



The New Approach to Claims Processing: Disability, Death and Retirement (DDR) Workflow

Presented by:

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Our Mission...

“...to promote social justice and provide meaningful protection to members and their families against the hazards of disability, sickness, maternity, old-age, death and other contingencies resulting in loss of income or financial burden.”



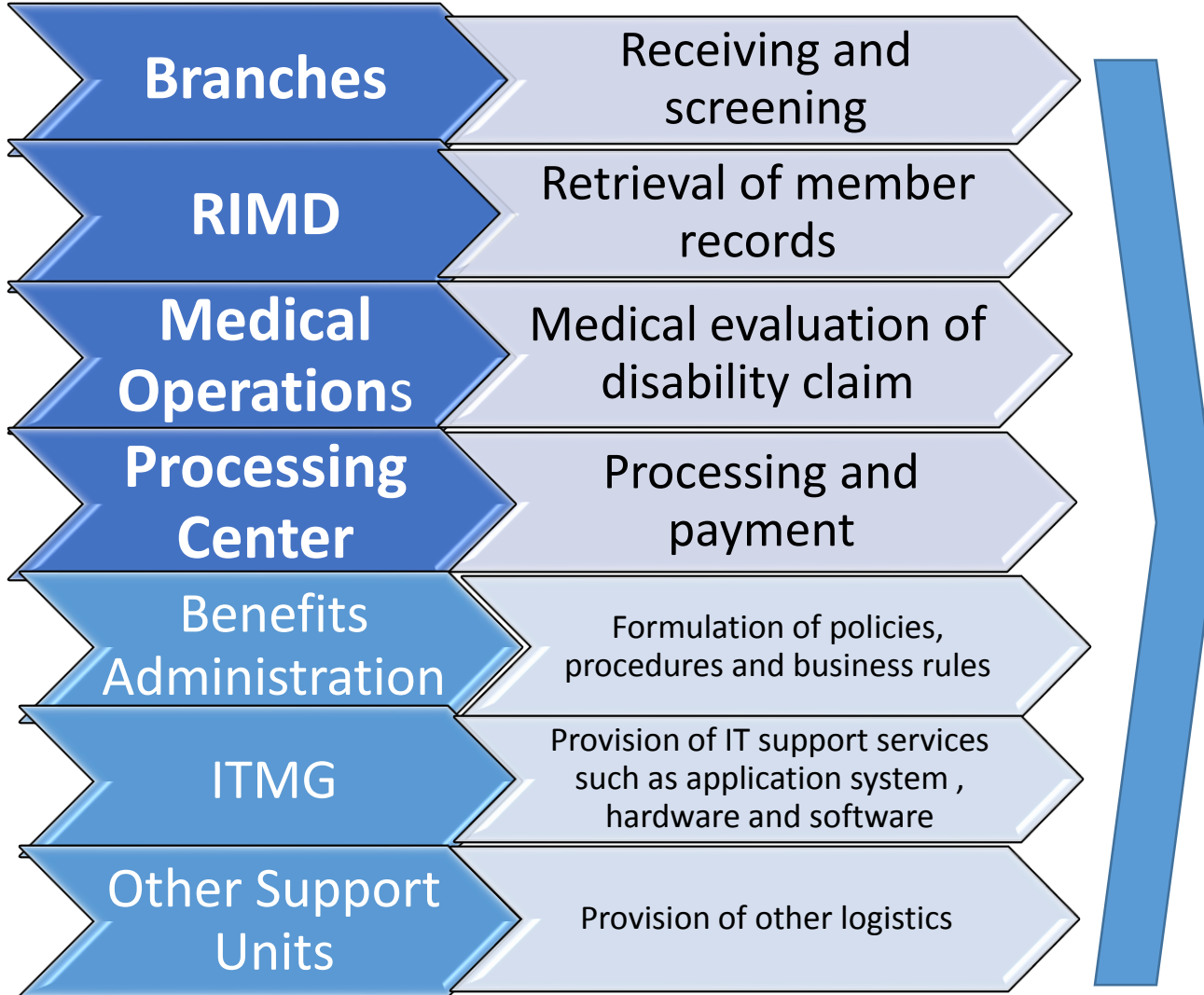
How to Fulfill the Mission?

