Document Processing
Transformed Open Enrollment for a Health
Insurance Giant

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Background: Open Enrollment Surge Pushes Health Insurance Company to the Brink

Insurance enrollment rates reached their peak in 2022, overwhelming **35 million people** enrolling in insurance coverage, according to the U.S Department of Health and Human Services. Our client needed a plan in place to handle the deluge of incoming documents for open enrollment season.

What is Open Enrollment Season?

Open enrollment season is a designated period in the United States when people can enroll in health insurance plans for the upcoming calendar year (**healthcare.gov**). Most health insurance companies prepare for this season by increasing their workloads to manage the influx of documents, which must be accurately captured, sorted, processed, and stored.

The Challenge: Outsourcing Open Enrollment Document Processing

The significant increase in physical documents during open enrollment resulted in higher operational and disposal costs due to excessive paper waste.

DATAMARK was tasked with designing a custom document processing solution for a major U.S. Health Insurance Company to digitize their workflow, reducing both waste and cost in the process. The client expressed interest in utilizing DATAMARK's **Enterprise Content Management (ECM)** expertise to automate its document processing strategy.

The Approach: Analyze for Pain Points and Implement ECM

DATAMARK's Business Engineers proposed a custom document processing plan using their **Business Process Management System (BPMS)** to find pain points in the client's current process. **Lean** and **Six Sigma** methodologies were implemented to streamline redundant steps. The solution included automating process improvements using **Enterprise Content Management (ECM)**, a tool designed to centralize digital data and track employee project timelines.



The Solution: Streamline, Automate, and Expedite Document Processing

DATAMARK implemented **Optical Character Recognition (OCR)**, an automation tool that digitizes physical documents and extracts textual data for digital use. The data captured from **OCR** is also leveraged to predict changes in customer behavior and market trends.

Agents are then rigorously trained in the **OCR** process, coordinating scanning procedures between U.S. and Chennai facilities for format conversion. A barcode system was then applied to reduce indexing time and streamline the **OCR** process, relying on the quality of document barcodes.



Results: Automation Reduces Human Error While Revealing Trends in Document Processing

Within a year, OCR enabled DATAMARK to process over **40 million images** for our client, with six images per claim, significantly reducing operational costs for our client.

DATAMARK surpassed quality expectations, reaching a perfect image **calibration score of 100%**, improving quality, and reducing human error with our client in mind.

By implementing the revitalized barcode process, DATAMARK was able to index over **250 documents daily**, reducing paper waste and costs for our client.

DATAMARK surpassed its **98% Service Level Agreement (SLA)** goal, boosting overall satisfaction for our client.

40
MILLION
IMAGES

6
IMAGES
PER
CLAIM

250
DOCUMENTS
DAILY

98%
SLA
SCORE

Conclusion

DATAMARK's implementation of a custom document processing solution shows the impact of leveraging advanced technologies like **OCR** and **ECM** to fit our client's needs. By automating the document processing workflow, DATAMARK not only reduced operational costs and paper waste but also improved accuracy and efficiency for our client.

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