

# SmartOffice

## PaperClip Mojo Integration

Turn handwritten insurance applications into SmartOffice pending cases

Does your staff spend hours entering information from handwritten insurance application forms into your agency management system? Thanks to SmartOffice's integration with PaperClip Mojo, you can say goodbye to that time-consuming chore. Mojo automatically transcribes the information in application forms and creates pending cases in SmartOffice.

### The New Way to Process New Business

Here are just a few of the benefits of using SmartOffice and PaperClip Mojo.

Key Benefits		
<p><b>Get Fast, Accurate Transcription of Form Data</b></p>	<p>Mojo combines the power of crowdsourcing and cloud computing to transcribe data from PDF application form images. Mojo processes and sends the form data to human transcribers for validation before securely reassembling the results. This method is more accurate than current optical character recognition (OCR) technology.</p>	
<p><b>Take Advantage of Strong Data Security and Compliance</b></p>	<p>Data fragments from a single form are sent to multiple transcribers to obscure the data's context. Sensitive fields like Social Security numbers are split up before being sent. Transcribers have no idea what the characters they are transcribing represent or whom the data applies to.</p>	
<p><b>Speed Up Your New-Business Workflows</b></p>	<p>By automatically creating pending cases in SmartOffice based on data processed through Mojo, the integration lets your staff get to work on new cases right away.</p>	
<p><b>Boost Staff Productivity</b></p>	<p>Manual transcription of application forms and manual pending case creation are a thing of the past. With the time saved, your staff can focus on servicing clients and improving support to producers in the field.</p>	

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# Take a Look

**Acme Insurance** Application for Individual Life Insurance  
NORTH DAKOTA

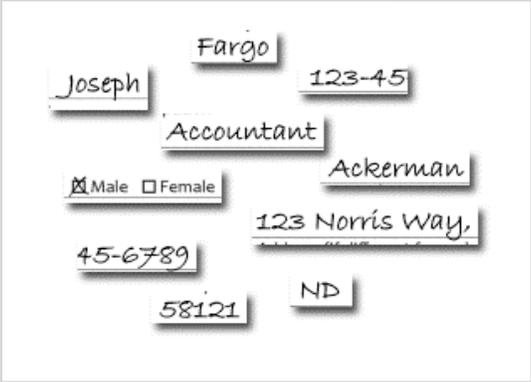
**A. Proposed Insured (PI 1)**

1. Name First Joseph		Middle Ackerman		Last Ackerman	
2. Sex <input checked="" type="checkbox"/> Male <input type="checkbox"/> Female	3. Date of Birth (mm/dd/yyyy) 11 / 3 / 1969		4. Social Security / Tax ID # 123-45-6789		
5. Drivers License State, No., Issue and Expiration Date ND, A1234567, exp. 1/2/18		6. Marital Status <input checked="" type="checkbox"/> M <input type="checkbox"/> D <input type="checkbox"/> S <input type="checkbox"/> W		7. Birth Place (State/Country) N. Dakota, USA	
8. Citizenship If other, provide details including valid Green Card or Visa # and Type. (Attach a copy of complete document) <input checked="" type="checkbox"/> US <input type="checkbox"/> Other Details					
9. Address Street 123 Norris Way,		City Fargo	State ND	Zip 58121	
10. Mailing Address (if different from above) Street City State Zip					
11. Years at Address 10		12. Telephone Number Personal (702) 555-1326-Business (702) 555-6782		13. Email Address jackerman@domain.com	
14. Employer Self-employed		15. Occupation Accountant		16. How Long 20 yrs	
17. Business Address Street 456 Schneider St.		City Fargo	State ND	Zip 58121	

**B. Proposed Insured (PI 2)** Complete for:  Survivorship Plan  Additional Insured Rider  
If multiple additional insureds complete form PM5023. If info for PI 1 is same as PI 2 indicate same.

Handwritten applications from the field are often saved in PDF format at the agency. Staff typically rely on inaccurate OCR technology or manual entry to move that data into the new-business workflow.

PaperClip Mojo eliminates hassle by splitting the PDF data into fragments and sending those fragments to human transcribers. Sensitive data (like SSN) is sliced up in a way that obscures its context and protects personal information.



Submitted - Life - Joseph Ackerman (Joe... - Assurance Plus Life - Acme Insurance - Lo, Verona

Menu

Detail (P) Benefits Requirements Delivery (D) Advisor Requests Riders/Reinsurance Activity/Mail (M) Letters/Documents Policy Transactions (T) >>

**Status and Dates**

Status: Submitted 11/14/2017

Submitted 11/14/2017

Signed  Submitted  Approved  Delivered

All Req In  Issued  Inforce

**Basic Policy Information**

Policy # Link ID  
Unique Case ID 123456789-27 Case #

Center Acme Insurance Co

Plan Name Assurance Plus Life

Options  
Plan Type Term Sub-Type  
State Cash Rec 0.00  
Inforce Request Alt Policy #  
UW Type Priority  
Purpose  
Processing Type  
Keywords  
Show Parent  
 Replacement  Visible to advisors  
 MultiLife Policy  Do not include in reporting  
 CTN/Recreation

Opportunities  
Tax Type  
Face Amount Underwritten Amt 0

**Important Contacts**

Underwriter  
HO Reg  
Team Case Manager Janine Wong  
Contact Issueth.Ackerman File Location

**Current Premium Information**

Model Premium Annual Prem 0.00  
Pren Mode Annual Prem 0.00  
Pay Method Duration  
Target Excess Prem 0.00  
Comm Model 0.00 Comm Annuity 0.00  
Weighted by Premium Do not calculate  
Flat Extra/1000 Flat Extra Yes  
1035 Lump Sum  
List Bill # Renewal  
Prem Stop Date

**Policy Advisor List**

Role	First Name, Last Name	Interest
Primary Advisor	Verone Lu	100.00

**Policy Insured List**

Contact Name	Propor Rate	Issue Age	Save Age	Role
Ackerman, Joseph	45			Primary Insured

**Policy Relationship List**

Role	Contact Name
Primary Contact	Joseph Ackerman
Owner	Joseph Ackerman
Payer	Joseph Ackerman

Mojo reassembles the results and sends the data to SmartOffice, where it creates a SmartOffice pending case record. Mojo even creates the contact record if it doesn't already exist.

