North Carolina
Total Retirement Plans

State Treasurer of North Carolina
Dale R. Folwell, CPA

ENTER REPORT

EMPLOYER SELF-SERVICE USER GUIDE

Feb 2017

State of North Carolina
Department of State Treasurer
Retirement Systems Division

Table of Contents

1--INTRODUCTION

The Retirement Systems Division (RSD) of the NC Department of State Treasurer (DST) is responsible for the administration of the statutory retirement and fringe benefit plans, as authorized by the NC General Assembly, which covers the Teachers' & State Employees Retirement System **(TSERS)**, the Local Governmental Employees' Retirement System **(LGERS),** the Consolidated Judicial Retirement System **(CJRS)**, and the Legislative Retirement System of NC **(LRS)** employees. RSD provides plan support for around 1,200 Employers who submit monthly payroll contribution reports on behalf of about 500,000 active members. In addition, the RSD provides monthly retirement benefits and services to more than 235,000 retirees and the surviving beneficiaries of deceased retirees of all the NC Retirement Systems combined.

The **ORBIT** (Online Retirement Benefits through Integrated Technology) application was implemented in September of 2007 to empower Employers to obtain a higher level of information online without having to call or correspond with the ORBIT Employer Reporting Group for answers. ORBIT was also applied as a self-service system, which allows members of the NC Retirement Systems to find their personal information on the ORBIT website. Members of any NC Retirement System and Employers may access ORBIT, as well as many other links at www.myncretirement.com.

The purpose of this User Guide is to serve as a training manual in addition to a reference tool in support of the online Employer Self-Service software applications. The applications covered in this Guide are as follows:

- **Enter Report**
- **Submit CSI**
- **View Invoices**
- **Download Member ID**
- **Death Notice**
- **Missing Beneficiary Designations**
- **Agency Admin**
- **View Member Info**
- **Check Retired Status**
- **Report Viewer**

1.1 PREFERRED SYSTEM REQUIREMENTS TO RUN ORBIT

- **Personal Computer that supports an Internet connection (Windows is NOT required)**
  - Reliable connection to the Internet (Cable; DSL; or, LAN)
  - 1.3 GHz or higher
  - 1280 x 720 monitor resolution

- **Browser Application**
  - Microsoft Internet Explorer 7.0 or higher
  - FireFox 7.1 or higher
  - Netscape Navigator 9.0 or higher
  - Safari 3.2.2 for Windows
  - JavaScript must be enabled
  - 128 bit Encryption enabled
  - Cookies must be enabled

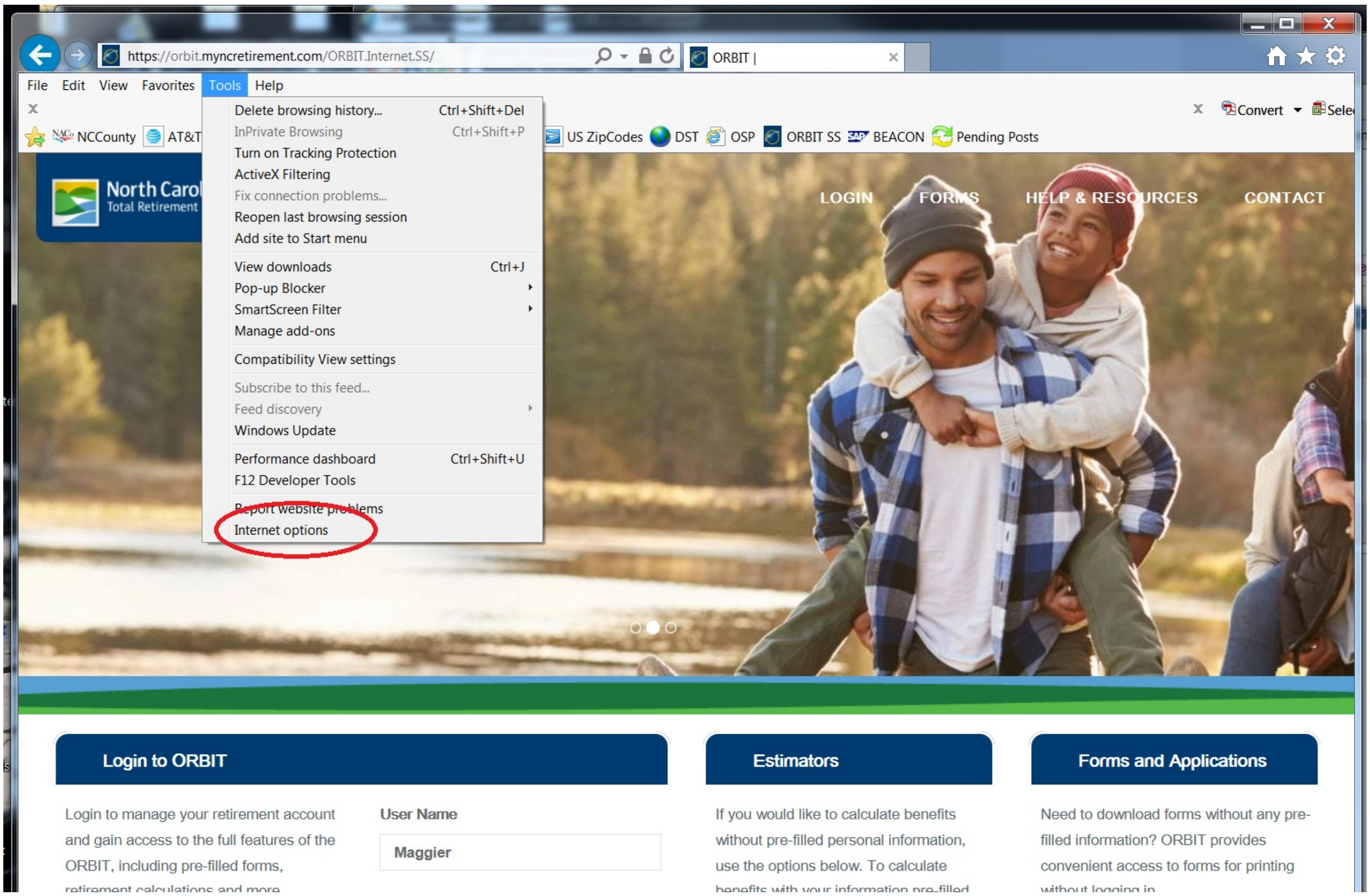
- **Adobe Acrobat Reader 9.0 or higher (to view PDF forms)**

- **Access to a printer for in-house copies**

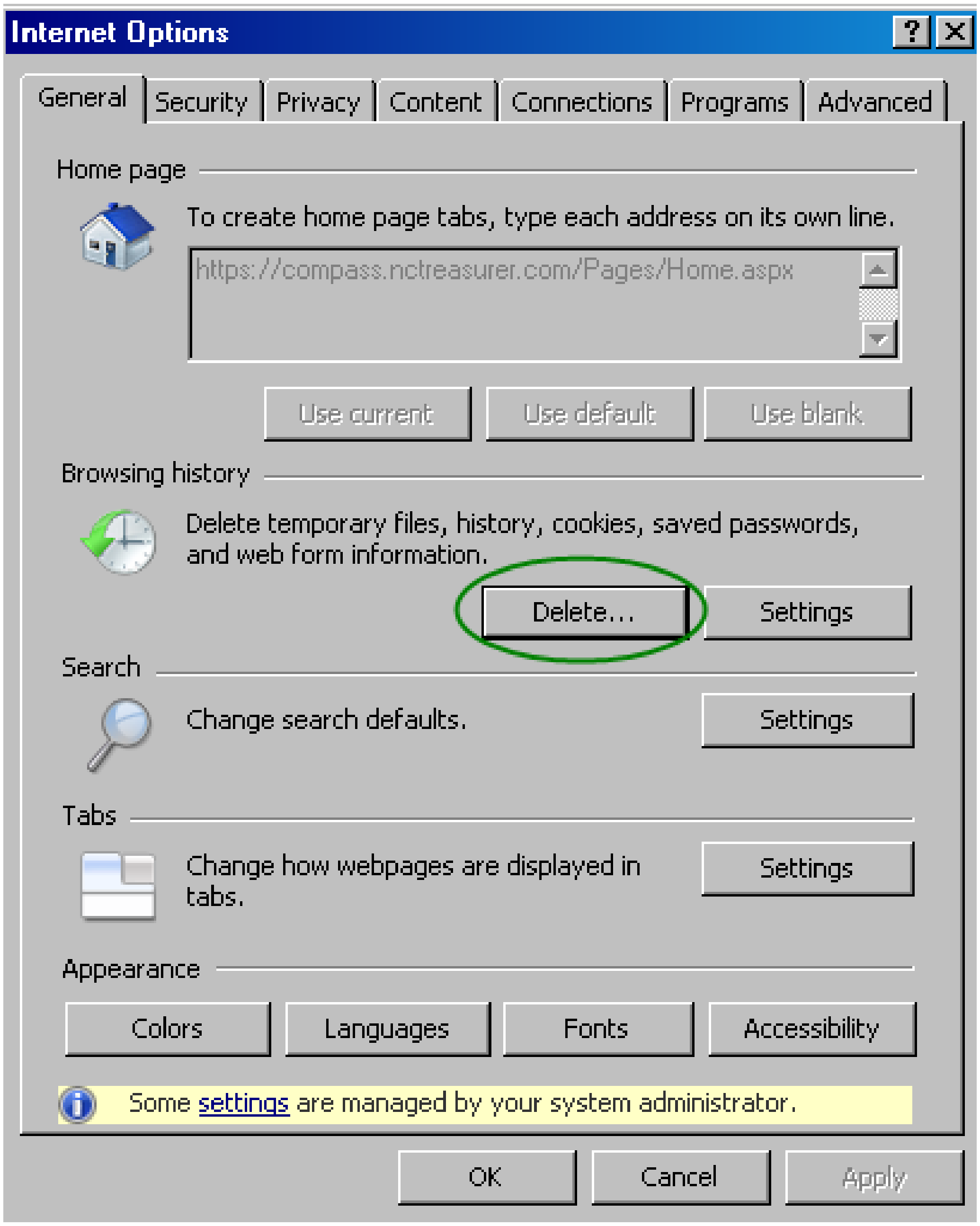
1.2 COMMON INTERNET PROBLEMS

This web-based system is available on the Internet. At times, programs and applications on the Internet appear as if they are not working properly. When attempting to logon to ORBIT, your cache may be filled to capacity. To correct this problem, the following steps must be taken to clear your cache:

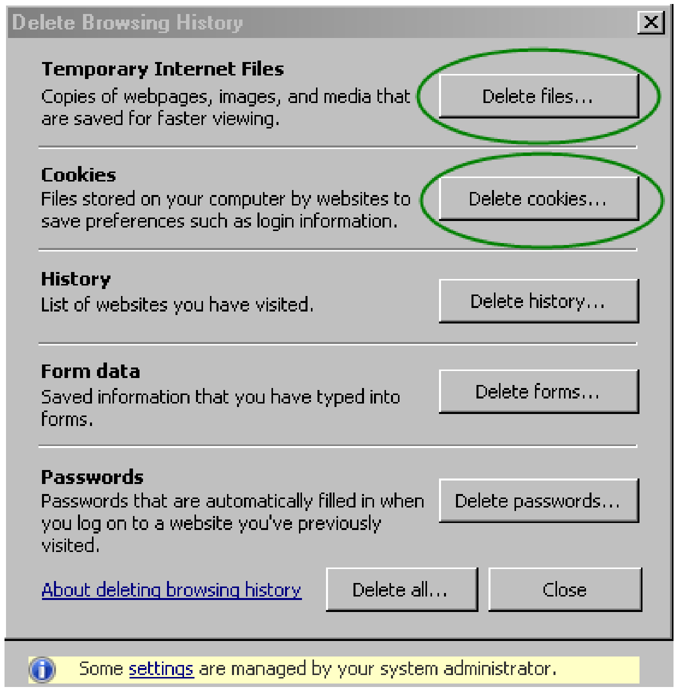
Step 1--On the ORBIT Login page, click on **Tools> Internet Options**.



Step 2--The Internet Options box will appear. In the middle, under Browsing History, **click** Delete... .



Step 3--The Delete Browsing History box will appear. Your goal is to clear out the **Temporary Internet Files** and the **Cookies** on your computer.



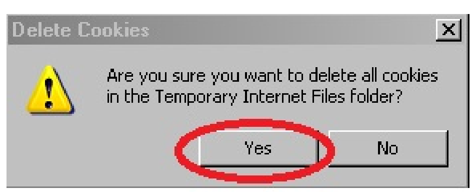
1. **Click** 

.
   a. The Delete Files box will appear with a confirmation, click:

   b. A status box will appear while the temporary internet files will be deleted.
   c. When complete, the status box will automatically close.

2. **Click** 

.
   a. The Delete Cookies box will appear with a confirmation, click:



   b. A status box will appear while the cookies will be deleted.
   c. When complete, the status box will automatically close.

Step 4--The Temp Files and Cookies will be deleted. **Click** Close to close the Delete Browsing History box.

Step 5—Click OK to close the Internet Options box.

If these actions still do not work, close Internet Explorer down completely. Then, go back in to logon to ORBIT again.

