

Vision 2030 Strategic Planning Workshop

Wednesday, September 14, 2022 by Steve Delaney, CEO

Vision 2030- Why We Started This Journey

In SEPTEMBER 2021 We Discussed:

OCERS then faced Two Large Challenges

- Alameda Recalculation Immediate
 - 2,500 accounts to be recalculated with all ensuing documentation and management of benefit payback
- 100% Benefit Accuracy Immediate and long term
 - Internal Audit had found OCERS was running a 6%-8% error rate
 - Core benefit reflecting base salary was generally correct, errors tended be related to additional salary items that had to be included as
 outlined in Memorandums of Understanding

OCERS also faced these Constraints

- Extreme plan complications
- External data access
- Desk manuals needing update
- V3 Constraints

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I Recommended We Focus on Technology

- Artificial Intelligence (AI) driven data maintenance
 - Member data held in OCERS data folders
- AI driven benefit calculation
 - No need for manual rechecking of work, nor additional manual QA layer
 - OCERS team members focus on analytics and strategic initiatives
- Natural Language/Machine Learning will provide for immediate customer service questions
 - OCERS team members focus on direct customer service with our members caring for more complex higher value interactions
 - Allows AI phone assistant to serve members 24 hrs a day in natural human voice

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Vision 2030 – AI Technology to the Rescue

What is Artificial Intelligence?

Al is a set of technologies used to help machines understand how humans think. Once these machines understand the human mindset, they are able to complete tasks in place of humans.

What is Robotic Process Automation?

RPA is an automation technology that implements, and manages robots. These robots mimic humans and can complete routine tasks without needing human touch.

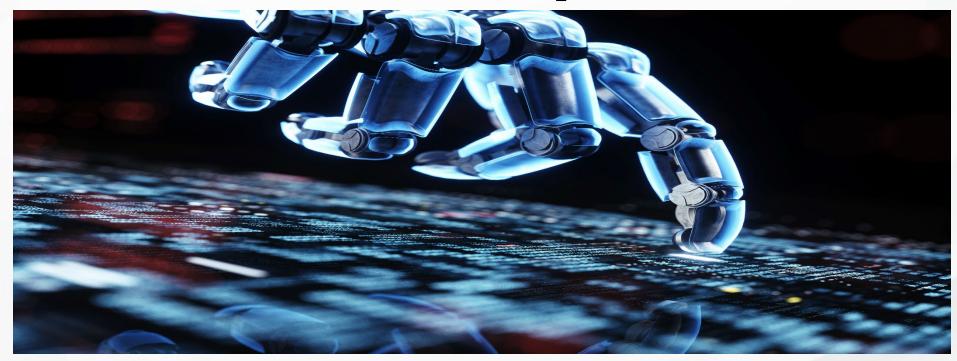
What is Machine Learning?

ML is all about data and algorithms. Instead of spending time inputting rules for ML, this technology uses real-time data to predict the next step in the process. It will create a model of the typical workflow pattern and begin to improve the algorithm based on common relationships and historical data.



Vision 2030 – The Ultimate Goal

An Artificially Intelligent Pension Administration System that by 2030 will calculate all OCERS pension benefits accurately without any human intervention required.

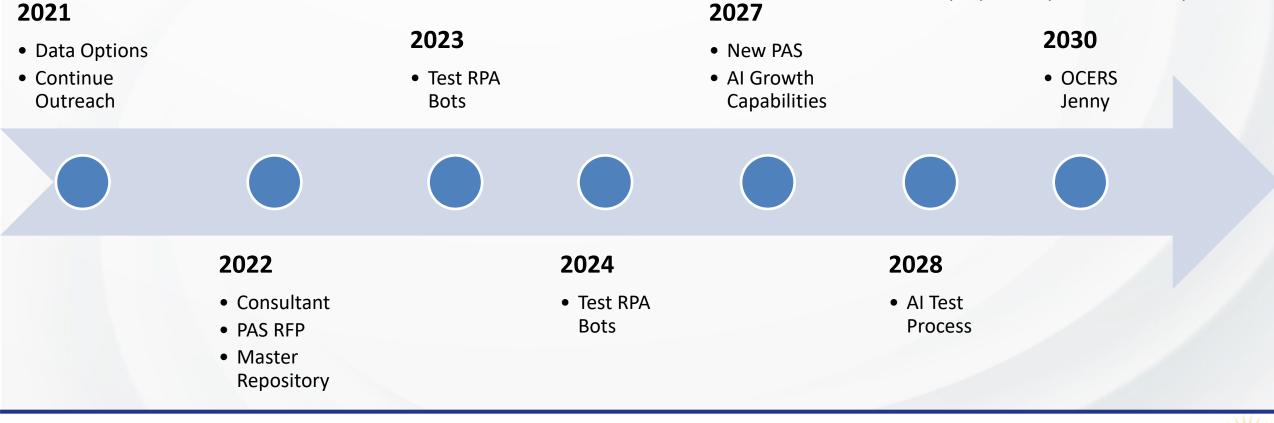


Vision 2030 – The Initial Timeline (2022)

Vision 2030 Timeline

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"Dave, this conversation can serve no purpose anymore. Good bye."



