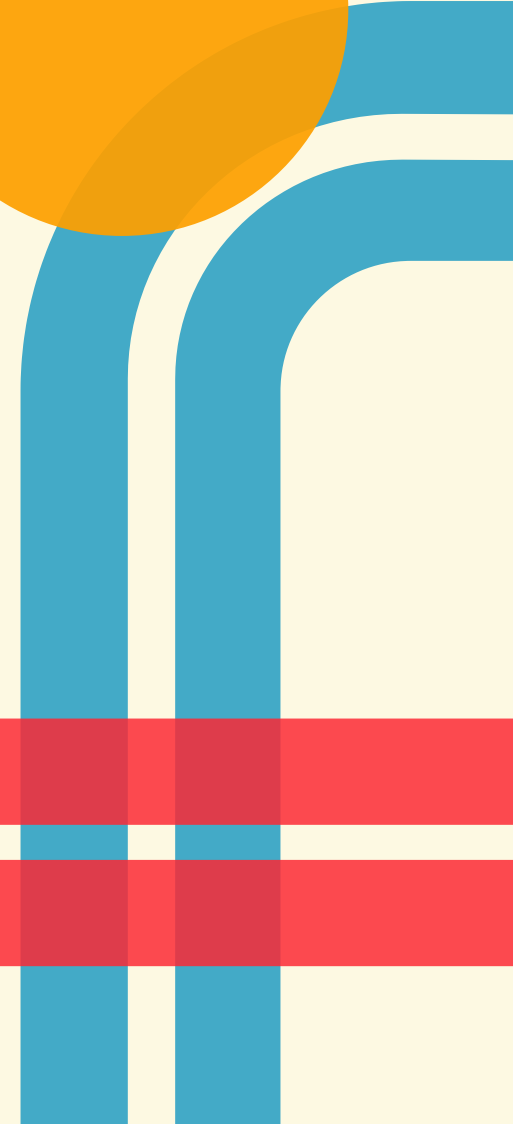


LACERA's Journey To Case Management



Agenda

Introduction

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Where we were

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Where we are

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Where we aim to go

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Questions

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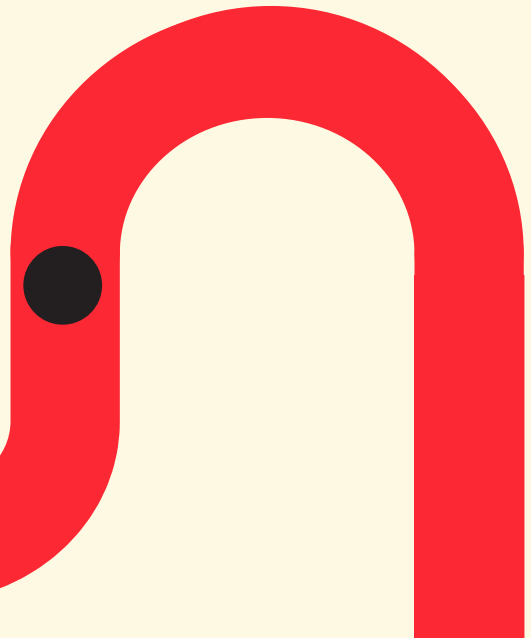


3

Introduction

**Hernan Barrientos, Disability
Retirement Specialist Supervisor**

- **Joined 2011**
- **Processed applications 2013 – 2017**
- **Oversees a team of Disability Retirement Specialists**
- **Helped deploy LACERA's Case Management System**





4

Where we were



- **Paper**
- **Paper!**
- **PAPER!**
- **Manual work**



5

Where we were



- **No time tracking**
- **Less staff**
- **Fewer applications**

An abstract graphic on a light cream background. It features a green line that starts from the left, curves down, and then continues horizontally. A blue line starts from the bottom, curves up, and then continues horizontally, overlapping the green line. A red line starts from the top right and curves down. An orange circle is positioned on the left side. Two small black dots are located on the green line: one at the first curve and one at the end of the horizontal segment.

