

Document automation platform for social service programs

SOLUTION BRIEF



SIMPLIFICATION THROUGH INNOVATION™



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The business challenge

Health and Human Services programs such as Child-support Enforcement, Medicare/Medicaid, SACWIS, and TANF are challenged to keep up with high caseload volumes while attempting to deliver social services within their individual programs. Program management teams are chartered with keeping a pulse on federal, local, and legislative reforms that impact their programs' ability to deliver quality service, while accelerating the rate of case closures. Many social services programs require customer interaction for months or years from eligibility qualifying to benefits/services delivery, case management, and eventual case closure.

Interaction with families seeking support is a document-intensive process. Legacy applications were typically custom-built with minimal attention given to the document generation requirements, with staff still relying on overburdened IT resources to modify document content and to build custom scripts into line-of-business applications for document assembly.

Today, agencies seek commercial off-the-shelf solutions and frameworks to breathe new life into their legacy systems, including managing the document automation life cycle.



"Our goal is children's financial security, which comes from certainty that they can count on their parents' support. In this plan, we move toward that goal by, among other things: focusing on increasing the amount and rate of money collected and distributed to families; setting as a national priority the reduction of support collected but not distributed; and measuring and counting as a success not just getting any collection, but collecting and distributing timely support payments."

– National Child Support Enforcement Strategic Plan
FY 2005-2009

"Provide technical assistance to states and other public agencies to increase enrollment of SCHIP, Medicaid, and qualified Medicare beneficiary/specified low-income Medicare beneficiary eligible individuals."

– Medicaid/SCHIP stated objective from HHS Strategic Plan
FY 2004-2009

"... on sample letters sent to custodial and non-custodial parents, comments were received stating:

"The letters were unclear and bureaucratic. They need to be simplified.

"More language translations are needed. Once the letters are translated, they can be shared among the counties using the same document generation software, so each county does not have to do its own translation."

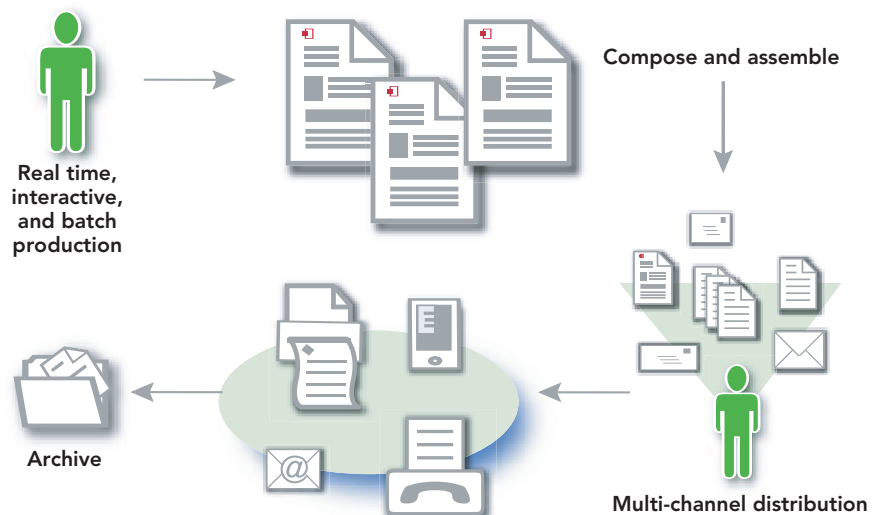
– Extract from State of California PRISM Advisory Group

The Cincom solution

Cincom's Intelligent Document Solutions™ helps social services programs accelerate caseload processing by offering a complete, commercial, off-the-shelf platform to streamline processes, support caseworker and management decisions, and cut costs. Intelligent Document Solutions' modular platform enables caseworkers to automate the creation, review, delivery, and archiving of critical document communications. Built with a web-based interface in an open systems architecture, Intelligent Document Solutions streamlines support-service processes – from batch-oriented general notices to complex, interactive legal documents – giving full desktop control at each touch point.

