



TOP REASONS INSURANCE COMPANIES CHOOSE FOXIT TO INCREASE CUSTOMER SATISFACTION

Improve Customer
Response Turnaround
Time by Going
Paperless



WHITE PAPER

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MANAGE DOCUMENTS BETTER TO MEET CUSTOMER EXPECTATIONS

The Insurance industry undeniably relies on a lot of documents such as claims, contracts, policy endorsements, no-loss statements, and much more. As a business that focuses primarily on services and agreements, it is apparent how much insurance companies process documents on a daily basis.

Foxit solutions help Insurance companies transition from paper to paperless, while enabling the ability to work with digital documents the same way that they would with paper. Enterprise automation provides file compression, digital conversions of email, TIFF, and Office docs to PDF/A, and high-quality Optical Character Recognition (OCR) to make scanned documents into text-searchable PDFs and Foxit PDF Editor allows users to create, convert, comment, and organize digital documents all within a single platform.

Why take the costs and risks involved with paper documents, when you can manage documents digitally by going paperless? The time lost handling paper documents could make your customer switch to a competitor instead. Today's insurance is transforming from paper to a streamlined anywhere, anytime type of digital industry.



TRACK DOCUMENTS WITH SMART PDF TECHNOLOGY

Smart PDFs, a standard PDF with a unique assigned ID, can keep track of digital documents as it travels within or outside an organization. Insurance agents can have full control over who can view and edit their documents, providing security for their PDFs. Any authorized viewer can also see comments and edits made in real time, giving Insurance agents the ability to see live updates on their documents the minute they're added for immediate response.

With Foxit's smart PDF solution, ConnectedPDF, insurance agents could get insight from their PDF documents and see which individuals have accessed their files, which pages they viewed, the changes they made, etc. Adopting Smart PDFs as a company standard could allow insurance agencies to cover areas of security, collaboration, and insight all in one.



SCAN AND OCR

Optical Character Recognition (OCR) enables printed images or paper texts to be converted into machine-readable text. With Foxit PDF Editor, insurance agencies can scan paper documents and automatically convert them into searchable digital text files. This makes archiving mass amounts of digital documents faster and easier to retrieve.

When working with multiple customer claims, insurance agents could easily convert their printed documents and search for keywords within the file, making it easier to retrieve the detailed information they need for their customers.



ARCHIVE, INDEX, AND SAVE SPACE

Archiving mass amounts of documents digitally saves room and money. With Foxit PDF Editor, users can convert all of their papers to PDF/A, the desired format for archiving. On top of archiving digital documents, Foxit PDF Editor also has an Outlook email plug-in that gives agents the ability to automatically archive their emails, making it easier for them to save information sent between clients.

Indexing allows an accurate and efficient search of PDF documents and forms. Accessing files immediately is a priority for insurance agencies, and with Foxit PDF Editor users can create an index and assign different bookmarks throughout their PDF files to a better organization for searchability. Insurance agents can also search up for specific documents with metadata embedded in each document.

When archiving so many documents, having enough space to store digital documents is just as important. With Foxit PDF Compressor, insurance agencies can automatically compress scanned documents into smaller files suitable for storage size for improved transmission and accessibility.





DIGITAL FORMS

Sometimes a form comes as a PDF, but it is not fillable. This is known as a non-interactive form, and with the typewriter tool, users can simply type on the PDF document to fill out the form. However, a better solution would be to convert the PDF into an interactive form. With Foxit PDF Editor, users can create interactive form fields for their scanned electronic documents automatically. Insurance agents can make custom form fields as well within their document, giving them the ability to make personalized forms for their own use-cases. With form fields, the creator can assign restrictions for each field (i.e., only allowing numbers in a field for account numbers), allowing less room for error.

Users can import data from other file formats into a PDF form, or export form data from PDF to other file formats, such as a CSV file. Foxit PDF Editor also supports 2D barcodes for forms integrated with Ultraforms technology, making it easier for form data to be scanned, captured, and incorporated into a database.



REDUCE RISK WITH PDF SECURITY

Knowing who has access to view a file is important to track your documents and keep information secure from internal and external leaks. Insurance agents are responsible for numerous documents such as contracts, policyholder agreements, PIP & HCFA forms, and require a controlled environment where other users have pre-authorized ability to modify or view specific documents.

Insurance agencies can set different security levels to their PDF documents in Foxit PDF Editor and control specifically what people can do with the document. The owner of the document can restrict another person's ability to apply edits such as copying text, deleted pages, or adding comments. With PDF security, the owner can also prevent other users from printing their document, as well as creating a custom password to lock their PDF documents for extra security. This reduces the risk of fraudulent claims and prevents any security issues related to the misuse of company documents.



SIGNATURES

Insurance agents are always collecting signatures and signing their documents. When it comes to signing documents, security is definitely a must. Foxit PDF Editor provides robust, secure and quick signatures features such as digital signature, DocuSign, and quick PDF sign. A digital signature can be used to authenticate the identity of a user as well as the document content. It stores information about the signer along with the date, time, and state of the document when it was signed.

Digital IDs that identify a person/organization is also supported by Foxit PDF Editor. Users can not only obtain a digital ID from a trusted third-party provider called a Certificate Authority (CA) but also create a self-signed digital ID with Foxit PDF Editor. Digital IDs are usually protected by password, and can be stored into a computer.

Insurance agents can also place a digital ink signature on their PDFs, as well as creating custom signatures that they can place on their forms like a stamp.

Foxit PDF Editor by default checks the validity of a signature when the documents are opened, ensuring authenticity of signatures.

All of these are options that insurance agents can integrate into their workplace to save time and increase productivity. No more waiting to process physical signatures on multiple documents anymore.



KEEP WORKFLOW ORGANIZED WITH DMS INTEGRATIONS

Keeping documents and workflow organized is essential for insurance agencies. Foxit PDF Editor's integrations with multiple Cloud Storage Services, Enterprise Content Management Systems (ECMs), and Document Management Systems (DMS) allows users to create, open, save, etc. PDF files using their centralized on-premises or cloud systems effortlessly for enhanced workflow productivity.

Foxit PDF Editor allows users to open and check out PDFs directly from the following:

- Sharepoint
- OneDrive
- iManage Work
- NetDocuments
- Enterprise Connect
- Egnyte
- Google Drive
- Dropbox
- Box
- Worldox
- Documentum
- eDOCS DM



TAKE CONTROL OF ENTERPRISE-WIDE DEPLOYMENTS

Foxit makes it easy to deploy Foxit PDF Editor and Reader to all desktops in the organization, no matter how wide-spread your empire reaches. Group Policies can be set for standardization, and SCCM deployments and SCUP (Microsoft System Center Updates Publisher) are supported to allow administrators to more accurately and efficiently install and update software. Mass deployments can also be customized through XML configuration support. And there are a plethora of online tutorials to guide your users through product features, offloading you from having to answer tedious support questions.

OUR CUSTOMERS



Leavitt Group



Watkins Insurance Group



Hoffman Brown Company



Merchants Insurance Group



Catto & Catto



The Horton Group



BF&M



NYCM Insurance