



PegaWorld

JUNE 7-9 | LAS VEGAS

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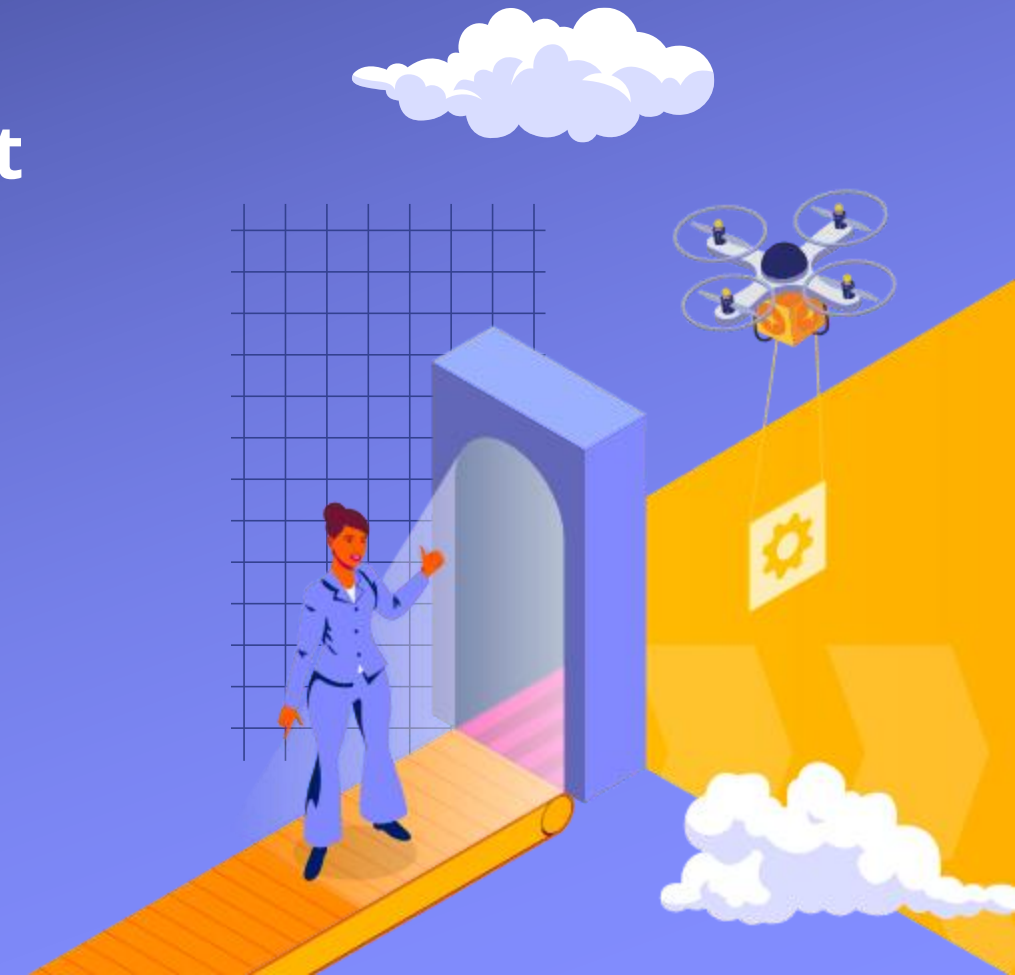
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PEGAWORLD 2026 | BREAKOUT SESSION

Transforming Back Office Operations at Blue Shield of California with Pega

From Fragmented Work to Intelligent Workflow Orchestration

Presented by
Rija Pagarkar
Blue Shield of California



Presenting today...