Intelligent Document Solutions enables you to skillfully manage the full spectrum of dynamic document-automation processes with features and functions that provide:

- Rich data acquisition from any source and format, including mainframes.
- Complex rules management to ensure concise, easy-to-understand formatted documents.
- Multi-language support to deliver culturally appropriate documents.
- A modular platform to manage the entire document life cycle.
- Versatile formatting and archiving, including PDF, Word, PCL, and AFP.
- Multi-channel delivery via fax, e-mail, print, and XML.



**Managing the document life cycle
with Cincom's Intelligent Document Solutions**

Intelligent Document Solutions' object-oriented architecture allows caseworkers and end-users to keep up with the high volume of cases by dynamically assembling and generating documents (from predefined paragraphs, images, and signatures, or with free-form text) according to case specifics while interacting with constituents in real time, all from a desktop browser! Because end-users can assign administrative rights to modify document templates in real time, they no longer need to wait in queue for IT support.

Features at a glance

- Sophisticated documents complete with data-driven paragraphs.
- Multi-platform, web-based design places document assembly, generation, and delivery in the hands of end-users.
- Leverage platform across multiple programs.
- Ability to add free-form text and full WYSIWYG document preview within a browser.

Expected productivity improvements

- Augment case-management applications by seamlessly managing document creation, archiving, and case logging.
- Dynamically deliver documents based on user preference (county agencies may exchange documents via preferred e-mail addresses).
- Directly integrate with legacy applications with our open systems, document automation platform.
- Ensure full reporting and compliance with new-hire and wage-withholding requirements.
- Create data reports to identify TANF clients whose cases could be closed with reliable receipt of child support.

Lower document communication costs for HHS programs

Cincom and Intelligent Document Solutions automate your business-critical document communication processes to maximize staff productivity and support management decisions, while delivering concise communications to clients.

Child-support enforcement: Notices, income assignments, tax offset notifications, case summaries, license suspension, letters, payment agreements and coupons, medical support notices, emancipation letters, support enforcement orders, and wage garnishments.

Eligibility and benefit determination for family assistance programs: Correspondence, notices, remittance documents, statements, certificates, and waivers.

Family support registry/state disbursement units: Notice generation, coupons, redirects, legal forms, income assignments, suspensions, etc.

Medicare and Medicaid services: Letters, notices, provider agreements, guidance documents, 1099s, medical provider directories, management, and administrative reporting.

SACWIS: Medical cards, survey forms, alerts, notices, state and federal reports (e.g., AFCARS, IV-E 12, and CFS-101), provider payments and remittance advice, contracts, petitions, and letters, attorney and supervisory approvals.

Temporary assistance for needy families: Agreement forms, vouchers, correspondence, eligibility and case action letters, forms, and reports.

The value to your agency

Health and Human Services programs benefit from Intelligent Document Solutions by printing thousands of notices daily (on time and without adding staff), preparing and delivering electronic letters on demand, and ensuring that formal documents contain accurate information in the correct format, thus eliminating re-work caused by error. All promote the well-being of clients, the self-sufficiency of families, and the mission of social services programs. Intelligent Document Solutions automates the generation and delivery of complex business-critical documents and improves their accuracy. Using it, agencies will:

- Realize federal incentives for accelerated program caseload processing.
- Meet the requirements of National Medical Support Notices.
- Dynamically assemble highly personalized, concise documents that reduce client and call center inquiries.
- Gain an enterprise portal view into all business documents.
- Brand client communications by locale (i.e., county logos).
- Reduce document-processing costs by as much as 60 percent.
- Decrease document-production times by as much as 90 percent.

Both public-service agencies and systems integrators win with Cincom's Intelligent Document Solutions:

- Agencies accelerate document automation, reduce deployment risks, ensure quality and enhance compliance, and simplify and optimize IT infrastructure.
- Consulting firms and systems integrators respond promptly to their clients' cost pressures with a proven, commercial, off-the-shelf solution from a reliable partner that can help you win business.

Dynamically assemble highly personalized, concise documents that reduce client and call center inquiries.



