

# The power of secure web forms to differentiate your business



## Background

Even in today's digital age, paper forms are still pervasive. They're widely used in hospitals, medical practices, banks, in financial services and by most companies in one shape or another. They're being filled out by hand, sometimes mailed or faxed into a processing department that then has to interpret the handwriting and key in the data. Some organizations have taken to encouraging customers to save time by printing out forms at home and filling them out before arriving for an appointment. That's not innovation.

However, forms are important. They capture customer details that are required to deliver services or make payment, and can contain confidential information that has to be protected for compliance reasons. Forms are here to stay, but innovation has arrived through secure web forms so they no longer have to be paper-based. This brief will detail how replacing paper forms with secure web forms differentiates your organization by allowing you to deliver goods and services more securely, faster, easier for customers and with less effort on your part.



## What are secure web forms?

Secure web forms are an extension of secure messaging technology and a core piece of an overall secure messaging portfolio (See fig 1). As more organizations adopt secure messaging services such as email encryption and data loss prevention, they will also be able to leverage the same technology to benefit from secure web forms.

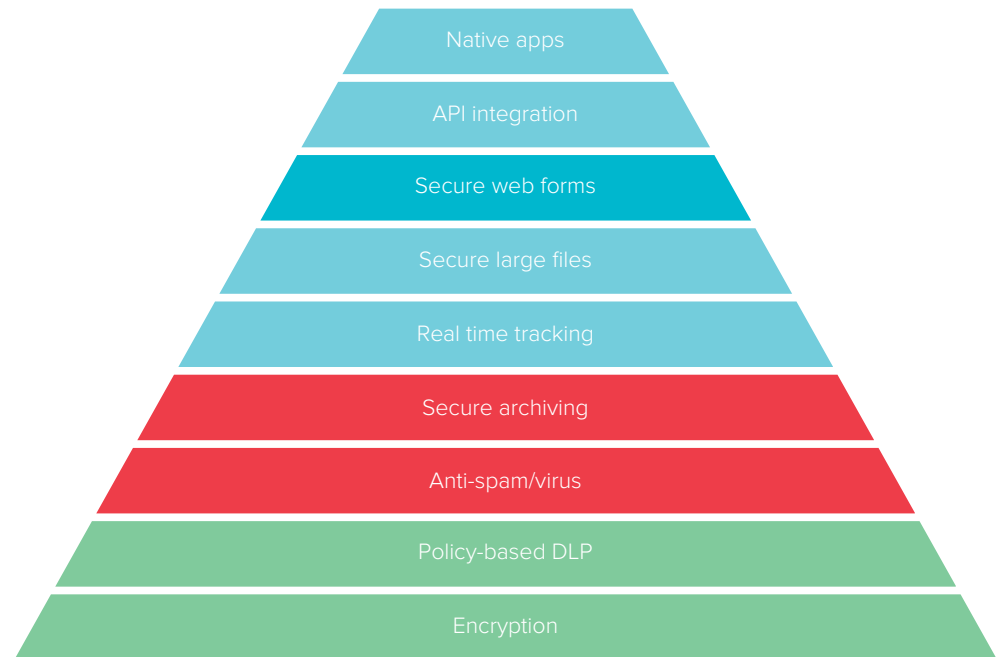
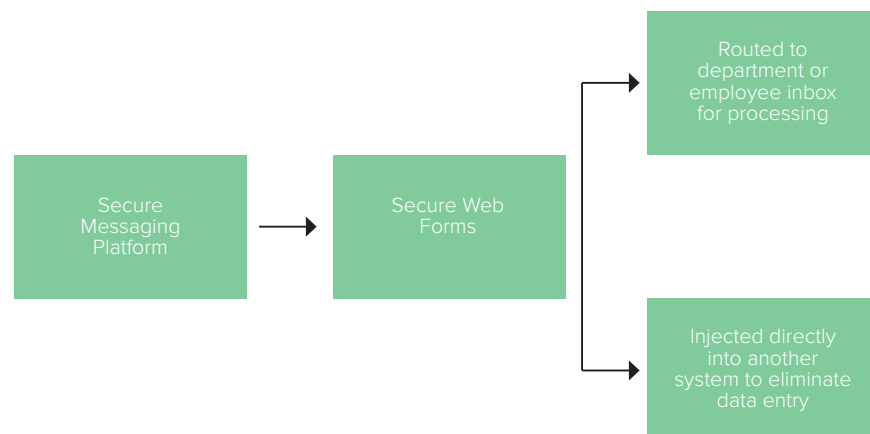


fig 1: Core pieces of a secure messaging portfolio

Secure web forms are powered by API integration with a secure messaging platform to provide encrypted web fields that can be routed directly into an employee's inbox for processing or directly injected into another system without any manual keying. The same technology that makes your email secure and compliant also powers secure web forms.



# How are secure web forms being used?

Secure web forms can replace any paper or pdf form used today, so the range of uses is very broad and customizable. Here are two of the most common applications:



## Healthcare

Hospitals, pharmacies, medical and dental practices continue to rely heavily on paper forms that are manually keyed into EMRs, EHRs, billing and other proprietary healthcare systems. Using secure web forms makes it easier and more secure for patients to submit medical histories, enroll in benefits, and provide insurance and billing information. Any paper form used today can be replicated into a secure web form.



## Financial services application processing

Financial services firms often use customer applications and quotes to initiate the delivery of various products including life insurance, credit line extensions and mortgage loans. It's common for applications to be transmitted via snail mail or fax or for a field sales person to initially gather information on paper. The information then must be entered into back-end systems before it can be processed. Secure web forms can be used to capture the initial application and route the information faster to the appropriate department, individual or systems for faster processing, delivery and revenue recognition.

# Is it time to move on from paper forms now?

The idea of eliminating paper forms is attractive, but how do you know if your organization should prioritize it now. It depends on need and impact. The questions below can help you assess the impact that implementing web forms can have on your organization.

## Are secure web forms right for you?

- *Are you in a regulated industry where confidential information on paper is a risk (i.e. target for theft, potentially misplaced, exposed on fax machines)?*
- *Would speeding up the delivery of products and services make a difference to your organization?*
- *How many forms do you process on average per month?*
- *Does information on paper forms have to be manually keyed into a system? (e.g. EMR, ERP, CRM)*
- *Are you allocating human and financial resources on data entry?*
- *How much headcount?*
- *What is the estimated cost per year?*
- *Is it important for you to be easier to do business with for customers?*

If you answered yes to three or more of the above questions, then your organization likely has a need. How you quantify your responses to the other questions gives you a broad idea of the potential impact. An additional step that could be taken to further quantify potential impact would be to map out your own specific workflow processes to identify where inefficiencies are occurring. You will then be able to determine specific metrics and potential efficiencies that could be gained such as time to deliver products and collect revenue.



## How does it work

The actual process of turning a paper form into a secure web form is an easy one. The first step is to design the form in HTML (or any other programming language such as PHP, ASPX), including all the options, fields and JavaScript field validations. It's no different than creating any other web form. There are many Web Sites that offer free web form design and editing tools that can be used to quickly draw up a web form.

Once a form has been created, it is typically either hosted on a temporary web page, or sent via email. Your provider will then take care of completing the form, hooking it into secure messaging platform, and establishing the secure link for submission.

## Summary

Secure web forms are a value-added component of an overall secure messaging portfolio. Utilizing API integration with secure messaging platform, secure web forms apply encryption and workflow routing to traditional paper-based forms. Organizations can benefit tremendously by using secure web forms to improve protection of confidential information, be easier to do business with for customers, speed up workflows and the delivery of services.