



**Medical Mutual**<sup>SM</sup>  
PROTECTING OUR PROFESSION

Medical Mutual of North Carolina provides physicians powerful tools to manage their policies online.

**Summary**

Medical Mutual is proud to be the only professional liability company owned and operated by North Carolina physicians. Physician leaders of the North Carolina Medical Society formed Medical Mutual in 1975 in response to the escalating medical liability crisis. Today, Medical Mutual has more than 8,300 physician members in North Carolina, Virginia, and Georgia. They have achieved this growth while maintaining the lowest operating costs in the industry, an "A" Excellent rating from A.M. Best, and the exclusive endorsement of the North Carolina Medical Society. Medical Mutual is also the only professional liability carrier to have operated continuously in North Carolina for more than thirty years.

**Challenge**

Medical Mutual of North Carolina wanted to differentiate itself in a highly competitive market and bring added value to its existing customers and agents. To this end, the company sought to advance its technology to ensure strong online capabilities and streamlined operations.

Previously, Medical Mutual's processes were largely paper-based. Some of the challenges they faced were:

- Slow processing when adding new and updating existing accounts
- Complex manual processes
- No convenient means for customers to view or change policies



*"Medical Mutual has very successfully used Trinisys' platform to provide its policy holders with a new level of customer service."*

**Travis Gregg,**  
Co-Founder & Principal,  
Trinisys

### Solution

Medical Mutual engaged Trinisys to move many of the processes it had traditionally done on paper to the Web. Trinisys accomplished this using its Data Entry and Web Forms technologies. Trinisys' solution met Medical Mutual's needs including:

- Viewing policy information and bills/payment history online
- Completing new business insurance policy applications online
- Renewing and editing existing policies online
- Allow customers to manage their contact information

Trinisys also integrated with existing systems, including the OnBase enterprise content management system, using Trinisys' Integration Engine. In addition, Trinisys' Web Forms technology was used for customer-facing and administrative web pages and forms.

### Result

Trinisys delivered a system that exceeded expectations and has the flexibility to grow - meeting Medical Mutual's needs today and in the future. In fact, they continue to add functionality and, in turn, value for their customers. Medical Mutual has benefited from:

- Faster processing speeds. Moving the processes to the Web greatly increased processing and decreased errors.
- A two-pronged policy management system: One for administrators with expansive capabilities and another with "read only" functionality.
- A system that has made once complex processes simple.
- Flexibility to quickly modify the solution as needed and even use the platform for other solutions.

"Medical Mutual has very successfully used Trinisys' platform to provide its policy holders with a new level of customer service," says Trinisys Co-Founder and Principal Travis Gregg.



Trinisys revolutionizes the way businesses collect and process information. Clients have drastically reduced the time and cost involved in acquiring data from paper and the web with Trinisys' innovative data capture software. The Trinisys integration engine enables companies to automate complex business processes and get data to the systems they use every day.