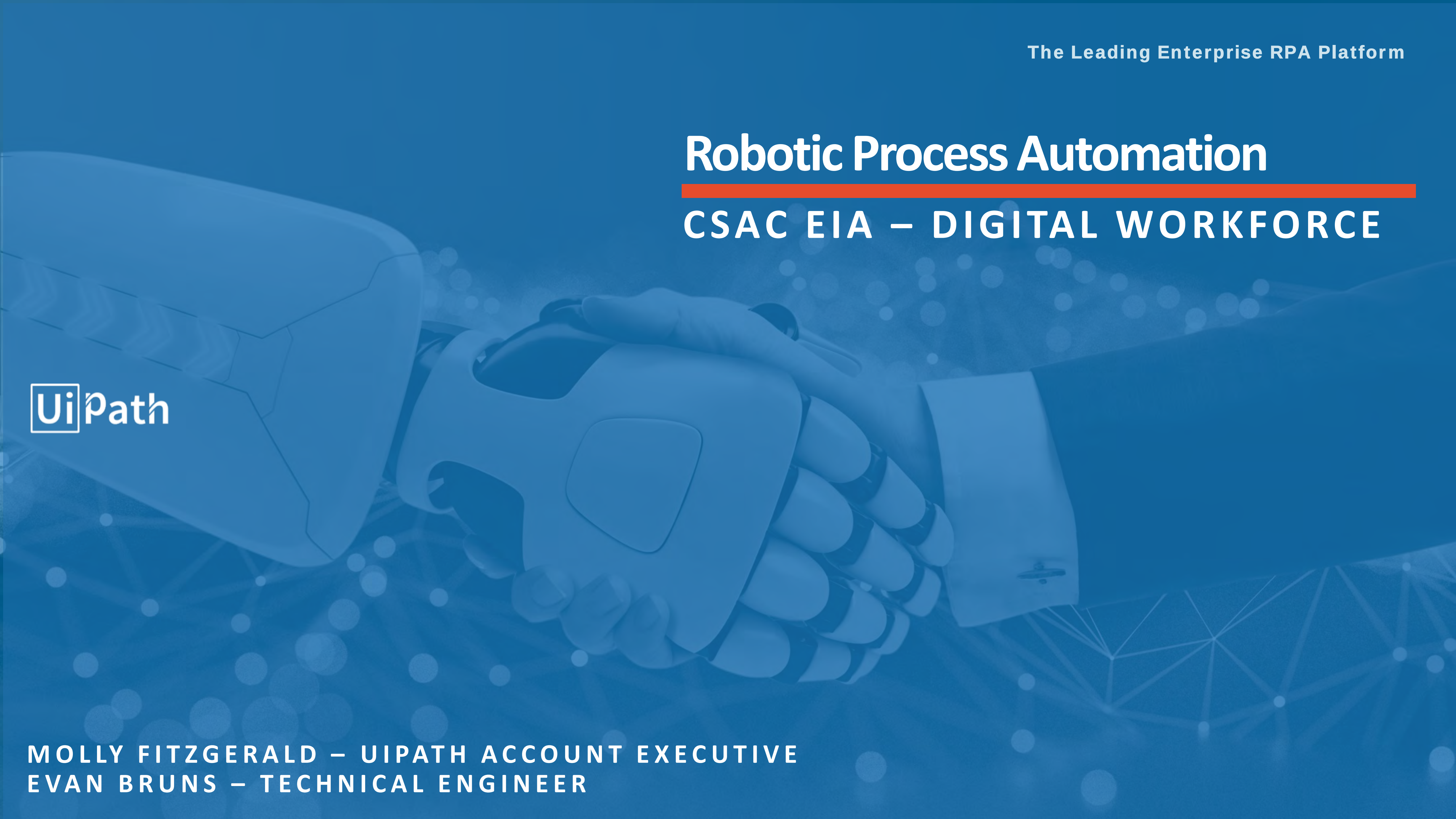
PRESENTATION

CAJPA SPRING WORKSHOP

TECH SAVVY, HR WISE & FISCALLY READY

CAJPA SUMMIT SERIES
POOL PROFESSIONALS

CAJPA
California Association of Joint Powers Authorities



The Leading Enterprise RPA Platform

Robotic Process Automation

CSAC EIA – DIGITAL WORKFORCE

UiPath

MOLLY FITZGERALD – UIPATH ACCOUNT EXECUTIVE
EVAN BRUNS – TECHNICAL ENGINEER

Agenda

UiPath

- What is Robotic Process Automation?
- View a Robot in Action – CSAC EIA Claims bot
- Where to Start - What processes are ideal to automate with RPA?
- Where to go to learn more?