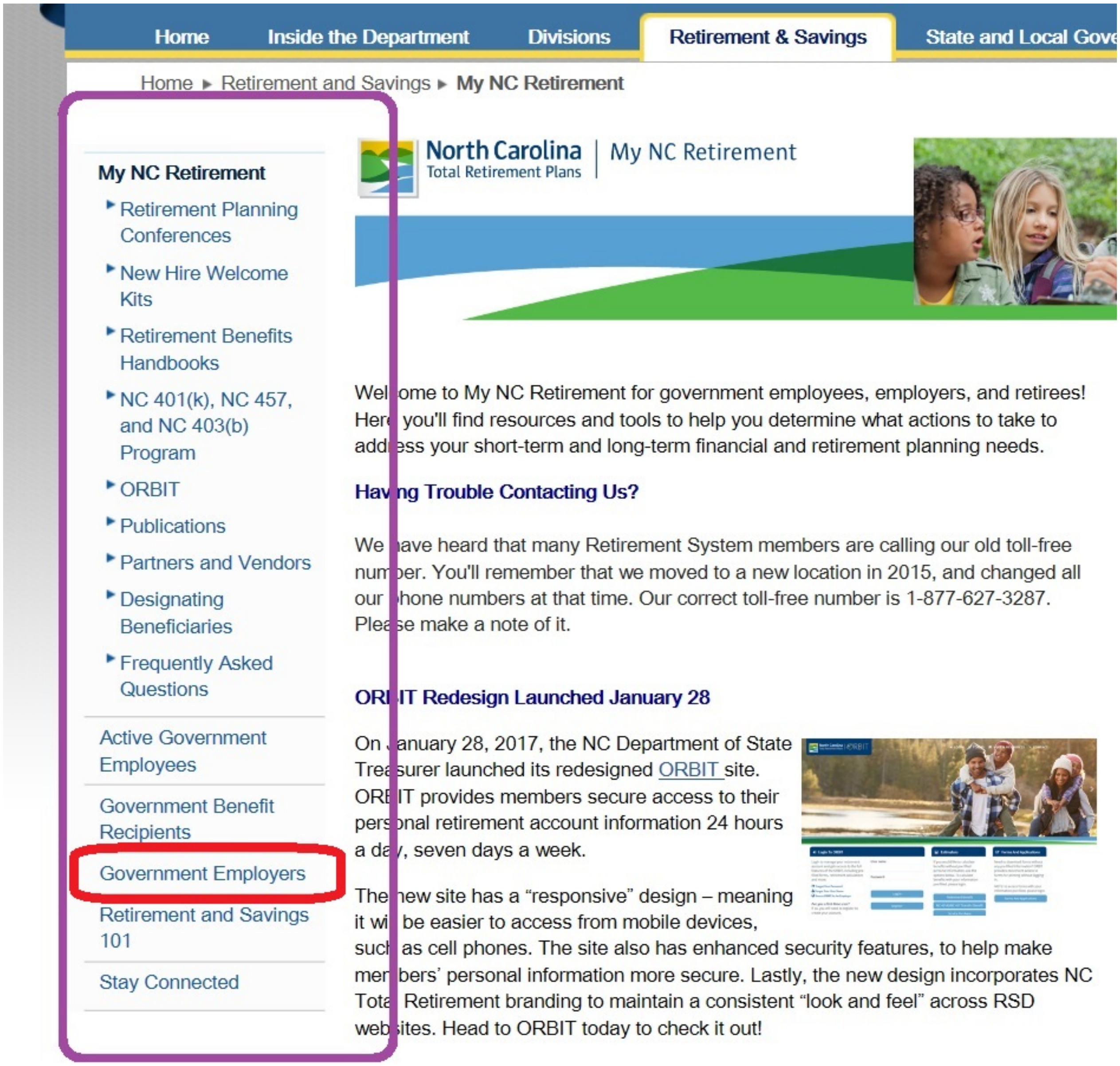
If this attempt does not work, please call the ORBIT Employer Reporting Group at this toll free number: **1-877-627-3287**, Press **2** and then select **Option 6** from the menu. Please remember that passwords used to logon to ORBIT are **case sensitive**.

Employers that submit monthly ORBIT reports should **ALWAYS** store their User ID and Password in a secure place. In addition, Employers should not confuse their own Member Self Service User ID and Password that they use to access their own personal information with their **ORBIT Employer User ID and Password**.

1.3 ORBIT BASICS

- ## Menu and Navigation

Step 1--Employers can access the Employer Self Service application page via the Department of State Treasurer's website: www.nctreasurer.com. On the left side menu, click "**Government Employers**". The screen shown below indicates several different links, including **Retirement Monitor Newsletter**, **Employers ORBIT Information**, **Laws and Legislation**, **Employers Manuals**, **Discontinued Service Retirement** and **LGERS and TSERS pension spiking information.**



Home | Inside the Department | Divisions | Retirement & Savings | State and Local Gove

Home ▸ Retirement and Savings ▸ **My NC Retirement**

My NC Retirement

- Retirement Planning Conferences
- New Hire Welcome Kits
- Retirement Benefits Handbooks
- NC 401(k), NC 457, and NC 403(b) Program
- ORBIT
- Publications
- Partners and Vendors
- Designating Beneficiaries
- Frequently Asked Questions

Active Government Employees

Government Benefit Recipients

Government Employers

Retirement and Savings 101

Stay Connected

North Carolina Total Retirement Plans | My NC Retirement

Wel ome to My NC Retirement for government employees, employers, and retirees! Her you'll find resources and tools to help you determine what actions to take to add ess your short-term and long-term financial and retirement planning needs.

Hav ng Trouble Contacting Us?

We ave heard that many Retirement System members are calling our old toll-free num ber. You'll remember that we moved to a new location in 2015, and changed all our hone numbers at that time. Our correct toll-free number is 1-877-627-3287. Plea e make a note of it.

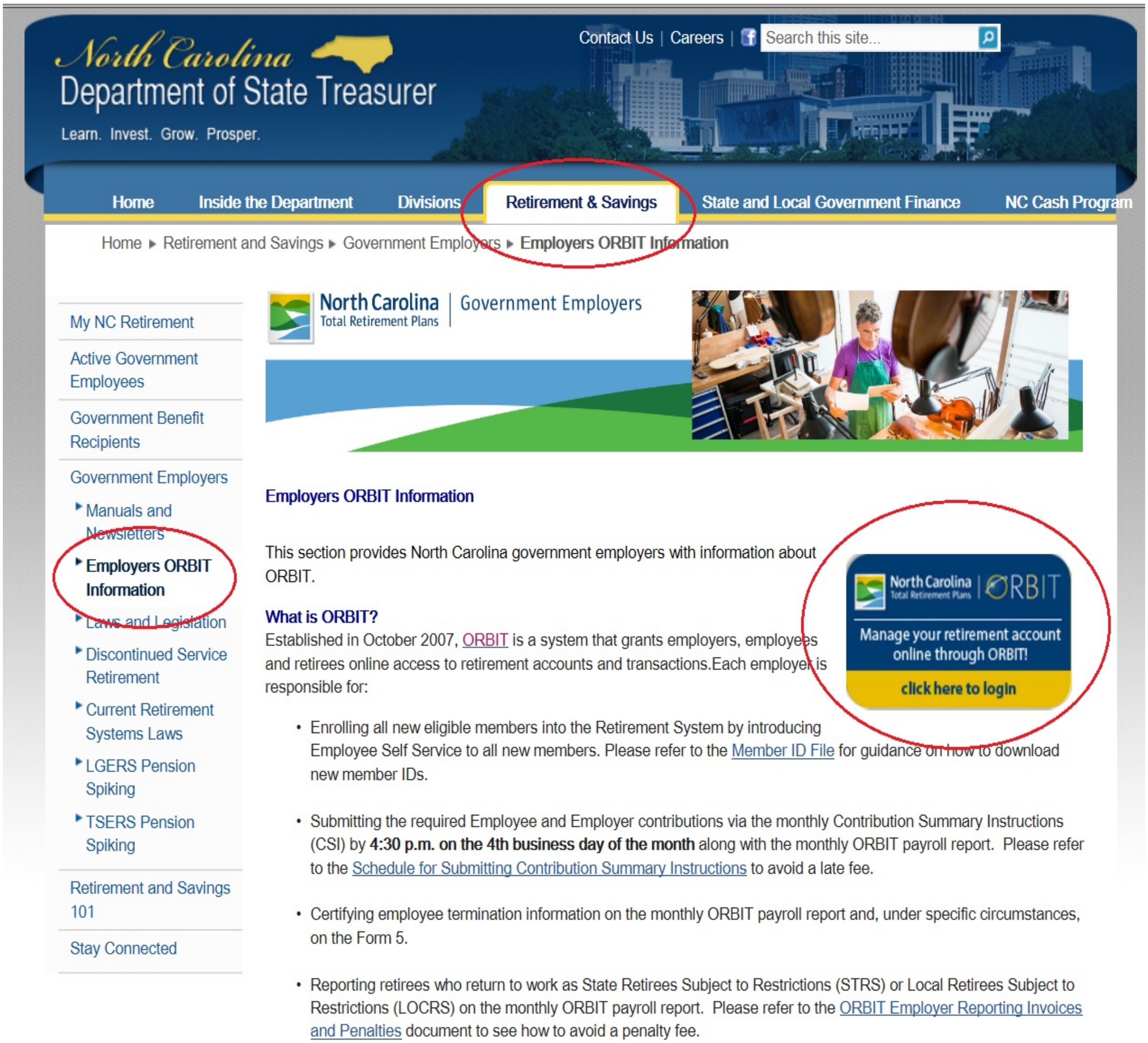
ORI IT Redesign Launched January 28

On anuary 28, 2017, the NC Department of State Trea surer launched its redesigned ORBIT site. ORE IT provides members secure access to their pers onal retirement account information 24 hours a da , seven days a week.

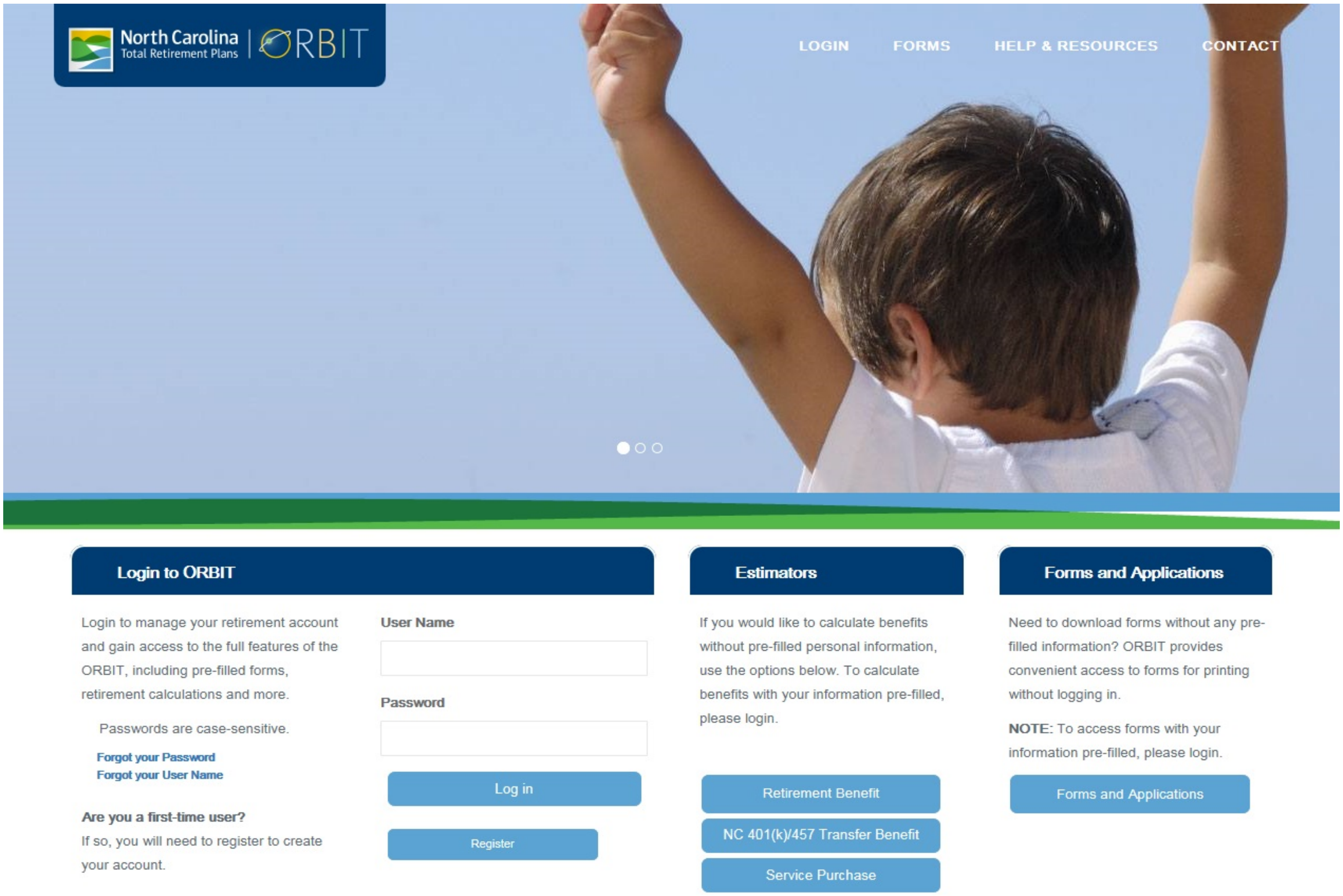
The new site has a "responsive" design – meaning it wi be easier to access from mobile devices, such as cell phones. The site also has enhanced security features, to help make mer bers' personal information more secure. Lastly, the new design incorporates NC Tota Retirement branding to maintain a consistent "look and feel" across RSD web ites. Head to ORBIT today to check it out!

Please review the **Employers ORBIT Information** page to learn more information on Employer ORBIT responsibilities, system specifications, and additional reference materials.

On both pages, the **ORBIT** application is located in the top right.



Step 2 - Once the [ORBIT - Login to Access Your Account]() has been accessed, the following screen will appear.



All Employer self-service users may access certain non-secure areas of the online application, such as **Forms, Educate Yourself, Contact Us** and various **Calculators** without logging into the application. However, to access any secure services, a valid **User ID and Password** is required.

Please note: The registration process is required <u>only</u> for access to individual members' accounts. User ID's and passwords are sent directly to the agency for Employer ORBIT access. If this information cannot be located, please contact **1-877-627-3287** or [OER@nctreasurer.com]().

This menu of services provided by this application is further explained under the **Employer Services Section** of this Guide**.**

- ## Required Fields

Required fields (those fields with a **red ***) must be provided. An error notification **in red** will appear on the screen and until the required information is corrected. ORBIT will not proceed any further.

- ## Error Messages

Error messages will appear alerting the user that data in the required field information is missing. These types of messages will pop up **in red** and **MUST** be added in order for ORBIT to supply the requested information.

- ## Security and Encryption

Security for this online application is already included in the form of validation and encryption. When logging on to ORBIT, the User Name and Password validates against the corresponding User data information already stored in the website's database.

Encryption is the process of hiding the value of a specific data set from unauthorized users or processes. Encryptions are used to secure an Employer's data on the website and application servers, as well as in the database.

- ## Cookies

The Employer Self Service (ESS) application uses Cookies to store the user information necessary to identify the User by RSD's online servers. Cookies used by Employer Self-Service servers will **ONLY** reside in the memory of the Employer's computer and will not be written to the User's hard drive nor saved in the ESS application database. These Cookies will also be encrypted to prevent any malicious acts. By encrypting the information prior to sending the Cookie, the information in the Cookie will be meaningless when read by anyone else. The application will then decrypt the text stored in the Cookie when using it for the application. Both the encryption and decryption of the Cookie information will occur in **COM** components of the architecture of the online application. When the User's session with the online application ends, the Cookie residing in the memory of the User's computer will be deleted.

- ## Help

The ORBIT ER Reporting Group **does not** keep a list of all of the specific passwords used by Employers. However, if an Employer experiences problems with the User ID or Password, the ORBIT ER Reporting Group does have staff available with the authority to assign a new password to an Employer.