Payment of benefits to members and their beneficiaries should be:

- Convenient
- Prompt
- Accurate
- Transparent



Units Responsible for Benefit Payments



**Right
benefit
paid to
right payee
at the
right time**



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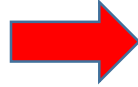
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Benefit Payment Cycle



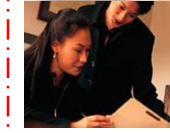
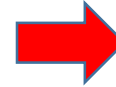
Branch

- Screens and receives claim application and supporting documents (claim records)
- Transmits claim records to Processing Center



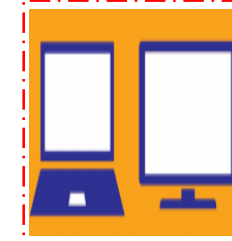
RIMD

- Retrieves member records
- Transmits retrieved member records to Processing Center



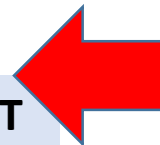
Processing Center

- Evaluates claim records
- Adjudicates claim
- Reviews and pays claim



ITMG

- Generates checks / payment abstract
- Releases to OSD



OSD

- RELEASE OF PAYMENT**
- Mails checks
 - Releases payment abstract to depository banks



Member / Filer

- Files claim application
- Submits documentary requirements



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Transforming the Way of Paying Benefits

Filing of claim

Old System

- ✓ Filer fills out hardcopy of claim application

Issues and Concerns:

- Difficulty in filling out form
- Too many details to be filled-out
- Inaccurate or incomplete information

DDRWF System

- ✓ No need to fill out form, electronic claim application is generated using the electronic form manager

Advantages:

- No need for the filer to supply information which are already in the SSS database
- Accuracy and completeness of information is ensured



Transforming the Way of Paying Benefits

Filing of claim

Old System


- ✓ Manual checklist of requirements
- ✓ Submission of documentary requirements
- ✓ Issuance of claim stub

Issues and Concerns:

- No uniformity in documentary requirements
- Documents already submitted not properly recorded / accounted for
- Additional documents, if any not properly recorded / communicated to filer
- No acknowledgement of documents submitted

CHECKLIST OF REQUIRED DOCUMENTS FOR RETIREMENT CLAIM

PENSION

- | | |
|--|---|
|  Application for Retirement |  Should be duly accomplished by the member |
|  Original and photocopy of single savings account or Cash Card enrollment Form |  Passbook/ATM |
|  SSS Digitized ID or 2 Valid Ids at least one w/ photo & signature |  Member |
|  Certification of separation from last employer for members less than 65 years of age; or |  If certification portion of retirement application is not accomplished by last employer |
|  Certification of cessation of business or practice of profession is required; or |  For self-employed members less than 65 years old |
|  Affidavit of member that he has no more income from self-employment to be accompanied by a certification from the barangay captain |  For expanded, self-employed members, farmers and fishermen who are less 65 years old |
|  Affidavit of separation in the absence of employer's certification of separation |  If last employer no longer exist |
|  Affidavit Re: Guardianship of incompetent (CLB-1.1B), if member is incapacitated |  Should be accomplished by the spouse of the member |
|  Application for Representative Payee (CLD-15), if guardian of member is other than the spouse |  To be accomplished by the guardian of the member other than the spouse |
|  Guarantor's Form (BPN-107), if guardian of member is other than the spouse |  To be accomplished by a guarantor |
|  Supporting Documents | |

Transforming the Way of Paying Benefits

Filing of claim

DDRWF System

- ✓ Online document matrix
- ✓ Document compliance module

Advantages:

- Standardized requirements for each case type and case scenario
- List of documents submitted and/or still to be submitted are captured by the system
- With document compliance letter

Application Number : C06D90RT1609160001

Claim Type : RETIREMENT

Date of Contingency : 12/22/2014

This is in connection with your claim application.

