Firefighters' and Rescue Squad Workers' Pension Fund Advisory Panel

June 2016

ORBIT Project Review

David Starling and Linda Enderlin

North Carolina
Total Retirement Plans

Status of Work in Progress

	Approved Requirements	BA Require-ments	BA Test Case Draft	Comm Text Review	IT Design	IT Develop-ment	Unit Testing	In Product-ion
1	Member Self-Service	100%	100%	**100%**	75%	0%	0%	
2	Enrollment	100%	100%	**100%**	10%	0%	0%	
3	Maintain Agency	100%	**100%**	N/A	100%	**100%**	**100%**	**May 2016**
4	Maintain EFT	100%	**100%**	**100%**	100%	0%	0%	
5	Maintain Agency Contact Info - SS	100%	100%	N/A	100%	10%	0%	
6	Roster Load Process	100%	**100%**	N/A	0%	0%	0%	
7	Process Contributions (TAD)	100%	**100%**	**100%**	0%	0%	0%	
8	Join/Add Existing Pension Fund Member	100%	0%	N/A	0%	0%	0%	
9	Roster Look-Up Screen SS	100%	100%	N/A	0%	0%	0%	
10	Process Contribution History Screen	**100%**	0%	N/A	0%	0%	0%	
	Percentage Complete June 2015	**38%**	**19%**	**4%**	**17%**	**1%**	**0%**	
	If we had 23 processes	**43%**	**35%**	**17%**	**17%**	**4%**	**4%**	
	Overall Completion June 2016 Now have 17 processes	**59%**	**47%**	**24%**	**23%**	**6%**	**6%**	

Remaining Function Requirements

11	Fully Credited Service Process
12	Roster Service Audit
13	Service Audit/Contribution Audit
14	Retirement
15	Service Purchase
16	Leave of Absence Screen
17	Member Self Service Process Contributions

Making Progress

- **ORBIT Self Service**
  - **New Look**
    - Visually more appealing
    - Responsive Design – meaning it can be viewed on any device without scrolling

  - **Security**
    - E-mail address will be required before being allowed to access the ORBIT environment

    - For certain changes in ORBIT, members will get a verification email requiring that they click on the link for the change to take place

    - User will need to go through verification steps to reset login and password

Making Progress

- **ORBIT Self Service**
  - **The Foundation**
    - Design and build the new architecture necessary for the increased security and the new look

    - Software upgrades necessary to support the new architecture necessary for the increased security and the new look

    - Working with a User Interface developer to design the new look and feel of the self service screens

Issues and Constraints

- **Resource Constraints Due to Competing Projects**
    - Pension Spiking
    - Applying for Retirement Online
    - Workflow

- **Operational Priorities Competing for Resources**
    - Year-end Reconciliation
    - 1099s
    - Annual Benefit Statement
    - Public Data
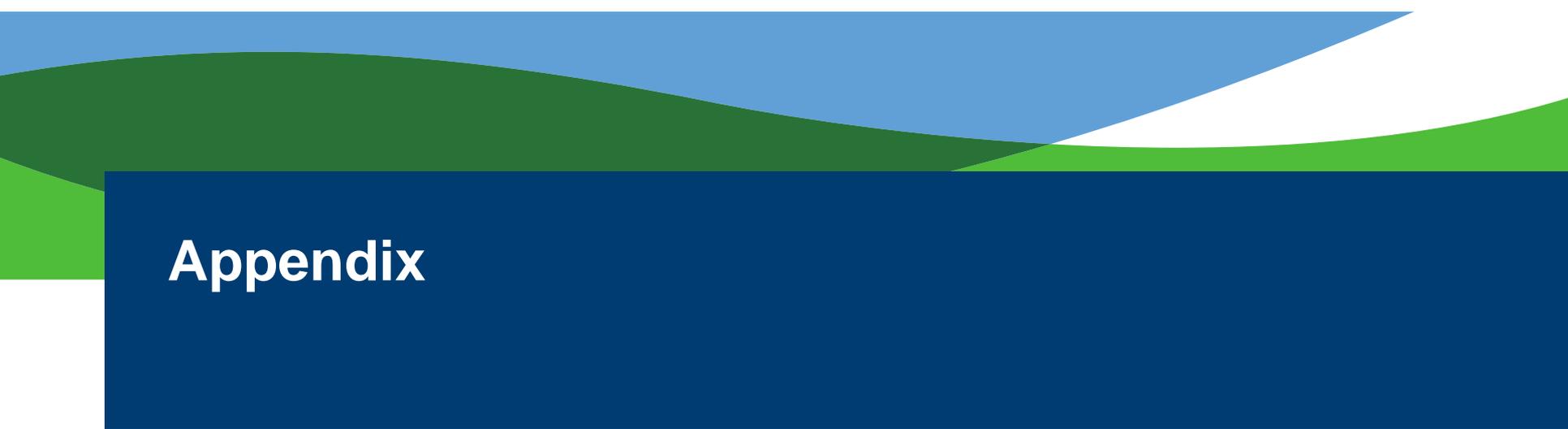
Appendix