2--EMPLOYER SELF SERVICE

2.1 Login

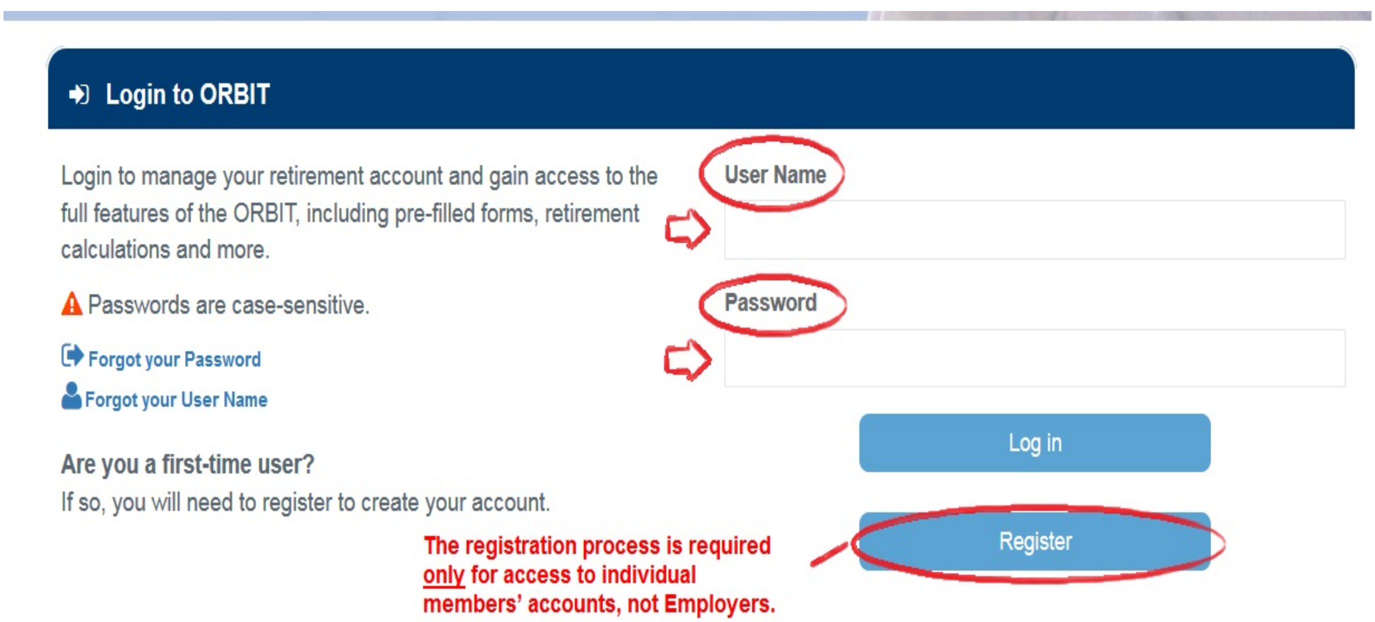
The Employer Self-Service (ESS) website allows you to access Employer Reporting and Employer specific functions. To access ESS, users must have a valid User ID and Password, which is provided by the Retirement Systems Division (initially). Once on the ESS site, the user will be able to access the different functions based on Employer specific data and security roles.

The steps described below explain how to log on to the Employer Self-Service website.

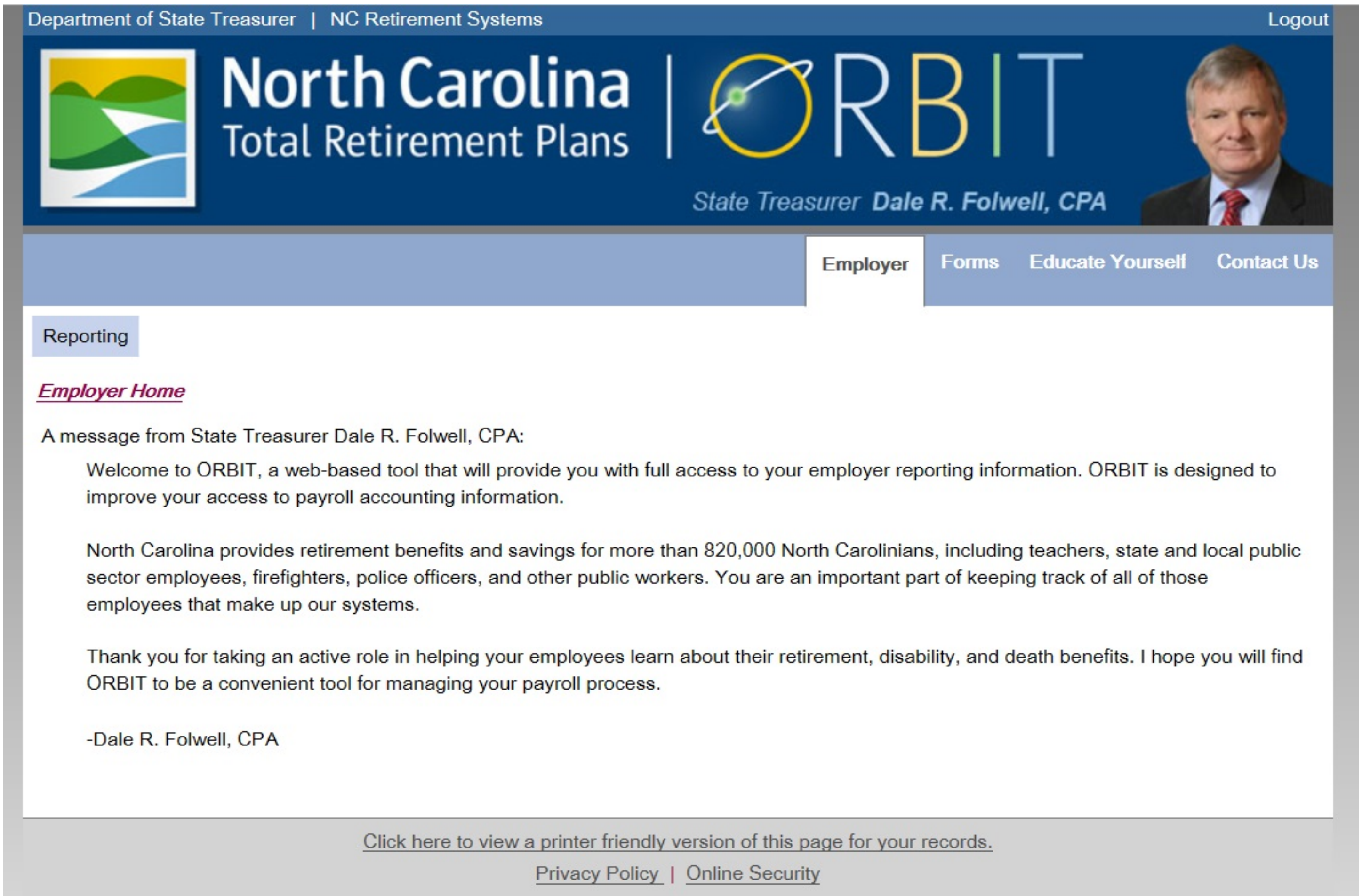
Step 1--Launch the Employer Self Service website from your computer by going to.

https://orbit.myncretirement.com/Orbit.Internet.SS/

Step 2—Enter the **User Name** and **Password** which the ORBIT Employer Reporting Group in RSD provided into the corresponding fields and then **click** Login.



Step 3 - When successfully logged in, ORBIT will display the following screen.



Step 4 - This guide follows each system tool under the **Reporting** tab.

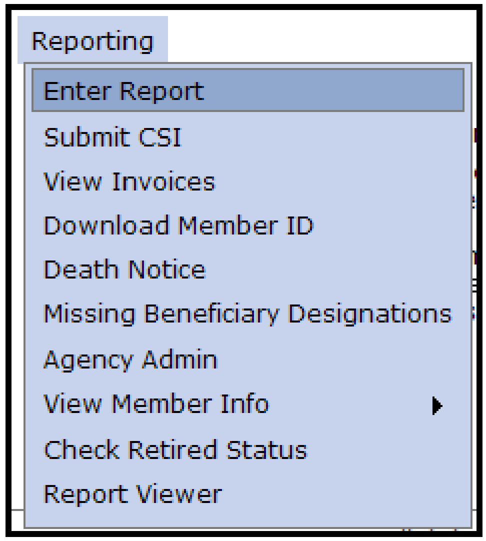
2.2 Enter Report

Employers who have less than 50 employees most commonly use this method of submitting monthly ORBIT reports. This method allows Employers to logon to the Self Service website and submit monthly reports using a template and “Live” data. (This method eliminates the requirement to “Upload” a data file as is required with the “Submit Report” Method.)

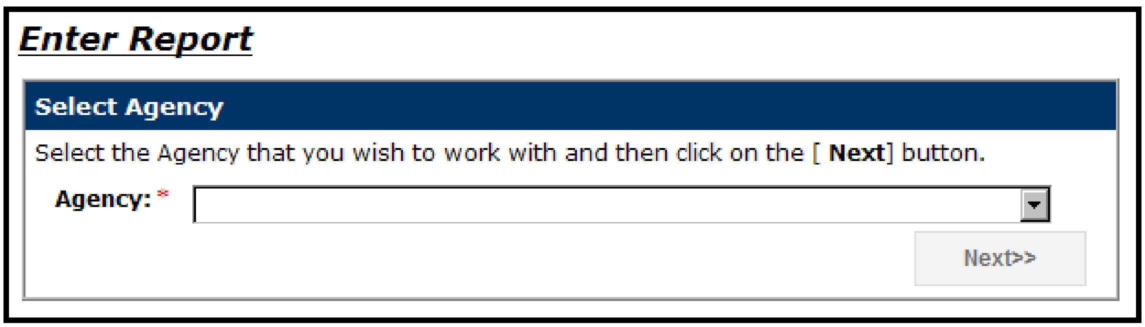
When entering all of your members for the first time onto this report, **ALL** employees must be set-up on the template before **the monthly ORBIT detail report** is submitted to the Retirement System through ORBIT. For subsequent months, Employers who utilize this method will only need to add newly hired employees or make updates to the information that may have changed since last month’s report such as terminations, retirements, or changes in salary.

- Create and Submit First ORBIT Report

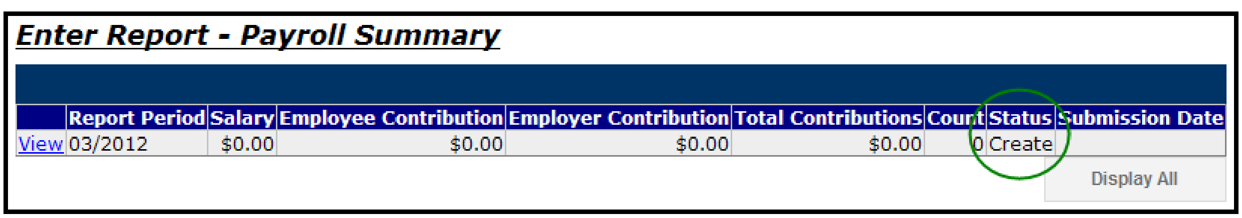
Step 1--Highlight to select **Enter Report** from the drop-down menu under the **Reporting tab.**



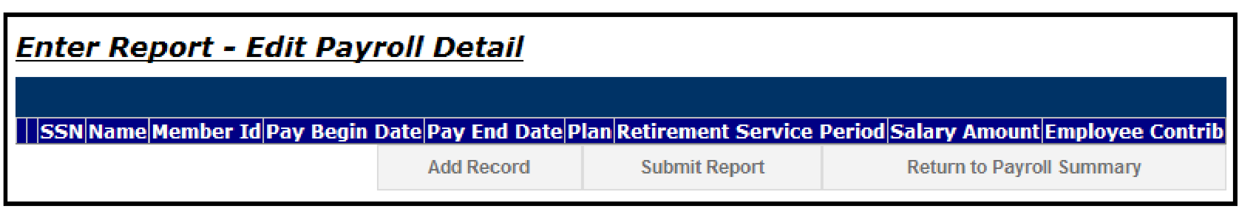
Step 2 - The Select Agency box will appear if you have access to multiple agencies. If not, this step can be skipped. Select the appropriate 5-digit agency code from the drop down box. **Click** Next>> .



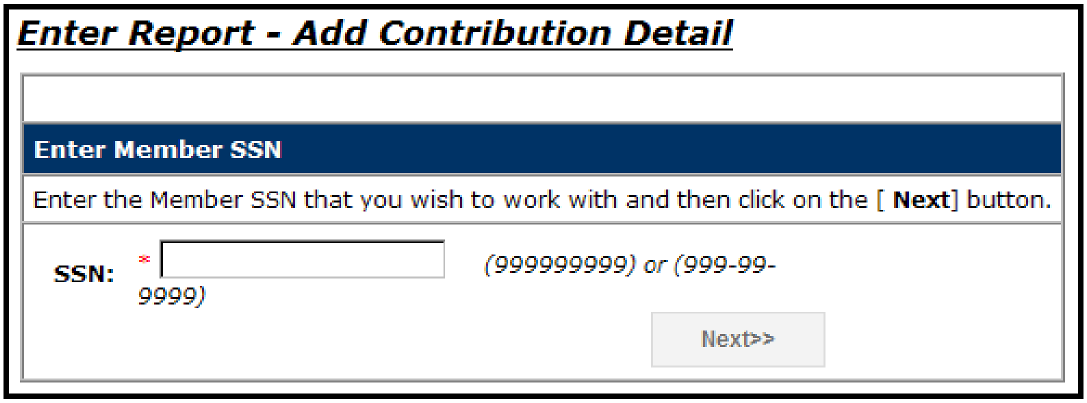
Step 3 -The **Enter Report – Payroll Summary** screen will appear showing the summary in chart format for the current month which will be in **CREATE status.**



Step 4--Click on **View** on the left side of the screen, the **Enter Report – Edit Payroll Detail** blank template will appear.



Step 5--Click Add Record at the bottom of the template. The **Enter Report – Add Contribution Detail** screen will appear. Enter the Social Security number and **click** Next>> .



Step 6 - Input each employee's information on the screen and **click** Save at the bottom of the record to return to the **Enter Report – Edit Payroll Detail** screen.

Step 7 - Once all employee information has been entered, **click** Submit Report on the **Enter Report – Edit Payroll Detail** screen.


Enter Report - Edit Payroll Detail

		SSN	Name	Member Id	Pay Begin Date	Pay End Date	Plan	Retirement Service Period	Salary Amount	Employee Contrib
View/Edit	Delete	123-45-6789	MEMBER , FICTITIOUS	1672224	3/1/2012	3/31/2012	LOCL	12	$3,000.00	$180.00

Add Record | Submit Report | Return to Payroll Summary

Step 8—The **Submit Confirmation** screen will appear. Click the **Continue** link to enter and submit the **Contribution Summary Instructions** (Payment).

For each month forward, the report template will be pre-populated with all the data from the previous month's report. Note: The Employer will be **required** to change the Pay Period begin and end dates each month. In some cases, it will also be necessary to change salary data.

