



Create & Connect

Streamlining Business Approvals: Introducing Approval Connector for Microsoft Teams

In today's fast-paced business environment, delayed approvals can significantly hinder operations, reduce efficiency, and cause friction between stakeholders. The Approval Connector for Microsoft Teams offers a seamless integration between operational workflows and the Microsoft Teams platform, ensuring faster, transparent, and efficient decision-making. By enabling configurable approval workflows and real-time notifications, the Approval Connector optimizes key processes such as underwriting (UW) approvals and claims management (CLM) approvals. These results enhanced productivity, better control, and greater satisfaction for all users.

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Approval Connector

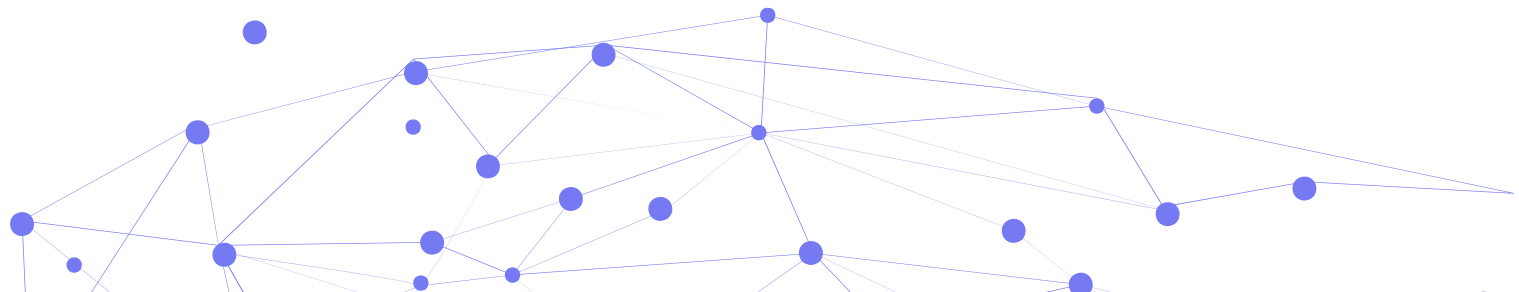
In today's fast-paced business environment, delayed approvals can significantly hinder operations, reduce efficiency, and cause friction between stakeholders. The Approval Connector for Microsoft Teams offers a seamless integration between operational workflows and the Microsoft Teams platform, ensuring faster, transparent, and efficient decision-making. By enabling configurable approval workflows and real-time notifications, the Approval Connector optimizes key processes such as underwriting (UW) approvals and claims management (CLM) approvals. These results enhanced productivity, better control, and greater satisfaction for all users.

Key Features

- **Configurable Approval Workflows:**
 - Support for single or multiple approvals.
 - Sequential and parallel approval logic configurable to business needs.
- **Integrated Notifications:**
 - Automatic task notifications sent to Outlook and Teams.
 - Keep approvers and submitters informed at all stages.
- **Task Management:**
 - Submitters can follow up or cancel requests easily.
 - Approvers can approve, reject, or reassign tasks seamlessly.
- **System Integration:**
 - Decisions are synchronized with operational systems, ensuring workflows resume without interruptions.
 - Supports both front-end portals and back-end core systems for seamless updates and next-step triggers.

User Benefits

- **For Approvers:**
 - Manage tasks conveniently within Teams or Outlook.
 - Reduce bottlenecks and make informed decisions quickly.
- **For Submitters:**
 - Gain visibility into request status in real-time.
 - Follow up directly within Teams or cancel requests as needed.
- **For IT Teams:**
 - Simplify workflow customization with a no-code/low-code interface.
 - Ensure scalability and adaptability to diverse business needs.
- **For Organizations:**
 - Improve operational efficiency and accelerate decision cycles.
 - Foster collaboration across departments with unified tools.



How It Works

• Workflow Overview

- **Trigger:** An approval request is initiated in the operational system (e.g., for a policy issuance or claim evaluation).
- **Notification:** Approval Connector sends task notifications to assigned approvers in Microsoft Teams and Outlook.
- **Action:** Approvers review and either approve, reject, or reassign the task within Teams or Outlook.
- **Synchronization:** The operational system receives the decision and resumes the business process automatically.