CERS Vision 2030 – First Steps (2022): KNOWLEDGE

- Formed an AI ad hoc Committee internally, with many departments represented
- Grew into Al Multi-Employer Monthly Roundtable
- Outreach
 - Canada (4 systems)
 - Dutch APG
 - Federal Social Security Administration
 - National speaking engagements/Survey

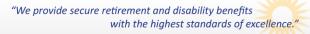


An example of early stage application –

David Yamasaki, CEO, Orange County Superior Courts



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- 2017: Analytics Revolution started with Court Innovation Grant
- 2018: Statewide workstream, governance framework
- 2019: Completed Data Warehouse (case management info, finance & HR)
- 2020: Analytics & tech infrastructure prepared us for COVID
- 2021: Several exploratory projects in AI / ML (predictions, classification, and meta data extraction)
- 2022: Document Intelligence RFP & vendor selected (buy not build)
- 2022+: Data As a Second Language campaign



Green: completed Orange: in progress

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snowflake

<u>Data 1.0</u> Data Warehouse

- CAVE (CMS data) CIG grant, completed.
- ii. Expand CAVE to include non-CMS data (Jury or Self Help)
- iii. Finance / HR data mart



<u>Data 2.0</u> Data Exchanges & Smart bots

Grand central data exchange

i.

- ii. Smartbot Dialogue flow: jury & collections
- iii. Natural Language IVR
- iv. JMS Jail data exchange
- v. CUP proof of corrections
- vi. Self Help editable court forms
- vii. CAP attorney exchange viii. Online Records access

Azure Databricks **Data 3.0 Predictions**

Build predictions engine using CAVE input data

- 1) Predict filings
- 2) Predict # of trials
- 3) Predict # of hearings
- 4) Predict # of court reporters
- 5) Predict number of jurors to summons



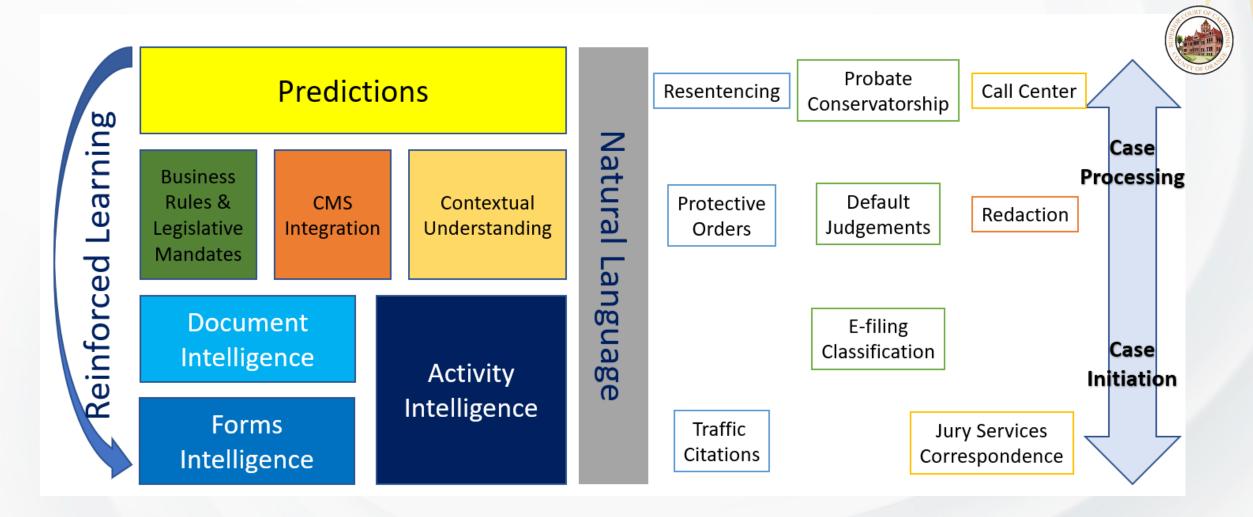
<u>Data 4.0</u> Doc Al/ML

(Document meta data)

