

# GTL IMPLEMENTS AUTOMATION & AI TO TRANSFORM THE CLAIMS HANDLING PROCESS

GTL Achieves an 85% Increase in Productivity with Solution from OPEX®

OPEX®

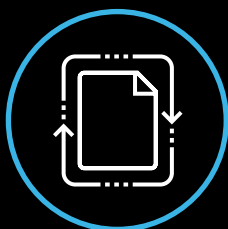
## // THE BACKGROUND

Guarantee Trust Life (GTL) is a mid-sized mutual insurance company based in the Chicago, Illinois area that specializes in life insurance and supplemental health products. GTL's document management center (DMC) is responsible for handling incoming mail from its policy holders for insurance claims, including prescriptions, medical records, and insurance forms. The DMC was composed of 11 staff members who would sort, open, extract, prep, and scan incoming mail manually on four scanners. The DMC typically processes around 2,000 pieces of mail each day, with Monday having the highest volume of the whole week. Last year, GTL received around 370,000 prescription slips from their customers that needed to be prepped and scanned. The volume of prescriptions slips has increased each of the last 3 years and is expected to increase again next year.

## // THE CHALLENGE

The DMC's document and claims handling process was very manual and time-consuming, taking all 11 employees nearly all day to complete. The mail and documents they received required intense prep-work before scanning, with multiple people handling sensitive documents as many as five times. Once the mail was received, it needed to be sorted and opened. Often, staples needed to be removed, and pages needed to be oriented correctly. Patch sheets were then created to separate different files, adding more time to the process. One of the biggest bottlenecks was handling prescription slips, which were too small to fit into the scanners they were using and needed to be taped to a larger piece of paper and then photocopied. Policy holders commonly mailed in their prescription slips intermixed with their family members' prescriptions. This required employees to separate individual prescriptions from one another, which was a time-consuming process.

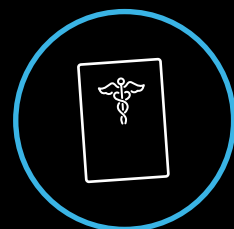
## // KEY CHALLENGES



MAIL AND DOCUMENTS WERE HANDLED 3-5 TIMES BEFORE SCANNING



DOCUMENT PREP WAS A COSTLY, TIME INTENSIVE, MANUAL PROCESS



PRESCRIPTIONS WERE COMMONLY SMALL CUT-OUTS THAT NEEDED TO BE TAPED TO LARGER PAPERS

## // KEY RESULTS

8

SECONDS SPENT PER DOCUMENT TO  
SCAN

82%

REDUCTION IN LABOR NEEDED FOR  
PREP WORK PRIOR TO SCANNING

35%

AMOUNT OF MAIL THAT IS SCANNED  
AND INDEXED WITH AUTOMATION  
AND AI

## // THE SOLUTION

After discovering the OPEX® Falcon+® RED™ scanner through Naviant, the DMC became interested in the system because of its ability to automatically open and present contents from sealed envelopes, scan small pages, and eliminate patch sheets, providing them with a solution for their key challenges. GTL invested in two scanners and was able to immediately transform their claims handling process, eliminating the need to tape prescriptions to new pages and create patch sheets. This increased their overall efficiency and freed up resources, only requiring two of the 11 original employees to prep mail. The remaining employees were able to focus on indexing documents and take on additional responsibilities in the process. They are now able to scan a page in eight seconds, down from the 52 seconds originally required for the task. The DMC used to open mail using an old slicer machine that has now been replaced by the new OPEX systems, saving money on future maintenance costs. The solution from OPEX and Naviant also allowed the DMC to incorporate AI into their document handling process and create claims automatically from information captured during the scanning process, saving them 2.5 minutes of processing time for each document.

## // THE FUTURE

Now that GTL is equipped with their incoming mail handling solution from OPEX and Naviant, they are better prepared to handle shifts in mail volume. The DMC has even taken on scanning services from other departments, easily handling prescription slips and correspondence from their policy holders. Rather than laying off employees who were no longer needed in the DMC, GTL was able to promote these employees into other valuable roles within the company, thanks to the new process. GTL's employees have also enjoyed working with the Falcon+ RED scanners, gaining more technical experience and allowing them to advance their careers.

**"OPEX IS GREAT. THEY TAKE CARE OF US. WE HAVE NO COMPLAINTS WITH THE SERVICE OF OUR FALCON SCANNER...AND WE'RE REALLY PICKY!"**

**-Susan Edwards**

Assistant Vice President of Policy Owner Service,  
DMC, GTL

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