The UiPath Enterprise RPA Platform

UiPath

UiPath Studio

Digitize your process

Your business processes and workflows

UiPath Orchestrator

Manage and secure

Your digital workforce

UiPath Robots

Deploy and scale

Your attended *and* unattended robots

Attended vs. Unattended Scenarios

UiPath

Attended	Unattended
Works with the agent on their desktop	Runs on a stand-alone computer
Typically triggered by user activity	Scheduled by Orchestrator
Uses agent’s credentials	Has robot-provisioned credentials

- Common Codebase
- Centralized Reporting
- Encrypted Assets
- Seamless Handoff

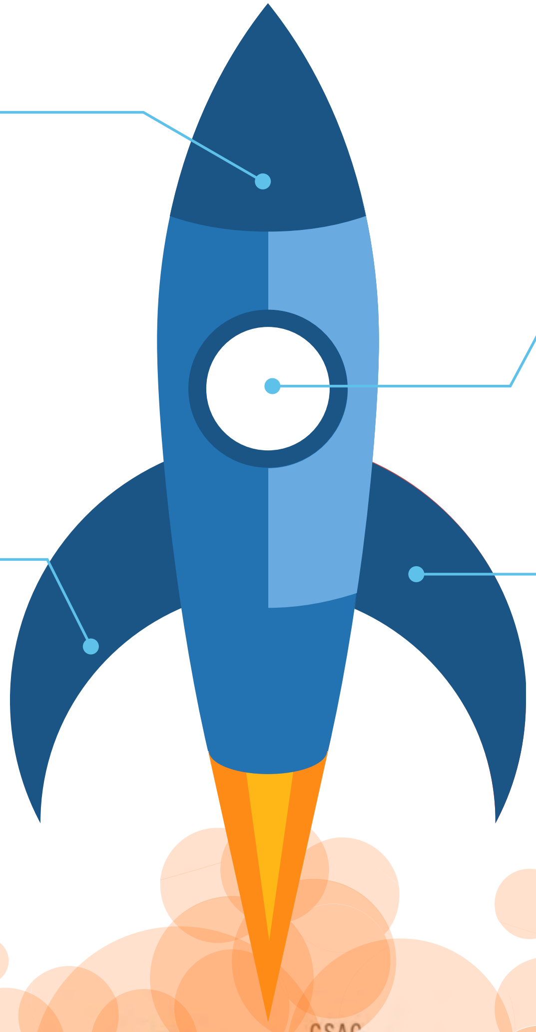
UiPath

PoC Results

CSAC EIA RPA Implementation Team

Cultural Adoption - SME
Debbie Arnold
Claims Assistant

RPA Executive Sponsor
Gina Dean
Chief Operations Officer



IT & Functional Engagement
Jeff Louie
Senior IT Specialist

Kenny Popst
IT Manger

RPA Business Analyst
Jen Hamelin
Director of WC Claims

Mike Pott
Chief Claims Officer

CSAC EXCESS INSURANCE AUTHORITY

TRINITY TECHNOLOGY GROUP

Pilot Process: WC Merge Claim Process

Basis for Selecting This Process

Increase in Claims Submissions requiring additional capacity to do data-entry activities. Looking for an innovative solution to automate manual processes within Claims Department.

Goals of Pilot

- Reduce repetitive, mundane work
- Improve Employee Satisfaction
- Have Staff focus on high-value task
- Avoid ending profitable lease
- Test UiPath's capabilities in SIMS, Word, Excel, Outlook and Document Management System

WC Merged New Claim

. Open email drag attachment to a working folder on desktop, go to SIMS/Claim Search, enter claimant name in **Claimant Name** search to see if it matches the DOI and the claim # listed on initial report. Click on the matching DOI/Claim #, this opens the claim to enter the fields required.

