

Boon Chapman
Austin, TX

No more missing policies...

LibertyNET insures faster document retrieval

Client Situation

Founded in 1961, Boon-Chapman serves their clients as a distinguished full service health benefits company and is also the oldest Texas-domiciled third party administrator. Located in Austin, Texas, they provide administrative services to many insurance companies and over 700 clients.

Between the sheer volume of documents and the meticulous workflow process that required the paper to touch multiple departments, the firm realized that something needed to change. "We process many new files a week in the Marketing department – we had paper everywhere, it was really unmanageable" said Kathy Phillips, Director of Marketing.

With goals to become more efficient, reduce the time spent searching for missing files, and to halt the exponential growth of their filing room, Boon Chapman decided to implement LibertyNET as their Electronic Document Management Solution.

"It would often take someone 45 minutes to find a client's file; there were even times that we couldn't find it. We'd have to call the client and ask them to resend the information. Now we can retrieve these documents in less than 10 seconds," John Dungey, Premiums Manager.

"Now [my employees] all look at me and say 'what did we ever do without it?'" –Kathy Phillips, Director of Marketing, Boon Chapman

Liberty IMS Solution

It wasn't a hard decision for Boon Chapman to make – they chose a turnkey solution from DOCUMENTATION, INC. which included LibertyNET as well as various capture devices. The first step was to automate the extensive workflow in the Marketing department, along with increasing productivity in the Premiums department by eliminating the hours of searching for missing documents. With LibertyNET, the total document processing time that used to take days – now only takes hours. "Plus, we have remote access to all of our documents allowing us to remain productive while traveling...and the best part is that things don't get lost anymore!" explains Phillips.

After the success of the initial implementation, Boon Chapman has expanded into 3 additional departments, Claims, Flex and Customer Service. All the time continuing to pursue the Company's ultimate goal, "to one



day go entirely paperless" says Dungey.

The only real challenge was to mentally eliminate the need to hold on to the paper. "The employees had to adapt to the feeling of looking at their files on the screen in LibertyNET instead of traditional paper documents," Phillips admits. However, once employees realized the dramatic increase in efficiency, they adjusted rather quickly. "Now they all look at me and say 'What did we ever do without it?'"

Client Benefit

The most obvious benefit of LibertyNET is the increase in productivity. Dungey recalls an individual who needed documents the same day in order to not lose coverage. "We were able to locate and email the Cobra packet to the client right then - and they were able to get their coverage in time."

Another huge impact has been eliminating their expanding filing room. Boon Chapman is now in the process of converting the room into a medical clinic that will benefit every employee. "The filing cabinets are already gone" explains Dungey...now that is something that nobody will miss!"

For more information about how LibertyNET can help your company, contact us:

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