17 Functions

- **Member Self Service:** A screen within ORBIT Self Service that is geared to be more specific to the member's membership and/or retirement account(s). If the member has more than one membership account (example TSERS and Fire & Rescue Pension Fund) they will select which account they want to view. If the member only has one membership or retirement account,
they will be directed to that account. Members with Fire & Rescue Pension Fund accounts will see data specific to that account

- **Enrollment:** A screen within ORBIT for Fire & Rescue Analyst to process new member enrollments. The screen will include checks to ensure that the applicant has included proof of age 18 or older and proof of social security number. If data is missing from the application, a letter will automatically be sent to the applicant informing them of what is missing along with a new form to complete

17 Functions

- **Maintain Agency Contact Info:** A screen within ORBIT Self Service for Agencies to provide and update agency contact information. Agencies can elect the type of notifications that they want to receive from our office

- **Maintain Agency:** A screen within ORBIT. Contact information provided and updated within the Maintain Agency Contact Info screen will also be populated within this screen. Fire & Rescue Analyst will use this screen to identify contacts when verification is needed

- **Maintain EFT:** A screen within ORBIT Self Service. We are replacing the TAD with an online TAD that we are calling the Process Contribution Screen. Once you start using the Process Contribution Screen, you will no longer send in a check for payment of contributions. We will draw the money from your bank account through an Electronic Funds Transfer (EFT). The Maintain EFT Screen is a new screen within ORBIT Self Service that Agencies will use to establish their Electronic Funds Transfer. Agencies will access the screen and provide bank data i.e. bank account and routing number

17 Functions

- **Roster Load Process:** A process performed by our IT department. We are adding edit checks to the process to ensure that member roster record data is complete. An example is Social Security numbers, there must be 9 digits and digits only. If a roster does not pass the edit checks, it will be rejected and we will request a corrected roster

- **Process Contribution Screen (TAD):** A screen within ORBIT Self Service. This is replacing the turn around document. Agencies will access the Process Contribution Screen and indicate the amount of contributions being submitted for each member. The screen will have a running tally as contributions are indicated. Once completed the user will indicate the bank account for the Electronic Funds Transfer and Submit for processing

- **Process Contribution Screen History:** A screen within ORBIT Self Service. This screen will have a list in chronological order of all Contributions that the Agency submitted. An Agency can access the screen and view the details of what they submitted

17 Functions

- **Join/Add Existing Pension Fund Member:** A screen within ORBIT Self Service. Agencies will use this screen to add members to their Process Contribution Screen. Once a member is added through this screen they will appear on the Agencies Process Contribution Screen the next time that they access the screen

- **Roster Look-Up Screen:** A screen within ORBIT Self Service. Agencies will use this screen to view member Roster data

- **Fully Credited Service Process:** A process within ORBIT where we match the Roster service and contributions received to grant fully credited service for each member. This will provide members with accurate account information when they log into ORBIT Self Service

- **Roster Service Audit:** A screen within ORBIT for Fire & Rescue Analyst to review and perform a service audit for a member and make any necessary Roster corrections

17 Functions

- **Service Audit/Contribution Audit:** A screen within ORBIT for Fire & Rescue Analyst to review and perform a member contribution audit and verify years of contributions paid

- **Retirement:** A screen within ORBIT for Fire & Rescue Analyst to process Fire & Rescue Pension Fund retirements. The screen will be designed to help with date of birth and social security number verification

- **Service Purchase:** A screen within ORBIT for Fire & Rescue Analyst to process Fire & Rescue Pension Fund prior service and contributions. The new screen will be more robust to enhance the turn around time to process service purchases

- **Place Member on LOA:** A screen within ORBIT for Fire & Rescue Analyst to process Fire & Rescue Pension Fund Leave of Absence for Military. The purpose of this screen is to ensure that the member is kept active within the Fire & Rescue Pension fund

17 Functions

- **Member Self Service Process Contributions:** A screen within ORBIT Self Service for members who do not pay contributions through an agency to process their contributions

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Thank you