. Look on report to see who the Member is, ex: Sacramento County Contracts, search for which Division/Department the employee works for such as Rancho Cordova Police. If it's not listed with Sacramento County Contracts, (most of the time it's not listed). I read through the initial report to see if I can locate the Department the employee works for. Usually it is listed somewhere on the report. If it isn't I will email the TPA back to request the department. At that time, I will close out of that claim, email the TPA requesting the information. Close the initial report email, make a notation what information I am requesting. Mark it as a follow-up and wait for the information to be sent back to me. If there are other Members such as ACCEL, NCCSIF, MPA etc., same process. If it's for example Monterey County, one less step. If it's a CSU/Aroma, SIRMA or CSRM same thing, I go to an Assignment Sheet to see which Specialist is assigned to that. **2nd Step**: Search for the DOI SIR history time period and the SIR amount for that loss date to determine which Specialist should be assigned to the claim.

. Click on Claim Maintenance Tab,

. At **POLICY/STATUS** go to **Examiner** Field: Enter Specialist name

. Go to **Affiliate Claim #:** enter Claim # from report

. Go to **CLAIMANT** (check to see at Claimant Address the fields are completed by TPA. If they aren't then I will have to enter #1 in address and Zip Code). This is necessary in order for the payments to process. Rarely this isn't completed.

. Go to **DATES/EVENTS**: **Excess Received Date:** Enter the date we received the report. Next go to **Excess Reportable to ~~EIA?:~~** enter Yes

.Click on **SAVE**. At this point a message box **may** pop up with a message **"Validation Errors: - Date Form Provided must be between Loss Date and today.** Click **Ok**, go to **Date Form Provided field**: highlight the date, hit delete to remove it from the field. Hit **SAVE** again. Pop up **Says Claim saved successfully,** click OK.

Click on Contacts Tab:

. Click on **Add,** enter the TPA's company name when it says "**Search by Name/Vendor, (ex: Intercare),** different addresses drop down and I search for the correct address to click on this populates in the field. Go the **Choose Contact Type** field: click on drop down error, it drops down choices to pick. I will always choose "Adjusting Office". Click on "Save".

Click on Letters Tab:

. Click on **Add.** **Letter Editor** opens up and I then complete different fields to retrieve the Acknowledgement Letter. **click ~~ok 1~~) Title:** type in acknowledgement ltr **2) Description:** type in acknow ltr 3) Select **A Template Category:** click on arrow - drop down box: select **EIA Letters** **4)** Select **ATemplate:** click on arrow – drop down box: click on side bar and **slide** down to choose/click **WC Acknowledgement Letter**. 5) Click on **EDIT DOCUMENT:** a box pops open…click Allow, another box appears, click ok. Acknowledgement Letter template appears. Complete address, salutation, hit save, click on File, hit Save As, box appears to name file and save into folder to mail attachment to TPA.

. Click on Attachments Tab:

. Click **Add: Document Date:** enter the date of the document that was prepared, go to **Description** field: type first report; click on **Attachment Type:** type in **First Report** (it populates). Close initial report and drag the copy to box **"to add an attachment, drag & drop it into this area",** once it gives the ok that it successfully attached, click **Save & Upload.** (If the document was too large, it would give you an error message at this point you would break the document down, once completed, reattach the file). A pop up appears, click OK. Go back to the folder, delete the initial report.

