

CASE STUDY: How Oregon PERS Modernized Their Online Member Service (OMS) Portal

For some retirement systems, a complete redesign of the existing Online Member Service (OMS) portal may be necessary. Such projects are time-consuming, costly, and require enormous effort from the staff. Other priorities might require staff time and energy to be spent elsewhere, such as implementing urgent operational and legislative mandates. Meanwhile, the existing portal's lifespan needs to be extended to keep it current, drive member engagement, make it efficient, increase retention rates, and enhance security. Provaliant Business Solutions helped Oregon Public Employees' Retirement System (OPERS) with an innovative solution to this problem.

The Solution

Provaliant's solution is based on a deep understanding of users (e.g., members, retirees), what they need, what they value, their abilities, and their limitations. In addition, the solution addresses the business objectives and prevalent cybersecurity threats. The keys to the solution are:

- **Upgraded Technical Stack:** Replace end-of-life libraries such as Struts, and upgrade third party libraries.
- **Reduced Complexity:** Keep functionality change to a minimum or none.
- **Stronger Security:** Enhance security protections to comply with current cybersecurity standards.
- **Enhanced User Experience:** with member-focused, modern visual design, which includes easier navigation pattern, typography that is easy on the eyes, placement of UI (User Interface) widgets where the users expect it and branding.
- **Device and Browser Independence:** Enhance the UI layer with modern browser standards to make self-service portals accessible from any device and browser.



CSS3 and HTML5
(Common Theme & Branding)

OMS

EDX

TPA

Separate Self-Service Portals

Based on these keys, the solution is to separate the Online Member Services (OMS), Employer Data eXchange (EDX), and Third-Party Administrators (TPA) portals, thereby reducing the interdependencies and creating the opportunity for each one to be independently modernized and enhanced. A major part of the UI upgrade includes achieving browser and device independence using semantic tags of HTML5, CSS3 and modern UI standards. This is achieved through creating a unified UI bundle that is easy to maintain and update. It provides a common place to control UI styles uniformly across the portal.

"The updated PERS OMS pages look great! Much easier to read than the previous version. Especially love the "tell me more" text at the bottom of the pages. Very handy!" – From a PERS member

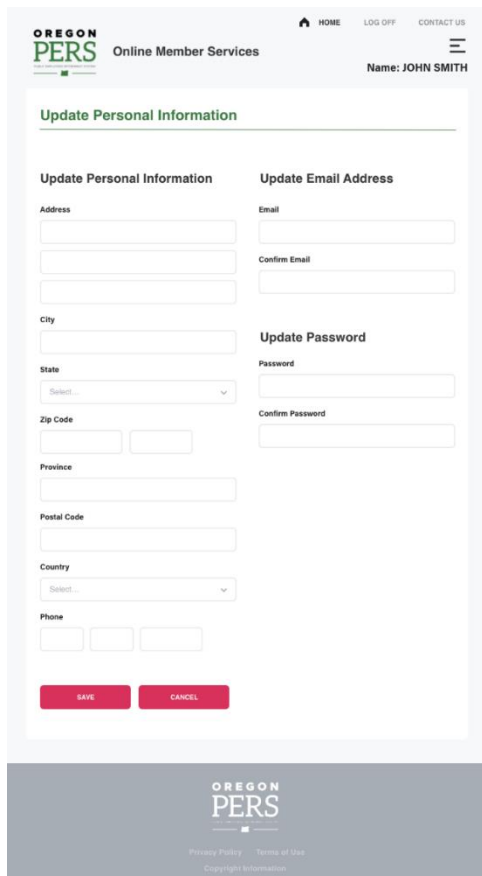
The Benefits

- 1. Minimum to No Changes to Business Functions:** UI modernization supports existing business functions.
- 2. Short Development Lifecycle:** Incremental releases provide rapid results.
- 3. Cost Savings:** Easy to maintain in-house (upgrade/evolve the UI bundle and UI technology change), saving costs.
- 4. Security:** Strict adherence to NIST & State Cyber Security framework is enforced throughout the software lifecycle to reduce the security risks. Static Application Security Testing and Dynamic Application Security Testing are incorporated in the DevOps process, and automated with Continuous Integration (CI)/ Continuous Deployment (CD) pipelines.
- 5. Modern Architecture:** Composable APIs work with traditional systems and modern applications.
- 6. Usability:** Built in “tell me more” sections enhanced usability.

BEFORE



AFTER



Mobile View

Tablet View