- POC evaluate viability of extracting meta data from court filing documents for case processing
- ii. Document Classification
- iii. Marijuana Redaction
- iv. General purpose fuzzy match (demurer 'met and conferred')









Business Rule

Writ Verification

	Requirement	Action
Header	Attorney of record TIP: Match to judgment. If attorney does not match, then search for Substitution of Attorney.	If attorney of record does not match - Reject.
Header	Court Location – Must be the correct court location of the case.	If court location does not match - Reject.
Header	Case Number	If missing or incorrect – Reject. (OK to accept as long as 6-digit core number is correct).
Header	Writ of Execution / Sale box	If missing - Reject
Header	Limited Unlimited box	If missing or incorrect - Reject. For Small Claims cases the Limited box must be checked.
1	Name of the county in which the levy is to be made Check Voyager to determine if there has been a writ issued for the same county within the last 180 days.	If blank – Reject. If a writ for the same county has been issued within the last 180 days and has not been returned – Reject.
3	Name of judgment creditor is as it appears on the judgment. If requesting party is the assignee of record, their name matches the assignment of judgment.	If names do not conform to judgment / assignment / renewal – Reject. (A list of acceptable variances is attached.)
	The appropriate box indicating judgment creditor or assignee is checked.	If box indicating creditor or assignee is missing – Reject.
4	Item 4 lists the name(s) as they appear on the judgment and last known address of the judgment debtor(s). If the checkbox indicates that there is additional judgment debtor(s), see line 21 on page 2 to verify they are listed.	If name(s) are missing – Reject If names do not conform to judgment (first check for Affidavit of Identity) – Reject. (A list of acceptable variances is attached.) If address is missing – Reject. If box indicating additional debtor(s) is not marked but the names are listed on line 21 – Reject.
5	Date judgment was signed. Judgment must not be greater than 10 years unless renewed.	If missing or incorrect – Reject. If judgment date is greater than 10 years and has not been renewed – Reject.

Document

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	Judgment entered			16. Accrued interest ren		5	8,307.8
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Extracting Document Meta Data & Applying Business Rule

			Ca	ase information	must	
TELEPHONE NO.:		FAX NO. (Optio		atch complaint		
WAIL ADDRESS (Optional):				atch complaint		
ATTORNEY FOR (Name):						
JPERIOR COURT OF CALI	FORNIA, COUNTY C	DF			\	
STREET ADDRESS:					\	
MAILING ADDRESS						
		e			· \	
PLAINTIFF/PETITION	"Entry of De	efault" mai	rked		· \	
				•		
FENDANT/RESPONDENT:						
REQUEST FOR	Entry of	Default	Clerk's J	udament		
(Application)						
TO THE CLERK: On the	Court Ju					
a. on (date):	complaint or cross	-complaint filed	Date of	complaint/cros	s-com	plaint
b. by (name):			Name	of plaintiff/cross	comn	ainant
	defendant (names)		Hame C	n plaintin/cross	comp	amant
c Enter default of	detendant (names)					
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Civ. Proc., § 585		aerk for a nearing	uale, unless u	ie court will effer a judgin	en on an	amaavit ander
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1174(c						
		Code Civ. Proc.,	§ 1169.)	, ,		
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"We provide secure retirement and disability benefits with the highest standards of excellence."



Presently, a Paralegal in our legal department must manually prepare all medical records pertaining to a disability claim by redacting with a black felt pen any Private Personal Information (PPI), going page by page for a visual search of such information.

Presented with 3,000 pages per claim on average, our paralegal takes approximately 40 hours to complete the manual redaction.

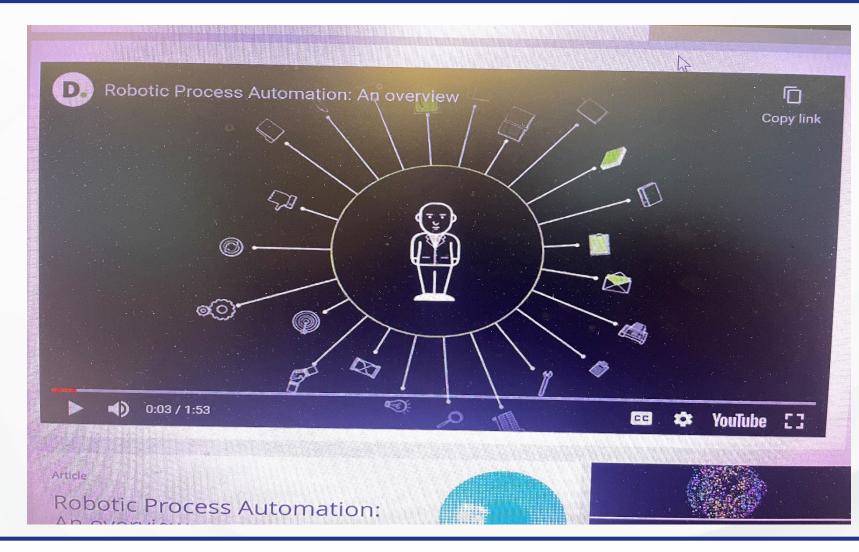
We need to be able to scan those documents and allow at least initially, Robotic Process Automation (RPA) to search, identify, and redact any PPI.

