



RESPONSIBLE DOCUMENT INTELLIGENCE FOR THE BENEFITS INDUSTRY

Document Intelligence for Benefits Administration

Plan documents go in as they are. They come back in the same template — reconciled, marked up, and audit-ready.

Plan Doc Audits

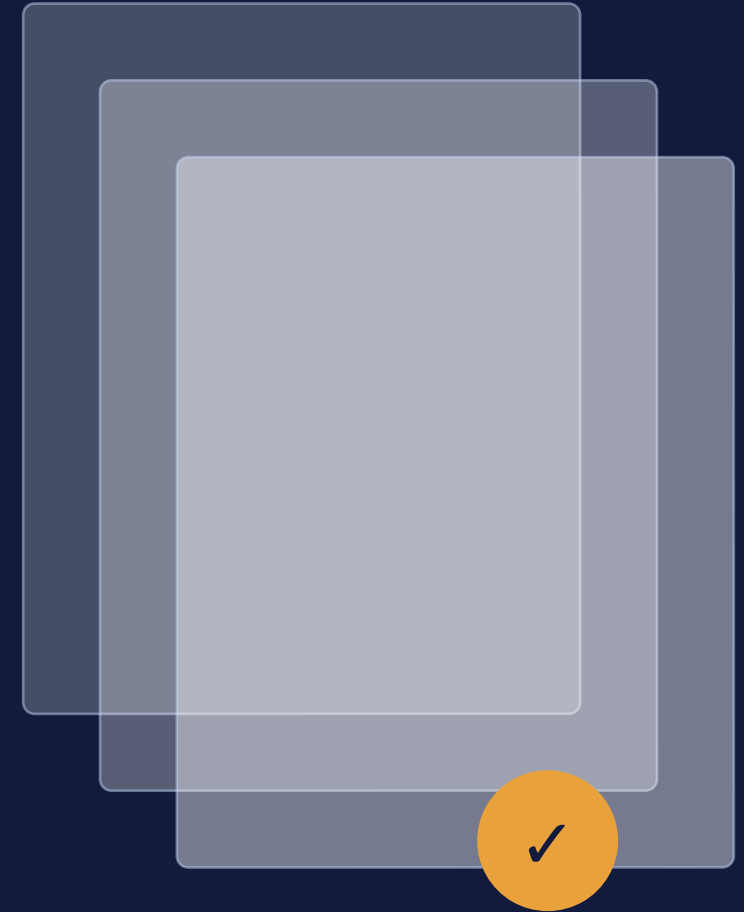
Primary production workflow

Single-tenant

Isolated client environments

99.5%

Contracted availability



Plan document reconciliation is still a manual, high-variance process

Benefits administrators absorb the cost of comparing carrier documents line by line — and carry the risk when a difference is missed.

01

Analyst time is the bottleneck

A single Plan Doc Audit or SPD comparison occupies a skilled analyst for the better part of a day — reading two documents side by side and transcribing differences by hand.

02

Findings live outside the document

Differences end up in a spreadsheet or an email thread. The carrier's template — the artifact everyone actually works from — is never updated in place.

03

Nothing checks the set as a whole

Contradictions between the SPD, the plan document, and the carrier's booklet surface only when a member, an auditor, or a regulator finds them.

WHAT WE SEE IN THE FIELD

170–200

document analyses per year at one mid-size administrator

~1,600 hrs

of analyst capacity consumed by that volume annually

0

systematic cross-document contradiction checks in the manual workflow

One platform, three engines

Each engine addresses a different failure point in the current process — and they run as a single pass, not three tools.



Reconstruction Engine

Ingests the carrier's document and returns it in its original format — inline edits, comments, and tracked changes layered onto a page that looks exactly like the template it came from.



Workflow Engine

Reviewers collaborate at the clause level rather than the file level, with routing, versioning, and a full record of who changed what and when.



Compliance Intelligence

Reads the document set as a set — surfacing contradictions, omissions, and drift between plan documents before they reach a member or an auditor.

A SINGLE PASS, END TO END

Ingest



Analyze



Reconstruct



Review & approve



Export in template

The structured-data pathway is retained alongside reconstruction — the repository of parsed plan data continues to build with every run.

Six workflows, one environment

Every workflow below runs on the same ingestion and analysis core. Adding one is a configuration decision, not a development project.



Plan Doc Audit

IN A plan document or benefit schedule against its approved template.

OUT Every deviation flagged, evidenced, and written back into the template.



Multi-plan & SPD comparison

IN Two or more plan documents or summary plan descriptions.

OUT A clause-level difference map showing what changed, where, and why it matters.



Carrier document reconciliation

IN The carrier's booklet against the plan document and the SPD.

OUT Contradictions between the three surfaced before a member or auditor finds them.

