

ActiveDocs smart calculations,  
business rules, and optimized  
approval streamline resident  
document generation for Regis.



DOCUMENT AUTOMATION SOFTWARE

[www.activedocs.com](http://www.activedocs.com)



“ActiveDocs’ automated information gathering and embedded intelligence reduce the time and cost of creating documentation, to better serve Regis’ customers and to protect Regis from errors that can turn into penalties.”

Regis Aged Care has been providing elder residential care in Australia since 1994 and operates more than 50 individual facilities across all Australian states.

Elder residential care is complex in Australia with many federal government regulations requiring compliance as well as regulations and legal language which change from one state to the next. Compliance largely relies on use of correct content and how accurately intake staff can create individuals’ personal histories and transcribe their personal financial data, a process that involves many variables and opportunities for error. Simple errors can affect the company’s customers – a resident’s admission to a facility, transfer to a new facility, or the level of government subsidy they receive for care – and can subject the company itself to regulatory penalties.

The challenge for Regis was to reduce or eliminate compliance exceptions and transcription and clerical mistakes through accurate and validated information capture, targeted approval, and legally compliant document generation.

### THE SOLUTION

The ActiveDocs solution at Regis leverages advanced Template Design and Management, wizard-driven information capture, self-adapting approval workflows, and compliant document generation.

ActiveDocs Templates and Snippets are designed to embody the business rules, data validation, content control, and advanced calculations that ensure accurate information capture and compliant documents.

ActiveDocs Template Management allows Template Designers to efficiently manage changes in response to business and regulatory drivers.

The ActiveDocs Document Wizard provides a user-friendly Q&A session enabling capture and validation of accurate and compliant information.

Behind the scenes the ActiveDocs Workflow engine dynamically adjusts the approval requirements for each document based on parameters such

### CUSTOMER

Regis Aged Care

### INDUSTRY

Elder residential care

### CHALLENGE

Eliminate compliance exceptions and clerical mistakes which affect a resident’s admission, transfer, or the level of government subsidy.

### SOLUTION

Document Wizard captures information using smart validation and complex calculations for accurate and compliant document generation. Dynamic Workflow engine ensures documents are correctly approved, creating an accurate resident record.

### BENEFITS

Smart validation ensures minimal document rework. Business Rules and Calculation engines provide real-time confirmation of information. Dynamic Workflow engine routes documents for approval. Document Assembly engine creates accurate, legally compliant, branded documents.



as location and the type of care needed.

ActiveDocs' industry-leading document assembly capability generates accurate and legally compliant documents using business rules and templates designed with all of MS Word's rich feature set to combine boilerplate and variable content and information.

## THE BENEFITS

Fast processing with minimal rework is enabled with rapid and validated information capture using automated complex calculations and business rules for real-time error detection and remediation, accuracy, and legal compliance.

Timescales for document sign-off are optimized by ActiveDocs' unique automated context-driven routing for approval, ensuring that approval is preferentially requested from local managers to leverage short-as-possible lines of communication.

Accurate and legally compliant documents are assured through the use of compliant templates and business rules to determine content.

## HOW IT WORKS

ActiveDocs Templates provide the outline structure for the documents, designed and managed by Regis using ActiveDocs Designer which integrates with Microsoft Word. Using standard Word features the Templates define all of the styling and formatting, fixed content, headers and footers, and other key elements.

ActiveDocs Designer's integration in Word allows Regis designers to define where data and content will be added to the document, and where the data and content will be sourced from, including user input and other systems and data sources. Designers also define context-sensitive business rules and complex calculations for

validation and to vary data and content requirements as well as the output content.

ActiveDocs Designer also allows Regis designers to control the overall document generation process by defining workflows to control adaptable approval, final formatting, delivery, and storage, of the document.

The user interface for document creation is the ActiveDocs Document Wizard which presents the Template as a Q&A session in the browser, automatically following the business rules and data & content requirements of the Template. Users simply answer the questions presented to them, by providing input from the keyboard or selecting data or content from other systems or repositories as determined by the design of the Template. Where selections can be determined automatically, user input is omitted.

On completion of a Document Wizard session, the ActiveDocs Composition engine assembles the document which is then subject to any applicable workflows which are automatically adjusted to provide optimal processing for each document, ensuring that approval is preferentially requested by automated email from local managers to leverage short-as-possible lines of communication.

## KEY FEATURES

*Sophisticated Template Design* allows complex and compliant Templates and Snippets to be managed, developed, and maintained with maximum responsiveness by business users.

*Template Management* enables Template Designers to efficiently manage changes in response to business and regulatory drivers.

*Document Wizard* renders Templates as simple Q&A sessions which allow and validate input from the keyboard and from other systems and sources.

