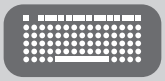
Symbeo | Capture Center Tour

	PROCESSES	NOTES
1	OPERATIONS + CULTURE	■ Hiring | Background Checks, Temporary Phase ■ Staff Retention ■ Training Depth | Cross-training ■ High Confidence Methodologies ■ Best Practices and Project Level Documentation ■ Project Level Change Control Rollout ■ CDO | Control Desk Operations ■ EASE | Event Accountability System For Escalation ■ SSAE 18 | SOC1 2x/Year and SOC2 Annual ■ Safe Harbor Certification and HIPPA Compliance ■ Business Continuity Plan
2	DOCUMENT CONTROL	■ Courier Services | Symbeo and Outside Couriers ■ Receiving ■ Shipping ■ Document Destruction ■ Security of Paper Documents ■ Secure Storage
3	MAILROOM + SCANNING SERVICES	■ Mail Opening | Depth of Personnel & Equipment ■ Mailroom Services | Document Preparation ■ Live Checks and Legal Documents ■ Recycling And Waste ■ Scanners ■ Image Quality | Attended Scanning
4	DOCUMENT CLASSIFICATION HIGH LEVEL PASS	■ Blank Image Tagging ■ Document Separation | Pass 1 ■ Scan Audit ■ Fax / Email Capture
5	DATA CAPTURE 	■ Dual Pass Key From Image With QA Compare ■ Data Capture Manual ■ Document Separation ■ Document Classification ■ Document Tags
6	DOCUMENT CLASSIFICATION QA PASS	■ Confirm Counts From Pass 1 ■ Correct Discrepancies ■ Document Separation Audit ■ Non-transactional Classification Audit
7	BUSINESS PROCESS ENGINE	■ Data Formatting ■ Critical Fields Audit ■ Invoice Totaling Validations ■ Vendor Resolution ■ Business Unit Resolution ■ First Approver Resolution/assignment ■ Aliasing ■ PO Validation ■ PO Line Matching ■ Specialist Review ■ Vendor Attributes ■ Duplicate Invoice Detection ■ Customer Specific Rules ■ Coding Assignment from Routing ■ Upload / Output To TransAct AP
8	AUDITING EXAMPLES	■ Envelope Audit ■ Image Quality ■ Turnaround Time ■ Key Stroke Accuracy ■ Routine Observations of Processes ■ Process Reviews and Skills Brush Ups