Please be informed that we have received the following documents/:

- » RETIREMENT CLAIM APPLICATION (10/2008)/IF CERTIFICATION PORTION WAS NOT ACCOMPLISHED BY THE LAST EMPLOYER - CERTIFICATE OF SEPARATION FROM LAST EMPLOYER (FOR MEMBERS LESS THAN 65 YEARS OLD)/IN THE ABSENCE OF EMPLOYER'S CERTIFICATION OF SEPARATION OR IF LAST EMPLOYER NO LONGER EXISTS/IF MEMBER'S RESIDENCE IS FAR FROM THE ADDRESS OF THE LAST EMPLOYER - AFFIDAVIT OF SEPARATION (SSS FORM E-417)
- » SINGLE SAVINGS ACCOUNT OR CASH CARD ENROLLMENT FORM OR ATM CARD WITH INITIAL DEPOSIT SLIP (IF NAME IS NOT EMBOSSED IN ATM CARD)
- » SSS CARD OR 2 VALID IDS OF MEMBER BOTH WITH SIGNATURE AND AT LEAST ONE WITH PHOTO AND IF FILED BY A REPRESENTATIVE - 2 VALID IDS OF GUARDIAN/REPRESENTATIVE BOTH WITH SIGNATURE AND AT LEAST ONE WITH PHOTO
- » MEMBER/CLAIMANT PHOTO AND SIGNATURE CARD



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Transmission of Claim Records to Processing Center

Old System

✓ Hardcopies are sent by the branches to the Processing Centers thru courier or postal service

Issues and Concerns:

- Delays in transmission
- Possibility of loss/damage while in transit
- Incomplete transmission of records

DDRWF System

✓ Scanned images are uploaded thru file transfer

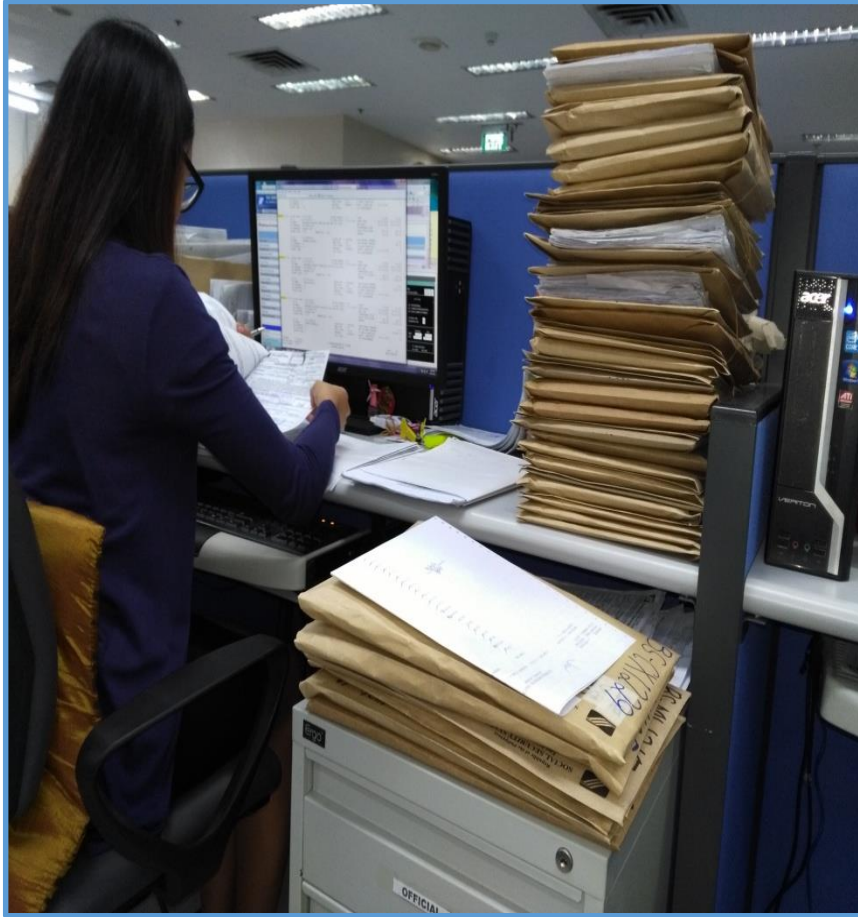
Advantages:

- Real-time transmission
- Paperless
- Secured against loss/damage
- Savings on postal / courier service



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Processing and Adjudication of Claims



Old System

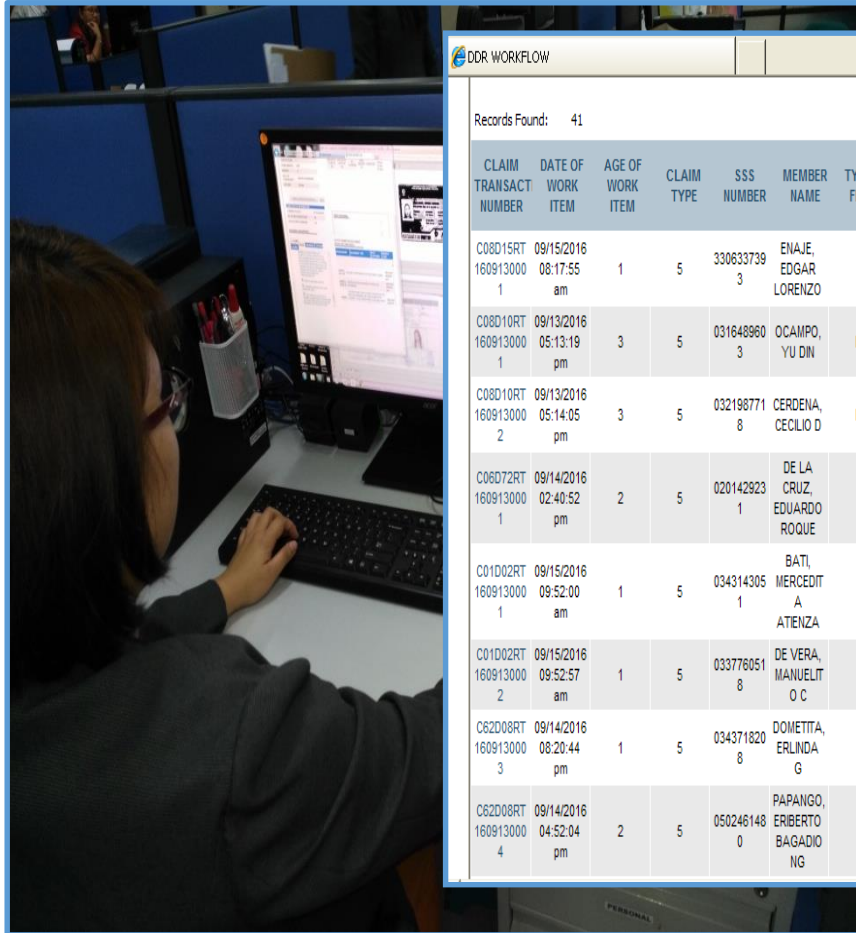
✓ Hardcopies of claim records are examined and evaluated

Issues and Concerns:

- Processor has to look on the claim record page by page
- Has the discretion to choose which claim to evaluate
- Decision / action taken are recorded only in the claim folder
- Hard copies of records piled up at the workstation
- Letters manually prepared and sent to branch/filer if additional documents are required