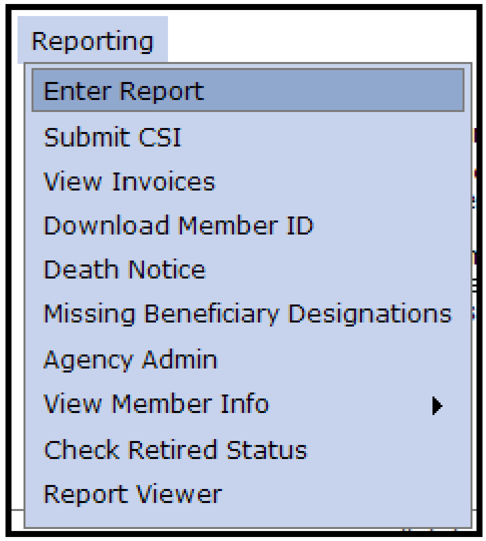
*(**__Note:__** ORBIT equates the term **Pay Period** date with the span of time that the employee **actually** worked to earn this amount of money. **Pay Period does not** represent the date when the employee was actually paid.)*

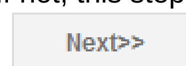
- Add a Record

When adding an employee's information, certain fields are required such as Social Security number and other demographic information for the new record. Records may also be added to monthly reports which are not yet ready to submit.

If a monthly detail report has already been submitted, the Employer **can** unsubmit the report **ON THE SAME DAY** it was submitted. After 24 hours have passed, this option will no longer be available and this report cannot be unsubmitted. If the status of the report shows as **SUBMIT** and the **UNSUBMIT REPORT** has disappeared from the end of the line, the report can’t be unsubmitted. In addition, once the status of a report has changed to **IN PROGRESS** or **POST**, the report can’t be unsubmitted.

Step 1--Highlight to select **Enter Report** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click 

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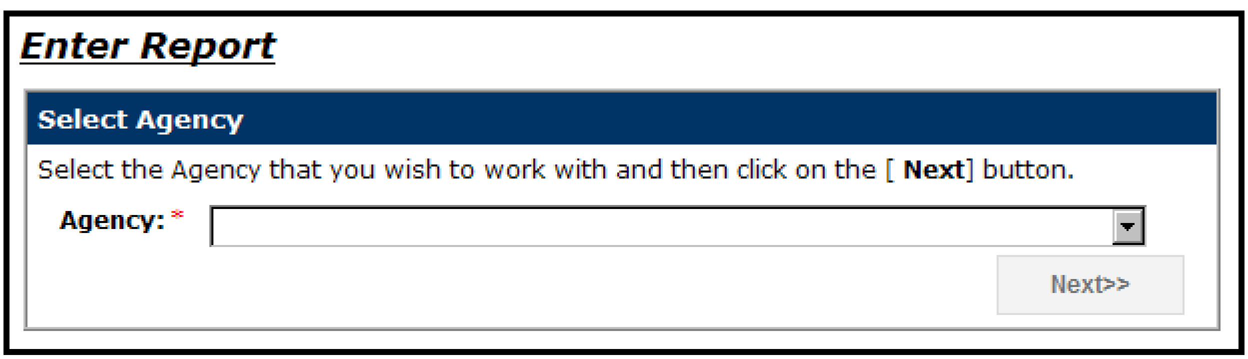
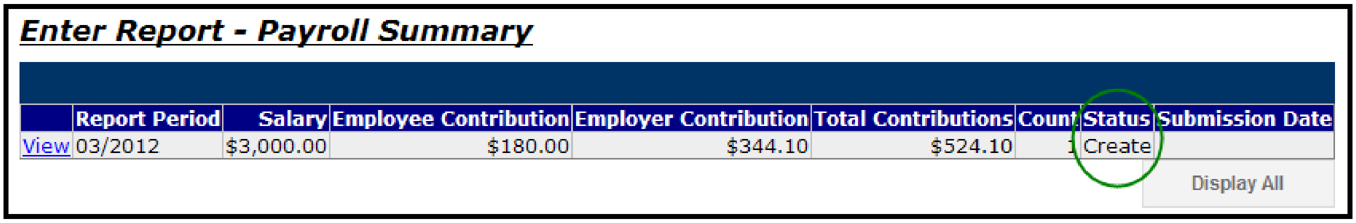


Step 3--The **Enter Report – Payroll Summary** screen will appear showing the summary in chart format for the current month which will be in **CREATE status.** To view all past reports, click

.

A chart will appear of all previous payroll summaries will appear.



Enter Report - Payroll Summary

	Report Period	Salary	Employee Contribution	Employer Contribution	Total Contributions	Count	Status	Submission Date
View	03/2012	$3,000.00	$180.00	$344.10	$524.10	1	Create	

Display All

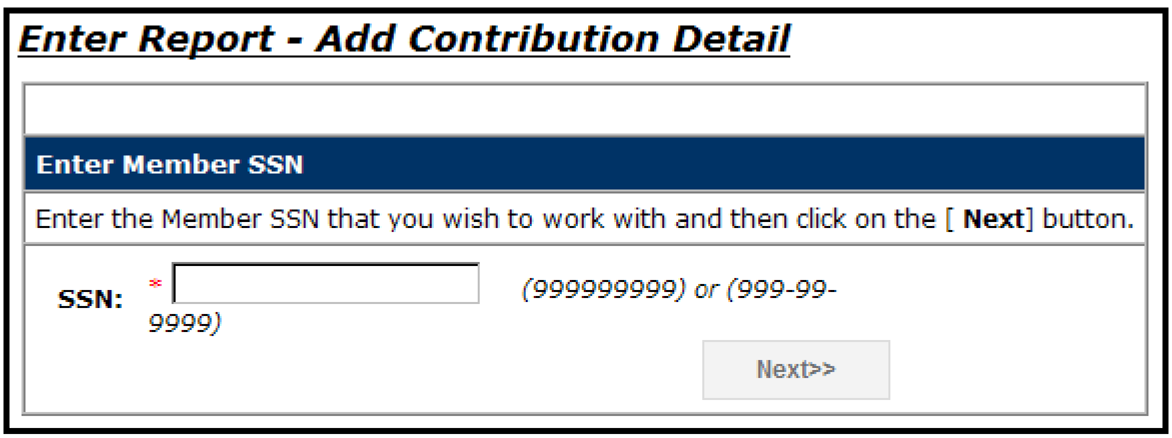
Step 4--Click on **View** on the left side of the screen, the **Enter Report – Edit Payroll Detail** will appear.

Enter Report - Edit Payroll Detail

		SSN	Name	Member Id	Pay Begin Date	Pay End Date	Plan	Retirement Service Period	Salary Amount	Employee Contrib
View/Edit	Delete	123-45-6789	MEMBER , FICTITIOUS	1672224	3/1/2012	3/31/2012	LOCL	12	$3,000.00	$180.00

Add Record | Submit Report | Return to Payroll Summary

Step 5--Click Add Record at the bottom of the template. The **Enter Report – Add Contribution Detail** screen will appear. Enter the Social Security number and **click** Next>> .



Enter Report - Add Contribution Detail

Enter Member SSN

Enter the Member SSN that you wish to work with and then click on the [**Next**] button.

SSN: * (999999999) or (999-99-9999)

Next>>

Step 6--An Employer is required to enter a Social Security number prior to entering the other required data fields because ORBIT matches the SSN to an existing record and automatically populates the blank detail record with the **Demographic Information** which consists of:

- SSN
- Member ID Number
- Date of Birth
- Gender
- First Name
- Last Name
- Address
- City, State, & Zip Code

The **Enter Report -- Add Contribution Detail** screen is shown below:

Enter Report - Add Contribution Detail

72991 - TOWN OF WARRENTON - 03/2012

Demographic Information

SSN:		123-45-6789	Member ID:		1672224
Birth Date:	*	1/1/1952	Gender:	*	Female
First Name:	*	FICTITIOUS	Middle Name:		E
Last Name:	*	MEMBER	Suffix:		
Prefix:					
Care Of:					
Address Line 1:	*	325 N SALISBURY ST			
Address Line 2:					
City:	*	RALEIGH			
State:	*	NC - North Carolina	ZIP Code:	*	27603-1388
Country:			Out of Country:		

Step 7--The second section of the **Enter Report – Add Contribution Detail** report requires that the Employer enter the **Employment Information** which consists of:

- Retirement Plan Code
- Department
- Job Classification Code
- Shared Position Code (if applicable)
- Employment Date
- LGERS Waiting Period End Date
- Retirement Svc Period (**RSP**)
- RSP Begin & End Dates

(**<u>Note #1</u>:** *The LGERS waiting period (**LOCWP)** end date is for those Local Government employees who have a set number of weeks or months after hire date before they are allowed to enter the LGERS. It can vary in length from 30 days to one year. The Employer should put in the date when the LOCWP ends.)*

(**<u>Note #2</u>:** *Retirement Service Period (RSP) refers to the number of months the member works in the calendar year. Members are usually on a 10-month, 11-month, or 12-month RSP. In a few circumstances, a member may be on a 9-month RSP.)*

The **Enter Report – Add Contribution Detail** screen shown below:

Employment Information

Retirement Plan Code:	*			
Department:				
Job Classification:	*			
Shared Position:				
Employment Date:	*		LGERS Waiting Period End Date:	
Retirement Service Period:	*			
Retirement Service Begin Date:			Retirement Service End Date:	

Step 8 -The **Termination Information** section of the **Enter Report –** is only completed if an employee has died, retired or terminated and requires the following fields to be completed:

- Termination Type Code (**click** on the pull-down arrow)

  - Death

  - Involuntarily left Employment

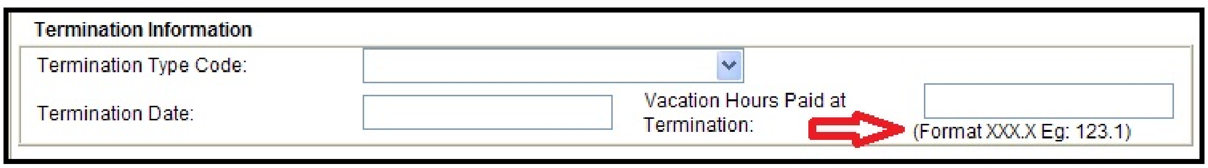
  - Retirement

  - Voluntarily left Employment

- Termination Date

  Date on Death Certificate or Last Day worked. The date AFTER the last day worked is **NOT** acceptable. If the employee has retired, use the last day of previous month before retirement date, Retirement Date is **always** the first of the following month. *(i.e.: last day worked 7/31/2015, retirement date will be 8/1/2015)*

  The **Vacation Hours Paid at Termination.** *Please enter the vacation hours using the format indicated.*



Step 9 -The **Contribution Information** section of the **Enter Report – Add Contribution Detail** screen is a section for reporting different types of pay and the dates the employee worked to earn this pay, **NOT** the date the money was paid to the employee. This section requires the following data fields completed:

- **Pay Type Code** (click on the pull-down arrow)

- Annual Longevity Payment	- Bonus Payment
- Leave without Pay	- Lump-Sum Annual Leave Payment
- Overtime Payment	- Regular Salary (the only pay type that grants retirement service)
- Summer	- Worker’s Compensation Payment

(**<u>Note</u>:** *When reporting employee as on Leave without Pay or Worker’s Compensation Payment, $0.00 is **ALWAYS** entered into the Salary dollar amount field, EE Contribution and ER Contribution fields.*)

● **Adjustment** Codes

PRIOR Period Adjustment - Used when Employer is changing a pay entry previously reported and needs correction (increased, reduced or backed out).

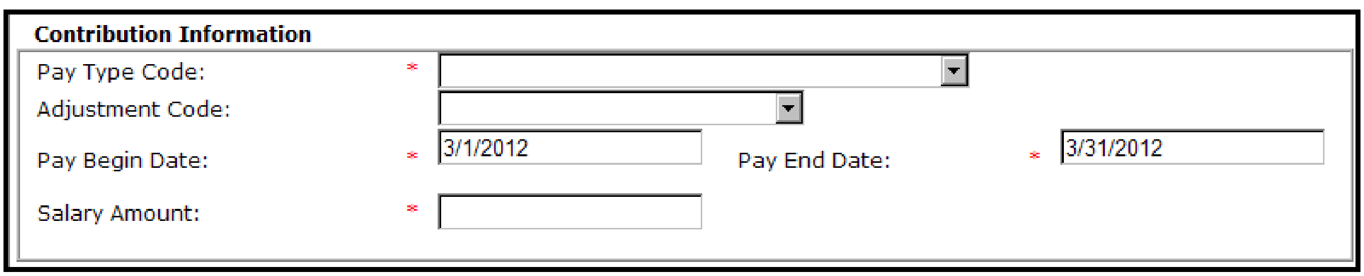
RETRO Adjustment- Used when the Employer omitted a record or line item from a previous month's ORBIT report.

● Pay Period Begin and End Dates are self-explanatory

Note: *It is important for the pay periods **never** to exceed the last day the employee actually worked. When employee retired, terminated or died in the Pay Period End Date fiel*d

● Salary Amount is self-explanatory

● The Employee Contribution field will automatically populate once salary is entered/saved into the field.


Contribution Information

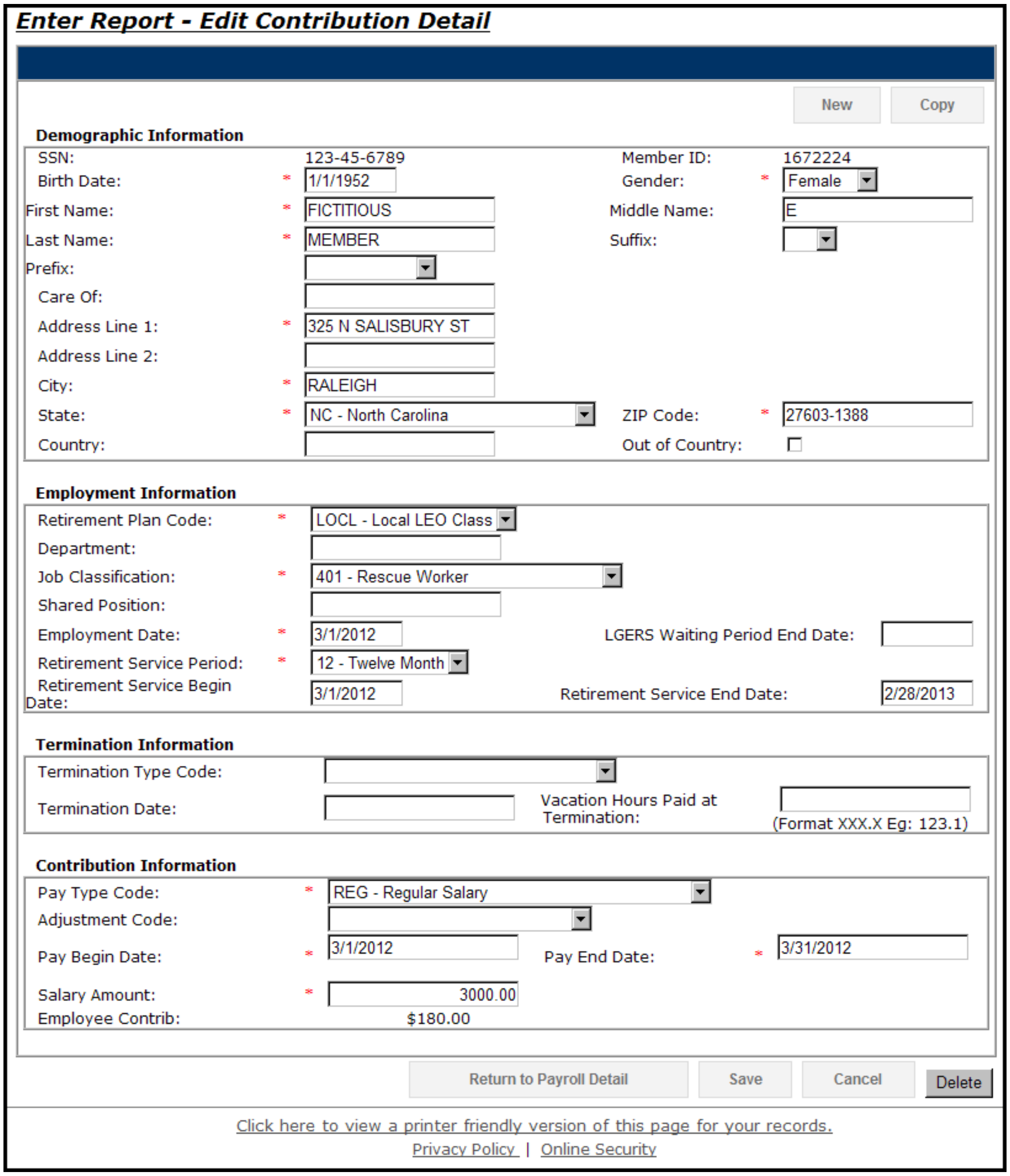
Pay Type Code: *

Adjustment Code:

Pay Begin Date: * 3/1/2012 Pay End Date: * 3/31/2012

Salary Amount: *

Step 10--Once all of these sections and required fields have been completed, the **Enter Report – Add Contribution Detail** screen will be displayed as shown below:


Enter Report - Edit Contribution Detail

New | Copy

Demographic Information

SSN: 123-45-6789 | Member ID: 1672224
Birth Date: * 1/1/1952 | Gender: * Female
First Name: * FICTITIOUS | Middle Name: E
Last Name: * MEMBER | Suffix:
Prefix:
Care Of:
Address Line 1: * 325 N SALISBURY ST
Address Line 2:
City: * RALEIGH
State: * NC - North Carolina | ZIP Code: * 27603-1388
Country: | Out of Country:

Employment Information

Retirement Plan Code: * LOCL - Local LEO Class
Department:
Job Classification: * 401 - Rescue Worker
Shared Position:
Employment Date: * 3/1/2012 | LGERS Waiting Period End Date:
Retirement Service Period: * 12 - Twelve Month
Retirement Service Begin Date: 3/1/2012 | Retirement Service End Date: 2/28/2013

Termination Information

Termination Type Code:
Termination Date: | Vacation Hours Paid at Termination: (Format XXX.X Eg: 123.1)

Contribution Information

Pay Type Code: * REG - Regular Salary
Adjustment Code:
Pay Begin Date: * 3/1/2012 | Pay End Date: * 3/31/2012
Salary Amount: * 3000.00
Employee Contrib: $180.00

Return to Payroll Detail | Save | Cancel | Delete

Click here to view a printer friendly version of this page for your records.
Privacy Policy | Online Security

Step 11---Click Save when all information has been completed, all information with a red asterisk **(*)** is a required field. ORBIT will return to the **Enter Report -- Edit Payroll Detail** screen and list the new employee previously added.

Enter Report - Edit Payroll Detail

		SSN	Name	Member Id	Pay Begin Date	Pay End Date	Plan	Retirement Service Period	Salary Amount	Employee Contrib
View/Edit	Delete	123-45-6789	MEMBER , FICTITIOUS	1672224	3/1/2012	3/31/2012	LOCL	12	$2,000.00	$120.00

Add Record | Submit Report | Return to Payroll Summary

Step 12--To return to the main Payroll Summary screen, **click**

.

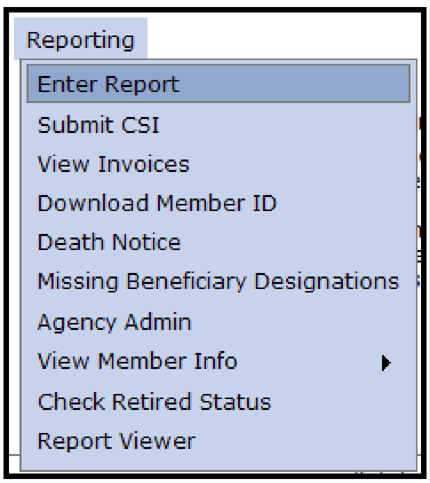
● View/Edit a Record (includes steps to Un-submit Report)

The **View/Edit a Record** function allows an Employer to view and/or edit member information using the same **Enter Report** tool. The Employer may change any information **except** the employee's Social Security number and member ID number on a monthly ORBIT report not yet submitted.

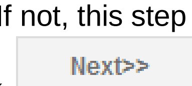
If report has been submitted, the Employer must **UN-submit** the report. Only reports in **Submit** status can be unsubmitted. Once the status of a report has changed to **In Progress or Post**, this feature is disabled and reports will not UN-submit.

The steps below describe how to **View/Edit** a record in the ESS site using the **Enter Report** method.

Step 1--Highlight to select **Enter Report** from the drop-down menu under the **Reporting tab.**



Step 2 - The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click



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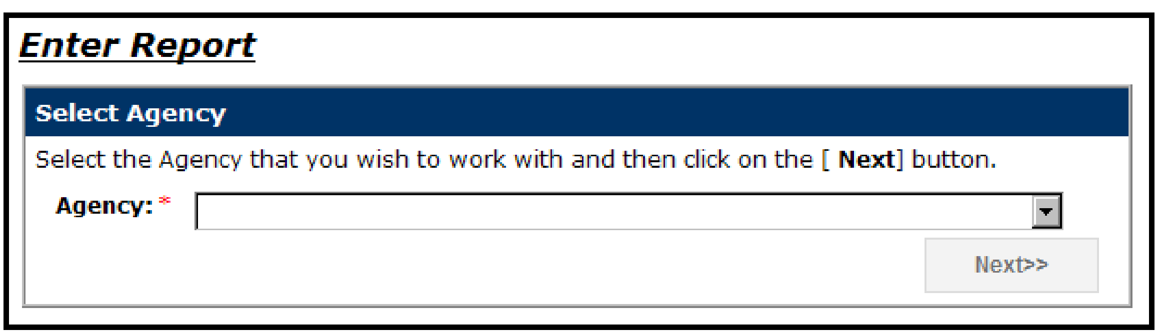


Step 3—Click on **View** beside a monthly report in **Submit** status.

Enter Report - Payroll Summary

	Report Period	Salary	Employee Contribution	Employer Contribution	Total Contributions	Count	Status	Submission Date
View	03/2012	$3,000.00	$180.00	$344.10	$524.10	1	Submit	3/2/2012

[Display All]

Step 4—The **Enter Report – View Submitted Payroll Detail** screen will appear, **click**

[UnSubmit Report]. The **Un-submit Confirmation** message will appear. **Click Continue**. The **Enter Report – Payroll Summary** screen will appear showing the report in **Create** status.

Enter Report - Payroll Summary

	Report Period	Salary	Employee Contribution	Employer Contribution	Total Contributions	Count	Status	Submission Date
View	03/2012	$3,000.00	$180.00	$344.10	$524.10	1	Create	

[Display All]

Note: If the [UnSubmit Report] does NOT appear on the screen, this means the report status has already changed to In Progress or Post. The monthly ORBIT detail report may **NOT** be unsubmitted and the error made by the Employer must be corrected on the following month's ORBIT detail report.

Step 5--Click View to see the employee list on the **Enter Report – Edit Payroll Detail** screen.

Enter Report - Edit Payroll Detail

		SSN	Name	Member Id	Pay Begin Date	Pay End Date	Plan	Retirement Service Period	Salary Amount	Employee Contrib
View/Edit	Delete	123-45-6789	MEMBER , FICTITIOUS	1672224	3/1/2012	3/31/2012	LOCL	12	$3,000.00	$180.00

[Add Record] [Submit Report] [Return to Payroll Summary]

Step 6—Click View/Edit beside the record of interest. The **Enter Report – Edit Contribution Detail** screen will appear. Make the necessary corrections.

- To view a previous employee, **click** [Back].
- To add a new employee, **click** [New].
- To add an additional record or make adjustments for an existing employee, for example, a bonus or longevity payment, click [Copy]. A new detail screen will open containing all of the same data as the original record **EXCEPT** for the **Contribution Information.** However, an

Employer has the ability to change all four sections of the **Enter Report – Edit Contribution Detail** screen.

- To view the next member on the report, **click** Next.

Step 7- When all edits are completed and the needed corrections are on the report, **click** Save located at the bottom right of the screen. To return to the Payroll Detail screen without making any changes, click Return to Payroll Detail or Cancel. To delete this record, click Delete.

Step 8 - From the **Enter Report — Edit Payroll Detail** screen, **click** Submit Report to resubmit the report including the changes.

Enter Report - Edit Payroll Detail

		SSN	Name	Member Id	Pay Begin Date	Pay End Date	Plan	Retirement Service Period	Salary Amount	Employee Contrib
View/Edit	Delete	123-45-6789	MEMBER , FICTITIOUS	1672224	3/1/2012	3/31/2012	LOCL	12	$3,000.00	$180.00
View/Edit	Delete	123-45-6789	MEMBER , FICTITIOUS	1672224	3/1/2012	3/31/2012	LOCL	12	$500.00	$30.00

Add Record | Submit Report | Return to Payroll Summary

Step 9 - The **Submit Confirmation** screen will appear. Click the **Continue** link to enter and submit the **Contribution Summary Instructions** (Payment).

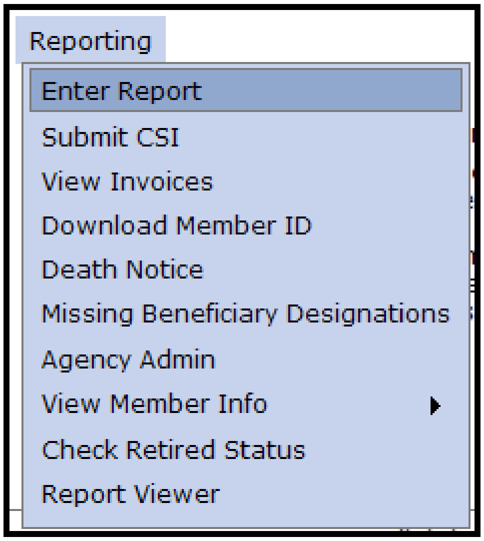
• Delete a Record (includes steps to Un-submit Report)

The **Delete Record** function allows a record on the monthly ORBIT report (not yet been submitted) to be deleted. To delete a record on a **Submitted Report**, the Employer must unsubmit the report, but this may not always be possible if the status of the report has already changed to **In Progress** or **Post.**

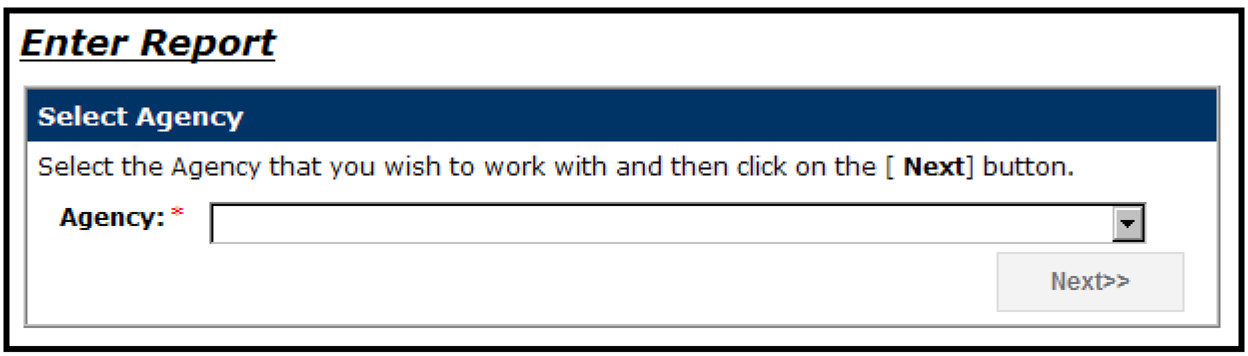
In these instances, the monthly ORBIT detail report may **NOT** be unsubmitted and the error made by the Employer must be corrected on the following month's ORBIT detail report.

The steps below describe how to delete a record on the Employer Self-Service website using the **ENTER REPORT** module.

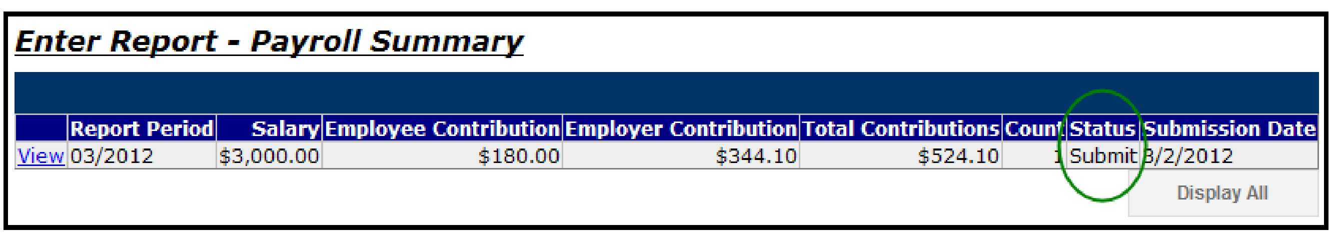
Step 1--Highlight to select **Enter Report** from the drop-down menu under the **Reporting tab.**



Step 2 - The Select Agency box will appear if you <u>have access to multiple agencies</u>. If not, step should be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>>.



Step 3—Click on **View** beside a monthly report of interest.



	Report Period	Salary	Employee Contribution	Employer Contribution	Total Contributions	Count	Status	Submission Date
View	03/2012	$3,000.00	$180.00	$344.10	$524.10	1	Submit	3/2/2012

Step 4 - The **Enter Report – View Submitted Payroll Detail** screen will appear, **click** UnSubmit Report. The **Un-submit Confirmation** message will appear. **Click Continue**. The **Enter Report – Payroll Summary** screen will appear showing the report in "**Create"** status.

Enter Report - Payroll Summary

	Report Period	Salary	Employee Contribution	Employer Contribution	Total Contributions	Count	Status	Submission Date
View	03/2012	$3,000.00	$180.00	$344.10	$524.10	1	Create	

Display All

Note: If the [UnSubmit Report] does NOT appear on the screen, this means the report status has already changed to In Progress or Post. The monthly ORBIT detail report may **NOT** be unsubmitted and the error made by the Employer must be corrected on the next month's ORBIT detail report.

Step 5 - Click View to see the employee list on the **Enter Report – Edit Payroll Detail** screen.