Intelligent Document Solutions

Automate document generation

Intelligent Document Solutions enables you to:

- Accelerate document communications by reducing or eliminating manual processes.
- Increase efficiency by enabling local users to access models from a central repository.
- Allow caseworkers to generate documents from anywhere in the organization via a web browser.
- Increase productivity by integrating with existing databases and applications.
- Transition from paper-intensive to electronic document delivery, including e-mail, fax, and web.

Increase productivity by integrating with existing databases and applications.

Reduce document communications costs

Intelligent Document Solutions saves on:

- Labor costs, because automation reduces the costs associated with manual processing.
- Papers costs, because you preview documents directly within the design environment.
- Preprinted document costs, because you embed logos, graphics, etc., eliminating stationery.

Assure quality and enhance compliance

Intelligent Document Solutions features:

- A central repository for all models, ensuring that any changes in law or terminology are promptly made to case-related documentation.
- Reusable components that enable authors to use common components – paragraphs, signatures, headers, and more – across multiple document models, eliminating the re-keying of data.
- Rules-based logic that provides sophisticated functionality within document models, including data-driven logos, regulatory language, paragraph dependencies, and signature inclusions by jurisdiction.
- Version control that manages and monitors all edits or changes to document models, ensuring compliance, accuracy, and consistency as document volumes grow.

Simplify IT infrastructure and optimize existing investments

Intelligent Document Solutions provides:

- A single, comprehensive solution for batch automation and interactive document generation.
- A browser-based interface and rich system management tools with full WYSIWYG document previewing.
- Multi-platform support, including Windows, UNIX, and z/OS, to ensure that solutions are deployed on field-proven platforms indigenous to most support agencies.
- An open API interface, including ASP, .NET, and Java to facilitate rapid integration with existing databases, workflows, and line-of-business applications.

Benefits at a glance

- Reduce document communications costs.
- Assure quality and enhance compliance.
- Meet the requirements of National Medical Support Notices.
- Optimize existing investments.



Core Components

Design

The Intelligent Document Solutions design environment utilizes a familiar Windows/MS Word interface that enables document authors to easily create sophisticated document models with minimal IT involvement – complete with variable data-driven text, bar codes, graphics, tables, etc. By utilizing reusable components (e.g., paragraphs, signatures, and headers), document authors can ensure accuracy and consistency while eliminating the need to re-key data. Document authors can also preview documents from right within the design environment facilitating editing, compliance, and error corrections before consuming valuable production resources and incurring printing costs.

