

Eccentex Customer Success

Eccentex HyperAutomation Cloud for Pension Funds

Compliance Enforced. Delays Eliminated.
Experts Empowered. Cost Efficiency at Scale.

Eccentex HyperAutomation Cloud is a purpose-built management platform designed to modernize legal procedure intensive pension fund operations.

It enables public retirement systems and employee retirement associations to achieve stronger compliance, higher operational efficiency, and sustainable cost savings at scale, as a recent implementation at a major pension fund, - serving nearly 200k members across multiple counties in the US - demonstrated.

[Learn more ▶](#)

This case study is written based on an independent governmental entity responsible for administering and managing retirement funds for county employees and public agencies ensuring pension benefits and related services for their members and beneficiaries.

Major Operational Challenges of Public Pension Funds

Public pension organizations operate under constant pressure where precision, compliance, and timely deliveries are critical. Statutory mandates, regulatory oversight, and legal scrutiny leave little tolerance for procedural errors. Even minor documentation gaps can trigger appeals, financial losses, or reputational risks. At the same time, pension processes - including disability retirement applications, appeals and writs, benefit determinations, and board reviews - are inherently complex processes, multi-staged and highly dependent on specialist expertise.

Industry sources consistently highlight the top 3 root causes of any major delays such as:

"Missing signatures remain a leading contributor to retirement processing delays."

- U.S. Office of Personnel Management

"Paper-based workflows and manual processing continue to hinder efficiency, particularly during peak demand periods."

- U.S. Government Accountability Office

"Public retirement systems frequently report disability application cycles extending well beyond one year due to procedural complexity and workload volume."

The pattern is clear. Manual, document-driven processes are no longer sustainable in compliance-intensive environments.

These challenges may lead to

Extended processing times

Processing delays often worsened by workforce reductions and related operational constraints, which contribute to larger backlogs and slower service deliveries.

Persistent backlogs

The number of work-items in the backlog keep growing especially for complex cases that cannot be handled automatically or require manual review.

Operational bottlenecks

The Social Security Fairness Act, - signed January 5, 2025 -, repealed the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO), triggering a surge in recalculation requests.

Rising labor costs

Pension administrations must retain skilled staff to manage retirement benefits, investment portfolios, compliance, actuarial work and complex technology. Higher wages and benefit expectations can inflate cost over time.

Member dissatisfaction

A recurring theme among members and retirees is the frustration caused by slow processing of benefits and responses, including retirement applications, recalculation requests and service calls.



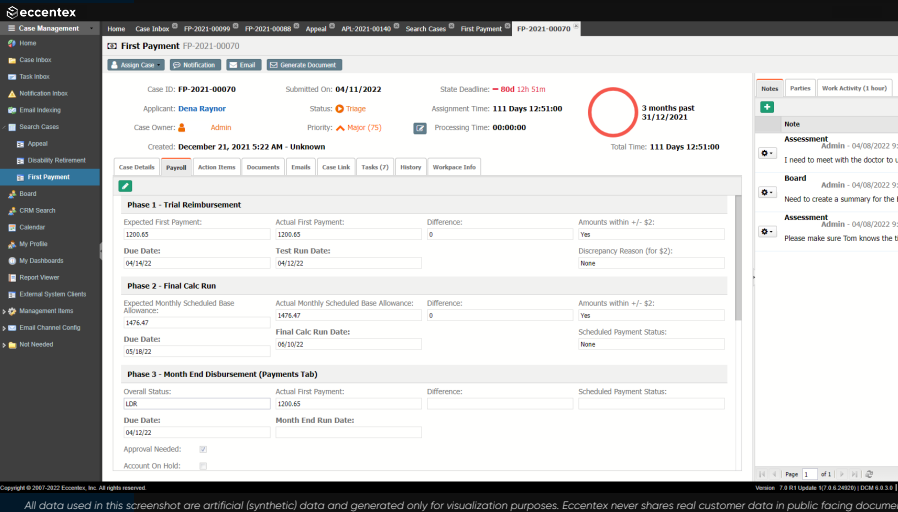
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Eccentex Core Capabilities Utilized by Pension Fund Management Organizations



