Case Study

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Serco Deploys a Digital Workforce to Boost Case Management Efficiency for a Major US Federal Agency

Serco assists millions of consumers each year through case-management efforts which involve the intake and processing of tens of millions of documents and hundreds of millions of data records. By applying automation at key points, Serco is today able to triage casework components into parts that can be fully or partially automated, separating parts which require more highly skilled knowledge workers. This capability has allowed Serco to drive far greater efficiencies without compromising quality or accuracy.

300,000
RPA-Executed Processes Performed in One Month

40 Million
Document Pages Automatically Analyzed and Classified

5 Million
Cases Successfully Adjudicated Each Year

Work Like Tomorrow.™

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Meet Serco Inc.

With over 50,000 employees in more than 20 countries across the world, Serco is a global leader in case management services that support vital government programs to enhance the experience and outcomes of consumers. Serco's integrated approach combines policy expertise, business process excellence, and intelligent automation to help Federal, State and local governments deliver outstanding service to millions of citizens.

Products in Use

Kofax Capture
Kofax Monitor
Kofax Process Intelligence
Kofax RPA
Kofax VRS Elite

Focus

Case Management, Process Intelligence, Optical Character Recognition (OCR), Robotic Process Automation (RPA)

Challenge

The Serco system supports the eligibility verification process for tens of millions of consumers each year who are seeking to purchase health insurance through the HealthCare.gov Marketplace, as part of the Patient Protection and Affordable Care Act, or ACA.

While not an entitlement program in the traditional sense, the ACA does provide for a "means tested" benefit, where the consumer must meet evolving eligibility criteria related to income, citizenship or immigrations status, and other factors. Although HealthCare.gov can confirm eligibility through Federal data sources for most consumers, the law requires independent verification through documentation. That's where Serco comes in.

Eligibility verification at this scale cannot be completed internally by government personnel. Serco was hired to provide the exclusive role of eligibility verification using Serco's workforce of approximately 4,000 individuals across four processing centers. Serco also serves as the sole recipient for all mailed correspondence, which represents over 40 million pages each year.

This work must be performed quickly, often with tight service-level requirements (SLAs), while simultaneously ensuring that each consumer is served consistently within a fluid set of rules and despite seasonally. One of Serco's greatest challenges is to deliver lower costs, without affecting quality or consistency, for work that is highly varied and complex, yet with labor rates set by legislation and a customer (the Federal government) that pays a fixed price for each case it works.

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As part of this process, Serco must compare information extracted from scanned documents with data from external systems of record, such as government databases. If data on an application does not match with data from one of these external systems, Serco asks the applicant to send additional documentary evidence to support their application. Serco must meet the government's stringent SLAs for data-processing speed and accuracy without sending its own operational costs and complexity soaring.

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One of the key challenges the company faced was the cyclical nature of the government's case load. At regular points in the year, data-processing volumes would surge by a factor of five. To accommodate these seasonal spikes, the company was forced to rapidly onboard thousands of employees. This massive recruitment effort was a significant drain on operational efficiency, and so Serco decided to deploy automation to allow for stable headcount and faster delivery of services.

Solution

To achieve its vision, Serco turned to its trusted technology partner Kofax. By employing Kofax automation to take over repetitive, simple tasks, the company realized that it could empower its human workers to focus on more complex activities. Higher levels of automation would allow the company to achieve more with fewer human resources—reducing its hiring requirements during peak periods.

One of Serco's first goals for process automation was case management to intelligently capture data from forms and to speed up the ingestion part of the process. In the past, employees manually reviewed and transcribed information from customers' documents, before collating and matching it with data from external systems to determine their eligibility. To streamline the process, Serco deployed Kofax Capture to extract data from paper forms, Kofax VRS Elite to clean up poor-quality images, and Kofax Transformation to automatically classify each document using artificial intelligence (AI) and machine learning (ML) technology. By automating what would otherwise be manual and time-consuming data entry, the Kofax solution reduced labor costs, minimized the risk of errors and drives operational efficiency for Serco.

Based on the success of its initial work with Kofax, Serco saw an opportunity to introduce automation into additional process areas. In particular, the company recognized that its employees were still spending significant amounts of time searching for and manually retrieving documents during the case management process. Working with the Kofax team, the company deployed Kofax RPA to automate the search and retrieval process, and configured the software robots to follow the complex set of business rules that the workflow demands.

After seeing the positive effect that Kofax RPA was having on operational efficiency, Serco was more confident than ever that automation was the key to avoiding a massive recruitment effort during seasonal peaks in data-processing volumes. To further improve results, Serco partnered with Kofax to build a digital workforce powered by intelligent automation from Kofax RPA and Intelligent Data Capture. While the previous two engagements had focused on augmenting the work of human beings, this evolution in capability created a parallel, robotic workforce that used the same case management systems, rules, and governance as employees.

Using Kofax's Intelligent Automation platform, Serco implemented end-to-end automation for low-complexity work in its case management process. Today, an automated decision-making service determines whether a task is suitable for a software robot, and then assigns it to Kofax RPA. Next, the Kofax software robot logs into the case management system as if it were a human user, and completes the task based on the same rules and governance frameworks that apply to Serco employees.

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Results

Since it began to harness Kofax Intelligent Automation to take on many of the repetitive, manual tasks in its case management workflow, Serco has freed time to focus on more complex cases. In fact, the Kofax solution now completes as many as 300,000 processes per month, saving an estimated 100 full-time employees during peak work periods. As a result, the company can accommodate regular spikes in processing requirements without hiring the same peak-level additional support workers that would otherwise be required.

By augmenting its processes with software robots and intelligent data capture, Serco is driving up the consistency of its work. Automating error-prone tasks such as clearing expired applications from the system ensures that business rules and controls are applied, reporting is accurate, and quality is assured. At an average processing speed of four minutes per task, the Kofax solution is also up to four-times faster than a typical human employee.

Thanks to machine learning capabilities of the Kofax solution, Serco's solution is becoming more accurate all the time. Using analytics insights in the cognitive document processing component of the solution, the company identifies and corrects frequently occurring exceptions, and ensures the system is running smoothly.

> **"Serco uses the Kofax intelligent automation platform, leveraging Robotic Process Automation (RPA), Intelligent Document Capture, as well as Process Intelligence components to make eligibility decisions for vital public programs that benefit millions of people."**
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> **Nathaniel Palmer,** Director of Solution Architecture, Serco Inc.

Every year, Serco processes 45 million applications on behalf of its U.S. government client—and automation from Kofax plays a key role in almost every one of them. By continuing its close collaboration with Kofax, the organization plans to continue to leverage automation to improve operational efficiency, reduce handle times, and ensure high-quality services.

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