



Sun Life Financial
227 King St South
Waterloo ON N2J 1R2
Canada
www.sunlife.com

Company Type:
Insurance

Location:
Ontario, Canada

Products:
OPEX AS3690i
Kofax KTM software



OPEX AS3690i

Sun Life Implements One-Touch Document Capture Platform for Claims Processing

Chartered in 1865, Sun Life Financial is a leading international financial services organization providing a wide range of wealth, health, life and retirement products to over 20 million individual and corporate customers in 25 countries.

The Challenge

Sun Life was manually processing over 25,000 medical and dental health claims daily (over 28 million documents annually) in four regional centers. In addition to reporting and tracking inaccuracies, the length of time to process a claim could be as long as seven days. Sun Life undertook an imaging and workflow project to improve cycle times and control.

Sun Life's biggest hurdle was the complexity of over 800 different sizes and types of medical claim documents. Ranging from business card size up to standard letter sized paper, the variety of documents posed challenges in preparing the documents for imaging and the systematic classification and extraction of data from the images.

The Solution

A majority of the documents needed to be mounted on an 8 ½ X 11" carrier in order to scan on traditional scanners. This was deemed cost prohibitive and time consuming. Therefore, Sun Life focused on a solution using OPEX AS3690 scanners in conjunction with Kofax Transformation Modules to meet their needs.

The AS3690's ability to handle a wide range of documents allows Sun Life to quickly convert paper claims into images with little or no prep. As the documents go directly from the envelope onto the scanner in a single-touch, transaction integrity and document control is greatly enhanced. Once scanned, the images are then passed through the Kofax KTM module, where documents are classified and data extracted from more than 800 established form types. Images and data are then transferred to Sun Life's claims management system for adjudication.

The Results

The AS3690 has shown itself to be a workhorse in this environment. "They are proving to be quite robust machines," says Mark Connell, Director, Digital Mail & Image Services at Sun Life Financial Canada. "The machines are very solid with minimal down-time. The OPEX Service team is very responsive to our needs when needed."



OPEX Corporation
World Headquarters
305 Commerce Drive
Moorestown, NJ 08057 USA
+1 856.727.1100 tel
+1 856.727.1955 fax
www.opex.com

Sun Life has realized a number of benefits in the implementation of this solution, including:

- Increased data accuracy
- Improved timeliness and accuracy of management reports
- Almost 100% transaction integrity
- Enabled a virtual processing environment.
- Consolidation of their processing centers to 2 from 4

The Future

With projected volumes to exceed 5.5 million additional pages in 2012, Sun Life has chosen to incorporate the newest technology and capabilities from OPEX: the AS7200, the only one-touch document capture platform for claims processing. Additionally, Sun Life is beginning to look at other areas of their organization that can benefit from the efficiencies and workflow improvements offered by their OPEX equipment.


About Sun Life Financial

Sun Life Financial is a leading international financial services organization providing a diverse range of protection and wealth accumulation products and services to individuals and corporate customers. Chartered in 1865, Sun Life Financial and its partners today have operations in key markets worldwide, including Canada, the United States, the United Kingdom, Ireland, Hong Kong, the Philippines, Japan, Indonesia, India, China, and Bermuda. As of September 30, 2011, the Sun Life Financial group of companies had total assets under management of \$459 billion. For more information please visit, www.sunlife.com.

Sun Life Financial Inc. trades on the Toronto (TSX), New York (NYSE) and Philippine (PSE) stock exchanges under the ticker symbol SLF.

About OPEX

OPEX Corporation is a recognized global technology leader in high-speed mailroom automation and document imaging. Since 1973, OPEX systems have provided performance enhancing workflow solutions and cost-effective results to thousands of organizations around the world. For more information call (856) 727-1100 or visit www.opex.com.



The AS7200i, the latest in the AS-series of OPEX scanners, offers enhanced features, capabilities and software options.

The SunLife trademark is the property of, and owned by, SunLife assurance Company of Canada. All rights reserved. Used by permission.