



North Carolina



Retirement Systems Division

Online
Retirement
Benefits through
Integrated
Technology



Welcome to the...

**2007 ORBIT Information
Session
for Employer Partners**

**Presented by the
North Carolina
Department of State
Treasurer
Retirement Systems
Division**



Agenda

- 9:30 am** **Welcome and Session Review**
Kristen Bierline, Retirement Systems Division ORBIT Team
- 9:35 am** **ORBIT in Review**
David Starling, Retirement Systems Division ORBIT Team
- 10 am** **Active Member Rollout, Employer Reporting,
and their Impact on You**
Roscoe Perry, Retirement Systems Division ORBIT Team
- 10:30 am** **Questions and Answers**
ORBIT Team
- 11:20 am** **Closing Remarks**



Retirement System Mission & Vision:

Mission:

To provide competitive and secure retirement benefits in a customer focused, timely and accurate manner.

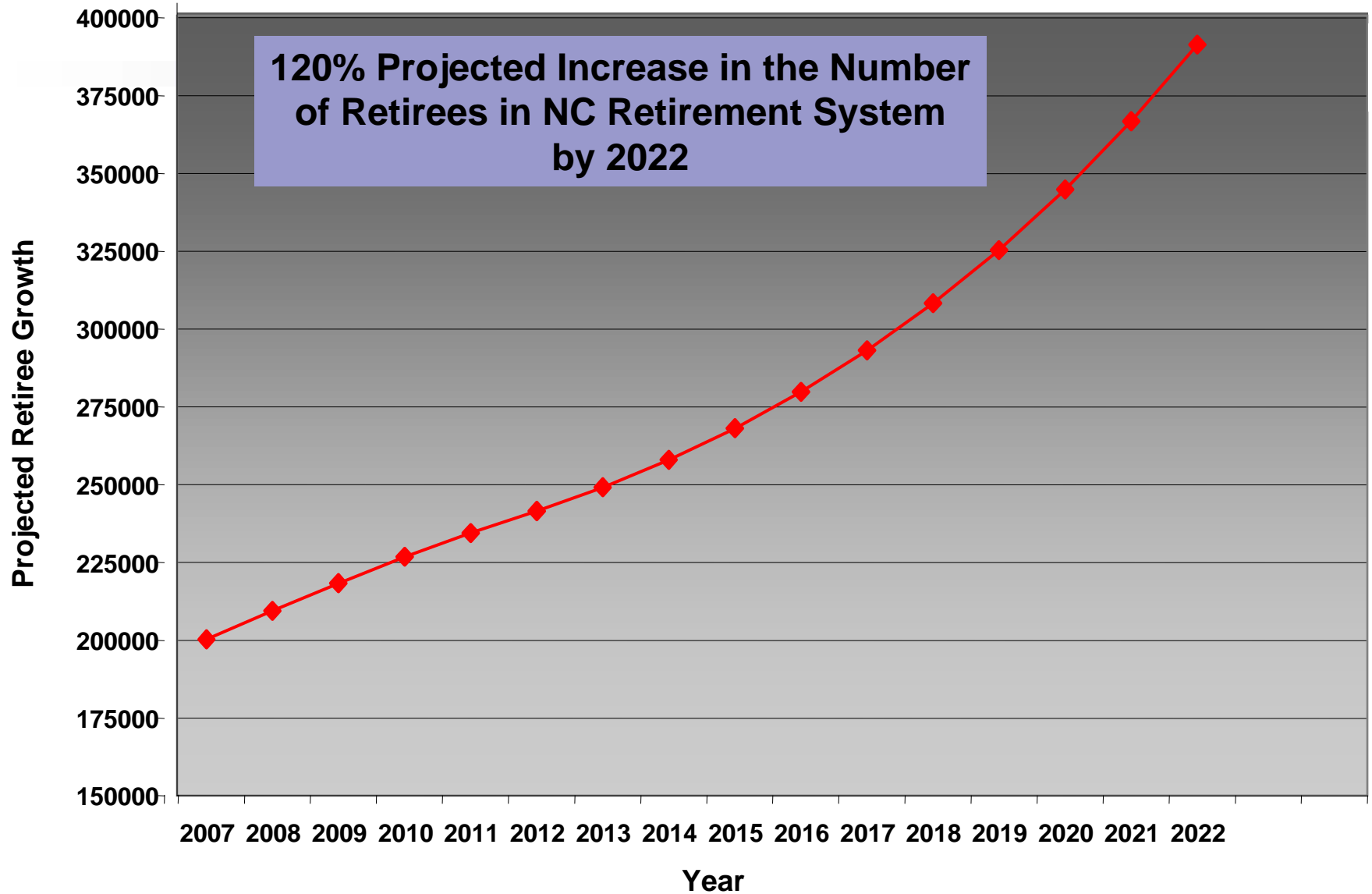
Vision:

To be a national model in retirement benefits and service.

Strength of the NC Retirement System

- Ranked #2 pension fund in nation by Standard & Poor's for the second year in a row (2/07)
- One of only five pension funds nationwide that honestly has resources to cover promises
- Topped the list of pension funds ready for retirees in Governing magazine (10/06)
- 11th largest public pension plan in the country (Pensions Investment Magazine, 1/22/07)
- 17th largest pension plan overall (Pensions Investment Magazine, 1/22/07)

Projected Retiree Trend





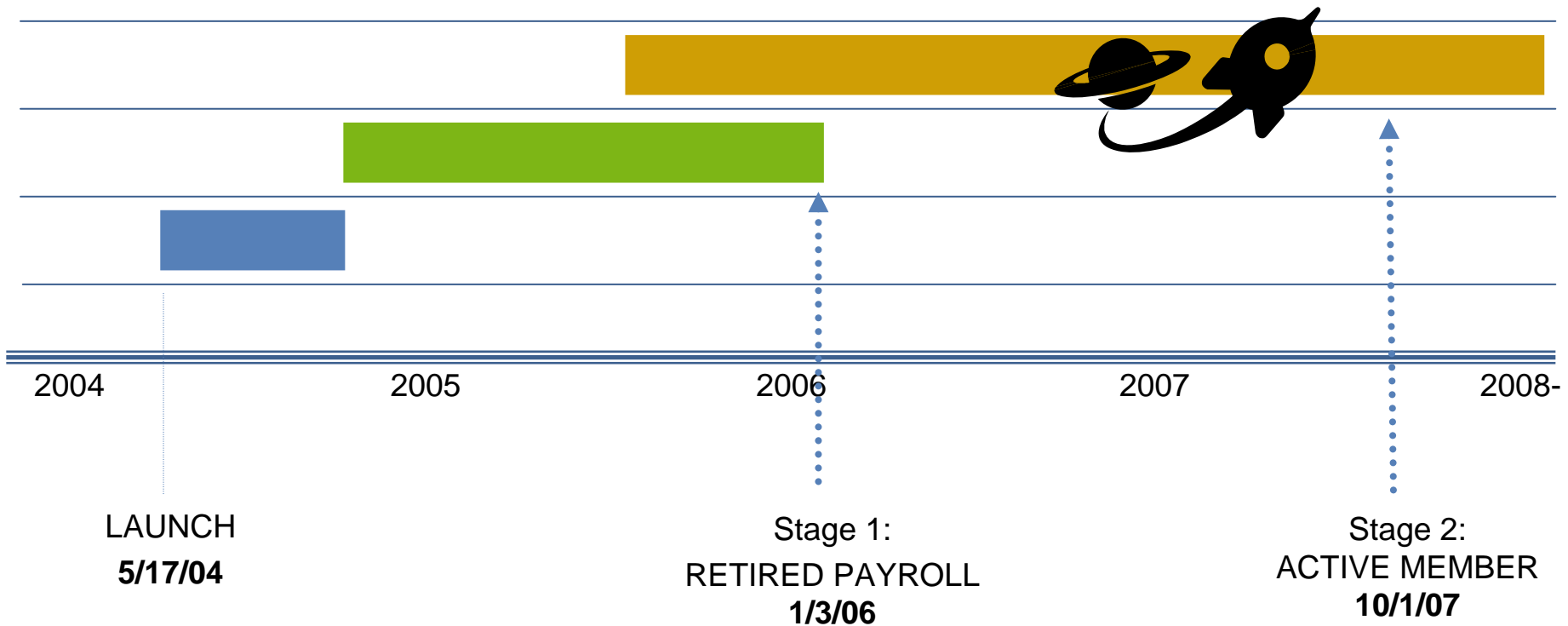
ORBIT Objective

- Improve Customer Service
- Improve Efficiency
- Improve Accuracy of Information



ORBIT In Review

Countdown to Implementation





Your Suggestions in 2005

1. Increase access to records
2. Increase access to people