**What
changed?**



7

Where we were



Covid-19 Pandemic





8

Where we were



Demographics



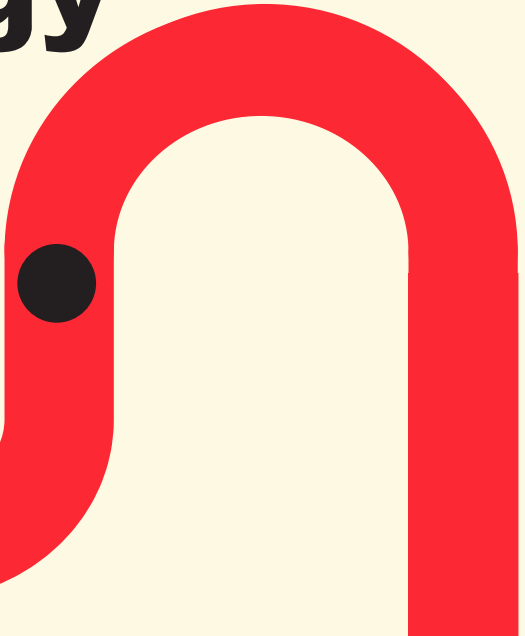


9

Where we were



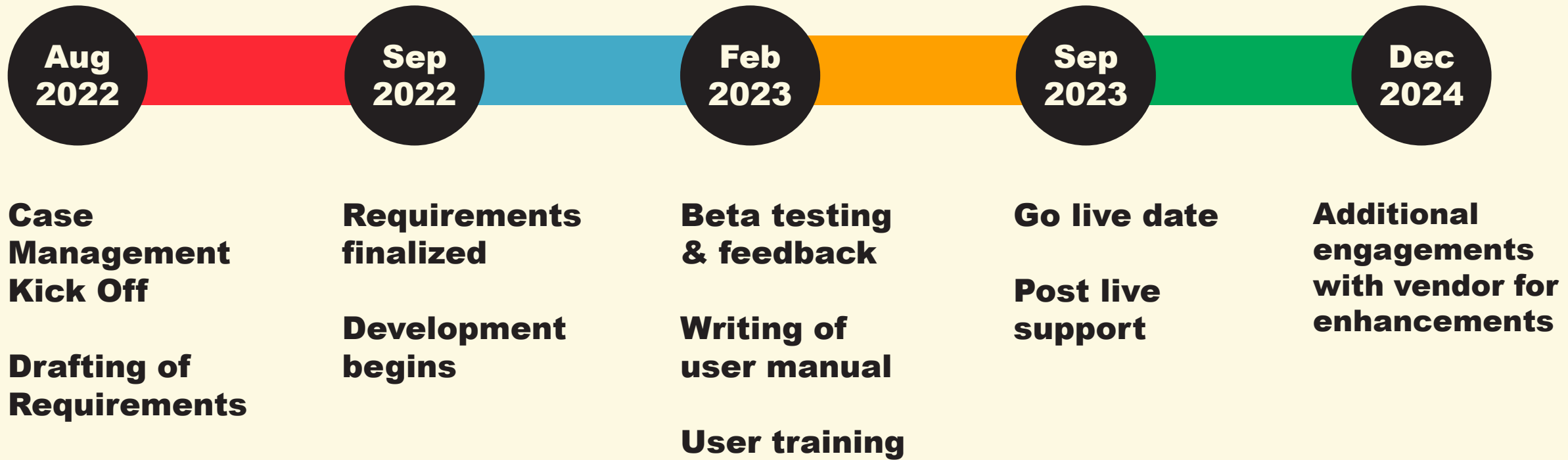
Advances and Investment in Technology





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Timeline





11

Where we are



Challenges

- **Communication with parties**
- **Scope**
- **Time**
- **Limited resources**
- **Staff acceptance**



12

Where we are



Lessons Learned

- **Demonstrate the process**
- **Ensure a common vocabulary**
- **Have the difficult conversations / have them early**
- **Bounce ideas off each other**
- **Step away**



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Where we are

- **Track processing times**
 - **Case**
 - **Specific tasks / milestones**
- **Track deadlines**
- **Track staff activity**



14

Where we are



Improved correspondence and forms handling

- **Consistent templates**
- **Ability to add dynamic fields & language**
- **Automate sending via various methods**
- **Generated Proofs of Service**



15

Where we are



DASHBOARDS



**APPROVAL
PROCESSES**



BOARD AGENDA

An abstract graphic on a light cream background. It features a thick green line that starts from the left, curves downwards, and then continues horizontally. A thick blue line starts from the bottom, curves upwards, and then continues horizontally, overlapping the green line. A thick red line starts from the top right and curves downwards. A solid orange circle is positioned on the left side. Two small black dots are located on the green line: one on the upper curve and one on the horizontal segment. The text "Where do we go from here?" is written in a bold, dark grey sans-serif font, centered in the right half of the image.

**Where do we
go from
here?**



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Where we aim to go

Continuing user training and participation

- **Continue with an environment of feedback**
- **Encouraging feedback from users at all levels**
- **Continuing to build trust between users and the system**

Further enhancements

- **Target areas for automation**
- **Seek opportunities to connect with other technology solutions**
- **Fixing bugs**



18

Where we aim to go



Opportunities in AI, OCR, and Robotic Process Automation (RPA)

- **Validate documents submitted by members**
- **Streamline 'indexing' of our medical records**
- **Keeping the human element**



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Questions

Questions?





Thank you

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