

# Pension Gold V3 Integrated System Project Update

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**July 20<sup>th</sup>, 2023**



# Agenda

- Overview PAS System Replacement Project
- Project Objectives
- Project Timeline and Activity Update
- Core Functionality Major Systems
- The Integrated System
- A Look Ahead

# Project Objectives

## PENSION GOLD

- Centralize Processing, Verification in One System
- Automate Standard Benefit Calculations
- Enhanced Member and Employer Engagement
- Comprehensive Exception Management
- Transparency Pensionable Salary Review

## ONBASE

- Increased efficiency Member Data Updates
- Targeted Document Views – Specific Purpose
- Automation Forms and Correspondence Development
- Initiate Workflows with Member Requests



# ACERA PENSIONGOLD V3 PROJECT TIMELINE

Project Design Start  
2/3/20



Member Maintenance – Records (D1) 2/21/20  
– 2/22/21 –



Employer Exception Management (D2) 9/11/20 –  
1/13/22



Benefit Setup & Estimates (D3) 11/2/21 –  
1/13/23



Benefit Payroll (D4) 1/11/23 –  
9/7/23 **\*\*(CURRENT)\*\***



General Ledger / Member Direct/ Employer  
Direct (D6) 9/1/23 – 3/27/24

Parallel Processing 6/24 – 8/24 – **\*\*\*\*Go Live Q4  
2024\*\*\*\*\***



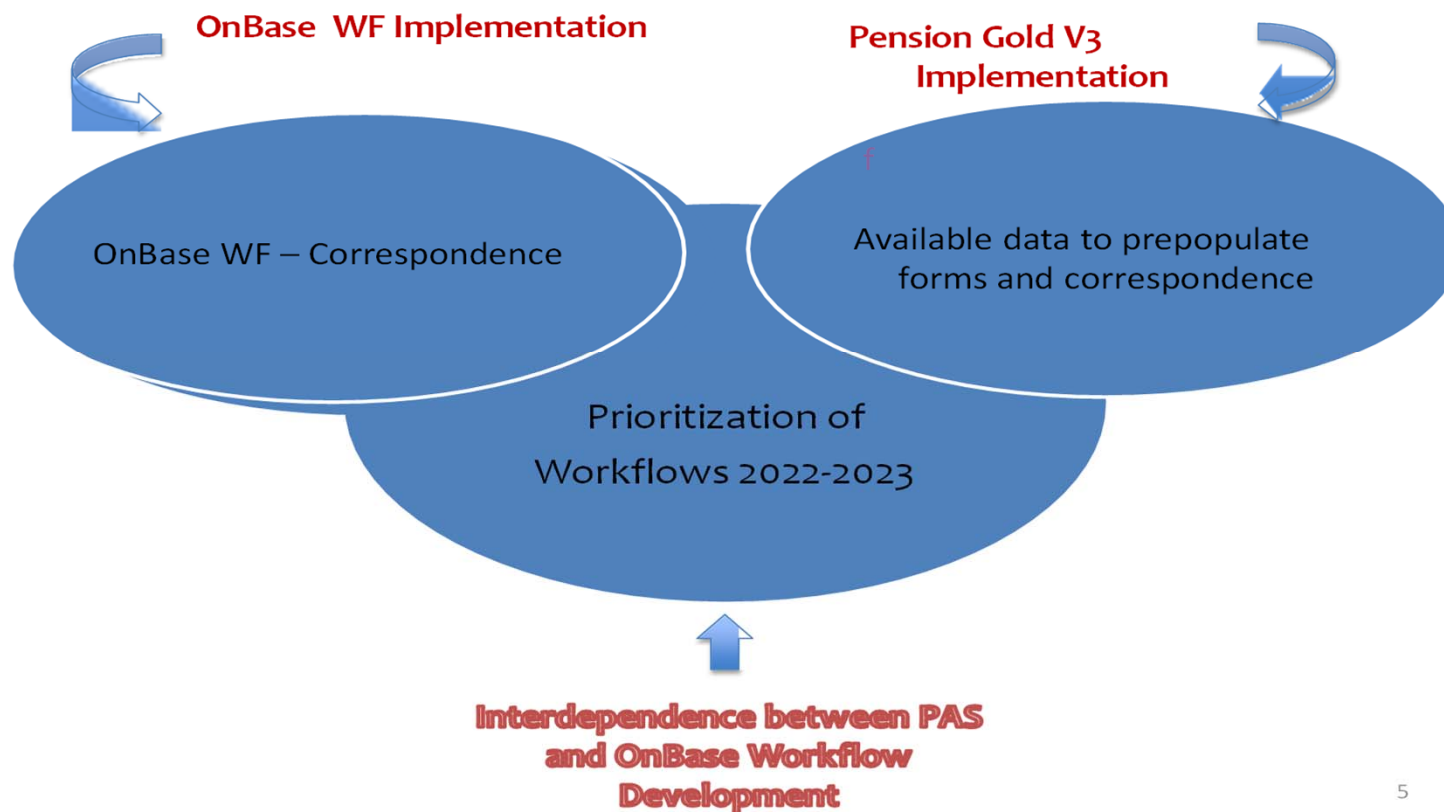
Employer Direct Full Implementation Q4 2024