• Step-by-Step Example

- A claims officer submits a high-value claim approval request in the front-end portal.
- The request is routed to three approvers in sequence via the Approval Connector.
- Notifications are sent to each approver in Teams and Outlook.
- Each approver reviews and takes action (approve/reject), and the status is updated in real-time.
- Upon final approval, the operational system resumes claims processing without manual intervention.

Use Cases

• Underwriting (UW) Approvals

Enable single-level approvals for faster decisions on policy issuance or changes, ensuring timely customer service.

• Claims Management (CLM) Approvals

Support multi-level, sequential workflows to handle complex claim evaluations involving multiple stakeholders.

Technical Specifications

• Supported Platforms:

Microsoft Teams, Power Automate, operational systems with API compatibility.

• Workflow Features:

Single and multi-level approval processes.
Parallel and sequential workflows.

• Notification Channels:

Teams and Outlook integration.

• File Attachments:

Support for attaching and viewing documents such as PDFs by attachment file or SharePoint link.

• Security:

End-to-end data encryption.
Compliance with industry standards for data protection.

• Integration Requirements:

Operational system connectivity through API.
Storage integration with insurer's document management system such as SharePoint for attachments.

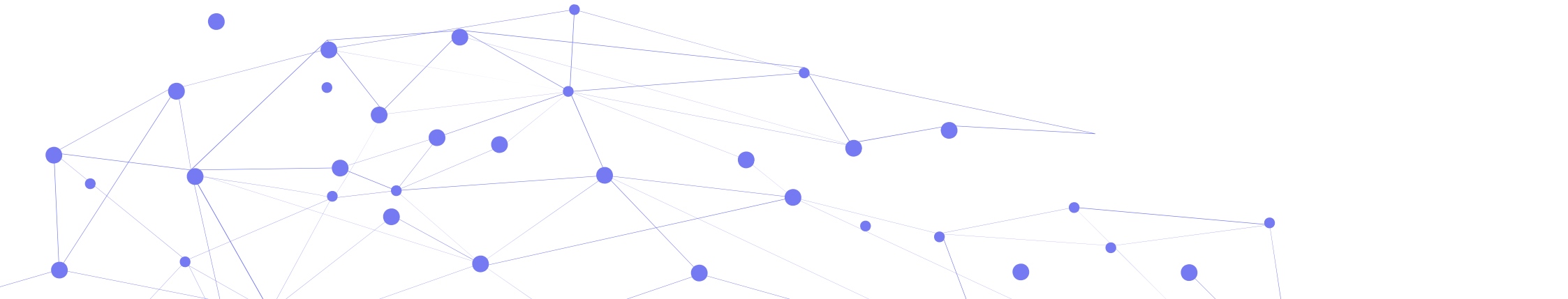


Screenshots

The screenshot displays the Microsoft Teams 'Approvals' application. The interface includes a top navigation bar with 'Approvals', 'Received', and 'Sent' tabs. A search bar is located at the top right. Below the navigation, there is a sidebar with various app icons (Activity, Teams, Chat, Calendar, OneDrive, Planner, OneNote, Approvals, Power BI, Dynamics 365, Helpdesk Bot, AskGem Bot). The main content area shows a table of approval tasks under the heading 'Approvals'. The table has columns for Priority, Request title, Status, Source, Created, Sent by, and Sent to. All tasks in the list have a status of 'Requested'.