ALSO AVAILABLE IN THE SAME ENVIRONMENT



Single-stream SPD restatement

Rebuild a current SPD from its amendment history.



Invoice comparison

Carrier invoices against enrollment and contracted rates.



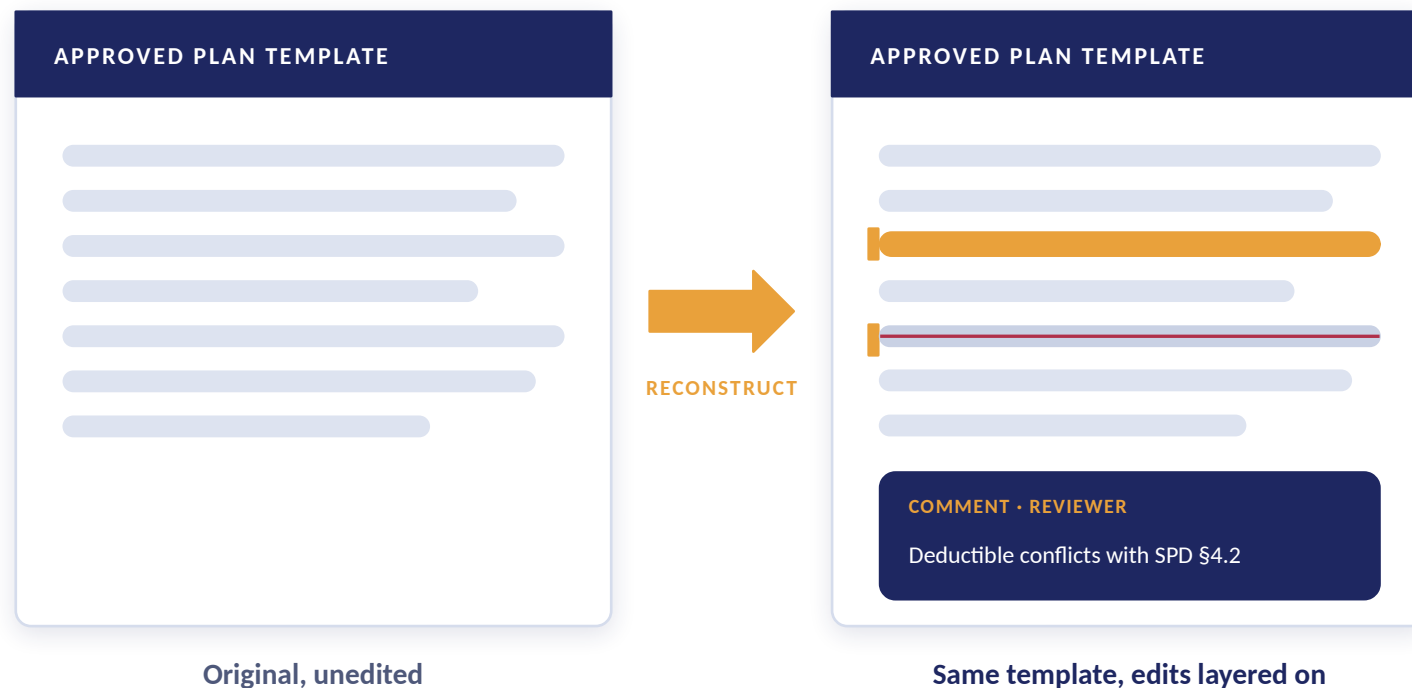
Meeting minutes extraction

Decisions and actions pulled from committee records.

The output is your document, not a report about it

SyncroDoc

Most tools hand back findings in a spreadsheet. SyncroDoc writes them into the carrier's own template — inline edits, tracked changes, and margin comments on a page your team already recognizes.



1

Visual fidelity

Pagination, headers, numbering, and carrier branding survive the round trip intact.

2

Native track changes

Edits arrive as real tracked changes and comments — reviewable, acceptable, or rejectable in Word.

3

Nothing to re-key

The reviewed document is the deliverable. No transcription step between finding and filing.

Fidelity criteria are agreed in writing during design and tested before release.

What is under the hood

SyncroDoc

Capability grouped the way a buying committee evaluates it — the analyst's question, the manager's question, and IT's question.

DOCUMENT INTELLIGENCE

Format-agnostic ingestion

PDF and Excel accepted as received, with no pre-processing or manual tagging.

Template-preserving output

Original formatting retained, with edits and comments layered in place.

Structured plan repository

Every run adds parsed, queryable plan data to a growing internal dataset.

COLLABORATION & CONTROL

Clause-level review

Reviewers work on individual provisions rather than passing whole files around.

Full change history

Who changed what, when, and against which source document.

Contradiction flagging

Conflicts across a document set raised automatically, not discovered later.