Enter Report - Edit Payroll Detail

		SSN	Name	Member Id	Pay Begin Date	Pay End Date	Plan	Retirement Service Period	Salary Amount	Employee Contrib
View/Edit	Delete	123-45-6789	MEMBER , FICTITIOUS	1672224	3/1/2012	3/31/2012	LOCL	12	$3,000.00	$180.00
View/Edit	Delete	123-45-6789	MEMBER , FICTITIOUS	1672224	3/1/2012	3/31/2012	LOCL	12	$500.00	$30.00

Add Record | Submit Report | Return to Payroll Summary

Step 6 - Click Delete beside the record of interest.

Enter Report - Edit Payroll Detail

		SSN	Name	Member Id	Pay Begin Date	Pay End Date	Plan	Retirement Service Period	Salary Amount	Employee Contrib
View/Edit	Delete	123-45-6789	MEMBER , FICTITIOUS	1672224	3/1/2012	3/31/2012	LOCL	12	$3,000.00	$180.00
View/Edit	Delete	123-45-6789	MEMBER , FICTITIOUS	1672224	3/1/2012	3/31/2012	LOCL	12	$500.00	$30.00

Add Record | Submit Report | Return to Payroll Summary

Step 7-The **Deletion Confirmation** screen will appear.

Windows Internet Explorer

Are you sure you want to permanently delete the employee 'MEMBER,FICTITIOUS' and his/her contributions from Payroll Details? If so, click 'OK,' otherwise, click 'Cancel.'

OK | Cancel

Step 8 – Click [OK]. A list of employees **without** the deleted employee will be displayed.

Enter Report - Edit Payroll Detail

		SSN	Name	Member Id	Pay Begin Date	Pay End Date	Plan	Retirement Service Period	Salary Amount	Employee Contrib
View/Edit	Delete	123-45-6789	MEMBER , FICTITIOUS	1672224	3/1/2012	3/31/2012	LOCL	12	$3,000.00	$180.00

Add Record | Submit Report | Return to Payroll Summary

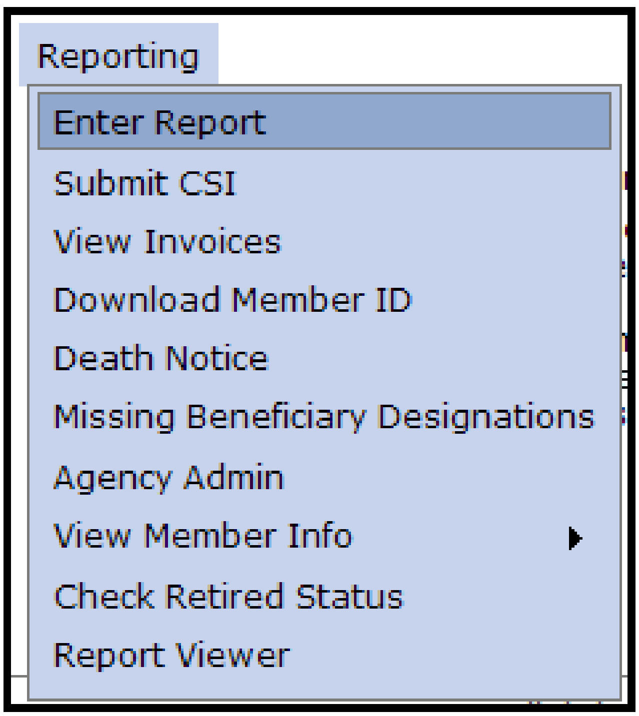
Step 9 - From the **Enter Report — Edit Payroll Detail** screen, **click** [Submit Report] to complete the submission of your corrected information.

Step 10—The **Submit Confirmation** screen will appear. Click the **Continue** link to enter and submit the **Contribution Summary Instructions** (Payment). See section 2.3 for detailed instructions.

● View Previous Payroll Summaries and Details

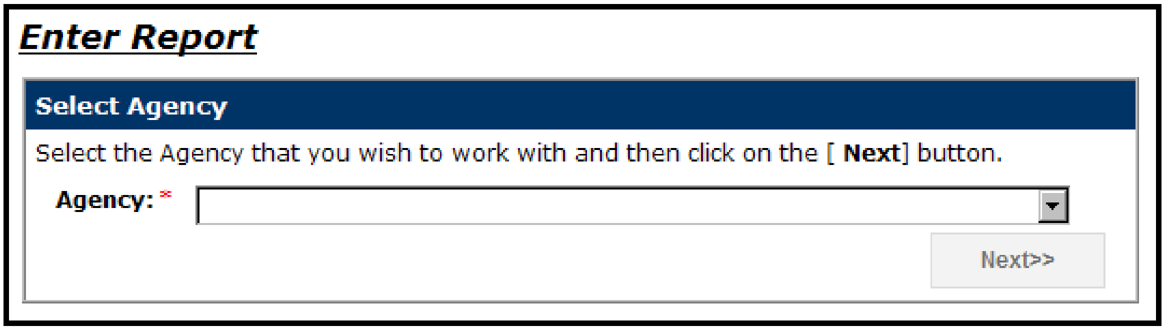
ORBIT tracks all reports ever sent into the Retirement System. Agencies can view this historical data.

Step 1--Highlight to select **Enter Report** from the drop-down menu under the **Reporting tab.**

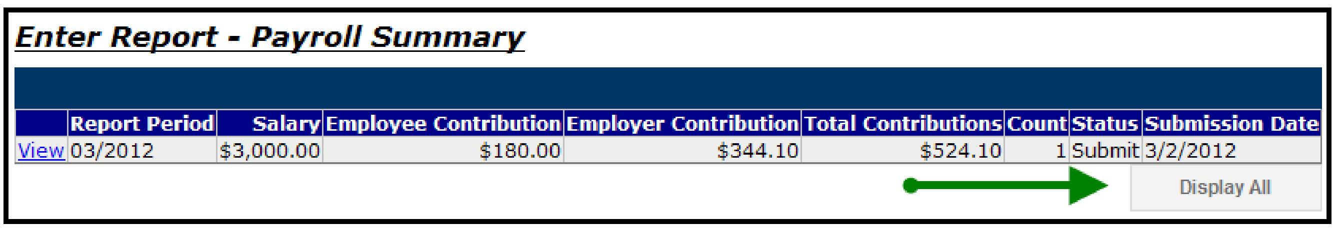


Step 2 - The Select Agency box will appear if you have access to multiple agencies. If not, this step should be skipped. Select the appropriate 5-digit agency code from the drop down box.

Click Next>> .



Step 3 -The **Enter Report – Payroll Summary** screen will appear showing the summary in chart format for the current month. To view all past reports, click Display All .



	Report Period	Salary	Employee Contribution	Employer Contribution	Total Contributions	Count	Status	Submission Date
View	03/2012	$3,000.00	$180.00	$344.10	$524.10	1	Submit	3/2/2012

Step 4 - A chart will appear of all previous payroll summaries will appear showing Report Period, Salary, Employee Contributions, Employer Contributions, Total Contributions, Count, Status and Submission Date. To view details of a specific report, click **View** located to the left of the report of interest.

2.3 Submit Contribution Summary Instructions

Each month after the monthly ORBIT detail report has been submitted, a second report is required called the **Contribution Summary Instruction Report, or CSI report.** The CSI report is the Employers' financial piece and the money that matches the details on the payroll summary. The CSI report submitted additionally online through Employer Self-Service module. The total amount on the monthly CSI report **must match** the salary and contribution amounts on the monthly detail report.

The CSI also allows Employers to pay any outstanding invoices at the time of the CSI submission. Invoice balances calculate into the final payment amount on the CSI. **Paper checks** are no longer accepted as forms of payment, this is now handled as an electronic transaction, and all checks will be returned to the Employer.

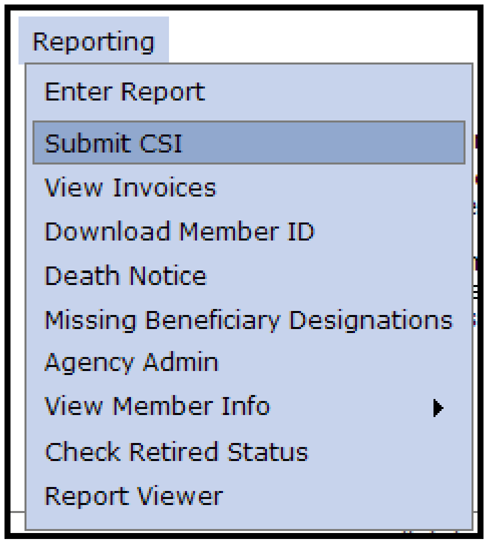
Employers use the CSI report to pay the financial amount shown on the report through EFT (**Electronic Funds Transfer**). EFT is the Employer's authorization for transfer funds from the Employer's financial institution into the NC Retirement Systems account.

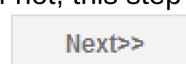
Regardless of the form in which the employer transmit the details (**Enter Report** or the **Submit Report)**, all Employers are required to submit a monthly **CSI Report** (financial contributions).

- ## Submit Contribution Summary Instruction (CSI)

The steps shown below describe how to submit a CSI report via the Employer Self-Service.

Step 1 - Highlight to select **Submit CSI** from the drop-down menu under the **Reporting tab.**



Step 2 - The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click 

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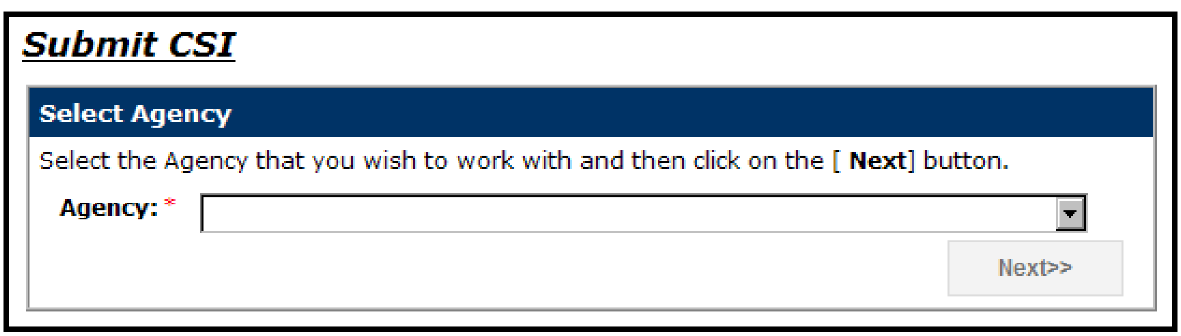


Step 3 - The **CSI – Employer Reports** screen will appear. Click on **View/Edit** on the left side of the screen.

CSI Employer Reports

	Report Period	Salary	Employee Contribution	Employer Contribution	Invoice Total	Net Amount	Status	Submission Date
View/Edit	03/2012	$0.00	$0.00	$0.00	$0.00	$0.00	Create	

Display All

Step 4 - The **CSI Details** page will appear. Confirm the pre-populated **Total Wages, Total Employee Contributions** and **Total Employer Contributions** under each Retirement Plan Type. Confirm the **Net Contribution Amount** matches the ORBIT report.

Step 5 - If there are any prior period adjustments, click **View/Edit Prior Period Contributions**. Confirm the pre-populated **Total Prior Wages**, **Total Prior Employee Contributions** and **Total Prior Employer Contributions** under each Retirement Plan Type. Click **Close** to remove the prior period information from view.

Step 6 - Employers have the option of either paying the outstanding invoices or overriding invoice payment during the reporting month. To pay an outstanding invoice(s), click Select >> .

Invoices

Override Payment of Invoices: ☐ *

Select >>	Action	Invoice Number	Invoice Type	Invoice Amount

Net Invoice Amount $0.00

Step 7 - The **CSI Details – Select Invoices** page will appear listing in summary chart format the **Agency Number, Invoice Number, Date, Invoice Amount, Outstanding Amount, Invoice Type** and **Action**. Check the **checkbox** located to the left of the invoice(s) of interest to include invoice payment with your CSI payment.

To view invoice details in PDF format, click **View** located to the right of the invoice(s) of interest. For additional instructions and information, please see the **View Invoices** section of this guide.

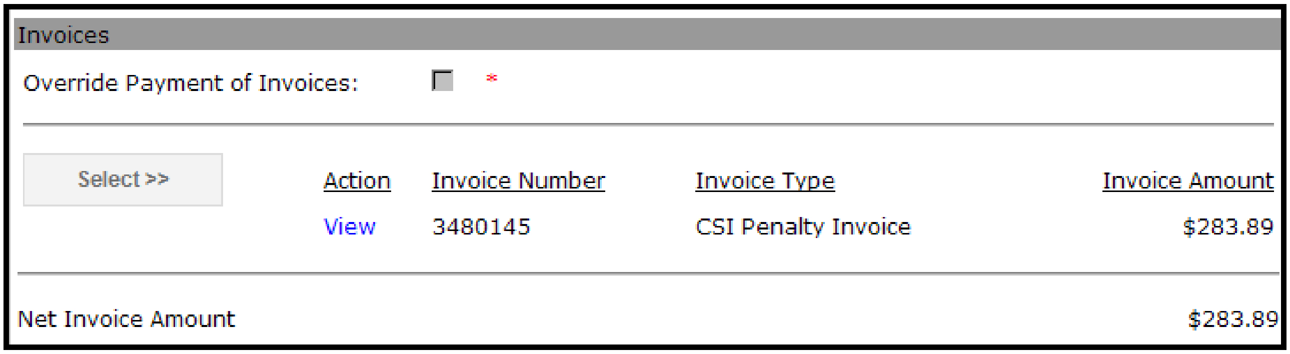
CSI Details - Select Invoices

	Agency Number	Invoice Number	Date	Invoice Amt	Outstanding Amt	Invoice Type	Action
☐		3480145	02/02/2012	$283.89	$283.89	CSI Penalty Invoice	View

1

Save Cancel

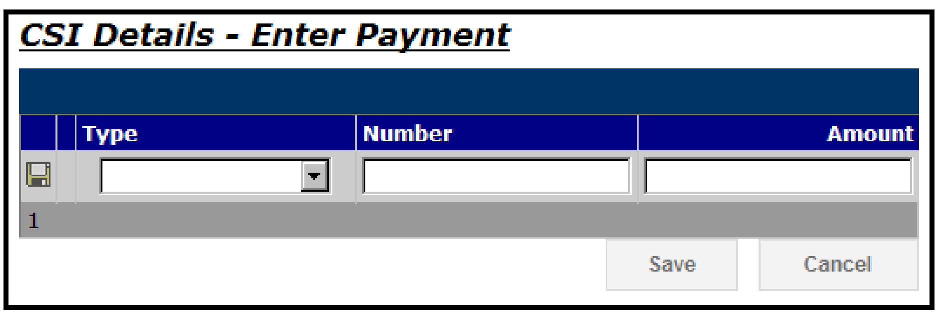
Click Save when invoice selection is complete. Click Cancel to exit without making any changes. The invoices and payment amount will appear on the **CSI Details** page (for those invoices selected for payment.) If the invoice indicates a credit amount, the credit amount will be deducted from the **Net Invoice Total** on the **CSI Details** page.



