



HOW A RETIREMENT SYSTEM REDUCED SURVIVOR BENEFITS FROM YEARS OF WAITING TO DAYS

Discover how automation and guided workflows
reduced delays and improved accuracy for a retirement system.

About the Customer

A leading U.S. public retirement system serving employees and retirees across multiple counties and districts. It oversees billions in assets with a focus on financial security, sustainable investments, and long-term member value. It is committed to delivering secure retirement benefits and supporting members through clear, compliant, and efficient processes.

Engagement Story

For years, the retirement system relied on a largely manual process to manage survivor benefits, a task that directly affected families depending on timely financial support. Over time, these manual touchpoint intensive workflows became difficult to sustain. Paper-based processes, repeated data entry, and limited tracking capabilities led to growing backlogs, processing delays, and a lack of transparency across the entire workflow.

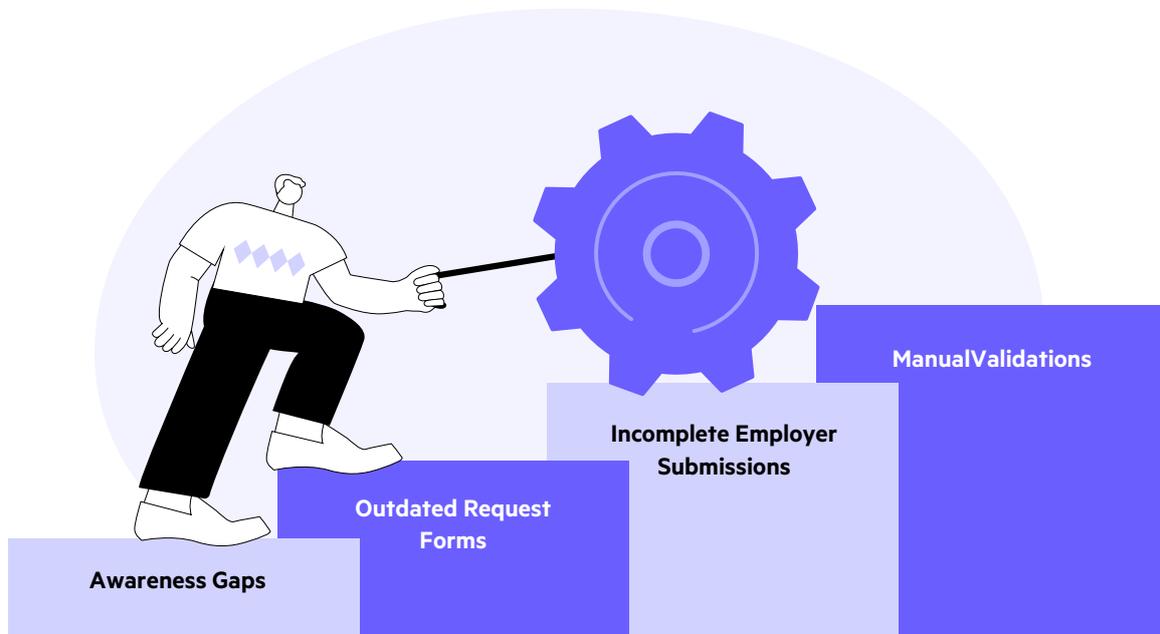
The organization recognized that the legacy approach could no longer meet the expectations of members and beneficiaries. To deliver on its mission of providing financial security with accuracy and compassion, it needed a faster, more reliable way to process survivor benefits.

To resolve this, the public retirement system partnered with EvonSys to design and implement a streamlined process that improved accuracy, timeliness, and compliance with regulatory requirements.

Manual processes, outdated forms, and incomplete submissions slowed Survivor Benefit Processing and created unnecessary friction for beneficiaries.

Key Business Challenges

Operational and communication gaps slowed Survivor Benefit Processing and created friction for members and beneficiaries.



Awareness Gaps

A large portion of the member base lacked awareness of the benefits they were entitled to. This knowledge gap often resulted in members not fully utilizing the support available to them.

Outdated Request Forms

The paper forms used were difficult for members to locate and complete, and outdated versions were sometimes submitted. Combined with mail-based correspondence, the process lacked transparency, leaving members frustrated and uncertain about the status of their requests.

Incomplete Employer Submissions

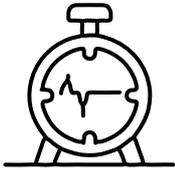
In some cases, retiree death notifications submitted by employers were incomplete, slowing processing, triggering repeated follow-ups, and disrupting timely support for beneficiaries.

Manual Validations

Critical checks, such as date of death, banking details and address, were manual, creating risks of errors, delays, and financial impact for beneficiaries.

Desired Goals

To modernize Survivor Benefit Processing, the institution focused on efficiency, empathy and reliability.



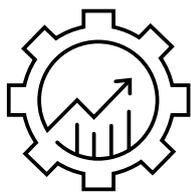
Timely Support

The primary goal was to ensure beneficiaries received their survivor benefits promptly, without delays or administrative hurdles.



Compassionate Experience

Deliver a process that balances accuracy with empathy, easing burdens and providing clear support during a difficult time.



