The story

One of five major San Diego County government divisions, the Health and Human Services Agency offers the community a wide range of health and social programs, including aging and independence services, public health programs, and children's services.

To help with the administration of these programs, the agency uses CalWIN, a state-approved program. Supporting documents used to qualify every individual for various government assistance programs, like food stamps (the Supplemental Nutrition Program),Temporary Assistance for Needy Families, Medical, and more were being transferred onto a digital format using EMC Documentum.

An integration challenge

Digitizing supporting documents and using CalWIN had introduced a challenge: How to get the two programs to communicate with each other automatically? Without this piece of automation, an agent using CalWIN would have to take information from relevant forms, then look for supporting documents in another system, visually and manually verify it, and then provide the information to an applying individual.

Computations and Permutations of the verification process

There was another requirement. CalWIN supported over 500 different forms. Based on the forms the agent was using for each case, certain combinations of fields needed to be verified. For example, if he was using Form A and Form B then social security and address fields needed to be verified in the supporting documents, whereas if he was using Form C and Form B then social security and driver's license details needed to be verified. These complexities resulted in hundreds of business rules, making process automation imperative. San Diego County chose Automation Anywhere to automate its extremely complex Health and Human Services processing and verification functions.

Working with a legacy application – a non-invasive approach is really the only way

Automation Anywhere's in-house experts sat down to design a process that would serve SDC's requirements. To integrate CalWIN with Documentum required significant code changes to CalWIN but being a legacy application, code changes to CalWIN were really not an option. Automation Anywhere's non-invasive approach was the solution. This way, those setting up the automation could work with the application and automatically retrieve data without making changes to CalWIN itself. Any other solution would have required programming or direct integration coding.

Seamless execution on 2000 computers – SMART Automation Technology

The agents all use different computer configurations – so any solution would have to adjust to several parameters like screen sizes and resolutions, operating systems, and different platforms including Citrix, and then run the automated tasks seamlessly on each computer. Automation Anywhere's built-in SMART Automation Technology, designed with adaptability in mind, would make this doable. It solved an ancillary issue as well: agents routinely opened multiple forms on the screen at once – and only the most recently opened was visible. SMART Automation Technology captured data from all active and non-active windows.

Project at-a-glance

Challenge:
Automating a complex, time-consuming verification processes requiring a legacy application, a document management system, and a variety of corresponding business rules.

Solution:
A non-invasive automation process utilizing the front-end of both applications, and a system that completed all verification requirements with the press of a single hotkey.

Benefits:
Reduced costs and risks, faster turnaround for verification, and fewer human errors.

"We evaluated many other products but we chose AA because of its flexibility to integrate with legacy systems ...I would recommend AA for its flexibility to integrate and automate processes of any kind."

- Vinesh Goyal,
  ECM Practice Director, Burntsand Corporation
  (Integrated solution provider, digitized ECM project for San Diego County)

AUTOMATION **ANYWHERE**

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Solution Design

Automation Anywhere experts devised a solution to bridge the systemic communication gap. An agent would be able to bring up verification documents from Documentum, using information from the CalWIN system, and launch the verification process with a single hotkey.
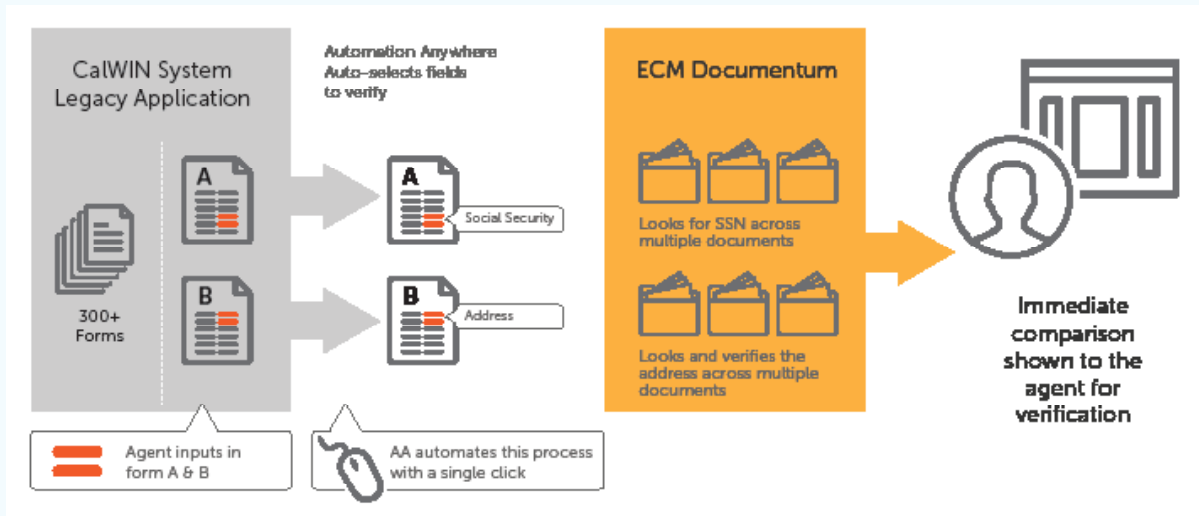
Automation Anywhere would look at the open forms on the agent's screen, use the combination to decide verification fields, identify relevant documents, and then pull up those documents from the ECM system for the agent. This would speed up the decision making, which in turn would translate to a seamless experience for the agent and the end user.

Benefits

The county had over 2000 agents using this system, which translated to countless hours saved in verification time alone. The benefits of automating these systems?

- A non-invasive solution reduced costs and risk. No additional resources were required for custom programming. And no code changes were needed for CalWIN or the EMC enterprise content management system, so no additional resources were required for modifications either.

- A quick and easy, side-by-side comparison meant faster turnaround for verification processes.

- Immediate ROI and time/cost savings

- Increased productivity and efficiency

- Fewer human errors, particularly in the verification process.

"Automation Anywhere made it possible to integrate a legacy system with Documentum without requiring any changes to the legacy system. Solution deployment was breeze and users loved the efficiency they achieved using Documentum as backend for content repository."

- Vinesh Goyal, ECM Practice Director, Burntsand Corporation (Integrated solution provider, digitized ECM project for San Diego County)

Discover how Automation Anywhere can give your business an edge.
Visit us at www.automationanywhere.com today.