Information Protection & Security State of Arizona–Retirement System

Change Request

November 17, 2021

ARIZONA STATE
RETIREMENT SYSTEM

Your money. Your future. Secure for your lifetime.

Agency Mission
Providing retirement & other benefits to Arizona public servants.

Agency Vision
For the benefit of our members, the Arizona State Retirement System will be a leading state benefit plan administrator in the areas of: Core Member Services, Investment Performance, Funded Status & Operational Effectiveness. This will be accomplished while keeping program benefits & associated costs relatively aligned, maintaining actuarial & fiscal integrity.
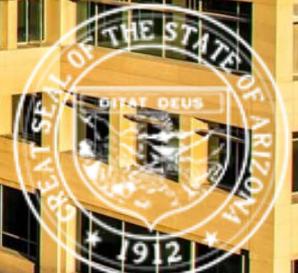
Project Team Introduction

ARIZONA
DEPARTMENT OF ADMINISTRATION
TECHNOLOGY

Roles Present at ITAC

- Mark Muraoka – ASRS Senior Project Manager/Business Analyst

- Trent Kendall – ASRS Application Development Program Manager

- Dave King – ASRS Chief Information Officer & Assistant Director

Project Introduction

Date/high-level overview of the approved original project investment justification (PIJ):

In December of 2018, ADOA ASET approved the original project investment justification (PIJ) to procure the Information Protection and Security solution.

This solution:
- *Reduces access to PII and adds access logging; lowering the ASRS risk of internal fraud*
- *Secures member PII by eliminating SSN as the main identifier in multiple software systems*
- *Logging solution will provide forensic data in the case of a breach*
- *Improved compliance with GAPP (Generally Accepted Privacy Principles)*

The original PIJ spanned November 2019 through June 2024 and a total project budget of $3,071,068.97

Project Change Request Overview

What in the PIJ is changing?:

☒ Scope

        ○ Adding Automation of Transactional Surveys

We are not requesting additional budget or time.

What initiated this change?:

- Phase 5 was estimated to begin in 2023 and would remove the SSN request from the incoming phone call system.
- Due to the requirement for State Agencies to migrate to the Genesys call center application, ASRS used this opportunity to achieve the primary purpose of Phase 5, while completing the migration from Finesse to Genesys.
- Recently, ASRS learned that Genesys does not support the same satisfaction survey functionality that we currently have with Finesse. While discussing options, we learned that the requirement to survey callers directly after the call has changed and the ASRS' preference is to send the demographic data to Qualtrics so they can survey callers sometime after the call is wrapped up.

Revised Project Scope

Identify any change in scope and possible benefits:

To replace the current functionality of offering satisfaction surveys immediately after completing a call, our request is to increase the scope of IPS to automate the collection and delivery of demographic data for calls and 11 other distinct transactions. The data will be sent to Qualtrics, with whom the ASRS has an existing relationship for survey administration.

The benefits are:

- Replace the current after call survey functionality with a solution that will increase our standing when compared to our peers in the pension benefit industry (CEM Score)
- Increased frequency of data for survey samples
- Automated solution will replace the current manual process
- Consolidate phone call satisfaction surveys with existing surveys within Qualtrics
- Establish architecture which will allow ASRS to expand our satisfaction survey capabilities in the future

Q & A
Session