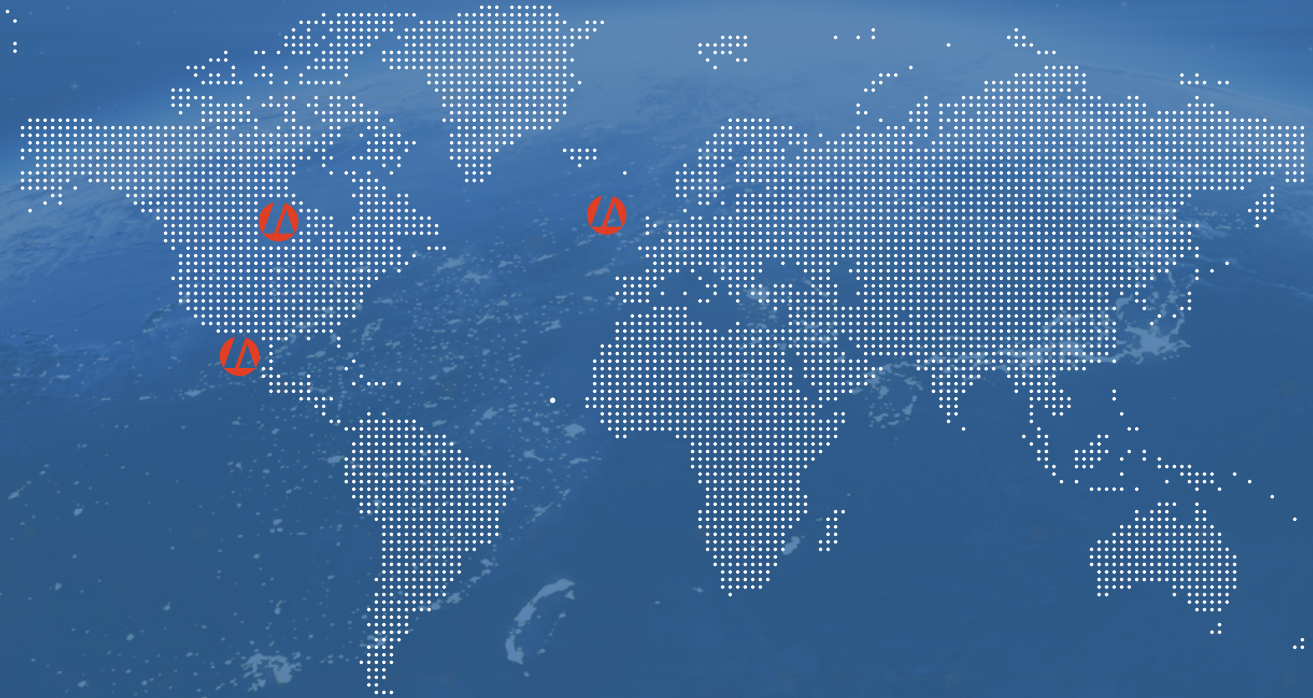# HOTdocs

INSURANCE AND DOCUMENT AUTOMATION

HOTDOCS.COM

ABOUT HOTDOCS AND ABACUSNEXT

HotDocs pioneered document automation technology more than 30 years ago and is now the global market leader. We've spent decades fine-tuning our technology and today provide solutions to property & casualty, large commercial (or speciality) and life insurance companies, including 8 of the top 15 insurance companies in the world.

The company was acquired in 2017 by AbacusNext, the largest Technology-as-a-Service (TaaS) provider for professional services, creating the most compelling products and services portfolio in the industry.

AbacusNext is headquarted in San Diego, CA with offices and data centres located in the UK and Canada.

WHAT IS DOCUMENT AUTOMATION?

In the simplest terms, document automation (also known as document assembly) is technology that enables the transformation of frequently used documents or forms into dynamic templates. These templates can then be used to easily generate documents via intuitive and responsive interviews.

Create operational efficiencies and control your documents by removing manual processes including cutting and pasting, finding and replacing, and lengthy review processes.

HOW CAN WE IMPROVE INSURANCE POLICY AND CLAIMS DOCUMENT PRODUCTION?

Incorporating our leading document automation solutions within policy documents and contractual document production gives insurance organizations greater control and increased efficiency during their document production and template approval processes. Automating the assembly of insurance documents makes it possible to:
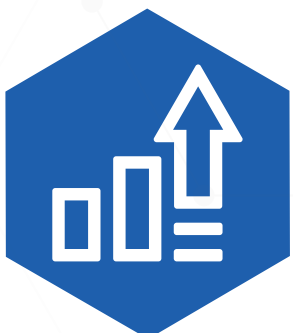
ENHANCE COMPLIANCE

- Adhere to approved business rules set by internal or industry authorities
- Built-in intelligence to document templates to ensure all required T&C's are available
- Enable template version control to ensure all users or systems that produce documents use the latest, most compliant version of your document template
- Promotes standardization ensuring that all assembled documents comply with internal brand guidelines