3. Provide additional training on common topics
4. Provide additional information on the Internet
5. Provide additional forms on the Internet

How your concerns were addressed

■ Improved business processes

- More efficient processes have streamlined the flow of information between DST and ORBIT stakeholders

■ Obtained additional resources

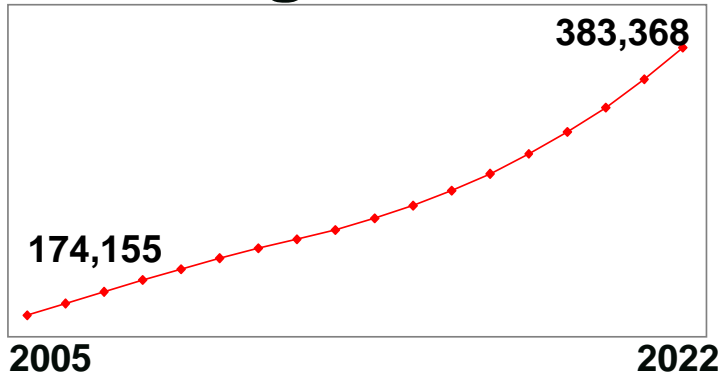
- ORBIT now provides retirees with secure access to retirement information online, 24 hours per day
- Toll-free employer line, Employer Education Services Unit, Training & Orientation Sessions, Employer Council, Retirement Monitor, ORBIT Informer and Updates

■ Upgraded information technology

- Most forms can now be found on the Internet with electronic submissions to come

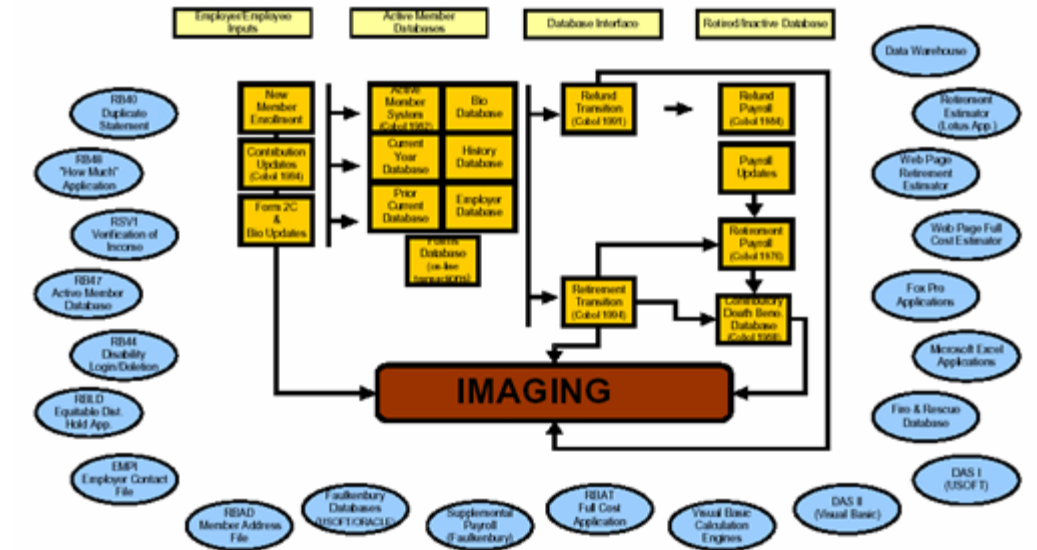
Change Continues to be Imperative:

Growing Demand...



Projected growth in retiree population

...Obsolete Technology



Transforming the Way We Work

Old Way	With ORBIT	Advantage for You
Manual, cumbersome processes	Automated processes	Increased efficiency; speedier response
Multiple, independent systems	Single, integrated system	Ability to share information
Members contact staff for answers	Members can go online to find answers	Greater convenience; reduced burden on staff
Difficulty in balancing and posting contributions	Ease in balancing and posting contributions	Award service credit for eligible contributions; Less rework and research
Paper records/filing	Electronic records/filing	Increased accuracy and consistency

Motive for Change

- Projected Growth in Membership 2006-2022 204%
- National Rank - Public & Private Pension Plans 11th
- Number of Members (working and retired) 700,000
- Value of Pension Fund (March 2007) \$71B
- Current Average Age of Active Members 44

All Other Figures as of Jan, 2007

ORBIT Successes

■ Successfully Implemented Retiree Services

□ Total payments made	3,029,111
□ Dollar amount of those payments	\$4.4 B
□ Correspondence packets sent	92,681
□ Retirees registered for self service	11,175
□ ORBIT Transactions Performed by Retirees	17,658
□ System outages	0

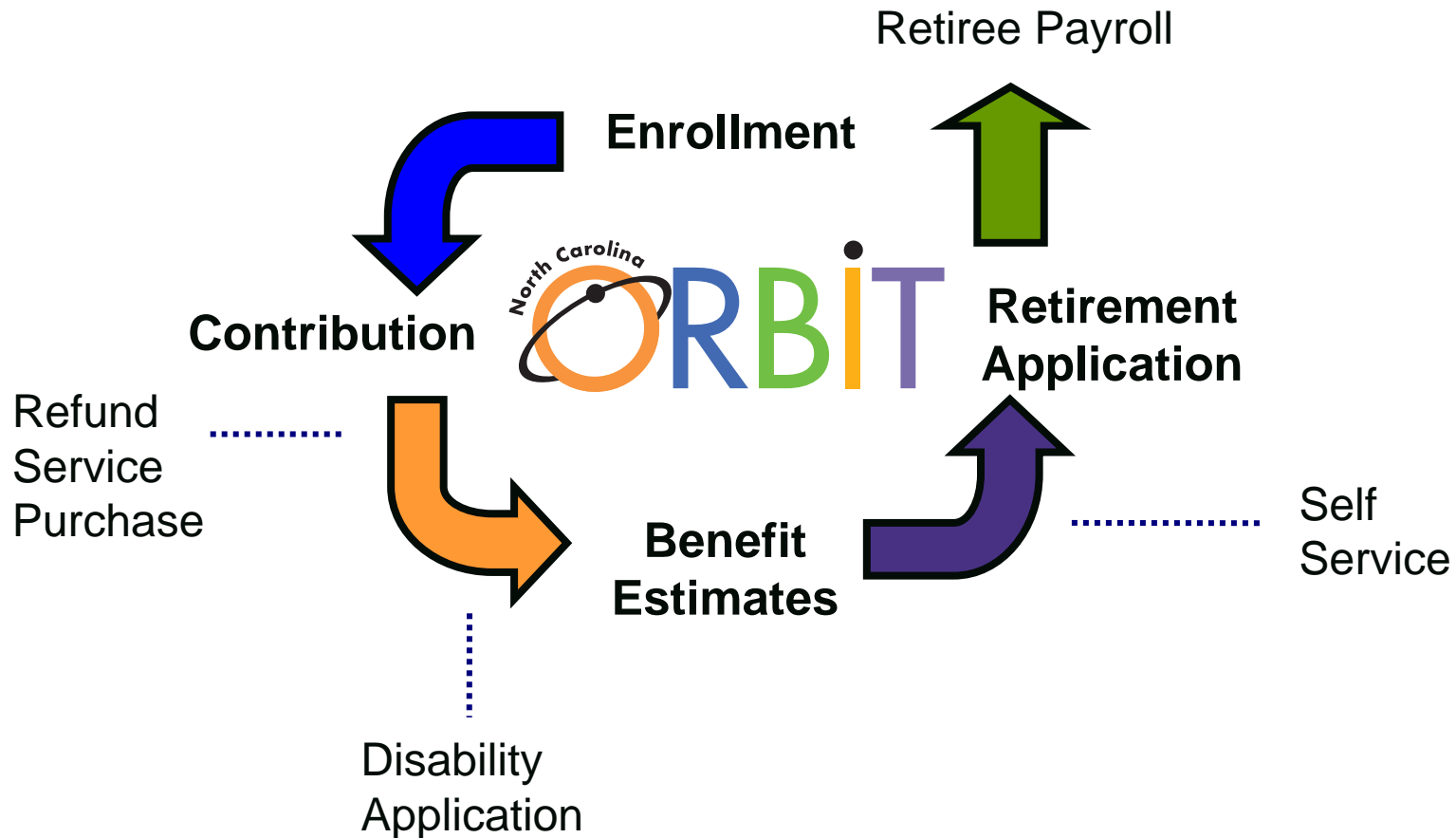
Figures as of March, 2007



Active Member Rollout & Employer Reporting

...their impact on you

Single System for the Member Lifecycle





Coming Soon...

Web Based Functionality for Employers

- Monthly Contribution Summary Data Entry & Generation
 - Enter Contribution Reports Online or via secure file transfer to RSD
 - Changes to File Format / Layout
- Give Employers access to their employees' files (in active phase)
- No more enrollment forms
- No more hard copy paper payroll reports