DEPLOYMENT & ASSURANCE

Single-tenant by default

A dedicated environment per client on Cloudflare edge infrastructure.

Model-independent core

The underlying AI provider can be substituted without re-engineering workflows.

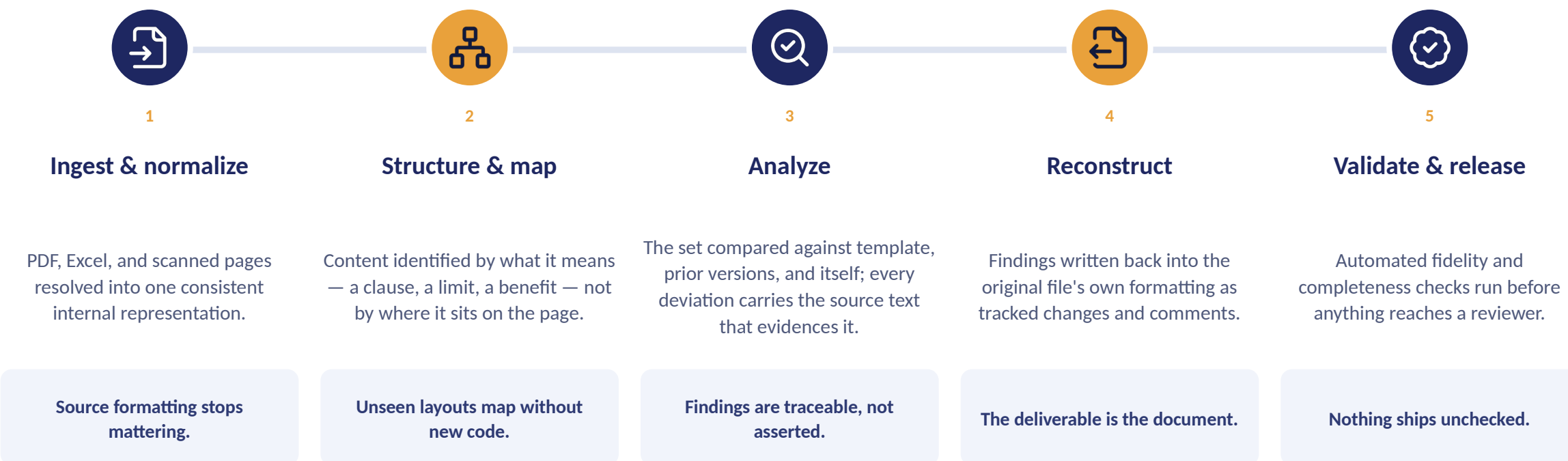
Contracted service levels

99.5% availability, severity-tiered response, ticketing, and service credits.

Delivered as a managed service — no infrastructure to stand up, no internal development team required to adopt or extend it.

What happens between upload and output

Five stages run on every document. Stages two and four are where the engineering effort sits — and where a generic AI tool stops short.



HUMAN CHECKPOINT

No output is filed automatically. A reviewer accepts, rejects, or amends every flagged change in the reconstructed document — the platform does the reading, your analyst keeps the decision.

Four problems a general-purpose AI tool does not solve SyncroDoc

Uploading a document to a chatbot is not the same product. These are the failure modes that separate a demo from something an analyst can file.



No two carrier documents are alike

Layouts, terminology, and section ordering differ by carrier and by year. Coordinate- or field-based extraction breaks on the first unfamiliar document.

SYNCRODOC'S APPROACH

Content is mapped by meaning against a growing template library, so an unseen layout is a mapping exercise rather than a development ticket.



Generating a document is easy; returning yours is not

Most tools rebuild an approximation from extracted data. Formatting, pagination, and carrier branding do not survive.

SYNCRODOC'S APPROACH

The original file is treated as the substrate and edited in place, rather than regenerated from a parsed copy.



Language models are not deterministic

The same prompt can produce different answers. That is disqualifying in a compliance workflow where a missed clause carries real consequence.

SYNCRODOC'S APPROACH

Outputs are constrained, every flag must carry the source text that evidences it, and automated checks gate release.



Naive implementations are expensive to run

Cost per document climbs quickly at production volume, which is what turns a promising pilot into an unaffordable rollout.