Rija Pagarkar

Product Management Leader, Platform Strategy & Operations
Blue Shield of California

Areas of Focus

- Pega-based back-office workflow design
- Operational transformation and case management
- Integration with enterprise systems (Facets, Pega Customer Service)
- Driving AI and automation into operations

BSC background

Blue Shield of California

- Independent member of the *Blue Cross Blue Shield Association*
- Nonprofit health plan *founded in 1939*, headquartered in Oakland, CA
- *Serving 4.8 million members* across California
- Committed to *digital transformation, innovation, and member-centric care*
- Key technology partners: *Pega, Genesys, Salesforce, AWS*



Mission: Ensure all Californians have access to high-quality healthcare at an affordable price

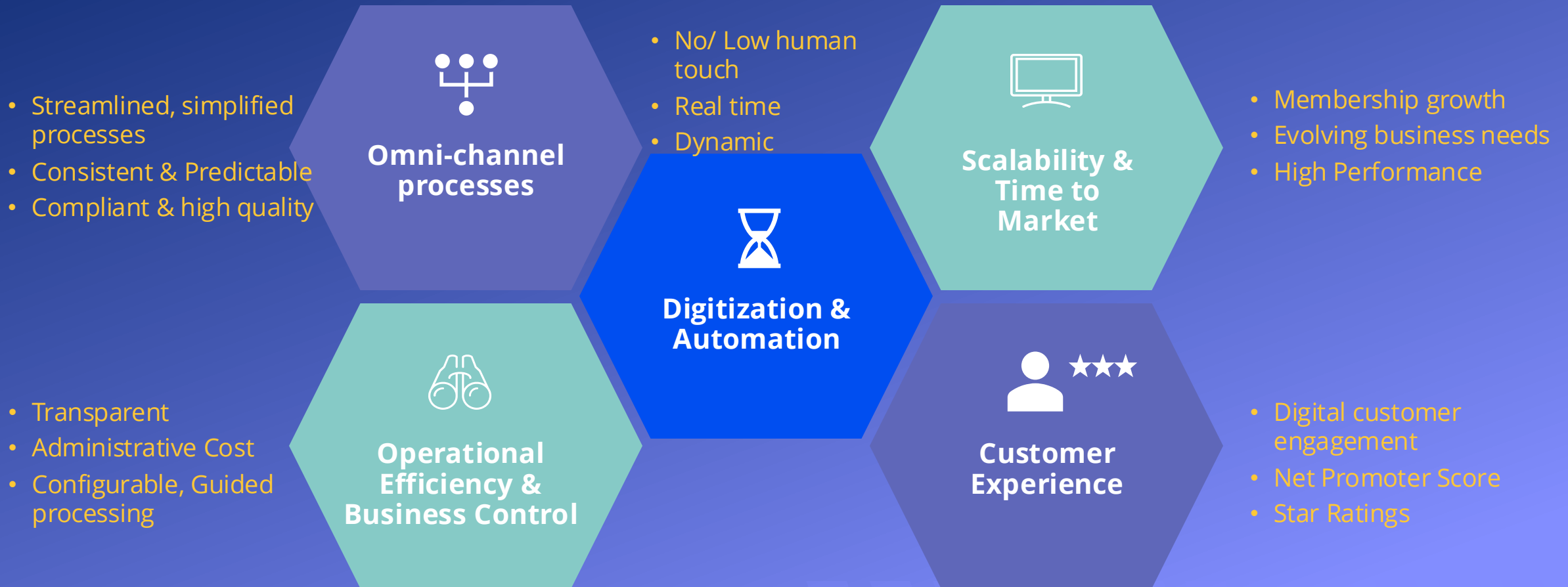
Medicare Enrollment Automation

Digitizing the Medicare Enrollment Journey



Medicare Enrollment Automation - Guiding Principles

Scalable, omni-channel platform that provides digital enrollment experience



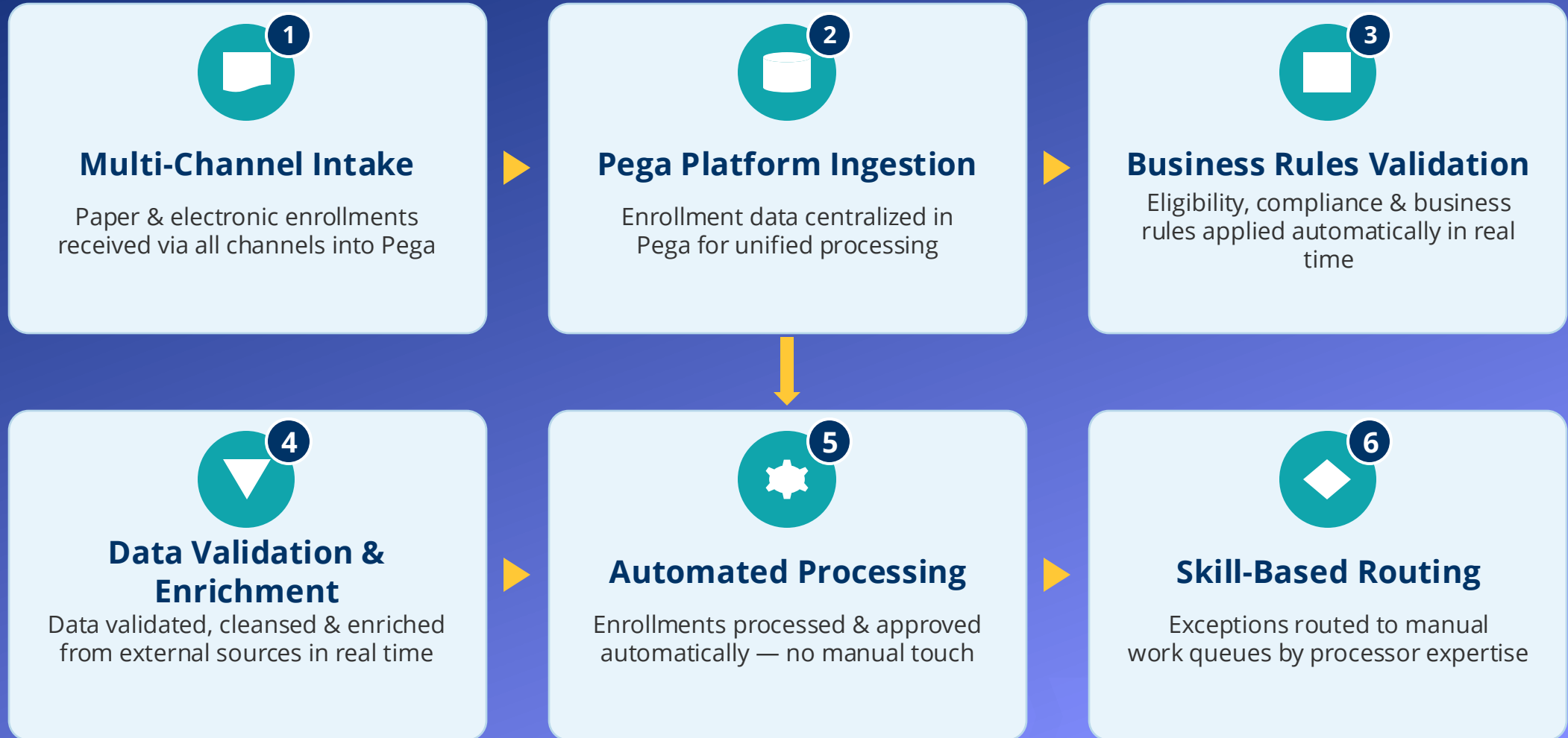
Medicare Enrollment (Previous Process)

End-to-end manual workflow before automation



Medicare Enrollment (Now)

Pega-driven automated enrollment with real-time processing and intelligent routing