Priority	Request title	Status	Source	Created	Sent by	Sent to
	For NB UW Approval: Policy H000036213 Product GEMMED001-Comprehensive hospital and surgi	Requested		12/13/2024 11:03:48 AM	●	●
	For NB UW Approval: Policy H000036213 Product GEMMED001-Comprehensive hospital and surgi	Requested		12/13/2024 11:03:04 AM	●	●
	For NB UW Approval: Policy H000036213 Product GEMMED001-Comprehensive hospital and surgi	Requested		12/13/2024 11:02:39 AM	●	●
	For NB UW Approval: Policy K000141787 Product GEM0170-FLEXILIFE 20	Requested		12/12/2024 10:20:53 AM	●	●
	For NB UW Approval: Policy 0010039806 Product GEMT001-Term Life	Requested		12/5/2024 4:23:58 PM	●	● ●
	For Claim Approval: Death DTH202500005 claim on [REDACTED]	Requested		12/5/2024 11:38:56 AM	●	● ●
	For NB UW Approval: Policy 0010039806 Product GEMT001-Term Life	Requested		12/5/2024 11:38:50 AM	●	● ●
	For [NB/CS/CLM] UW Approval: Policy [0010039806] Product [GEMT001-Term Life]	Requested		12/5/2024 10:07:20 AM	●	● ●
	For [NB/CS/CLM] UW Approval: Policy [0010039806] Product [GEMT001-Term Life]	Requested		12/5/2024 9:55:12 AM	●	● ●
	For Claim Approval: [Claim type] [Claim No] claim on [Insured name]	Requested		12/5/2024 9:55:05 AM	●	● ●

Figure 1: Approval Task List in Teams



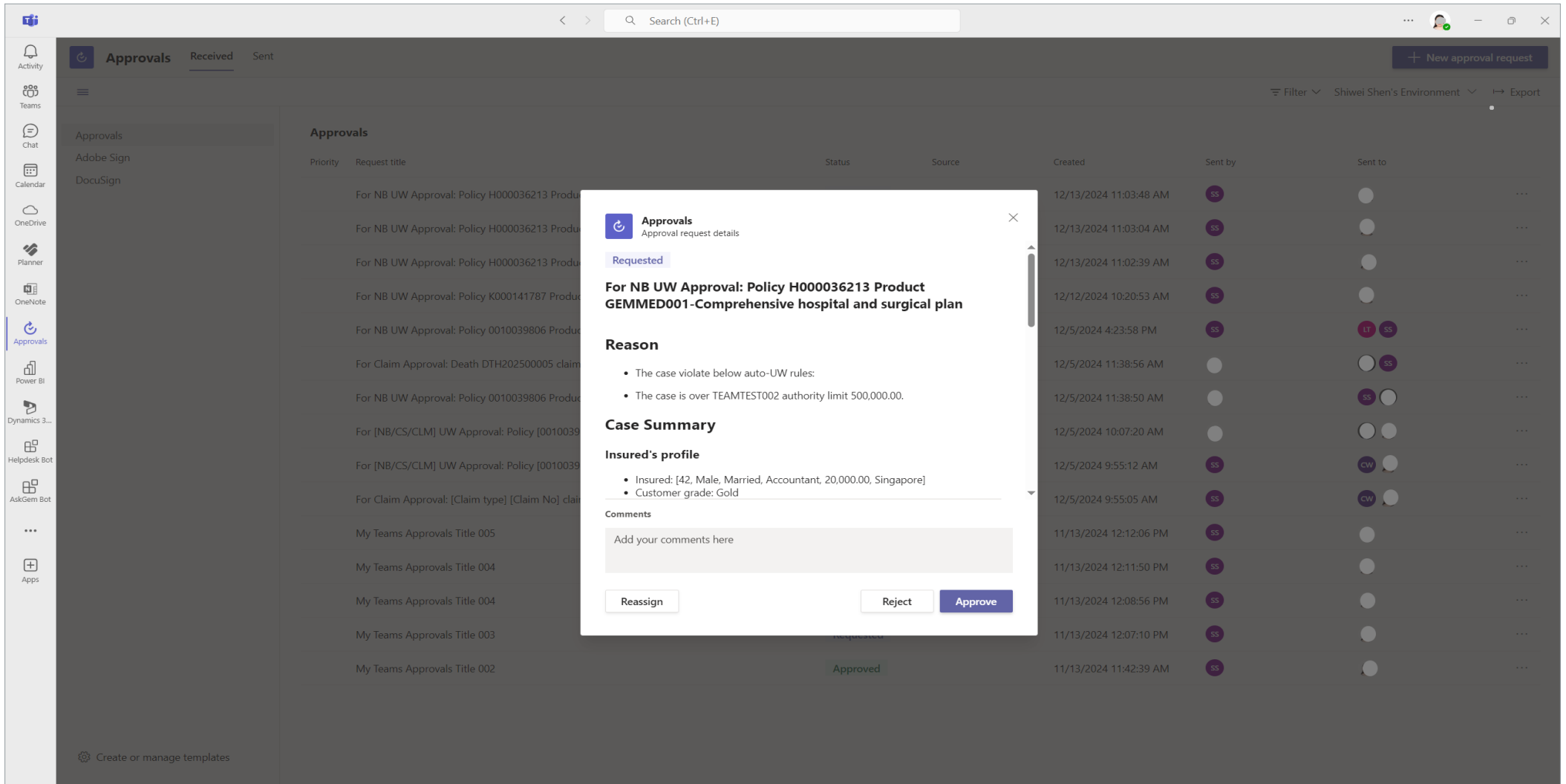
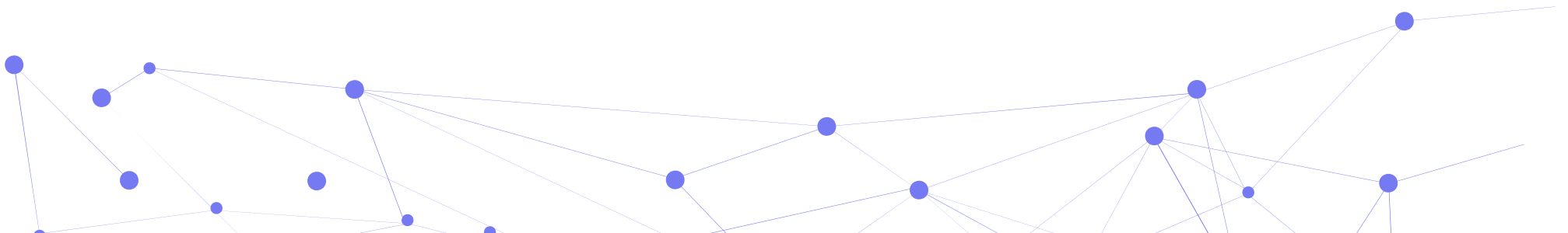