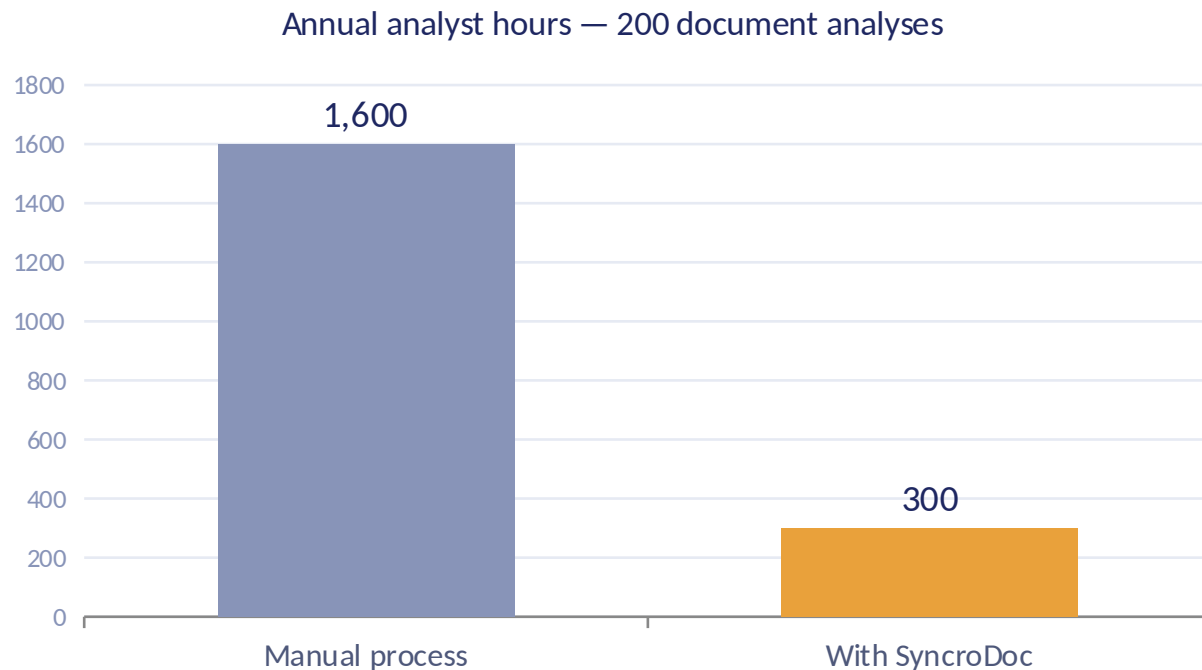
SYNCRODOC'S APPROACH

Cost per Audit is engineered and monitored directly, which is what makes a fixed annual fee possible at all.

Each of these is an engineering problem the platform solves today. The methods themselves are proprietary.

Reclaimed analyst capacity covers the license more than twice over ^{SyncroDoc}

The saving is not headcount reduction — it is analyst hours redirected from transcription to judgment.



1,300 hrs

of analyst capacity returned each year

~\$60K

value of that capacity at fully loaded cost

2.4x

first-year return against a \$25K annual license

Payback on the annual license in under five months.

Illustrative model — assumptions to be validated per client: 200 analyses/year; 8.0 hrs manual vs 1.5 hrs review-and-approve; \$46/hr fully loaded analyst cost. Excludes avoided rework and error-remediation cost, which are not modeled here.

Built to clear an enterprise IT security review

Security posture is documented up front rather than assembled during diligence — the controls below are contractual, not aspirational.

1 Single-tenant isolation

Every client runs in a dedicated environment. No shared data stores and no cross-tenant processing.

2 No training on your data

Contractually prohibited and flowed down to the underlying AI provider. Your documents never become someone else's model.

3 Zero Trust edge

Least-privilege access enforced at the perimeter on Cloudflare infrastructure, with access logged and reviewable.

4 Defined data lifecycle

Client data returned or destroyed within 30 days of termination. 72-hour security incident notification commitment.

5 PHI under BAA

Plan document and SPD workflows operate within an executed Business Associate Agreement; PHI is excluded until it is in place.

6 Insured and monitored

\$1M / \$2M technology E&O and cyber liability cover, with continuous external security-posture monitoring.

Operational commitments are carried in the Master Services Agreement and its service-level exhibit: 99.5% monthly availability, severity-tiered response and resolution targets, ticketing and escalation, and service credits.

Configuration, not custom code

New carriers and new document types are mapped by the platform rather than coded field by field — so adoption does not require an internal development team.

THE ANALYST'S DAY

1

Upload

Drop in the carrier documents in the format they arrived — PDF or Excel, no pre-processing.

2

Select the workflow

Choose the analysis to run. Everything else is already configured.

3

Review what is flagged

Work the exceptions the platform surfaces instead of reading both documents end to end.

4

Export in template

Take away the original document with edits and comments in place, ready to send.

WHAT ADOPTION ACTUALLY REQUIRES



No infrastructure

Delivered as a managed service. Nothing to install, host, or patch on your side.



No development team

New carriers and document types are mapped through the platform, not coded field by field.



No workflow rebuild

Analysts keep the process they know — the platform removes the transcription, not the judgment.



No lock-in to one model

The underlying AI provider can be substituted on notice, with a regression plan, if economics or performance change.

The first carrier template library is in production today; additional carriers join it without a new build cycle.