- Dynamic Case Management for complex, non-linear processes
- Automated Document Generation with regulated formatting
- Processing of high-complexity Board and Committee Packets (Often containing 1000+ pages with legally regulated formatting)
- Automated Legal Notifications and Process-of-service Workflows
- Embedded Compliance Engine aligned to Statutes & Regulations
- Intelligent Case Routing and Dynamic Workload Balancing
- Support for sub-cases, linked cases, and multi-stage workflows
- Integrates with Self-service Portals (digital submissions & tracking)
- Real-time Operational Dashboards and Visibility of Performance
- Native Microsoft Power BI integration for Advanced Analytics
- Comprehensive Audit Trail and defensible documentation
- GenAI / Low-code / No-code visual configuration tools
- Secure API-based integrations with existing systems
- Enterprise-grade security, scalability, and high availability

Eccentex Strategic Value for Pension Fund Organizations

Substantial Risk Reduction

Compliance is systematically enforced, significantly lowers the likelihood of procedural errors, appeals, and adverse legal outcomes.

Sustainable Cost Efficiency

Organizations can transition from large specialist-heavy teams to leaner expert cores supported by generic case workers without sacrificing quality or control.

Faster Operational Outcomes

Case timelines are dramatically reduced, while document packages and board materials are generated in minutes rather than weeks.

Proven in Large-Scale Environments

Successfully selected and implemented by large public pension systems within the United States.

Long-Term Agility

GenAI / No-Code / Low-code system architecture enables rapid adaptation to regulatory changes and evolving business requirements with minimal / no IT support.

Typical Users of the Solution

- Member Services Advisors
- Disability Retirement Specialists
- Appeals and Writs Coordinators
- Board and Committee Administrators
- Legal and Compliance Officers
- Fund Members (via Self-service Portal)

What differentiates HyperAutomation Cloud

Generic workflow and BPM (Business Process Management) platforms are not designed for the legal rigor, procedural precision, and audit defensibility required in public pension administration.

Eccentex HyperAutomation Cloud is fundamentally different. It is purpose-built for statute-driven, court-like processes, embedding legal and regulatory obligations directly into the workflow execution.

In appeals' scenarios, the platform effectively functions as a Digital Clerk of the Court, ensuring procedural integrity at every steps.

This results in systematic compliance, operational reliability and defensibility that conventional solutions cannot easily replicate.

Primary Stakeholders of Pension Fund Operations

Director of Operations / COO

Focus: Cost per case, processing speed, backlog reduction, compliance exposure, member satisfaction, workforce productivity.

IT Director / CIO

Focus: Implementation efficiency, integration simplicity, reduced custom development, scalability, maintainability.

Chief Compliance Officer

Focus: Audit readiness, error reduction, regulatory adherence, defensibility of decisions and records.

ECCENTEX STRATEGIC VALUE AND KEY SOLUTION STAKEHOLDERS



Modernize Pension Fund Operations with Confidence

Discover how Eccentex HyperAutomation Cloud - trusted by leading pension organizations - transforms legally intensive workflows through embedded compliance, intelligent automation, and measurable performance gains. Visit eccentex.com to schedule a personalized demonstration.



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How Eccentex HyperAutomation Cloud Transforms Pension Operations

Eccentex HyperAutomation Cloud directly addresses all structural challenges by embedding compliance, automation, and operational intelligence into every cases and workflows.

Rather than replacing specialists, the platform augments expert decision-making by automating procedural enforcement and document validation. Built-in intelligence continuously evaluates case completeness, – verifying required documents, signatures, dates, diagnoses, and quality standards – while clearly identifying exceptions or missing elements.