[Warranty Period to 11/25]



# ONBASE WORKFLOW- PENSION GOLD V2 DATA



# PENSION GOLD CORE FUNCTIONALITY

- **Member Maintenance** – Member, Beneficiary, Demographic Data Records
- **Employer Reporting** – Employer transmittal file posting and exception management
- **Benefit Setup & Estimates** – Benefit Estimates, Benefit Processing
- **Benefit Payroll** – Pay, track, reconcile and report on Pension Payroll activities Refunds, Insurance and Tax payments
- **General Ledger** – Captures and reconciles payroll data



# ONBASE CORE

## FUNCTIONALITY

### Document Management

- DIP – Import high volumes of documents in an automated process for all file types

### Indexing – Document Search

- Automated indexing benefits– (Sweeping): Pulling existing folders or file(s) imported into OnBase of previously scanned documents

### Workflow Optimization

Streamlines communication between departments for assignment and tracking of work

### Automated Generation and Routing of Forms and Correspondence

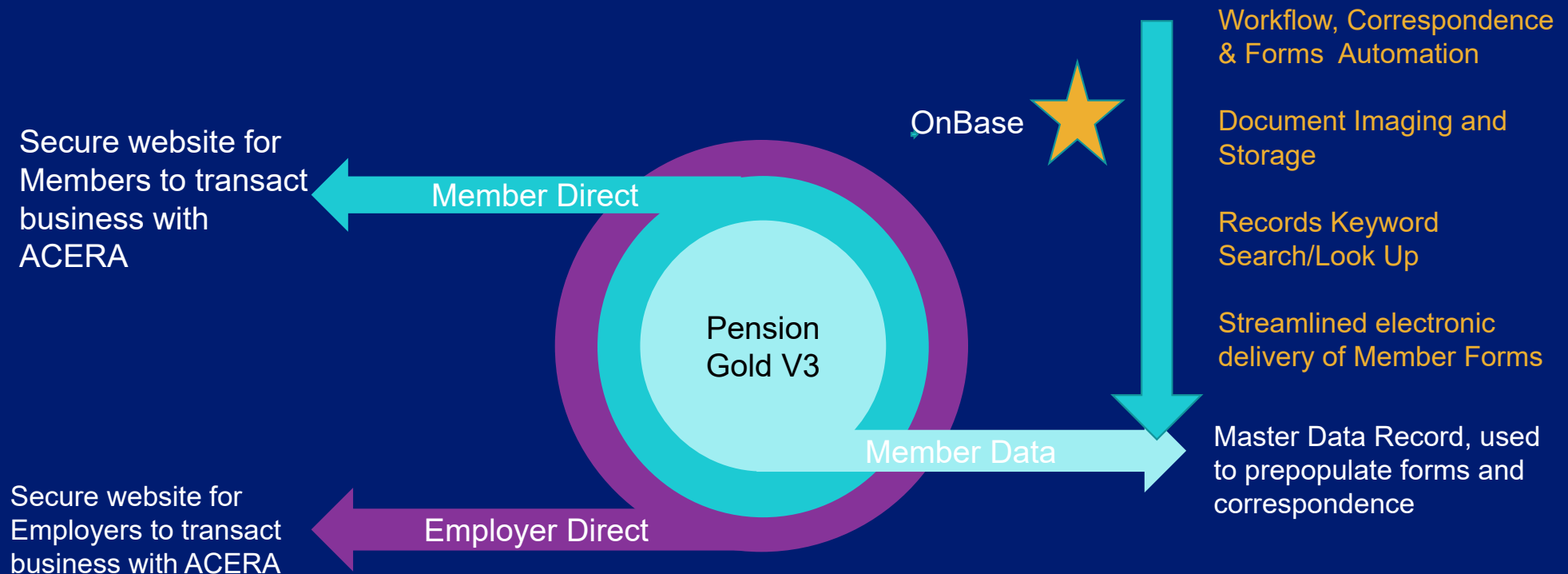
- Case Manager and Workflow Tools

### Activity and KPI Dashboard Reporting

- Visual Snapshot of Work Activity by Processor, Ageing Work Item, Department



# Pension Gold - OnBase Integrated System





# A Look Ahead

- **Member Direct** Design and Implementation
  - Broadcast Messaging, E-Forms-Workflow Pairing, Member Benefit Estimate Self-Service, Direct Messaging by Free Form Texts by Member to ACERA
- **Employer Direct** Design and Implementation
  - System Generated Correspondences, Employer Education Planning
- **OnBase** Implementation – Beneficiary Maintenance Case Manager

**-STAY TUNED-**



**Thank You!**