Transforming the Way of Paying Benefits

Processing and Adjudication of Claims



Records Found: 41

CLAIM TRANSPORT NUMBER	DATE OF WORK ITEM	AGE OF WORK ITEM	CLAIM TYPE	SSS NUMBER	MEMBER NAME	TYPE OF FILING	FILING DATE	FILING BRANCH	PRIORITY	STATUS	PROCESSOR	NO OF DOCS SCANNED	NO OF DAYS FROM FILING
C08D15RT 160913000 1	09/15/2016 08:17:55 am	1	5	330633739 3	ENAJE, EDGAR LORENZO	I	09/13/2016 08:37:09 am	C08	S	for Evaluation		5	3
C08D10RT 160913000 1	09/13/2016 05:13:19 pm	3	5	031648960 3	OCAMPO, YU DIN	R	09/13/2016 09:18:47 am	C08	S	for Evaluation		4	3
C08D10RT 160913000 2	09/13/2016 05:14:05 pm	3	5	032198771 8	CERDEÑA, CECILIO D	R	09/13/2016 09:28:16 am	C08	S	for Evaluation		6	3
C06D72RT 160913000 1	09/14/2016 02:40:52 pm	2	5	020142923 1	DE LA CRUZ, EDUARDO ROQUE	I	09/13/2016 09:46:03 am	C06	S	for Evaluation		3	3
C01D02RT 160913000 1	09/15/2016 09:52:00 am	1	5	034314305 1	BATI, MERCEDIT A ATENZA	I	09/13/2016 10:59:30 am	C01	S	for Evaluation		5	3
C01D02RT 160913000 2	09/15/2016 09:52:57 am	1	5	033776051 8	DE VERA, MANUELIT O C	I	09/13/2016 11:33:12 am	C01	S	for Evaluation		7	3
C62D08RT 160913000 3	09/14/2016 08:20:44 pm	1	5	034371820 8	DOMETTITA, ERLINDA G	I	09/13/2016 11:38:19 am	C62	S	for Evaluation		5	3
C62D08RT 160913000 4	09/14/2016 04:52:04 pm	2	5	050246148 0	PAPANGO, ERIBERTO BAGADIO NG	I	09/13/2016 11:44:04 am	C62	S	for Evaluation		8	3

Records of claim records
evaluated

Examined / evaluated
processor's Inbox on a
basis

Action taken on the claim
in the system and claim
is fully updated

Generated letter sent to
claimant with additional documents

are required, eventually thru
email/SMS



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Review and Payment of Claims

Old System

- ✓ Review based on hardcopy of Prooflist

Issues and Concerns:

- Review hardcopies of documents
- Batch review of claims
- Decision / Action taken recorded only in the claim folder

DDRWF System

- ✓ Review based on Online Prooflist

Advantage/s:

- Review scanned images of documents
- No need to await completion of batch review
- Decision / Action taken on claim captured by the system and claim status automatically updated



Transforming the Way of Paying Benefits

Release of Payment

Old System

- ✓ Thru checks
- ✓ Direct credit to filer's bank account

Issues and Concerns:

- Delays in delivery
- Loss of check in-transit
- Additional expenses

DDRWF System

- ✓ Thru checks
- ✓ Direct credit to filer's bank account
- ✓ Use of SSS UMID Card as ATM Card

Advantage/s:

- Real-time payment



Transforming the Way of Paying Benefits

Tracking of Claim Status

Old System

- ✓ Claim status was done manually

Issues and Concerns

- Only the initial status can be verified
- Status of in-process claim can be verified only through claim folder
- Verification can be done only at the branch / PRC where claim was filed/processed



SSS DDR WORKFLOW - CLAIM TRANSACTION HISTORY

CLAIM INFORMATION	
CLAIM TRANSACTION NUMBER	C08D19RT1809050002
SSS NUMBER	0904595598
MEMBER NAME	SAJULLA, DANILO R.
CLAIM TYPE	5
TYPE OF FILING	I
FILING BRANCH	C08
PRIORITY	S
DATE OF CONTINGENCY	2016-07-19 00:00:00.0
ENCODER	150231