INCREASE EFFICIENCY & IMPROVE CUSTOMER SERVICE

- Improve productivity by speeding up the document creation process by automating repetitive work
- Improve job satisfaction among staff by allowing them to focus on more productive work
- Ensure faster turnaround times for approvals and document packages
- Integrate with leading CRMs or claims processing systems to streamline workflows
- Delegate compliant document production to business introducers

MITIGATE RISK, INCREASE QUALITY & REDUCE COSTS

- Get it right first time - eliminate human errors that can creep into manual processes while reducing wasted time and associated costs
- Protect against legal issues stemming from inaccurate, non-compliant content
- Ensure global standardization by centralising all aspects of template creation
- Improve document quality

TYPES OF DOCUMENTS

HotDocs allows firms to automate the generation of lengthy and complex policy documents – anything from standard endorsements to claims litigation documentation. Not only can HotDocs dramatically reduce the time it takes to generate documents, HotDocs will also improve the quality of your policy documents by reducing the likelihood of human error. With HotDocs, insurance organizations can automate many types of documents and agreements including:

CLAIMS AND LITIGATION DOCUMENTS

POLICY DOCUMENTATION

NOTIFICATION LETTERS

DECLARATION PAGES

POLICY RIDERS

ENDORSEMENTS

AMENDMENTS

LOSS ADJUSTER DOCUMENTATION

LIFE AND ANNUITY DOCUMENTS

COVER NOTES

RENEWAL LETTERS

POLICY QUOTES

THE CONNECTED EXPERIENCE VIA ENTERPRISE APIs

In addition to offering document automation out-of-the-box, the powerful HotDocs APIs (application programming interfaces) facilitate integrations with other key line of business systems.

These integrations allow for the realization of even greater value by allowing others systems to generate documents automatically, pull data into the document assembly process, or allow users to save documents into their preferred document management systems.

Enhanced APIs allow simple porting between on-premise and Abacus Private Cloud (APC) deployments of HotDocs. An enhanced template management utility, the HotDocs Advance, comes complete with version control, forward publishing, group collaboration, and integration with HotDocs Author.

HOW HOTDOCS HAS HELPED CURRENT USERS

Saved over 125,000 work hours per year

Helped generate more than half a million documents per year

Saved thousands of pounds each time a document is created

CASE STUDY

A leading national auto, property and casualty insurer has more than 50,000 employees and a network of law offices located in almost every jurisdiction in the United States. These offices (referred to as in-house or "captive" counsel) function as regular independent law firms; however, their clients are limited to those insured by the head company. Law office sizes range from a handful of attorneys and support staff in the small offices to over 150employees in the largest office.

In early 2010, the insurance company began searching for a new method to replace their legacy document assembly, automation and generation system. This system, which was custom-built by internal IT staff, was relied upon by those in the law offices to create professional, accurate, custom documents for litigation practice. Virtually all documents needed, including pleadings, motions, answers and crossclaims, were automated to reduce the time and effort required of staff and increase the quality, consistency and accuracy of the documentation.

The company's decision to move off the legacy system was predicated, in part, on adesire to move away from the custom-built Visual Basic (VB) programming. They desired a more standardized approach, which would reduce the amount of internal programming, development and troubleshooting required to maintain the program. The company recognised there were options available to address document assembly and automation that would replace all the functionality of the old

program, but at a fraction of the internal resources. Of those available options, HotDocs was determined to be the best one.

Once a decision was made to use HotDocs, the company's law office central support staff contracted with HotDocs Technical Services to provide support in replacing the legacy document automation system. HotDocs assisted the company's staff in setting up the back-end servers and training a select group of support personnel in the template creation process.

When a law office staff member wants to generate a new document, he or she goes to the HotDocs Document Portal and selects the appropriate document. In the background, HotDocs pulls data from the company's case management system, which pre-populates the document with some of the information needed. The staff member then answers questions in a HotDocs interview. When finished, he or she simply clicks a button to generate the finished document in Microsoft Word.

All of the insurance company's law offices have now been fully deployed with HotDocs.

