

Reduce manual data entry

Sign regulated forms directly on a tablet device

Accelerate application processing

Increase visibility throughout the enrollment process

Solution Summary | Insurance | OnBase Mobile Enrollment

Streamline the enrollment process, reduce paper forms with OnBase

With OnBase Mobile Enrollment, mobile sales forces can complete, sign and submit enrollment forms on the go, whether online or offline. Any supporting documents, such as a client's utility bill or I.D., can be captured and uploaded with ease. Users can synchronize completed forms with OnBase throughout the day to process applications in a timely manner.



Complete smart forms electronically

Mobile personnel complete electronic versions of regulated forms, which are equipped with auto fill functionality for repeating fields to reduce entry time and errors. The electronic forms are also highly customizable to ensure compliance and ease of use. A variety of configurable business rules—including dynamic form fields that change based on data selection—increase accuracy and aid in completion.

Easily capture signatures and supporting documentation

After data collection is complete, the forms are displayed to the client and representative for review and signatures. Personnel can even capture and attach required supporting documentation—such as a utility bill to verify a client's address—utilizing the device's camera. This on-the-go capture feature results in faster, more efficient application processing.

Automate form routing, expediting assignment and approval processes

With employees synchronizing completed forms throughout the day, applications are immediately available for review and routed for approval. This allows supervisors to gain increased visibility into the overall progress and status of each enrollment application. In the end, this process reduces back-end data entry and time spent transporting documents to and from the office.

Increase your mobile sales force's productivity and expedite the entire enrollment process with the OnBase Mobile Enrollment solution.

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