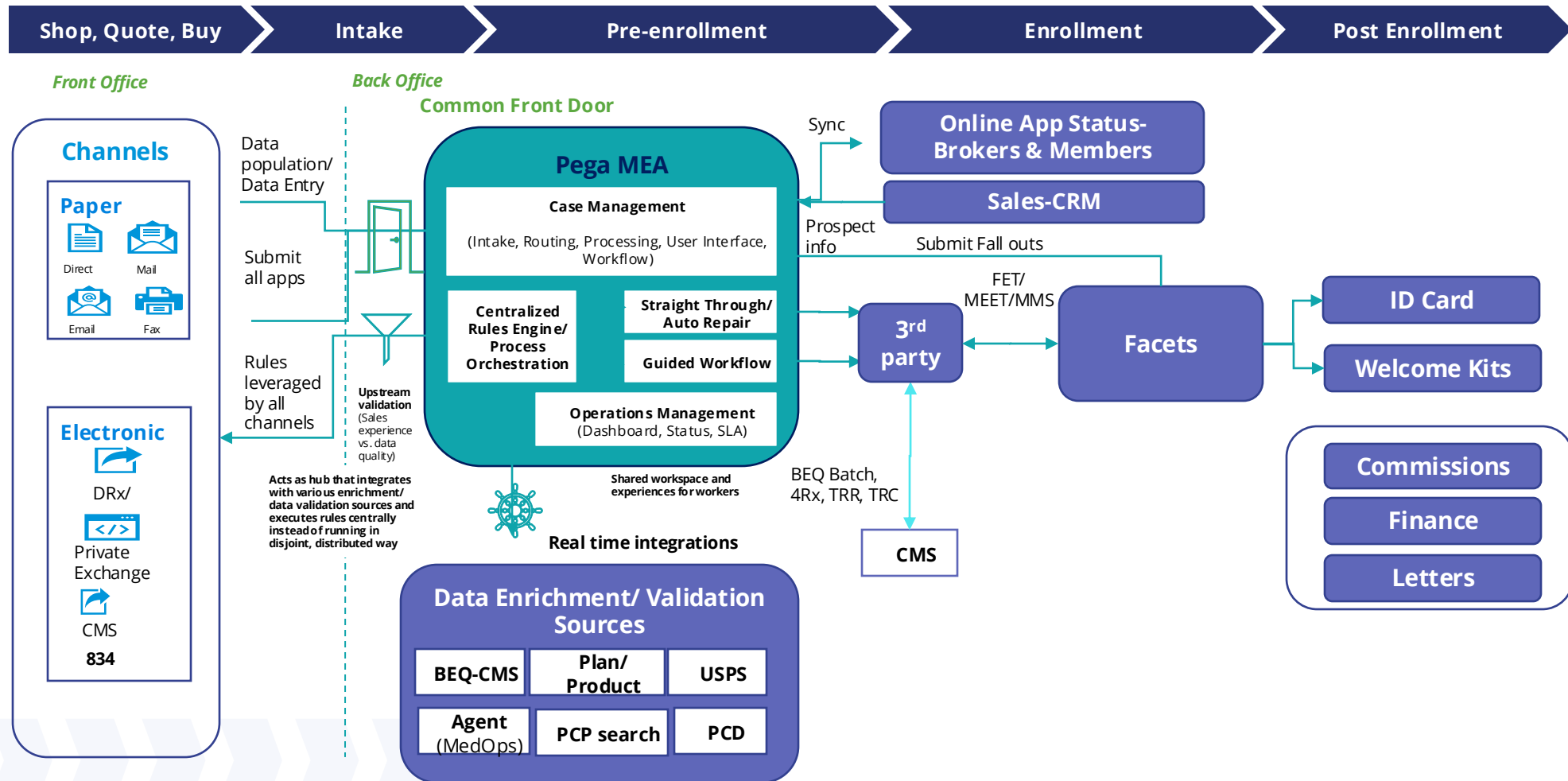


Medicare Enrollment-Solution Context

An Omni-Channel, scalable and centralized enrollment processing platform

Solution Highlights

- Centralized business rules and validation to ensure maintainability
- Straight Through Processing
- Automated Exception handling and advanced case management
- Leverages existing strategic investments
- Utilizes real-time government services
- Handoffs reduced and eliminated
- Complexity of processes are reduced



Inventory Workflow Management

Transforming Email Inventory Management



Email Inventory Solution Architecture (Now)



Automated Email Intake

Pega-IWM receives emails from members, employers, brokers, and partners, eliminating manual Outlook processing and creating cases automatically