Deploy

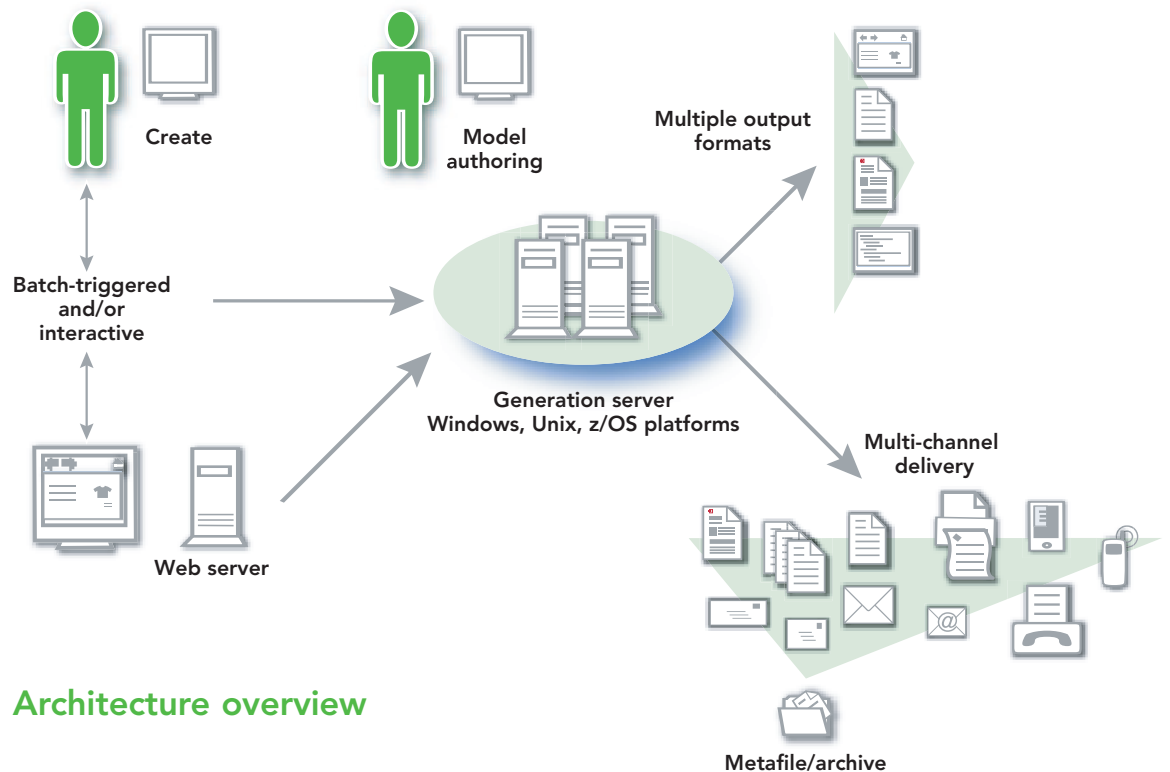
The multi-platform architecture of Intelligent Document Solutions' multi-platform architecture provides the ability to accept data inputs from any source and in any format, including ODBC, XML, flat files, and a host of other formats. Cincom Intelligent Document Solutions was engineered to deploy across a variety of platforms (e.g., Windows, UNIX, and z/OS), and output in a variety of formats (e.g., PDF, AFP, PCL, and XML). All document models are stored in a central repository that can be accessed via a web browser anywhere across the agency's support system, thus allowing local support organizations to dynamically generate and assemble documents on demand.

Deliver

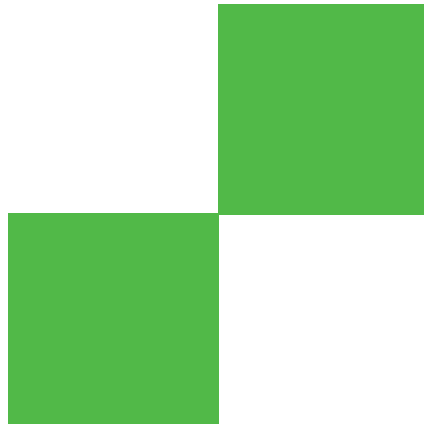
The Intelligent Document Solutions web-enabled architecture provides the ability to deliver personalized documents while interacting with customers in real time, and in any form they prefer – print, fax, e-mail, or web – all from a single, comprehensive solution. The Intelligent Document Solutions application suite fulfills a wide range of complexity and volume requirements.

Integrate

Intelligent Document Solutions offers a rich set of APIs and exits for integrating document generation with databases and line-of-business applications. API options include C APIs as well as Java and .NET APIs. By using these APIs and exits, staff can generate documents transparently from a line-of-business application, or they may initiate other applications.



Architecture overview



Easily create sophisticated document models with minimal IT involvement.

Why Cincom?

For nearly 40 years, Cincom's software and services have helped thousands of clients and partners worldwide simplify the management of complex business processes. Cincom specializes in the five areas of business where simplification brings the greatest value to managers who want to grow revenue, control costs, minimize risk, and achieve a rapid ROI better than their competitors. These areas are Data Management Solutions; Document Automation; Marketing, Sales, and Customer Service Solutions; Application Development Solutions; Manufacturing Business Solutions; and Outsourcing/Hosting Solutions.

Cincom serves thousands of clients on six continents including BMW, Boeing, Citibank, Ericsson, Federal Express, Milacron, Penn State University, Rockwell Automation, Siemens, Social Security Administration, and Trane.

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