myPolicyCenter

(Insurance Portal)

Companies in the insurance industry are facing a challenge to maintain and manage the multiple, old legacy policy administration systems which are inaccessible to outside users. On the end-user side, agents in agencies and policyholders struggle to get information about policies, billing, claims. Current multiple manual ways like email, fax, customer call centers to make requests for changes in policy, billing, claims and other information are time consuming and error prone. Insurance company back offices and underwriters spend a lot of time in contacting agents for correct data and manual tracking various things like endorsement requests and legal documents. There are always chances of missing deadlines, important details, legal documents for claims etc., which ultimately impact all the stakeholders (agents, underwriters, policy holders) in the form of customer satisfaction, efforts, time and money.

Solution—myPolicyCenter

The myPolicyCenter application by Persistent provides an insurance portal for all stakeholders with data from multiple legacy policy administration, billing, claims etc. systems to view, update, track all the relevant data for the policies. The Underwriters or back office personnel can easily access all the endorsement information and make the necessary changes in the legacy system manually and at the same time complete the task in Appian, so agents and policy holders get notifications. Use of Appian features like tasks, reports, web API, decision objects— the solution helps in easy ways to improve the efficiency, customer satisfaction and unlocks possibilities to explore automation using RPA, AIML technologies. The simulation of "myPolicyCenter" chatbot integration helps agents and underwriters to take the help of the knowledge base and more relevant sources.

Key Functionality and Features

myPolicyCenter Insurance Portal allows agents and underwriters to

- View the data for a policy holder from multiple legacy systems, line of businesses into a single interface instead of dealing with multiple systems.

- Interact with the Chatbot to take help from the knowledge base and various other resources.

- Submit/Review/Track endorsements, supporting documents and other quantitative information to take decisions.

- Tasks, email notifications, comments etc. as better ways of tracking and communicating with the insurance company.

- Review information about the insured for cross-selling opportunities for agents as multiple system data is accessible collectively at a single place.

- Integration with address validation to provide correct data at the endorsement submission for addresses.

- Easy to track the submitted requests and make amendments, corrections, upload supporting documents to help underwriters.

- Be more productive and efficient as all the required data and relevant documents are accessible within.

In addition to the above features myPolicyCenter can be enhanced to

- Provide an open access Web Portal to policy holders to access the policy information. The portal would reuse the Appian by exposing We APIs to get the data and create tasks.

- Some of the tasks like address change in the same city/locality doesn't need manual intervention and by using the Appian Decision Table, such tasks get assigned to RPA Bots group. A bot can easily

access these tasks and complete the necessary legacy system updates.

- Collect the data of various Chatbot interactions and type of endorsements to explain the need to agents and policy holders for improving various systems and marketing strategies.

Key Benefits

Single interface for agents to access policy holder data from multiple legacy systems with ease	Improved customer satisfaction and efficiency at the policy holders, agents and underwriters end	Easy tracking of data and interaction mechanism for all stakeholders and reduced data errors as data is validated at entry into the system	Cost saving for the customer call center, underwriter/ back office staff as manual efforts and time is saved to track information	Integration with Chatbot and other AIML technologies (OCR, NLP etc.) would help in the long run to automate the various steps/use cases

About Persistent

We are a trusted Digital Engineering and Enterprise Modernization partner, combining deep technical expertise and industry experience to help our clients anticipate what's next. Our offerings and proven solutions create a unique competitive advantage for our clients by giving them the power to see beyond and rise above. We work with many industry-leading organizations world-wide including 14 of the 30 most innovative US companies, 80% of the largest banks in the US and India, and numerous innovators across the healthcare ecosystem. Our company fosters a values-driven and people-centric work environment. Our strength of over 22,500+ employees is spread over 18 different countries across the globe.

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