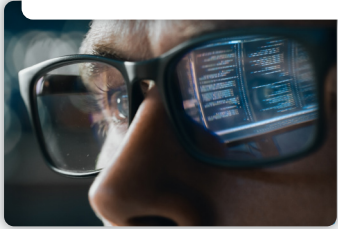


# Vision Benefits of America (VBA) Begins Automation Journey with Apps Associates



When VBA, a commercial group benefits organization offering customized plans to promote vision and dental health, noticed employees tackling time-consuming, manual data sorting and processing tasks, it began developing a plan to improve data processing across the board. With a long-term goal of implementing Robotic Process Automation (RPA) software, VBA turned to Apps Associates (Apps) for help.

## Initiating the Automation Journey

Apps first collaborated with VBA by assisting with its Oracle Cloud software followed by building a data warehouse prototype. After successfully completing the data warehouse project and supporting VBA's Oracle Cloud software, VBA was confident in selecting Apps to begin the process of automating routine manual processes. VBA chose to start the project with its Data Processing and Accounting departments. In addition to automation, VBA saw an opportunity for employees to enhance their abilities and gain first-hand experience on projects to better prepare them for future changes.

The teams reviewed RPA demos and agreed on a two-bot implementation; each one to address a use case from the two departments. VBA selected to have one bot built on Power Automate and one built on UiPath so that it could compare systems to see which one would make the most sense moving forward.

Next, the teams reviewed the manual processes being used. Apps found that VBA's Data Processing team is responsible for a large number of Electronic Data Interchange (EDI) files. The most repetitive EDI files the team handles are enrollment files sent from customers. Each day they receive hundreds of files that need to be opened, segregated into separate file types and processed through the appropriate manual workflow. This process requires an estimated 2-3 hours every day.

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VBA's Data Processing team was familiar with Power Automate, having automated a part of the EDI file

processing prior to working with Apps. To continue that process, Apps built a bot to reference all relevant files and automate the process of viewing, downloading and sorting the files. This was the more challenging bot to build, as it required a more complex ruleset for what it does with each file. Each file is sent out to a server after it is compared against a master Excel sheet to determine what to do with it. Once this workflow was successful, everything worked seamlessly.

Apps' review of VBA's Accounting team found that they were manually facilitating billing spreadsheets for certain customers. Each month, VBA would send spreadsheet invoices to customers containing a data dump of line-item charges. Their system would generate the spreadsheet invoices and then one team member would sort through the data and input the relevant information into emails for each customer. This process took an estimated six hours.

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## Working with Apps

Prior to starting this project with Apps, VBA had one bot on Power Automate, but was interested in exploring the capabilities of UiPath, as well. Having previously worked with Apps, and with the knowledge that Apps has expertise with both Power Automate and UiPath, VBA was happy to join forces with Apps once again. The project was a collaborative effort, with Apps drawing on industry experience to lead the project and VBA providing insight on what its employees need in the near future, as well as long-term.

"I had confidence that our VBA teams would be able to pick this up, but the Apps team did all the heavy lifting," said Aaron Ridsen, Chief Financial Officer at VBA. "The bots were fairly straightforward, and it was really seamless for my team, there was no pushback."

The bots have not only provided relief to both teams, but also helped VBA's larger goal of exposing employees to RPA bots. "We are working more closely with Apps so that we can make more headway," said Ridsen. "We want to get to a point where some of our experts are able to fix bots and create similar ones. This is step one on a much larger journey."

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Aaron Ridsen  
Chief Financial Officer at VBA

## The Results and Planning Ahead

To keep the momentum going, Apps and VBA plan to meet on a monthly basis to discuss next steps for continued progress.

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For VBA, the exposure employees gained building and maintaining bots, was critical. It was important

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to the organization that employees understood the new systems and are comfortable leveraging them. Continuing education is an important component in furthering VBA's automated processes.

With that said, VBA found throughout this process that having input from the Data Processing and Accounting teams made a big difference in

the successful outcome. Moving forward, the organization intends for the relevant teams to be heavily involved in the process, as well. Together with Apps, its employees and leadership team, VBA is confident it will be able to tackle the backlog of projects as it continues to transition away from legacy workflows.

VBA is a commercial group benefits organization that specializes in serving small to midsize companies. VBA is committed to offering customized, cost-effective plans with personalized service to promote vision and dental health.

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