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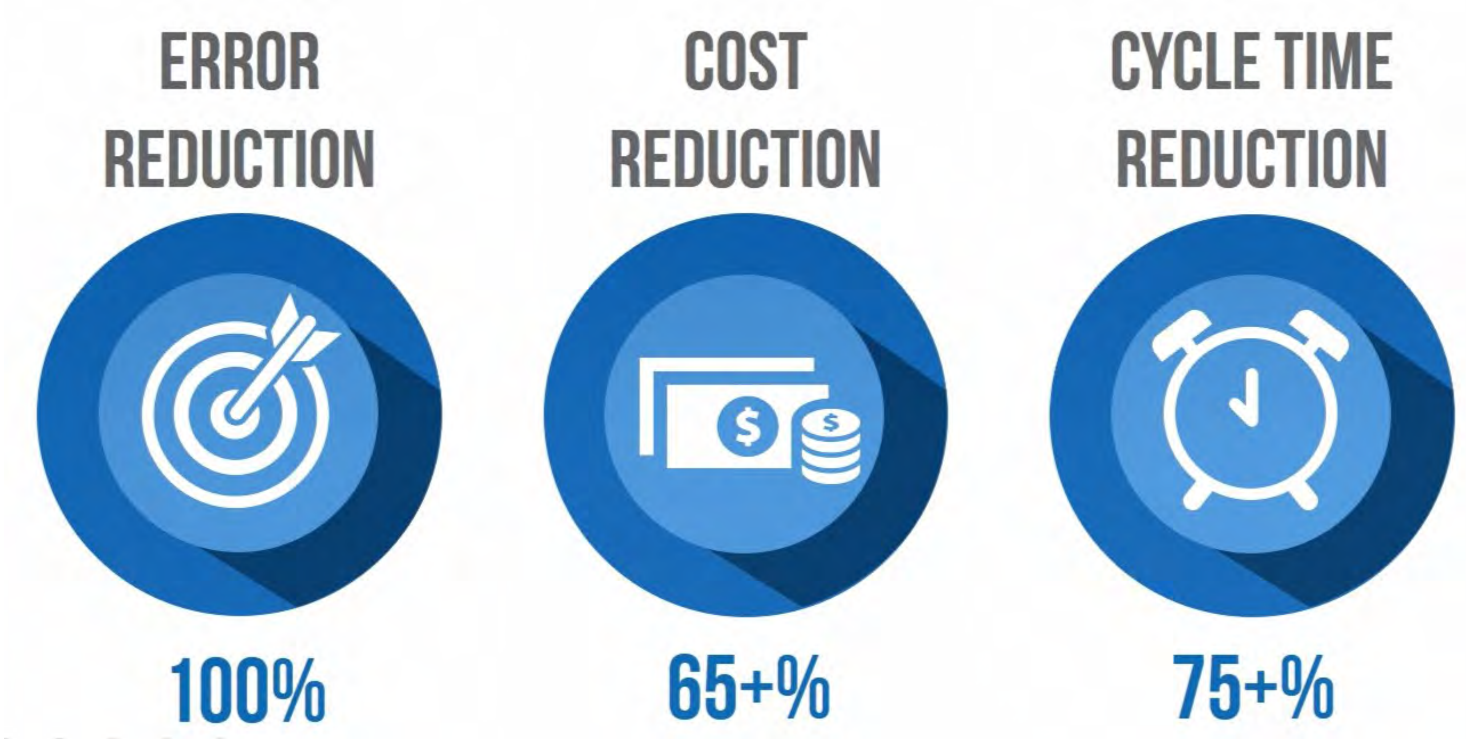
Go to the initial report email, hit reply, type in the subject line "Acknowledgement Letter – claimant name. Type in a very short message, thanking them for the initial report, please see attached our Acknowledgement Letter. Go to the folder where the Acknowledgement Letter was saved. Drag and attach to email. Hit send. Delete the original email in Inbox

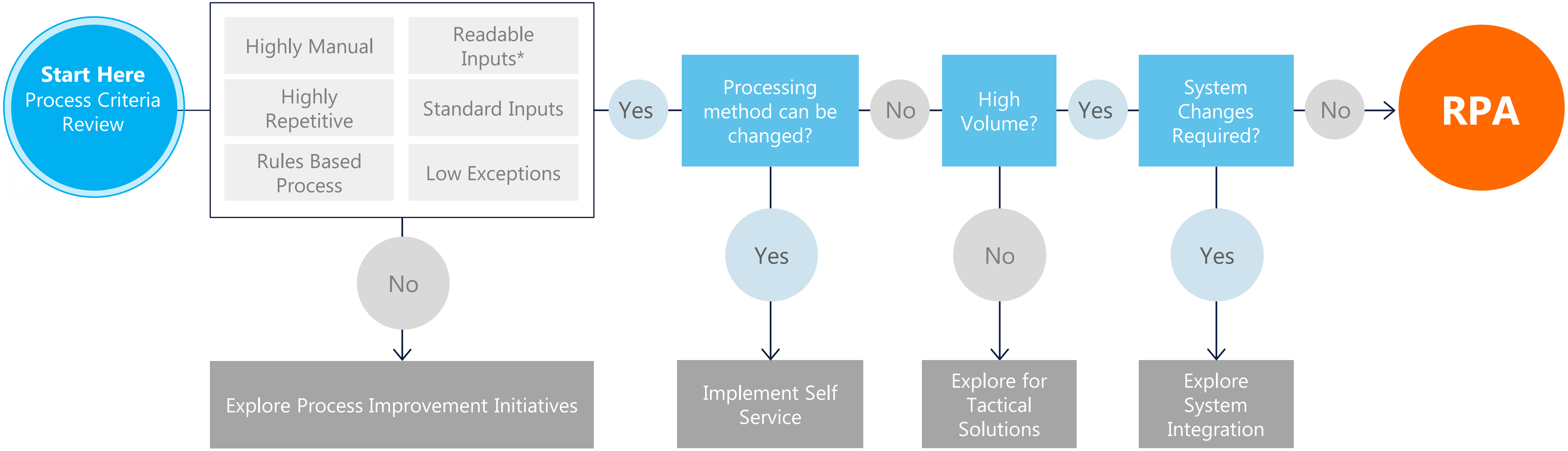
Task is completed for Merged new claim.