CURRENT STATUS	PAID
NO. OF DAYS FROM FILING	10
EXCESS OVER STANDARDS	0

START TIME	END TIME	PROCESS	PROCESSOR	ACTION	TURN-AROUND TIME
09/15/2016 11:36:17 am		FINAL STATUS		PAID	
09/13/2016 11:50:32 am	09/15/2016 11:36:17 am	IDDRS ONLINE		PAID	1 days 23 hours 45 mins 45 secs
09/13/2016 11:50:30 am	09/13/2016 11:50:32 am	IDDRS ENCODING		Encoded in IDDRS	2 secs
09/10/2016 03:11:33 am	09/13/2016 11:50:30 am	EVALUATION	CORREA, IMEE ESQUIVEL - DILIMAN	For IDDRS Encoding	3 days 8 hours 38 mins 56 secs
09/09/2016 01:39:39 pm	09/10/2016 03:11:33 am	RC SCANNING	MALBATAAN, AILEEN TAPIA	COMPLETED	13 hours 31 mins 54 secs
09/09/2016 09:11:22 am	09/09/2016 01:39:39 pm	EVALUATION	CORREA, IMEE ESQUIVEL - DILIMAN	For Doc/Folder Correction	4 hours 28 mins 17 secs
09/08/2016 12:02:36 pm	09/09/2016 09:11:21 am	EVALUATION	ABELLA, NAMNAMA C.	CHANGED PRIORITY	2 days 21 hours 8 mins 45 secs
09/08/2016 11:45:22 am	09/08/2016 12:02:36 pm	RIMD SCANNING	BAG AO, CELSO MUNDAN	COMPLETED	17 mins 12 secs
09/08/2016 07:54:18 am	09/08/2016 11:45:21 am	RIMD SCANNING		Transfer to My Inbox	3 hours 51 mins 3 secs
09/05/2016 09:55:58 am	09/08/2016 07:54:18 am	RIMD SCANNING	CARIASO, EDEL TUMINEZ	REFERRED TO RIMS	21 hours 58 mins 20 secs
09/05/2016 09:55:57 am	09/09/2016 02:41:47 am	RC SCANNING	MALBATAAN, AILEEN TAPIA	COMPLETED	3 days 16 hours 45 mins 50 secs

Inquiry module

ent -
be done
er may be
tion history is
verifiable online



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Feedback Mechanism

Old System

- ✓ Feedback is customer driven, given only upon request

Issues and Concern/s:

- Filer not well-informed of claim status

DDRWF System

- ✓ Automated feedback mechanism

Advantage/s:

- Periodic notices to filer of claim status thru email / SMS



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Workload Management

Old System

- ✓ Workload assigned manually

Issues and Concerns:

- FIFO rule not strictly observed
- No systematic accounting and monitoring of input, output and pending workload
- Inequitable distribution of workload

DDRWF System

- ✓ Workload Balancing System

Advantages:

- System-assigned workload
- FIFO rule strictly observed
- Equitable distribution of workload
- Dashboard system to monitor inputs, output, productivity and pending workload



Transforming the Way of Paying Benefits

Archival of Documents

Old System

- ✓ Hardcopies of documents archived



DDRWF System

- ✓ Scanned images are stored in Automated Records Management System (ARMS)

Advantages:

- Fast and efficient retrieval of claim records
- Scanned images are archived in the SSS repository of documents

Transforming the Way of Paying Benefits

Application System

Old System

✓ Multiple application systems

Issues and Concerns:

- Not user-friendly
- Problems on interfaces / integration

DDRWF System

✓ Comprehensive integration of multiple systems

Advantages:

- User-friendly
- One look-and-feel



Transforming the Way of Paying Benefits

Reportorial Requirements

Old System

- ✓ Incomplete reports

Issues and Concerns:

- Transaction reports
- Not periodic, generation of report as requested by user

DDRWF System

- ✓ Reports module

Advantages:

- Transaction reports
- Management reports
- Regular / Periodic generation of reports



Next Steps...

- Expansion of workflow process to Sickness, Maternity, EC Medical and Funeral Benefits
- Ongoing ISO Certification for the DDR Workflow System in selected Branches and Processing Centers
- Ongoing process improvement through adoption and implementation of 'Service Quality Framework'
- Online linkages with other government agencies such as NSO / LCR





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End of presentation. Thank you.