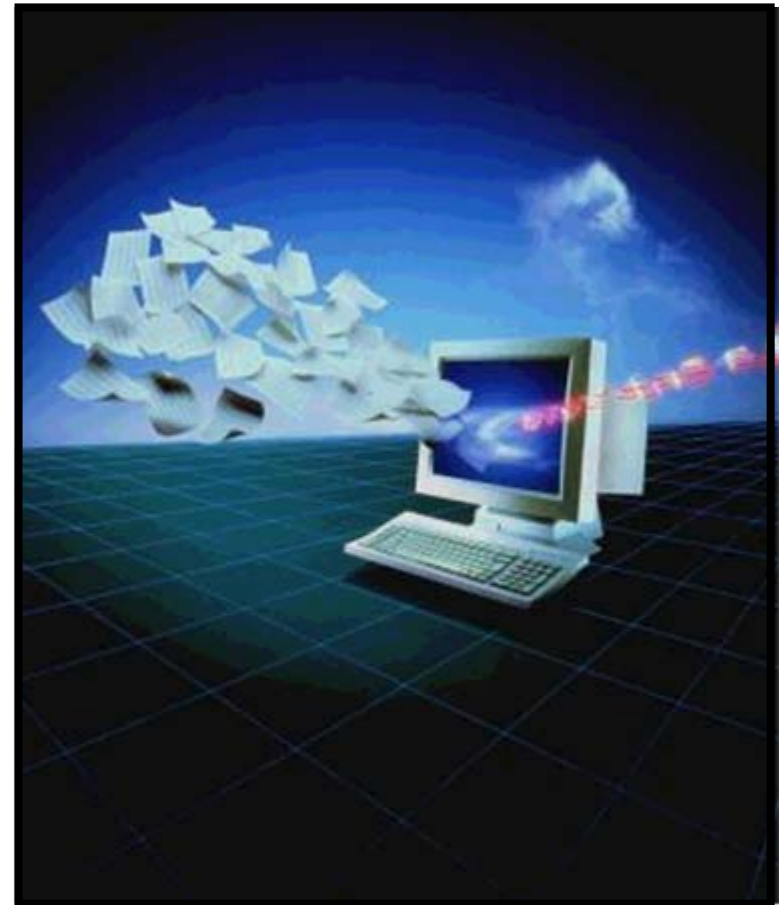
Employer Reporting

Number of NC Public Employers: 1,200

- Improved file format
- Electronic Submission
- Self Service
- Security Measures

Employer Reporting

- Maintain Employer Security
 - Employers will be granted user ids and passwords restricted to employer services. Employers will be able to change their passwords and contact information



Employer Reporting

ORBIT has worked with everyone in the State system

- Public Schools (Sartox, ISIS, Wake, Charlotte - Meck)
- Universities
- Community Colleges
- Central Payroll

...and these Local Government vendors:

MUNIS	Sunguard THE	CSI
ICS	Logics	CIBER
Southern Software	ACS	

...if you're dealing with a different vendor, please have them contact the ORBIT team ASAP



Summary of How It Works

1. Retirement Systems Division Assigns Web User ID
2. Employer Produces a File
3. Employer Logs in and Uploads File
4. Employer Enters Information Into CSI
(Contribution Summary Instruction)
5. ORBIT Collects Employer Bank Information for Overnight Electronic Debit
6. ORBIT Performs Balancing

Coming Soon...

Web Access for Active Employees

- Active Employees will be able to:
 - View their service history, service credit, credit and salary information
 - View beneficiary information
 - Access member annual statements
 - Calculate estimated retirement benefits using actual reported salary and service credit



New Concepts

Moving to the Member ID

- Increased security and privacy by replacing the use of a Social Security Number with a Member ID on letters, forms, and online transactions
- All forms and letters distributed to retirees today include a Member ID
- Member IDs will be assigned and distributed to active members as part of the Active Member Implementation
- Member ID should be left blank on the September 2007 Payroll reported in October 2007

New Concepts

Retirement forms have been “ORBITized”!

- DST updated its retirement forms in preparation for the ORBIT launch in October.
- New and updated forms will be available on the Employer Information website in September. Please replace existing forms by October 1st.
- The look of the new forms...

Choosing an Effective Retirement Date

North Carolina Retirement Systems

000000000

Please print or type in black ink.

Section A. Tell us about yourself.

FIRST NAME	MI	LAST NAME	SSN	
MAILING ADDRESS			MEMBER ID	
CITY	STATE	ZIP CODE	TELEPHONE NO.	DATE OF BIRTH

Section B. Please tell us the retirement system from which you wish to retire.

If more than one, a separate form is required for each retirement system account.

Teachers' and State Employees' Retirement System (TSERS) LAST EMPLOYER IN THIS SYSTEM