Anticipated Results in Leveraging RPA



Identify: Where to Start?

Guide to choosing the best candidate for automation



* Readable Input Type = Excel, Word, email, XML, PPT, readable PDFs etc. Non-readable input type: scanned image with no OCR

Processes every agency should automate

UiPath

HR services

- Data entry
- Payroll
- New hires, transfers, exits
- Time & attendance management
- Benefits administration
- Recruitment (back office)
- Personnel administration

Supply chain

- Inventory management
- Demand & supply planning
- Invoice & Contract management
- Work order management
- Returns processing
- Freight management

IT services

- Software development
- Server & app monitoring
- Routine maintenance and monitoring
- Batch processing
- E-mail processing and distribution
- Password reset/unlock
- Back up & restoration

Finance & Accounting

- Procure to Pay
- Order to cash
- Record to report
- Vendor management
- Collections
- Incentive claims
- Sales order management

Automation opportunities are practically everywhere in any organization.

AUTOMATION

Besides the typical horizontal services, there are other organizational activities that can easily fall under the scope of any automation strategy.

Finance and Accounting

Accounting

- Automating complex journal entries
- Performing and documenting account reconciliations
- Calculating and applying allocations
- Maintaining fixed-asset accounts

Accounts payable

- Entering non-EDI invoices
- Performing 2- and/or 3-way invoice matches
- Processing expense-approval requests
- Completing audits (eg. Duplicate supplier payments)

Accounts receivable

- Generate and validating invoices
- Applying cash to outstanding balances
  Analyzing and processing disputes
- Creating reports (eg. Accounts receivable aging, credit holds)

Financial planning and analysis

- Building standard management reports
  Consolidating and validating budget and forecast inputs
- Gathering and cleaning data for analysts

Payroll

- Flagging time-sheet errors and omissions
- Auditing reported hours against schedule
- Calculating deductions
- Harmonizing data across multiple time-keeping systems

Other

- Preparing external-reporting templates
- Conducting transaction audits of high-risk areas
- Preparing wire-transfer requests

Source: McKinsey&Company

UiPath

Where to go to Learn More

Helpful links for you and your team

UiPath

UiPath Academy
https://www.uipath.com/rpa-academy

UiPath Orchestrator Guide
https://orchestrator.uipath.com

UiPath Studio Guide
https://studio.uipath.com/

UiPath Robot Guide
https://robot.uipath.com/

UiPath Technical Support
https://www.uipath.com/contact-technical-and-activations

UiPath Marketplace
https://go.uipath.com/

UiPath Version Release Notes
https://www.uipath.com/release-notes

UiPath Community Forum
https://forum.uipath.com/

UiPath Demo Library
https://www.uipath.com/demo-library

UiPath GitHub - REFramework
Best practice for automation development
https://github.com/UiPath/ReFrameWork

UiPath On-demand Webinars
https://www.uipath.com/tutorials

UiPath Academy

360° training for setting up an RPA CoE

RPA DEVELOPER
- Foundation Training
- Orchestrator Training
- Advanced Training
- SAP Automation Training

IMPLEMENTATION MANAGER
- RPA Awareness Training
- Implementation Methodology Training

SOLUTION ARCHITECT
- RPA Awareness Training
- Business Analyst Training
- Foundation Training
- Orchestrator Training
- Advanced Training
- Solution Architect Training

RPA

Center of Excellence

BUSINESS ANALYST
- RPA Awareness Training
- Business Analyst Training

INFRASTRUCTURE ENGINEER
- Foundation Training
- Orchestrator Training
- Infrastructure Engineer Training

*Role-based training provides a rich & highly relevant learning experience for your Team – **a critical component to a successful & timely deployment***

For more details, check out:
UiPath Academy Training overview.pdf

TECHNICAL COURSES | **NON-TECHNICAL COURSES**