



PSI:Capture enables PMI Health Group to Automate Data Capture across the Organisation

Company background

PMI Health Group is the UK's largest independently owned provider of employee healthcare & risk management services. It brokers individual & business insurance plans for global employees and deals with 62 insurers, offering nearly 160 insurance policy types, across 14 separate markets. PMI Health Group, founded in 1986, is based in Northwich, Cheshire and currently employs 142 staff. A team of 20 occupational health advisors, consultant physicians and registered nurses help companies to cut the cost and incidence of sickness absence.

The Problem

Across the organisation, data from paper document and incoming PDF files needs to be transferred into the company's management systems. Information has to be entered into accounts, customer information (CRM) and document management systems. Although the company was already scanning some documents into their SharePoint document management system, the process of indexing was very labour intensive and time consuming. The move to a new CRM system prompted PMI Health to investigate OCR technologies to streamline documents indexing in SharePoint but also to help automate data capture from a variety of documents, including invoices, statements and insurance renewal documents.

The Requirements

PMI Health is scanning an average of 800 documents per day and needed an affordable and easy to use solution for automated document capture that would integrate with Microsoft SharePoint 2010, Microsoft Dynamics CRM and SunAccounts. The solution had to handle semi-structured documents such as healthcare provider invoices and structured documents such as financial statements and application forms. For both types of documents the ability to extract line item information was also needed. As the company plans to expand the use of document and data capture over time, the solution had to be scalable.

The Solution

Having investigated a number of technologies, PMI Health Group chose the Datafinitivity solution of PSI:Capture Enterprise because of its extensive OCR capabilities and wide range of connectivity options to backend business

systems. In particular the product's extensive SharePoint integration was one of the main deciding factors. The Datafinity solution was installed and configured to scan and extract data from a range of documents, including invoices, insurance provider statements and insurance renewal statements. The data extracted from documents is matched against the Accounts and CRM databases for validation and to retrieve additional indexing information to allow a full-text PDF of the documents to be stored and indexed in SharePoint for easy retrieval. Client account information captured from renewal statements is also updated in Microsoft Dynamics CRM. Header and line item data extracted from provider statements is exported to an MS Excel file for use by the Accounts Department. Scanning is carried out by a high speed Kodak i4600 production scanner. Additionally, a Microsoft Outlook email extraction utility was also provided to automatically save relevant PDF document attachments to the file system for automated processing by PSI:Capture.

"We process a large amount of documentation from a number of sources. PSI:Capture has enabled us to simplify our document scanning process significantly. Using data lookups from our CRM and Accounting software, PSI:Capture identifies and uploads documentation directly to the correct libraries in SharePoint, automating what was previously a labour intensive process." Nigel Scanlan, IT Manager, PMI Health Group.



Invoices and statements are scanned using a Kodak i4600 production scanner

PSI:Capture extracts data from the documents using keyword recognition and validates/retrieves additional index data using lookups to SunAccounts and MS Dynamics CRM

Invoices and statements are routed to the appropriate site, library and folder in SharePoint 2010 for storage and retrieval. Accounting data is exported to Excel files

Solution Components in Summary

Capture Software:	PSI:Capture Enterprise, ADE, ICR and SharePoint integration
Output Formats:	Text-searchable PDF, Database update and CSV data file
Content Repository:	Microsoft SharePoint 2010
Business Systems:	Microsoft Dynamics CRM, SunAccounts.
Scanners:	Kodak i4600 production scanner

About Datafinity Ltd

Datafinity delivers cost-effective, leading-edge document management and data capture solutions for companies that need to improve the efficiency of business and document processes within their organisation. By providing a combination of innovative market leading technologies and years of experience in document management solutions, Datafinity can help improve efficiency, save cost and enhance customer service whilst achieving a fast return on investment.

About PSIGEN Software, Inc.

PSIGEN is the innovative leader in advanced capture applications, and helps organisations convert content into managed digital assets. Their largest customers include service providers, business process outsourcers, and major corporations with significant customer concentrations in financial services, healthcare, manufacturing and retail.