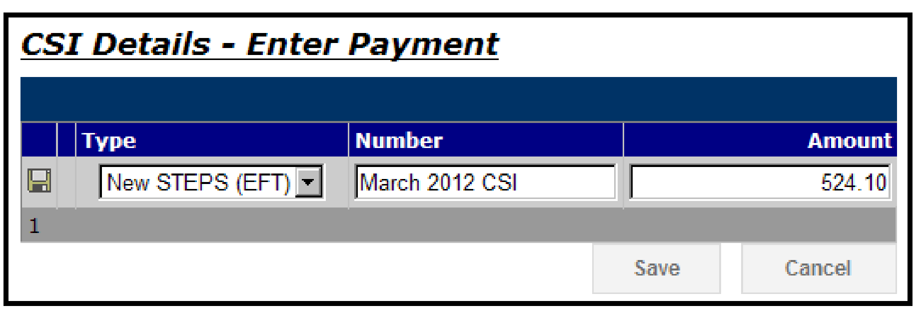
To skip invoice payment, check the override box on the **CSI --Details** page.

Note: If neither the invoice nor the override checkboxes are checked, a warning message about this requirement will appear.

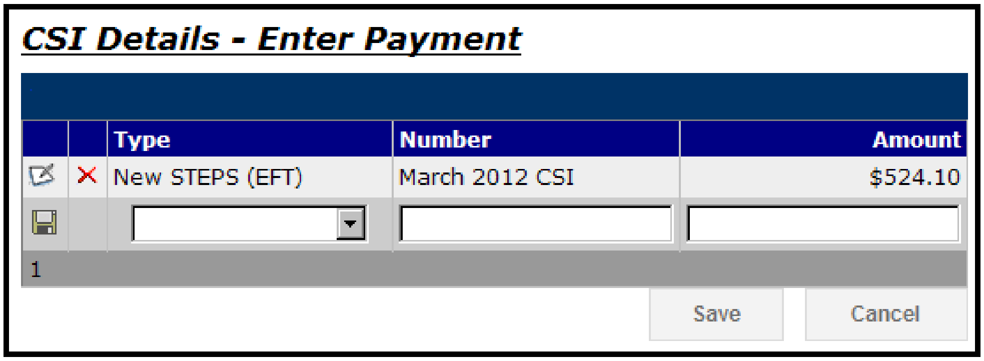
Step 8—Confirm the **Net Amount** to be sent to the Retirement System**.** To submit the **CSI Report Summary**, the Employer must enter the **Payment** information which is the last section on the screen and click Select >>. The **Enter Payment** screen will appear.



Step 9—Select a payment type from the drop down list, then enter the date (optional), number (optional), and the total contribution amount on the CSI Report.



Click the on the left of the screen. ORBIT will display this screen:



If there are other payment types that the Employer has to enter, the same steps must be followed in the row below the one the Employer just entered.

Step 10 - To edit already entered information, click . To delete the entry completely, click on the **red X** symbol and the entry will disappear. When the editing is completed, click the on the left of the screen.

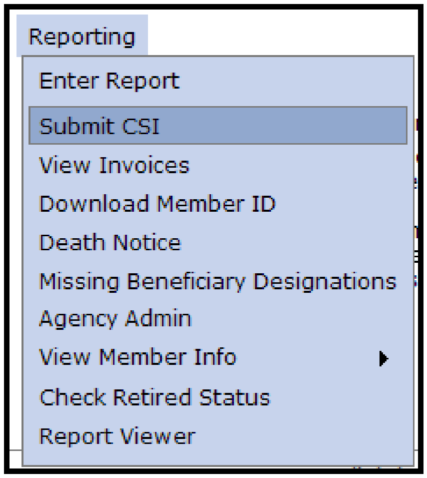
Step 11 - When all of the payment information has been entered, click Save or click Cancel to return to the **CSI Details** page.

To submit the **CSI report** to RSD, click on Submit CSI once finished entering the detail information. (**Note: The CSI report can only be submitted when the total payment amount equals to the net amount.)**

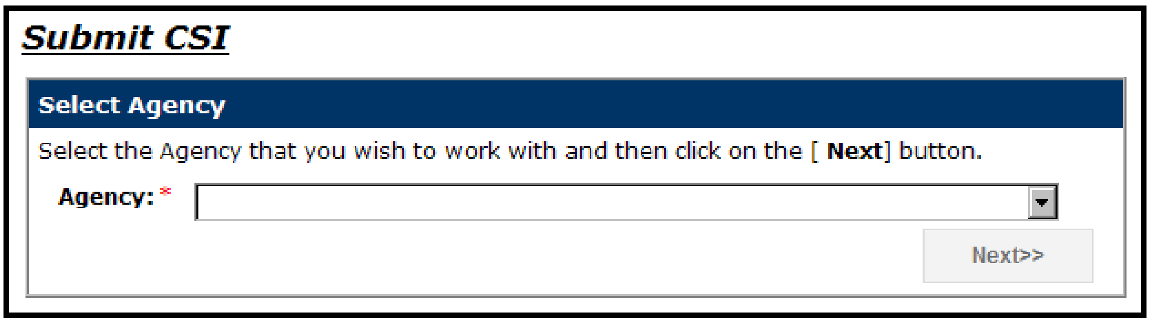
- ## Unsubmit CSI Employer Report

As long as the file in **Submit** status, the Employer has the option to unsubmit and resubmit a file containing different information. Once the nightly batch process has started, the **Unsubmit** at the end of the line above will disappear and the Employer will no longer be able to unsubmit the report again. Once the status of the report has changed to **In Progress** or **Post** status, the report can no longer be unsubmitted.

Step 1— Highlight to select **Submit CSI** from the drop-down menu under the **Reporting tab.**



Step 2 - The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>> .



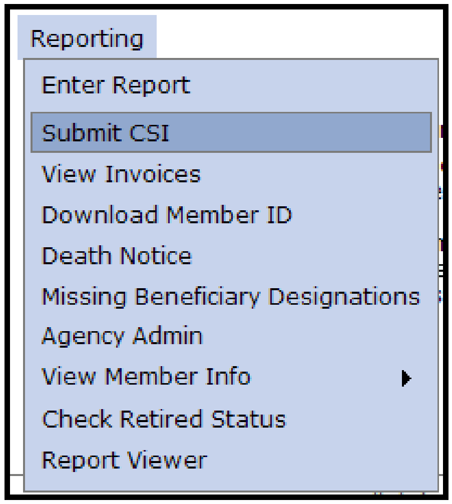
Step 3 - The **CSI – Employer Reports** screen will appear. Click on **Unsubmit** on the left side of the screen.

Step 4 - The Unsubmit Confirmation screen will appear. Click **Continue** to return to the **Submit Report** screen. The report status will change to **CREATE**.

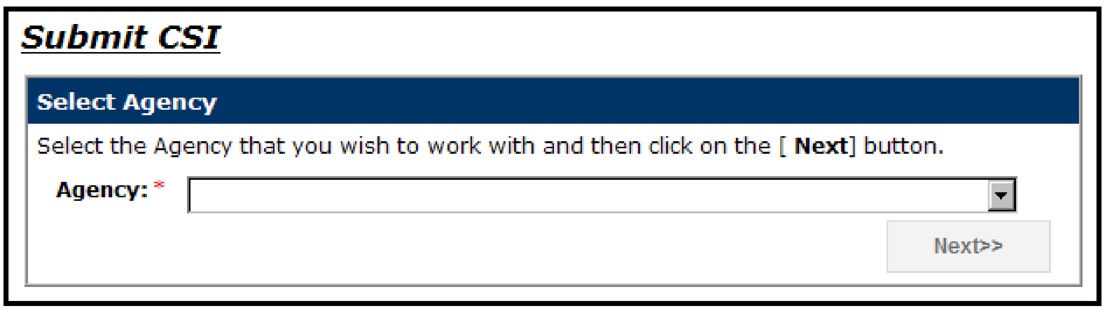
- ## View Previous CSI Employer Reports

ORBIT tracks all reports ever sent into the Retirement System. Agencies can view this historical data.

Step 1 - Highlight to select **Submit CSI** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>>.



Step 3—The **CSI Employer Reports** screen will appear. Click on **Unsubmit** on the left side of the screen. To view all past reports, click Display All.

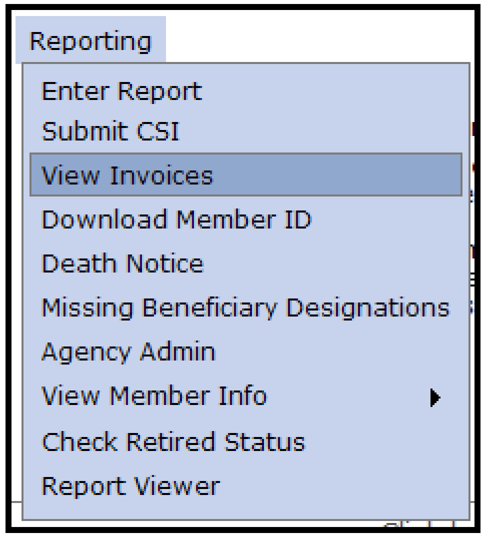
Step 4--A chart will appear of all previous CSI Employer Reports will appear showing Report Period, Salary, Employee Contributions, Employer Contributions, Invoice Total, Net Amount, Status and Submission Date.

To view details of a specific report, click **View** located to the left of the report of interest.

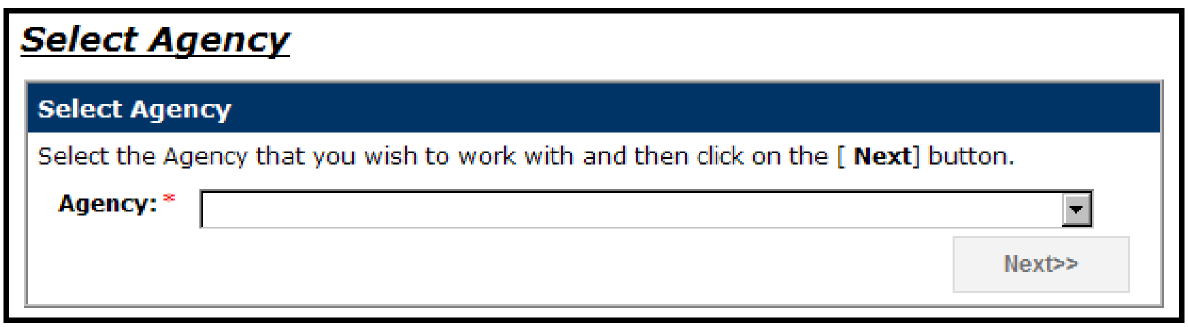
2.4 View Invoices

Employers can view PDF images of all invoices and details of invoice history. The steps shown below describe how to view invoice information in the Employer Self-Service tool.

Step 1— Highlight to select **View Invoices** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>>.



Step 3— The **View Invoices** summary chart appears listing **Action, Agency Number, Invoice Number, Date, Invoice Amount, Outstanding Amount, Invoice Type** and **Status.** Invoices are listed in reverse chronological order with the most recent listed first.

Invoice Types:

Adjustment Invoice- Auto-generated when records flagged in error are either posted or deleted to member accounts.

Amended Adjustment Invoice- Auto-generated when records deleted in error are restored and posted to member accounts.

Contribution Summary Adjustment- Auto-generated when underpayments, overpayments or rounding results in a change affecting employer and/or employee contributions.

CSI Penalty Invoice- A late fee is auto-applied to all agencies who do not submit their monthly CSI by 4:30 p.m. on the fourth working or business day of the month. The late fee is $25 or 1% of total contributions whichever is greater.

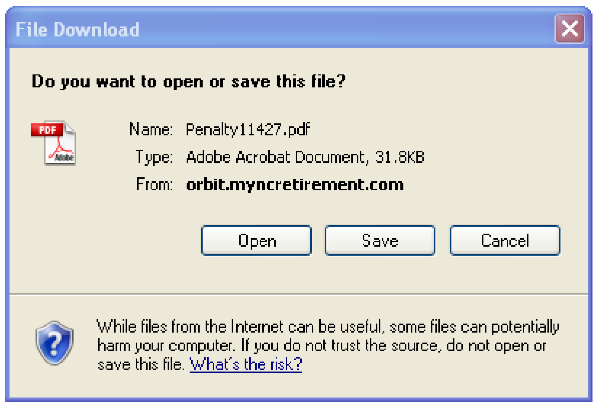
Manual Invoice- Reasons for this type vary. Please refer to the comment section on the invoice. Currently, this includes penalty invoices due to legislative changes.

Variance Invoice- Auto-generated when records already posted to member accounts are corrected.

Status Types include PAID, UNPAID and CANCELLED.

Step 4— Click **View** on the left of the screen to view invoice details. If the invoice is a **Contribution Summary Adjustment**, click **Summary** to see the summary information. Click **Details** to see the adjusted employee contributions.

Step 5— The **File Download** box will appear.



Step 6— Click Open to view the invoice details in Adobe. Click Save to download a PDF of the invoice details locally on your computer. The Save As box will appear. Choose a file location and click Save. Click Cancel to exit without viewing the invoice details.

Note: If the CSI report has already been submitted for the month, but is not yet **In Progress or Post** status, the Employer can unsubmit the monthly CSI report to make payment on an outstanding invoice.

2.5 Download Member ID

Employer Self-Service allows Employers to view and display the **ORBIT member ID numbers** for all its agency's employees. The **Member ID** field is required on the Employer's reporting file layout. In order for an Employer to receive this data and report their employees correctly on the monthly ORBIT reports, Employers will use the instructions below to obtain the **Member ID** data from RSD. For security purposes, the Member ID number of a new member replaces the use of an employee's Social Security number for identification purposes. However, the member's Social Security number will still be used for RSD tax reporting purposes.

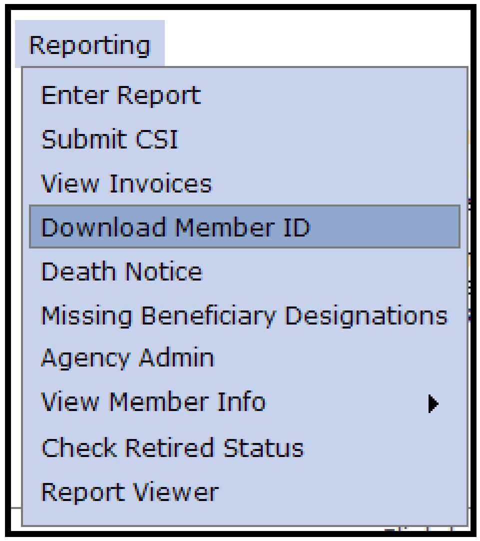
Employers have 3 ways to Download Member IDs-

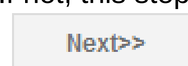
- Retrieve Only New Members
- Retrieve Members By Date
- Retrieve Members by SSN

- ## Retrieve Only New Members

This method allows an Employer to download the **Member ID numbers** which have been uploaded in the past month. The Employer has the option of printing the results **or** downloading the file onto the computer for future reference.

