

Randy Shepard & Associates

Case Study



Warranty Admin Solution Drives Success

Automobile warranty claims processor, Randy Shepard & Associates, Inc., streamlined their core business processes with DocuWare by routing all claims electronically, totally eliminating the need to physically move paper. The company received a return on their investment within the first year based on the reduced paper and printing costs alone. Their DocuWare solution links data and documents and successfully manages more than 1 million documents and growing.

Randy Shepard & Associates, Inc., (RS&A) specializes in warranty claims processing for new car dealerships nationwide and is dedicated to helping them navigate the complexity of warranty administration. RS&A performs warranty claims processing by reviewing every claim for manufacturer compliance, applying proper codes, entering the data and ensuring the appropriate documentation is submitted to the manufacturer with each claim. They also handle correcting rejected claims and resubmitting them and provide their customers with claim payment confirmations.

In the past, dealerships would send their warranty claims to RS&A as either paper or electronic documents. The claims would be logged into their custom in-house claims processing software IniTrack, which keeps track of the status of each claim. Then the claims were coded and annotations were made on the document. Next, the information would be entered into an online system and transmitted to the manufacturer for payment. Managing these claims was time consuming especially if a document needed to be verified from a previous day or week.

As their business grew, RS&A wanted to expedite their business process associated with processing paper documents, and make it faster and easier to locate any claim electronically.

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Industry: Service Provider

Location: New York, USA

Application: Company-wide

Document Types: Warranty Claims, Supporting Documents, Invoices, Checks, Accounting Documentation

Requirements

With more than 165 clients submitting between 800 – 1,300 claims a day that range from 3 - 12 pages each, RS&A knew they needed to move to a paperless process. They wanted to find a flexible, customizable document management system that would be able to “talk” with their IniTrack system and allow them to link the claim document to the information inside their in-house system. The solution needed to be easy to use and mimic their paper-based workflow.

RS&A evaluated several systems, but chose to implement DocuWare because their Authorized DocuWare Partner was able to create a working prototype, provide superior technical support, and connected RS&A with another DocuWare customer who had successfully customized and deployed DocuWare.

Solution

Today, most claims are received electronically. Each document is brought into IniTrack, indexed with dealer name, manufacturer name and claim number. Annotations are entered on an electronic layer over the document. The annotated information is then entered into the dealer's computer system and sent to the manufacture for payment. DocuWare acts as the backend document storage archive for IniTrack. As supporting claim documentation arrives, it can be easily added to a claim in process. Staff members do not even need to open DocuWare as a separate program because of its tight integration, allowing them to work in their familiar IniTrack program.

Benefits

With DocuWare, RS&A can keep a copy of each claim but still make digital annotations on a separate layer; having the original available is very helpful when answering dealer or manufacturer requests.

“When a dealer calls with claims questions, we simply punch in the claim number and view the claim on the screen. Prior to DocuWare, we would have to go through hundreds of claims to find a specific one and then call the dealer back in order to answer a simple question. With DocuWare our response is immediate, improving our customer service,” said Randy Shepard Jr, Chief Financial Officer and MIS Manager for RS&A.

DocuWare's tracking features allow RS&A to see who worked on each claim and allows them to go back to the staff member who originally worked on a claim when answering questions. Additionally, claims are able to be processed more efficiently because handwritten notes are no longer used and the electronic workflow ensures nothing is lost.

Adding DocuWare to RS&A's IT system allows the company and its dealers to eliminate document shipping costs. The transparent nature of the system helps ensure that each claim is submitted to the manufacturer within 24-48 hours, which in most cases results in claims being paid the following day. With DocuWare in place, cash flow has improved for both the dealer and RS&A. The dealer gets paid more quickly by the manufacturer and RS&A is able to bill the dealership for their services faster.

The Tasks

- Eliminate paper-based processes
- Integrate in-house software with a document management system
- Implement an easy-to-use, flexible, solution

The Benefits

- Received a ROI within one year
- Improved customer service and gained transparency
- Company-wide efficiency increase

Applied Modules

- Barcode and Forms
- CONNECT to Outlook
- Import
- Recognition
- Task Manager

"We are so happy with our digital claims process and the elimination of all the paper. With the superior support we receive from DocuWare and our Authorized DocuWare Partner, we are in a win win situation. Our integrated solution has increased the efficiency of the entire office and has positively impacted our customer service," said Shepard.

RS&A has eliminated most of their printing and copying costs, substantially reducing their paper use from 2,400 reams a year to 100 reams a year and they are continuing to refine their processes to eliminate even more printing and paper use. By moving to a paperless process the company removed filing cabinets and gained valuable office space, adding three new workstations.

Conclusion

"We received a return on our investment on DocuWare within the first year, based on printing and paper costs alone," Shepard said.

DocuWare has expanded to the internal workings of the company and is being used in the Accounts Receivable and Accounts Payable departments to store invoices, check stubs and other documents. With more than 1 million documents in their system, DocuWare is now a critical piece of RS&A's IT infrastructure.

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Randy Shepard Jr., Chief Financial Officer and MIS Manager, Randy Shepard & Associates, Inc.



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