This approach delivers measurable operational improvements such as:

- **Compliance by Design** – Statutory and regulatory requirements are enforced automatically
- **Delay Prevention** – Missing or incorrect inputs are detected early
- **Reduced Rework** – Errors are intercepted before advancing downstream
- **Expert Productivity** – Specialists focus on judgment-based decisions instead of manual verification
- **Accelerated Cycle Times** – Case processing timelines drop significantly
- **Optimized Staffing Models** – Lower dependency on scarce specialist resources
- **Audit-Ready Defensibility** – Enabling complete traceability of decisions and actions

The result is a more resilient, cost-efficient, and defensible pension operation.

Eccentex HyperAutomation Cloud – Additional Platform Capabilities

Dynamic Case Management

Eccentex HyperAutomation Cloud (HAC) comes with a full-scale Dynamic Case Management solution to enable organizations to define, automate, and optimize complex business processes.

Advanced Email Automation

HAC comes with a built-in enterprise-grade email management feature that brings advanced capabilities like email preview, email parking and related workflow automation. The platform offers multiple AI productivity features like Auto-Response, Auto-Classification, Auto-Summary, Sentiment and Intent Analytics, Email to Case and Case to Email creation features.

Intelligent Work Automation

Eccentex Intelligent Work Automation is tightly integrated with Eccentex Dynamic Case Management and can be effortlessly connected to any 3rd party source systems to capture, classify, prioritize and distribute all type of works across all available resources. The solution seamlessly integrates with existing enterprise systems such as ERP, BPM, CRM, Workflow or any custom / legacy solutions, to establish a unified global work queue that can be prioritized through dynamic Business Rules.

Business Intelligence

Eccentex HAC comes with an enterprise grade BI toolkit, including a comprehensive set of pre-built reports, dashboards, event-triggers, various visualization and data aggregation capabilities across the entire member journey.

Smart Document Handling

Eccentex HyperAutomation Cloud is equipped with an embedded Document Management and Intelligent Document Processing engine that can handle all case or work-item related documents. It can capture, analyze, validate, digitize and process documents based on their content regardless from their source or original format. When the data confidence is low the system exposes a Human Verification Station for Human Assisted quality checking.

AI Assisted Knowledge Base

Eccentex HAC comes with a full-blown Knowledge Management System that supports knowledge capturing, knowledge surfacing, enterprise level knowledge sharing and administration. The Knowledge Base subsystem is tightly connected to all other HAC products and features on platform level that enables a data aggregation. It ensures the single point of true, while allowing automated knowledge updates, quality and consistency checking as well as community-driven joint knowledge gathering.

Eccentex AI Services

The HAC platform can orchestrate best of breed AI services across any cloud to automate and enhance productivity, efficiency as well as customer and employee experiences. The platform embed AI automation in every business steps. It can off-load repetitive, boring admin work from valued team members while closing compliance gaps and minimizing the chance of human errors.

GenAI / Low-Code / No-Code Development Tools

HAC allows the business to design, develop and deploy their own solutions, or adjust their business processes without IT involvement. You can leverage the citizen developers or knowledge workers to capture and replicate best practices in every steps.

Platform-level Open APIs

HAC integrates with any legacy, homegrown or 3rd party source systems effortlessly through standard APIs, captures and exposes data securely and consistently between systems. It allows customer 360 views across all interactions and manages event triggers across the customer engagement ecosystem.

Vertical Templates and Accelerators

Application Development does not need to start from greenfield. You can leverage industry specific pre-built use cases to modernize, automate and enhance your business based on reusable vertical templates built on decade long collection of global best practices.

Flexible Delivery & Lifecycle Support

HAC supports public or private cloud-hosting, hybrid or on-premise deployments. Eccentex HyperAutomation as a Service (Haas) offer includes design, deployment, operation and maintenance. Services for organizations of all sizes. It allows you to adopt business automation without large upfront investments.