## COMPANY

Regis Aged Care Pty Ltd

## HEADQUARTERS

Melbourne, VIC, Australia

## FOUNDED

1994

## URL

[www.regis.com.au](http://www.regis.com.au)

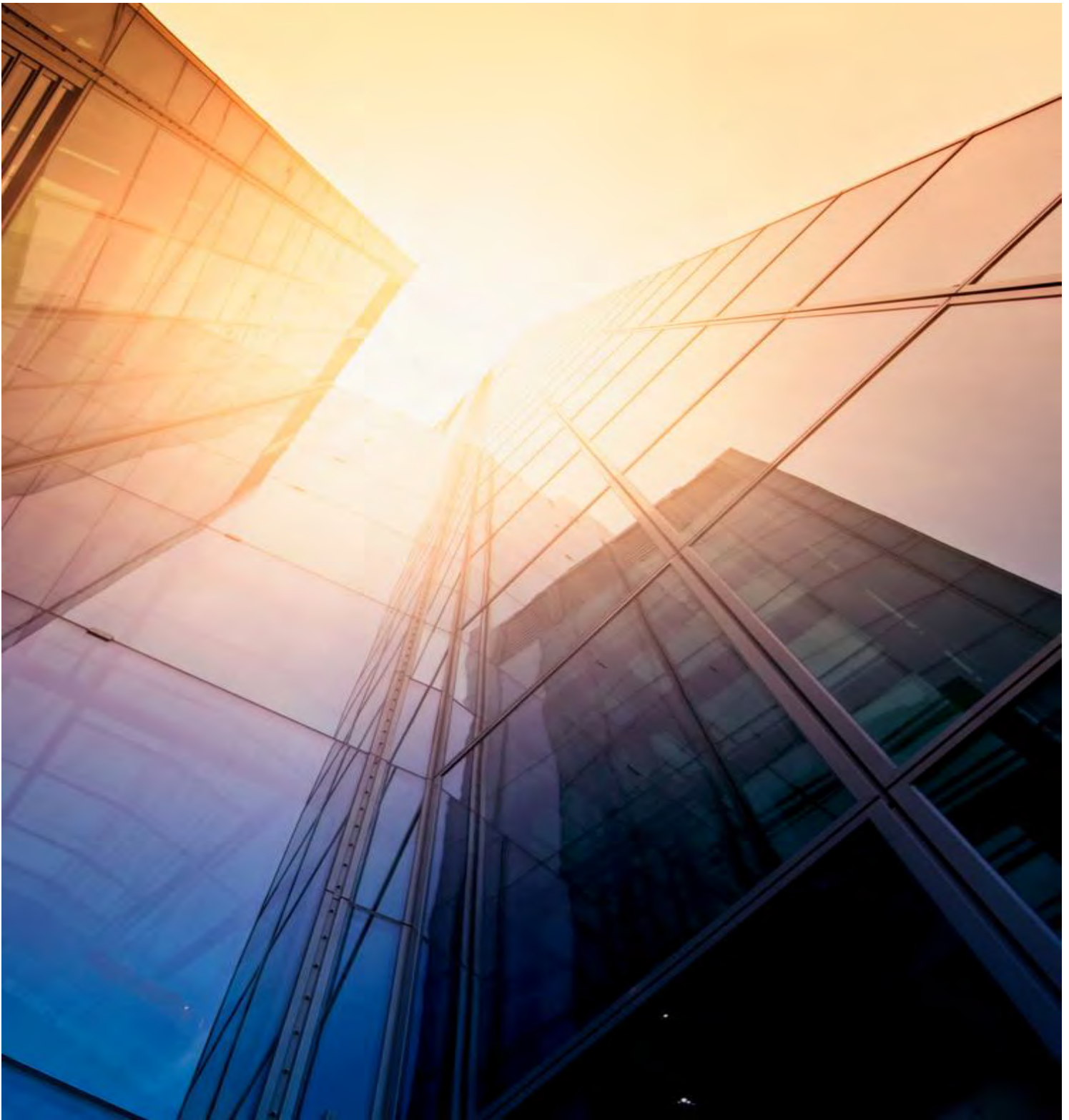
## PRIMARY BUSINESS

Aged care

*Calculation Engine* supports the complex calculations required to ensure that the resident information captured or generated in the document wizard is legally compliant with federal and state regulations.

*Business Rules Engine* facilitates implementation and deployment of complex content and business rules for information capture and document generation.

*Dynamic Workflow Engine* allows approval workflows to be optimized using short-as-possible lines of communication by ensuring approval is preferentially requested from local managers with automated context-driven routing.



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