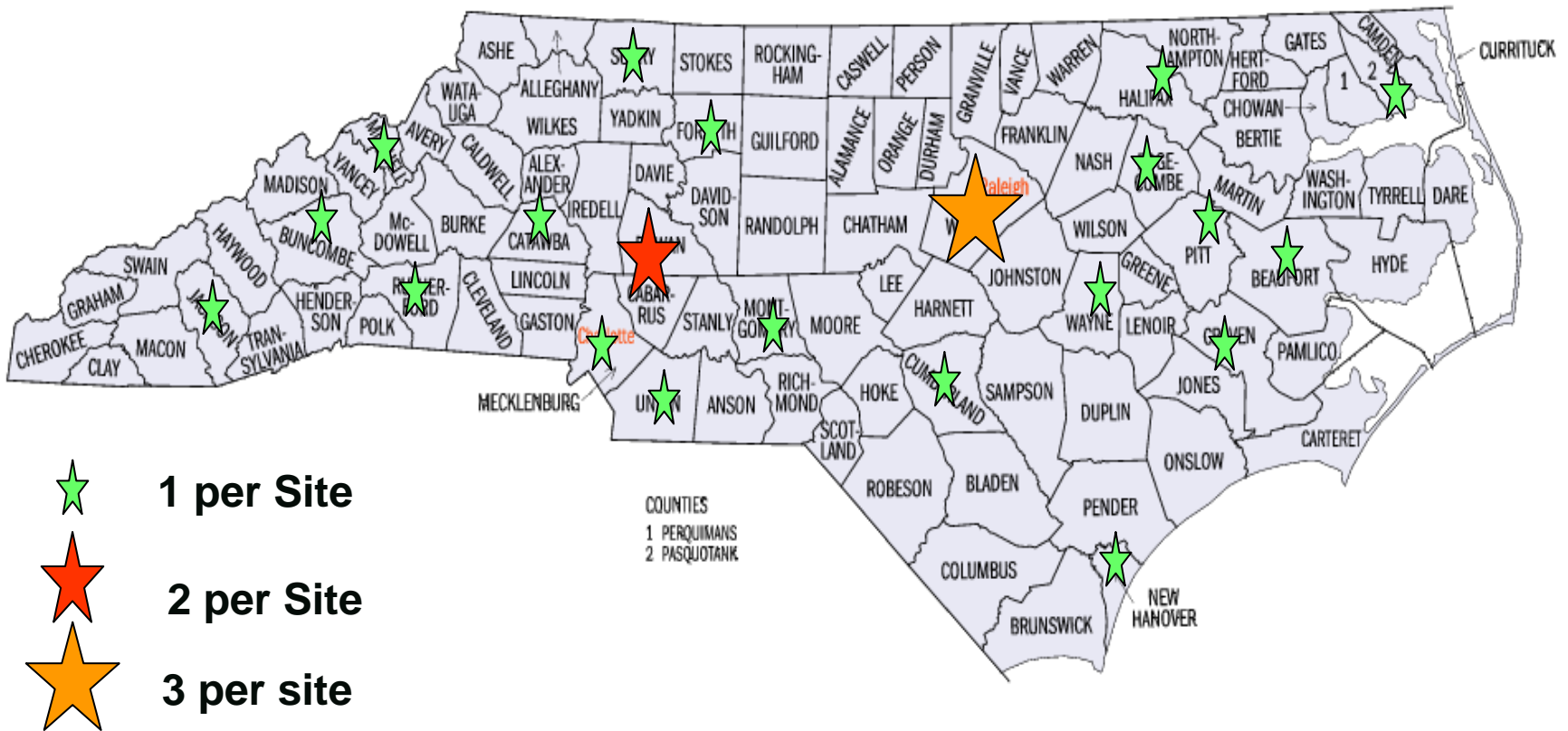
2007 Key Dates

- | | |
|-------------------------------|--|
| March | Employer Information Sessions
(Greenville, Raleigh, Hickory, Greensboro) |
| July | Training Sessions (Public Schools) |
| July - September | Training Sessions (All Employers) |
| October 1st | Go Live! (Employer Reporting for Sept.)
Employer Online Services and Active
Employee Self Service |

Employer Training

- Facilitated sessions July – September 2007
 - 4 sites for school system training
 - 20 sites for general population training
 - Registration information to be distributed in April
- Employer training (HR, IT, and Payroll)
 - Hands-on training sessions
 - User guides
 - Information toolkit
 - Webinars available 24/7
 - Question and answer sessions (live and replay)
- Helpdesk will be available for support