A Robotic Process Automation (RPA) possibility:

RS Vision 2030–Second Steps (2022): POSSIBILITIES



EXAMPLE Vision 2030–Second Steps (2022): POSSIBILITIES



"We provide secure retirement and disability benefits with the highest standards of excellence."

ORANGE COUNTY

OR AN GE COUNTY CERSSON Steps (2022): POSSIBILITIES EMPLOYEES RETIREMENT SYSTEM

2022 POSSIBILITIES CONTINUED...

We learned that our focus on leveraging technology and preparing for the integration of Artificial Intelligence into our mission goal does not and should not be limited to the processing of benefits. OCERS should aim to become an AI integrated system, touching on every department – Finance, Human Resources, Customer Service, Investments.



"We provide secure retirement and disability benefits with the highest standards of excellence."



Vision 2030 – Third Steps (2022): ACTIONS

Master Repository of Policies/Procedures Project

- RFP to hire Technical Writer
- To craft Desk Manuals
- To craft process rules for PAS foundation
- implement a repository and process for keeping documents updated and usable

New Pension Administration System to Replace V3 RFP for a Futurist A timeline Success matrices Future-Proofing/Scalability

RFP for Robotic Process Automation – Initial Use Cases

3-4 use cases at reasonable cost to demonstrate possibilities



Vision 2030 – Third Steps (2022): ACTIONS

2022 ACTIONS CONTINUED...

Getting Access to DATA is Vital – Working discussions just starting with the County of Orange





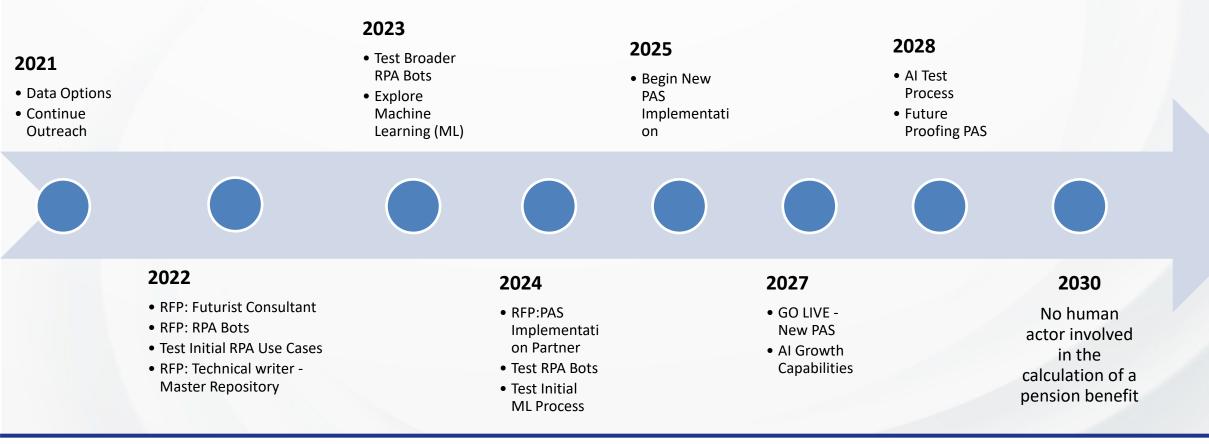
Vision 2030 – Planning for 2023

- CREATE A PROJECT MANAGER POSITION/OFFICE
- Master Repository of Policies/Procedures Project Ongoing
- LEAN processing and Simplification Initiative
- Access to Data Working discussions with County of Orange and other employers -Ongoing
- RFP for broader Robotic Process Automation of Use Cases
- RFP for New Pension Administration System (PAS) Implementation Partner
- Begin staffing build up to ensure we have Subject Matter Experts on staff for build in 2024 and onward



Vision 2030 (As of September 2022)

Vision 2030 Timeline



20



Vision 2030 – And beyond...

https://www.youtube.com/watch?v=80IIEnSNwQc