Intelligent Routing Engine

System automatically routes cases to work baskets using skill-based algorithms

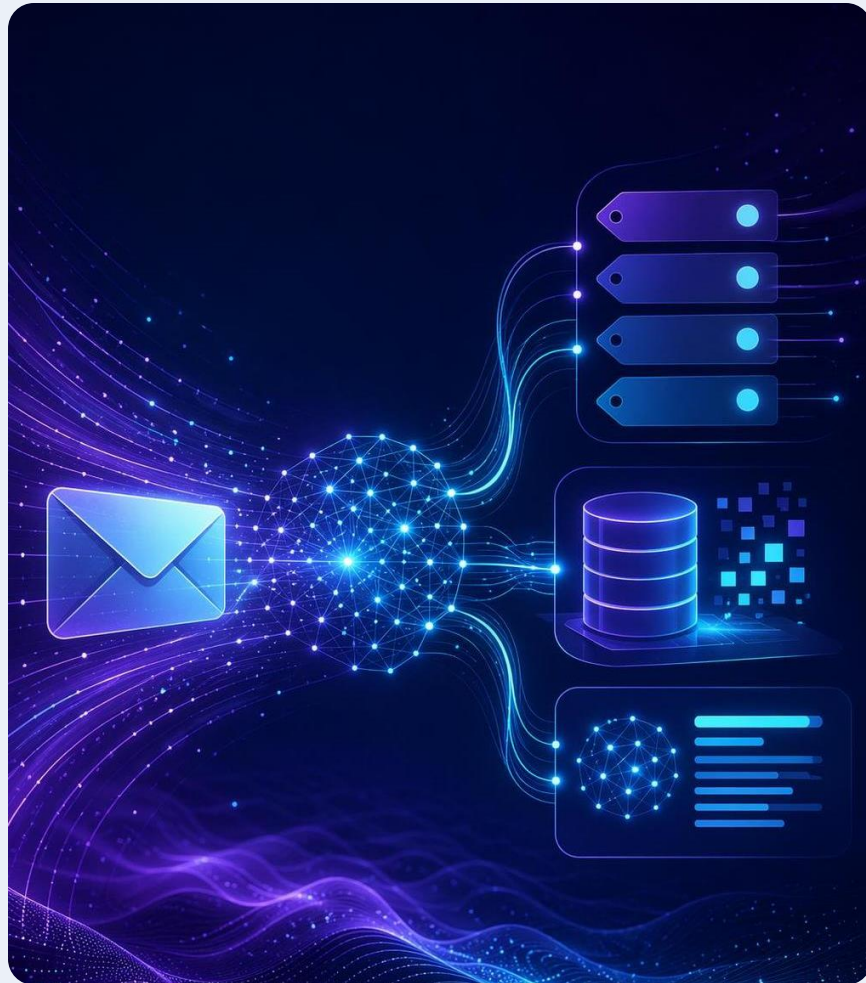
Facets Integration

Real-time integration enables automatic data population & validation

Audit Trail Capability

Complete transparency with timestamps, status changes, and processor actions recorded automatically

Email Inventory Solution (In Progress)



Zero email routing delays · Instant updates in Facets

Gen AI Email Classification

AI-powered classification automatically categorizes incoming emails by type, urgency, and required action

Automatic Updates in Facets

Classified emails trigger automated data population and validation in Facets

AI Summarization for Manual Review

Complex or multi-topic emails receive AI-generated summaries highlighting key actions

Exception Handling

Intelligent exception routing flags edge cases and anomalies for human review, with AI-recommended resolution paths

Internal Teams Self-Service Portal (Next)



Zero email routing delays · Instant updates in Facets

Dedicated Self-Service Access

Internal BSC teams access a dedicated, fully automated portal—eliminating email requests entirely

Request Type Configuration

Users select from predefined types including enrollment changes and billing inquiries

Real-Time Status Visibility

Stakeholders track request status and receive notifications without contacting the I&B team

What's Next: AI-Enabled Back Office

From workflow orchestration to intelligent, predictive operations

NOW

Pega Workflow Orchestration

NEXT

GenAI in Back Office Workflows

FUTURE

Predictive & Closed-Loop Operations

Where We Are

- Workflows orchestrated on Pega
- Standardized case design
- Real-time visibility
- Cross-team SLA management

AI Integration

- Intelligent triage and prioritization
- Auto-drafted responses (GenAI)
- Predictive case assignment
- Knowledge buddy embedded in back office

Closed-Loop Operations

- Predictive workload forecasting
- Continuous workflow optimization
- Connected front + back office (with BlueIQ)
- Self-healing operations

Thank you!

Q & A



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