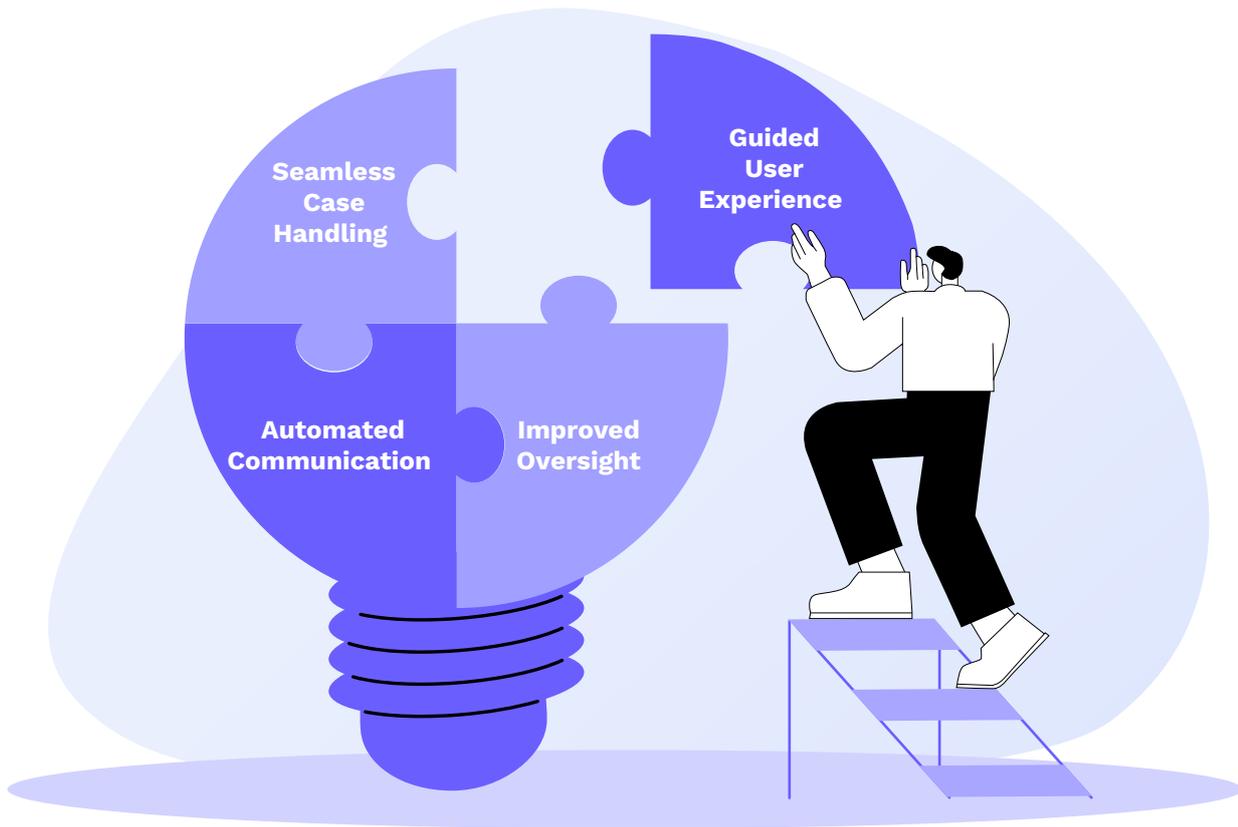
Operational Efficiency

Simplify complex, manual processes into standardized workflows that reduce errors and ensure smooth delivery of survivor benefits.

Solution

The organization adopted a structured, transparent solution built on Pega Infinity 24.1 and the Pega Customer Service Framework, supported by low-code capabilities. This modernized Survivor Benefit Processing, reduced errors, and improved the experience for members and beneficiaries.

Leveraging deep domain expertise and proprietary implementation accelerators, the solution introduced was rapid, future-proof, and balanced operational improvements with a people-first design approach.



Seamless Case Handling

Using Pega's Case Management, notifications are automatically captured and routed, with real-time eligibility checks ensuring accuracy from the start.

Guided User Experience

Pega's guided interfaces walk staff through each case step-by-step, minimizing errors and standardizing workflows.

Automated Communication

Communication templates within the system keep families informed and reassured throughout the process.

Improved Oversight

Pega's dashboards and real-time reporting provide managers with visibility into workloads and performance at every stage.

Business Outcomes

EvonSys helped the institution transform a complex retiree death process into an easy and transparent experience for beneficiaries.



Faster Processing

Payment timelines were reduced from years to just days, and in many cases, beneficiary payments can now be processed within a single day.



Streamlined Operations

Intricate manual processes were digitized and standardized, improving accuracy and reducing staff effort.



Compassion at Scale

The new approach combined technology and empathy, ensuring beneficiaries experienced dignity and timely support during critical life events.

In just 4 months, Survivor Benefit Processing went from years to days, bringing greater transparency and care to beneficiaries.

Because when life changes in an instant, the response shouldn't take weeks. With Pega and EvonSys, dignity comes first.

Client Testimonial

I want to commend the entire EvonSys team for another exceptional release. Kudos to the whole team for their incredible hard work and dedication! The Retiree Death process, our most intricate and challenging business operation, has been significantly streamlined through our digital transformation strategies and reusable, simplified workflows. This has drastically reduced payment processing times from years to just days.

- **Chief Enterprise Solutions Officer**



Simplify complex processes with EvonSys

Talk to our experts



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