Employer Training Locations



Employer Training Locations and Dates

- 4 sites for school system training
- 20 sites for general population training
- Morning and afternoon sessions available

Locations and Dates

Asheville	7/16	China Grove	8/1	New Bern	8/21
Charlotte	7/17	Spruce Pine	8/6	Goldsboro	8/22
Greenville	7/19	Hickory	8/7	Elizabeth City	8/27
Raleigh	7/20	Dobson	8/8	Weldon	8/28
Raleigh	7/23	Washington	8/13	Winston Salem	9/10
Fayetteville	7/24	Rocky Mount	8/14	Salisbury	9/11
Sylva	7/30	Raleigh	8/15	Monroe	9/17
Shelby	7/31	Wilmington	8/20	Troy	9/18



ORBIT Retiree Self Service Demo Site

- A sample website was developed to help you...
 - Prepare for employee questions
 - Improve your understanding of the ORBIT system
 - Demonstrate ORBIT directly to your employees
- A sample account will allow you to:
 - Practice employee registration
 - View and manage Direct Deposit, Tax, Payment, and Account information

Demo Site Continued...

- You can request access to the demo site by sending the following information to the RSD's Employer Education Services Unit (EESU):
 - Name, Title, Agency/Employer, E-mail address, 5 Digit Employer Reporting Code, Phone number, and the best time to reach you and walk you through the application.
- Send your requests by email to eesu@nctreasurer.com



Online Retirement Benefits
through Integrated Technology
North Carolina Department of State Treasurer



Richard H. Moore,
State Treasurer

Home Retiree/Benefit Recipient Available Forms: Retirement Forms (Requires Acrobat Reader 7.0+) **OPEN**

Retiree/Benefit Recipient

[Educate Yourself](#) [Help](#) [Contact Us](#)

Welcome

Welcome to ORBIT

[View Personal Information](#)

[View Account Summary](#)

[View Payment History](#)

[View CDB Information](#)

[View Tax Documents](#)

[View Earnable Allowance](#)

[View Direct Deposit](#)

[Maintain Tax Withholding](#)

[Maintain Address](#)

[Maintain Phone/Email](#)

[Income Verification](#)

[Logout](#)

A message from State Treasurer Richard H. Moore:

Dear FRANK,

Welcome to ORBIT, a state-of-the-art technology tool that will provide you with full access to your personal retirement account. We designed ORBIT to improve your access to your retirement information, and the service we are able to provide to you. You can feel secure as a member of one of the strongest retirement systems in the country. Now, you have access to a state-of-the-art retirement technology system that is a model for the nation.

It is our privilege to bring this exciting new technology to you.

-Richard H. Moore

* You may view detailed information and instructions by clicking on

[View Personal Information](#)

[View Dir](#)

[View Personal Information](#)

This section contains the personal information (name, address, date of birth, etc.) we currently have on file for you.

[View Account Summary](#)

This section allows you to view your payment details, along with your federal and state tax information.

[View Payment History](#)

This section contains a history of your payment information.

[View CDB Information](#)

This section contains Contributory Death Benefit information.

[View Tax Documents](#)

This section allows you to view and print prior years of 1099R's and W2's.

[View Earnable Allowance](#)

[View Direct Deposit](#)

This section allows you to view your EFT (Electronic Fund Transfer) account information.

[Maintain Tax Withholding](#)

This section allows you to view and update Federal and State Withholding Information.

[Maintain Address](#)

This section allows you to update your home and payment address.

[Maintain Phone/Email](#)

This section allows you to update your phone numbers and email address.

[Income Verification](#)

This section allows you to request an income verification letter be sent to a third-party.

[Logout](#)

Demo Retiree Self Service What it Looks Like



Questions & Answers



Thank You!

www.myncretirement.com/orbitinfo

Roscoe Perry: roscoe.perry@nctreasurer.com or 919-715-2649
Employer Education Services Unit (EESU): eesu@nctreasurer.com