Figure 2: Approval Screen in Teams on Laptop



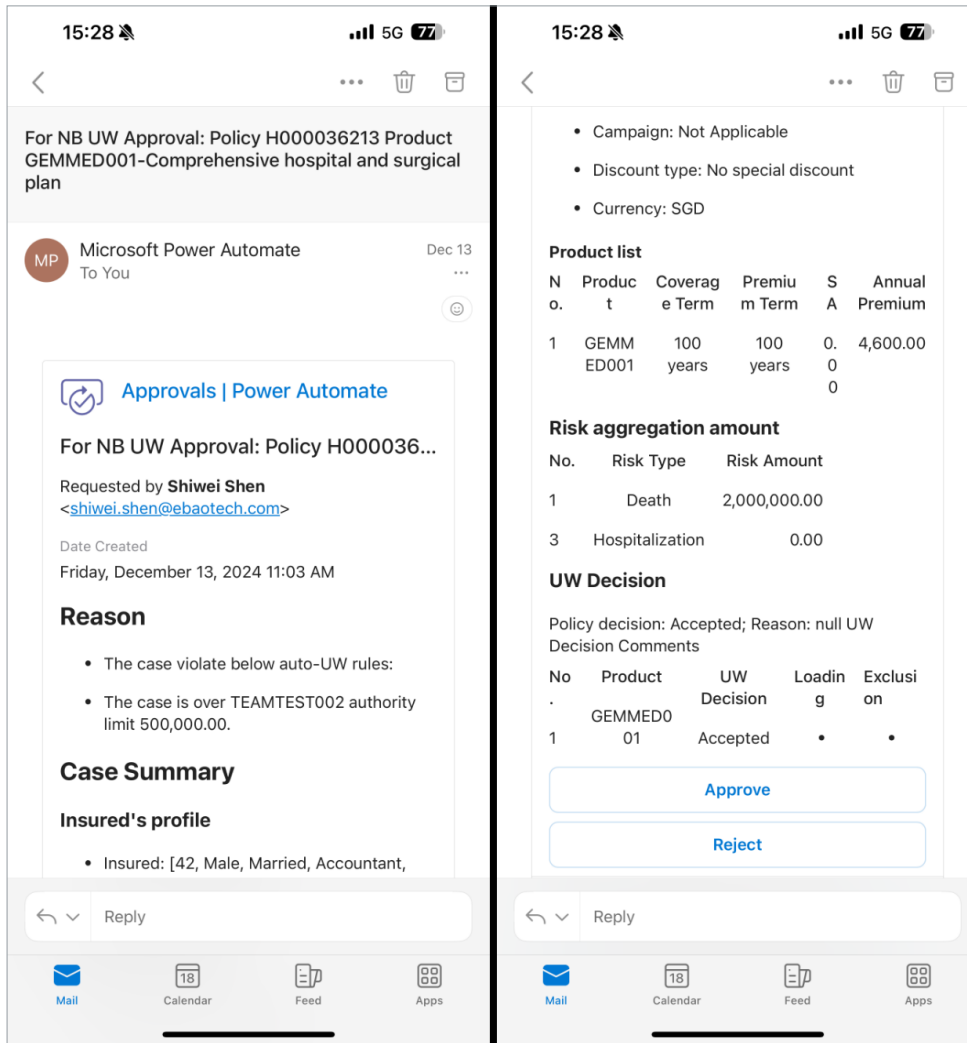


Figure 3: Approval Screen in outlook on Mobile

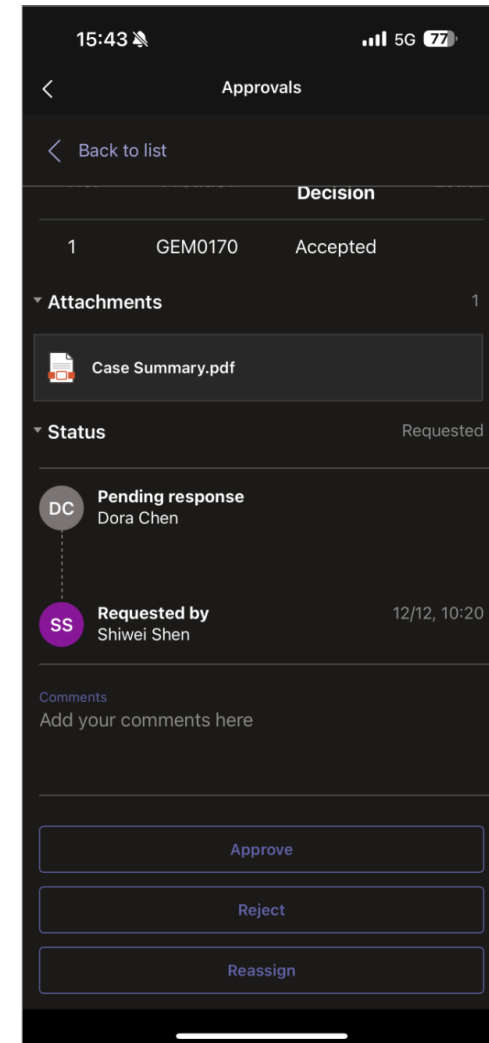
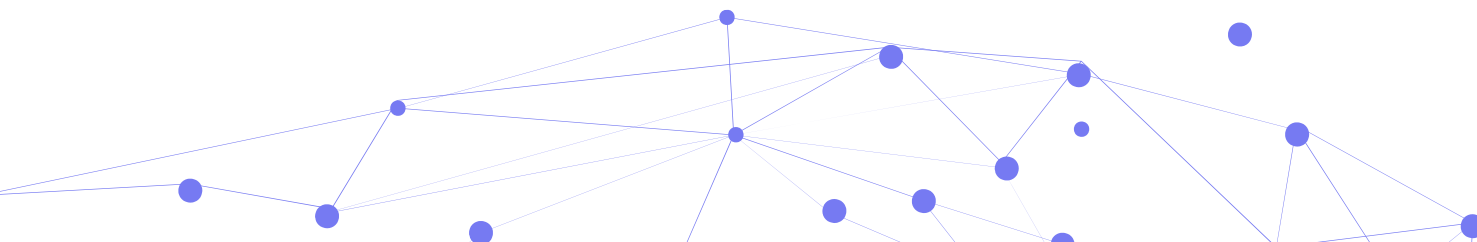


Figure 4: Approval Screen in Teams on Mobile





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