PERA Board of Trustees Meeting

Modernization Update

August 2022
At the May board meeting we were asked to address two items:

1. Provide more information on the return on investment for our modernization effort
   - Technology Obsolescence
   - Benefits to our members, employers and staff

2. Include mobile capabilities on our roadmap
<table>
<thead>
<tr>
<th>Capabilities</th>
<th>Member Experience</th>
<th>Employer Experience</th>
<th>Operational Efficiency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eliminate obsolete technology that has created operational, security and support risks</td>
<td></td>
<td></td>
<td>✓</td>
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<tr>
<td>Substantially increase self-service capabilities for members and personalize the service to the member situation</td>
<td>✔</td>
<td></td>
<td>✓</td>
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<td>Enhance member and employer service interactions to improve and speed up service</td>
<td>✔</td>
<td>✔</td>
<td>✓</td>
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<tr>
<td>Apply automation to routine service activities to increase operational efficiency</td>
<td></td>
<td></td>
<td>✓</td>
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<td>Automate and simplify the applications process including e-signature capability</td>
<td>✔</td>
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<td>Redesign payments functionality to improve the process of establishing and adjusting member payments</td>
<td>✔</td>
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<td>Create a 360-degree view of the stakeholder for easy access to information, track call topics, call notes and communications</td>
<td>✔</td>
<td>✔</td>
<td>✓</td>
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<td>Provide advanced call center capabilities to better serve the member including interactive voice response, caller authentication, virtual hold, chat, integrated messaging and speech analytics</td>
<td>✔</td>
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<td>✓</td>
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</table>
Eliminate obsolete technology that has created operational, security and support risks

Our programming language dates back to the 1970s for the Apple computer and became obsolete in 2002.

We are required to maintain older unsupported versions of desktop and server operating systems creating operational risk.

Maintaining currency with security updates is difficult or impossible creating cyber security risk.

Building modern software that meets our business needs is not possible.
Chat Bots and interactive voice response enable members to get routine questions answered quickly and easily.

Live chat from myPERA with a customer service representative.

Simple on-line application process with e-signature, status tracking, and secure communication for refunds, benefits, etc.

24x7 service for basic transactions like direct deposit, tax withholding, PERA ID#, 1099R, password reset, etc.
Virtual hold allows a callers “place in line” to be reserved. When it’s their turn in queue, the caller receives a call from the system and is connected to a representative.

Post call surveys capture the member experience. Providing PERA a NPS (net promoter score)

Confirmation text messages providing status updates i.e. receipt of an application, refund request or confirmation of scheduled consult.

Integrated member experience regardless of contact method.
Redesigned ERIS Employer Portal - Highlights

- User-centered website with dashboard view, report tracking, admin tools and learning modules
- Seamlessly send & track payments within PERA’s system instead of using external banking website
- Single point of access to share files, exchange private data and communicate securely.
- Added controls to validate data in real-time to identify errors and ensure data integrity
Integration across platforms makes information readily available to PERA staff and improves service quality to members and employers.

Modern OCR technology will make document access faster and more accurate by reducing manual keying.

Responsive system with standard programming results in faster development of new modules and elimination of workarounds.

Automated and ad hoc performance measurement reports and queries for data analysis.
Will we have an application for mobile devices? **Yes.**

**Desktop PC**
- 22 inch screen

**Android Tablet**
- 10 inch screen

**Samsung Galaxy**
- 6 inch screen

Tablet is turned horizontally so the user scrolls down to see all details.