This implementation of HotDocs is one of the largest in the United States, consisting of more than 20,000 templates and a user population dispersed all across the country.
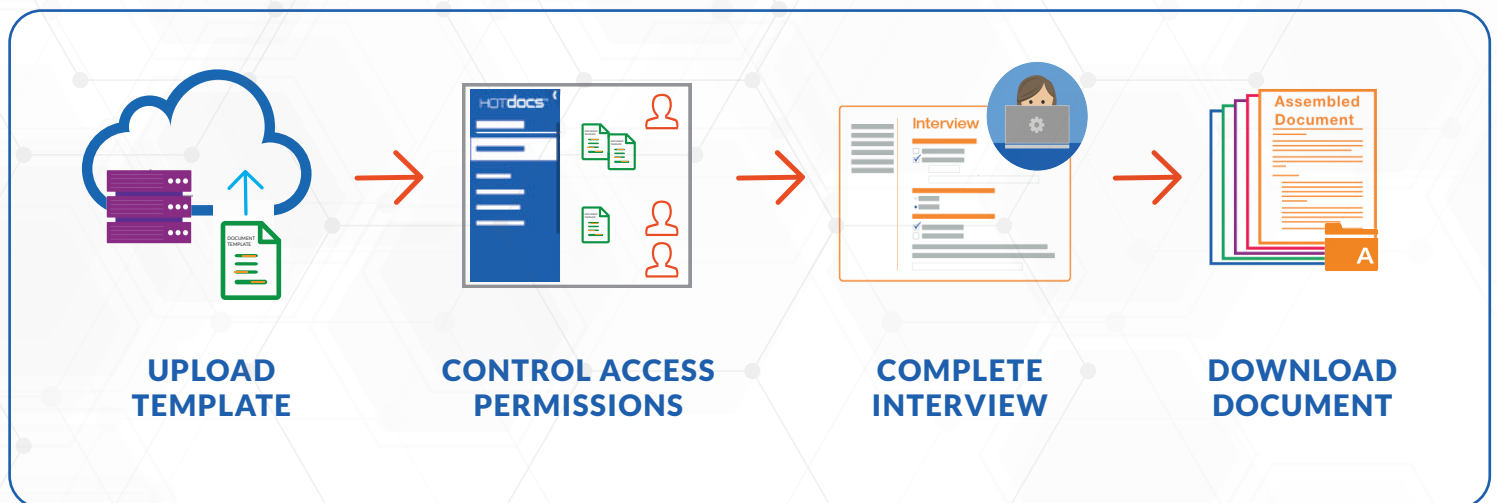
HOTDOCS AUTHOR

HotDocs Author is our latest product that gives you the ability to transform documents into powerful templates. HotDocs templates save time, money and yield better quality documents than the outdated cut-and-paste/search-and-replace methods.

For text-based documents, HotDocs Author works inside your word processor. HotDocs Author utilises an easy to use select-and-click approach to inserting variables and embedding business logic into logic documents.

HOTDOCS ADVANCE

HotDocs Advance is an enterprise-grade, browser-based document automation solution that makes it easier than ever to implement HotDocs, regardless of an organisation's size. HotDocs Advance can be deployed on Cloud, Abacus Private Cloud, or On-Premise.

| UPLOAD TEMPLATE | CONTROL ACCESS PERMISSIONS | COMPLETE INTERVIEW | DOWNLOAD DOCUMENT |

HOTDOCS ADVANCE FEATURES

ADMINISTRATIVE EXPERIENCE

Administrative tools
Powerful tools for administering IT, integrations, users, publishing, templates, and file management.

Cloud, Abacus Private Cloud and On-Premise solutions
Flexible options enable browser-based document generation both online and offline.

Integrations
Robust, secure, Service Oriented Architecture and industry-standard APIs enable simplified integrations with business applications such as BPM, CRM, DMS, ECM, database, and e-signature technologies

Template and file management
APIs support enhanced management of templates, work items, answer data, document generation, and completed documents. File repository available in cloud, Abacus Private Cloud, or on-premise.

Seamless integration between Author and Advance
Identical behaviour, functionality, and support for both desktop and browser-based interviews.

User management
Ability to efficiently manage end-users, groups, and permissions via built in user system and Active Directory.

Security
Cloud API security based on industry standards.

Muti-tenant support
Easily deploy HotDocs via multi-tenanted solutions or partner infrastructure.

Scalability
Flexible, proven, and scalable architecture that meets the needs of any organization – regardless of size.

END-USER EXPERIENCE

Browser-based template interviews
Supports document generation on a variety of devices (PC, MAC, tablets).

Work items
End-users can more efficiently manage completed documents and answer files associated with each of their clients.

Full API suite
Enhanced APIs provide increased options for viewing, creating, and editing work items, documents, and data.

High performance
Users can expect only the best performance with the platform optimizations.

TEMPLATE AUTHORING EXPERIENCE

Simple, intuitive template creation
New authoring interface design makes it easier to handle even the most complex documents or document packages. Editing tools are easier to discover and learn. Field editor wizard guides template designers through each step of the authoring process.

Collaborative template development
Multiple template authors can easily coordinate their template design efforts.

Automatic error alerts
Template and scripting error alerts are displayed immediately during the template creation process to help authors identify mistakes prior to testing or publishing.

Powerful, local test assembly
Template functionality testing is available without the need for server upload or internet connectivity. Local tests conducted by the template author utilise the same interview code as those assembly sessions conducted in Advance. PDF post-assembly tests operate in a similar fashion. This functionality provides for more accurate interview testing.

Condensed field view
Hide HotDocs field text in Microsoft Word templates for a simplified template overview.

File conflict analysis
Files in the template library are continuously analysed in the background during template development to help identify conflicts between templates and files.

Simplified publishing and performance
The streamlined uploading and publishing process required to package a template is done automatically in the background providing for a faster publishing process. HotDocs Author is used to directly upload and manage published templates in Advance.

Increased language support
Documents and interviews support nearly any language or localization requirement.

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