Intelligent Automation Meets Case Management

Most federal agencies have sizable case management responsibilities. Whether they concern services delivery, grants, healthcare, law enforcement, emergency management, consular affairs, loans or benefits, federal case management operations consume enormous staff and financial resources. Case management systems may serve as repositories, trackers and collaboration platforms for cases. This means agency employees conduct data entry, data extraction and basic decision-making to keep the cases moving along every day.

Case management workloads are growing even as agencies confront constrained budget resources and contend with limited staff and rising citizen expectations to be able to access data. Data is also being received in many formats (multiple channels of digital and physical) further complicating how data gets to the case management systems. As the data that agencies collect and generate to support their case workloads grows exponentially, this requires new ways to drive efficiencies in case management system operations.

So, with ballooning administrative costs, case backlogs and, ultimately, large resources spent on lower value tasks, what can agencies do to achieve better outcomes?
Intelligent automation drives better constituent service

Many agencies are replacing or augmenting their case management workflows with automated processes that allow caseworkers to focus more on the headwork of the job. This means faster, more informed decisions and a stronger focus on serving constituents—and less time on tasks like manual data entry or copy/paste activities between systems. This is good news and in direct support of the President’s directive to focus on higher-value work.

As agencies begin to make changes in their case management operations, intelligent automation will play an ever-increasing role. The reality is that most agencies can’t jettison their case management investments due to complexity of deployment and costs. Rather, a “work with” approach can provide dramatic improvements in productivity. Intelligent automation harnesses the combined power of artificial intelligence (AI), natural language processing (NLP), and intelligent workflows to improve case management speed and performance while delivering significant efficiencies.

By leveraging an integrated intelligent automation platform, the difficult and manual tasks of getting data into a case management system are no longer a manual undertaking. One example is deploying automation at the multi-function device (scanner and printer) level, where a user can start the digitization journey of paper documents as part of the conversion. Intelligent automation offers the ability to authenticate who an individual is and what rights he or she has on the system, automatically recognize and classify a document, automate workflows to deliver a document to a system of record, and intelligently capture key information. This, in turn, helps with compliance risk, increases productivity, reduces cost and enables employees to shift to higher-value work.

The intelligent automation journey is just beginning at the initial ingestion point, though. By combining cognitive capture, process orchestration, robotic processing automation (RPA), advanced analytics, and mobility & engagement capabilities, federal agencies can automate many of the tasks that currently burden the workforce. Imagine a veteran that needs to submit documents for benefits but doesn’t have access to a scanner or printer. Mobile capture and e-signature offer an easy way to get those documents to the agency, while back end automation can recognize those documents, intelligently route and extract data, and move them to the correct location for processing.

As automation continues to mature, the concept of "hyperautomation" is gaining traction. Gartner defines hyperautomation as “an effective combination of complementary sets of tools that can integrate functional and process silos to automate and augment business processes.” This makes sense for case management systems too, as there are many friction points in the daily work using a case management system that can be eased with the correct automation technologies that work together. This also means staff move toward the more challenging work that humans do best. As additional capacity is built, this means the workforce can begin to shift focus on how to improve mission outcomes, while deploying a deliberate and continuous improvement approach toward automation. Long development cycles should be a thing of the past with a platform of capabilities that is COTS, no-code and trainable at all skill levels. In this “hyperautomation” and “low code” world of case management, this means the workforce becomes empowered to innovate and focus on delivering better services.

“We’ve just migrated around 18,000 files for our finance area. If we were to move all of those items manually, it would take at least two to three weeks. With Kofax RPA, we migrated all 18,000 files in just 19 hours. Plus, as Kofax RPA handles everything automatically, it means that our team is free to focus on other activities, helping us get through more work in less time.”

An official at a large federal department
Digital workforce management to mitigate risk

As federal agencies scale automation, the need to manage, monitor and govern automation deployments will only increase. Some are concerned that this focus on automation means that humans won’t have a say or that improper decisions will occur. Automation used in case management must be tuned to the comfort and risk level of the organization it supports. As an example, a robot should never make the decision to deny benefits to someone without the correct controls in place, nor should critical data for a grant application not be validated prior to extracting to a system of record. Fortunately, a well-integrated intelligent automation platform provides the ability to audit processes anywhere on the platform, monitor the performance of automations (including robots) with real-time analytics, and ensure governance to the overall process.

From a compliance perspective, it’s essential for IT to have visibility into what systems, processes and privileges are given to each digital worker. Securing and monitoring how information is used by all resources is key. Identity management integrated with enterprise security solutions supports unified governance over digital/people access to sensitive systems and applications. As human and digital workforces continue to merge, a single governance environment for human and digital workers becomes essential to reduce process fragmentation and risk.

Use Case:
Kofax automated the eligibility verification process for a large federal health care program.

AI-enabled data-capturing tools extract data at massive scale, analytics capabilities monitor processes and workflows, and robotic capabilities follow the same case management systems, rules, and governance as human employees, but at up to six times faster.

The Result?
300,000 processes completed per month, saving substantial labor hours while providing a surge capacity that otherwise would have to be manual. Moreover, automation has helped dramatically improve the consistency, accuracy, quality and speed of the program’s work.

Kofax Intelligent Automation for Federal Case Management

As you review your current case management processes, consider the following common challenges and how Kofax Intelligent Automation can help:

How does deploying automation make my case management operations more resilient during periods of disruption?

Kofax automation can dramatically increase the number and speed of processes completed and provide a surge capacity that otherwise would have to be manual. It also enables users to leverage a web browser to deploy automation, allows for remote and secure ingestion of documents, and seamlessly integrates with other technologies like chat bots and voice bots.

I know my organization spends too many resources manually entering data into our case management system

Kofax securely ingests data from virtually any device or channel, and it leverages AI to accurately extract information from scanned images, regardless of format, and places data into case management systems of record. Using machine learning/AI, the Kofax platform learns documents and improves extraction rates as humans provide feedback. The ability to automatically recognize documents and separations between groups of documents further improves productivity.

I don’t have visibility into how data is getting into my case management system and where the bottlenecks are.

Kofax offers real-time analytics on the ingest and verification of data processed by the platform. This starts at the device and includes any technology that’s in the platform, including RPA. We can see who scanned what in, where, when, what data was extracted, and who validated which data. We can even look at the performance of subgroups and determine areas for improvement.

I’m worried about errors and the quality of data entering my case management system.

Kofax automatically flags erroneous data and leverages data matching / fuzzy logic to cleanse data prior to load. The customer can define how sensitive the engines are down to the field level.

I don’t have a case management system, but I’m drowning in email and manual approvals running our business and know that we are not running efficiently.

Kofax offers a robust case management offering as part of our intelligent automation platform. Additionally, we can offer mobile integration, e-signature and other automation technologies to speed up decision-making and move cases faster.
Why Kofax

Kofax is an industry leader in data capture and intelligent automation, providing the broadest platform to enable your employees to “Work Like Tomorrow.” Whether in mission delivery, citizen engagement or back-office functions, Kofax Intelligent Automation empowers governments to transform business processes, reduce costs, and improve citizen experience and workforce satisfaction.

25 years of intelligent automation experience

90% renewal rate in federal

39 customer agencies covering civilian, military and intelligence

130,000 licenses worldwide

Operating at 350 federal sites, processing 100-plus million pages annually

Global Leader in capture: 30% market share

To learn more about how Kofax can improve operations at your agency, go to: www.carahsoft.com/vendors/kofax or reach out to our federal sales team at federal@kofax.com.