Step 1— Highlight to select **Download Member ID** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click 

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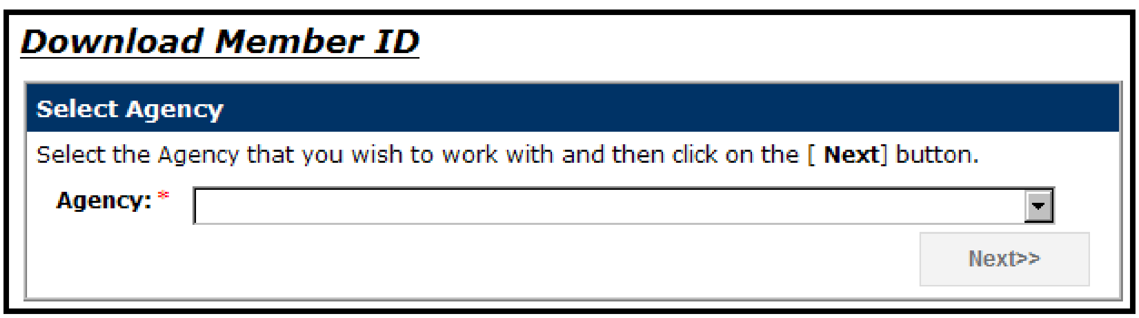
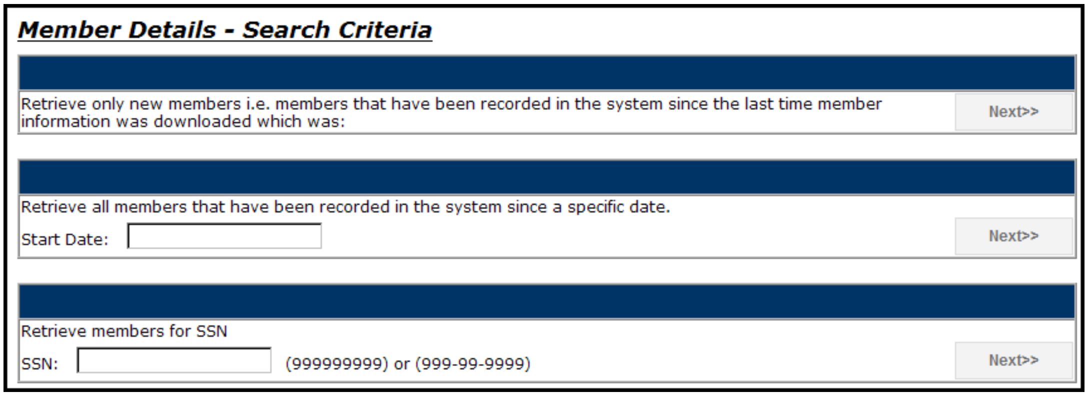


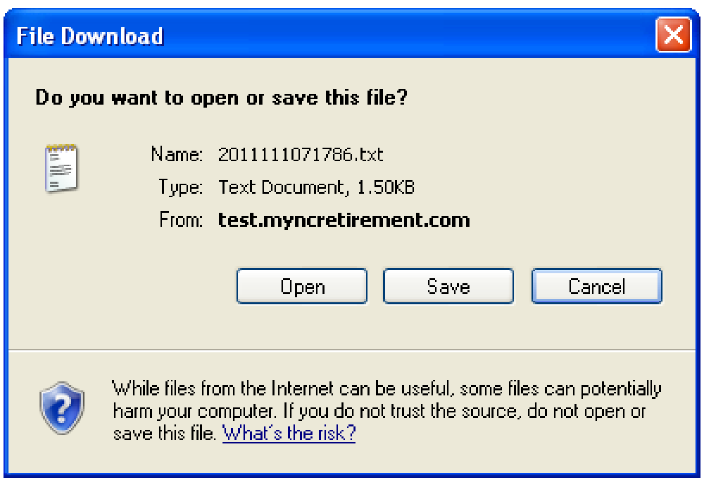
The **Member Details – Search Criteria** screen will appear.



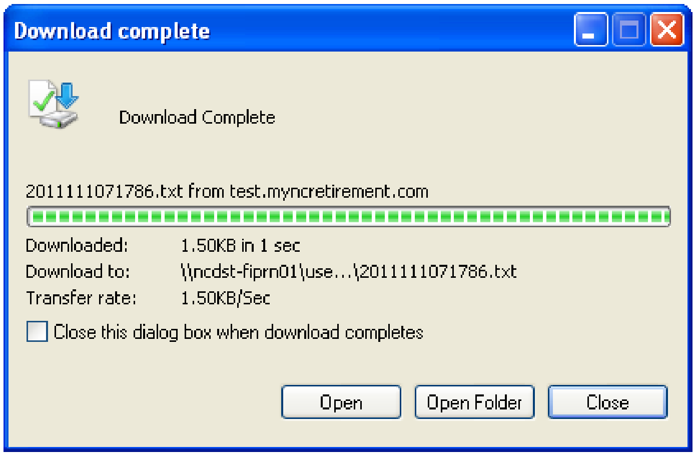
Step 3—Click Next>> beside the **Retrieve Only New Members** box located at the top of the three boxes on the **Member Details – Search Criteria** screen.

The **Member Details** page will appear listing all new member ID numbers loaded in the past month including the **Member ID, SSN, Name, Create Date** and **Download Date.**

Step 4— To return to the **Search Criteria** page, click Return to Search Criteria. To download the file of new member ID numbers, click Download File. The **File Download** box will appear.



Step 5— To exit without viewing or saving, click Cancel. To view the list, click Open. To save this file locally, click Save. The Save As box will appear. Save the file at the desired location. The **Download Complete** box will appear.



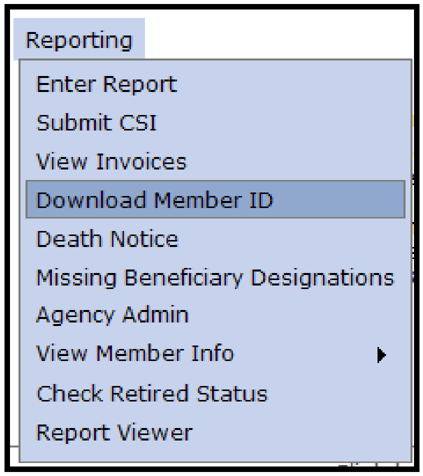
Step 6— Click Open to view the downloaded file. Click Open Folder to go directly to the file location. Click Close to exit.

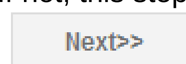
Step 7— To print the results, click on the **"Click here to view the printer friendly version of this page for your records"** link at the bottom of the page.

● Retrieve Member by Date

The **Retrieve Member by Date** function allows an Employer to download only member ID numbers that were loaded as of the date entered. The Employer has the option of printing the result or downloading the file for future reference.

Step 1— Highlight to select **Download Member ID** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click 

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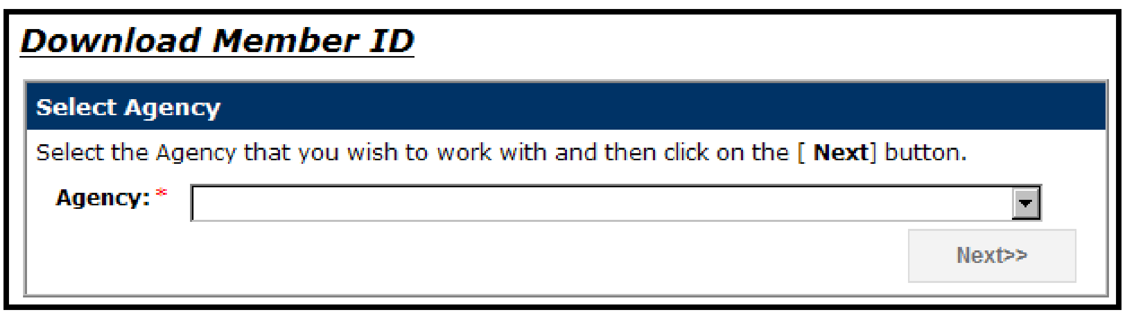
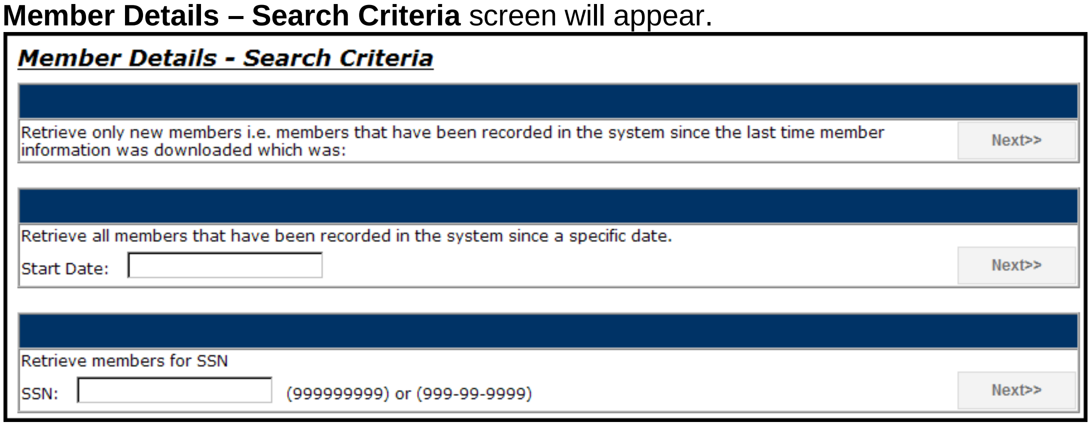


The **Member Details – Search Criteria** screen will appear.

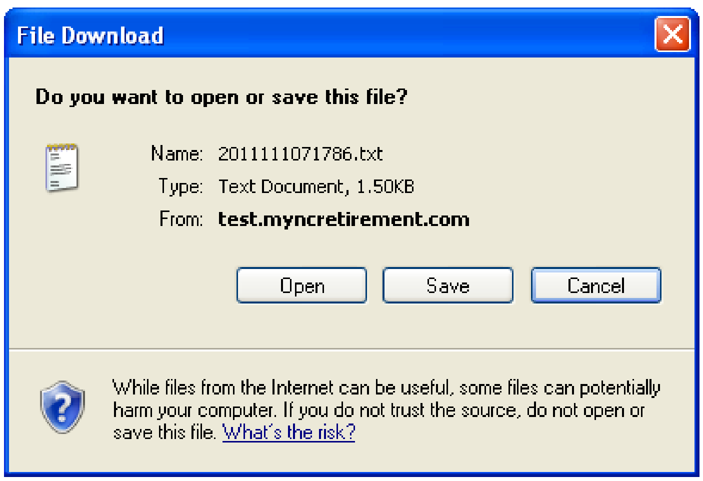


Step 3—Enter a **Start Date** in the text box located in the **Retrieve Member by Date** field using MM/DD/YEAR format or select the date using the calendar icon that appears once you click in the box.

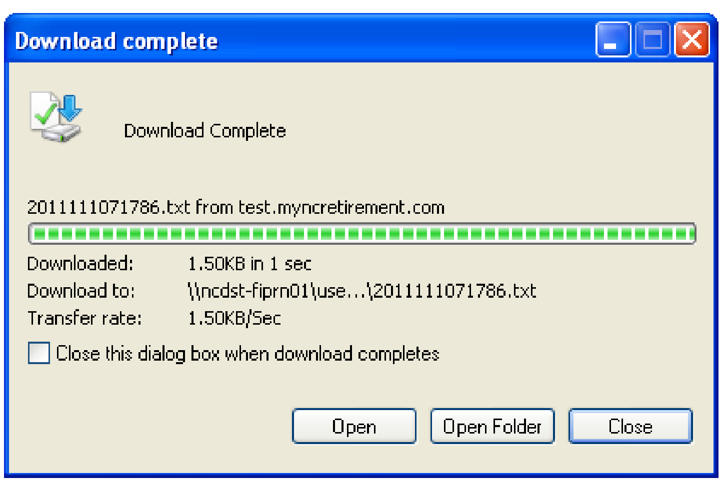
Step 4— Click Next>> beside the **Retrieve Members by Date** box located in the middle of the **Member Details – Search Criteria** screen.

The **Member Details** page will appear listing all new member ID numbers recorded since that date including the **Member ID, SSN, Name, Create Date** and **Download Date.**

Step 5—To return to the **Search Criteria** page, click Return to Search Criteria. To download the file of new member ID numbers, click Download File. The **File Download** box will appear.



Step 6— To exit without viewing or saving, click Cancel. To view the list, click Open. To save this file locally, click Save. The Save As box will appear. Save the file at the desired location. The **Download Complete** box will appear.



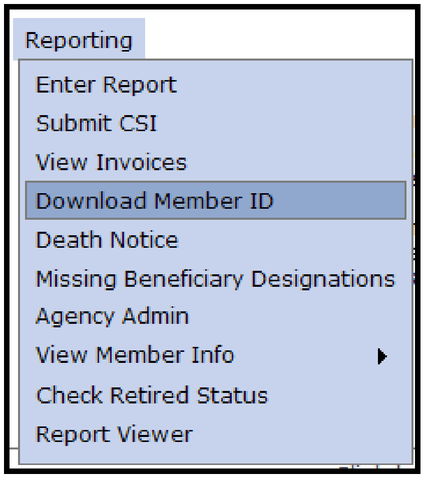
Step 7— Click Open to view the downloaded file. Click Open Folder to go directly to the file location. Click Close to exit.

Step 8— To print the results, click on the **"Click here to view the printer friendly version of this page for your records"** link at the bottom of the page.

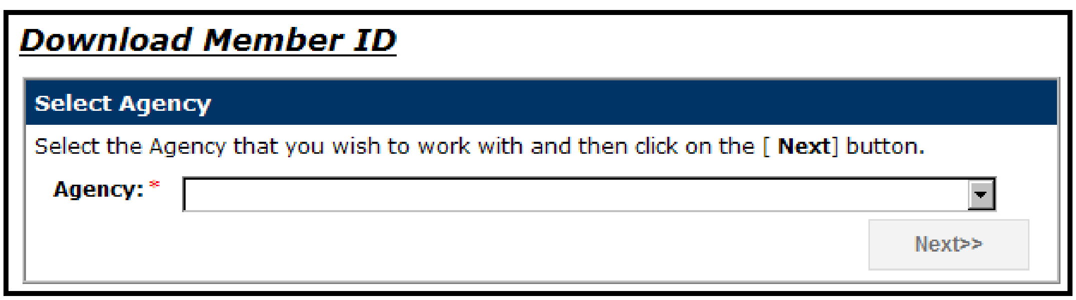
- ## Retrieve Members by SSN

This function allows an Employer to download only the member ID number of the SSN entered. The Employer has the option of printing the results of this type of search or downloading the file for future reference.

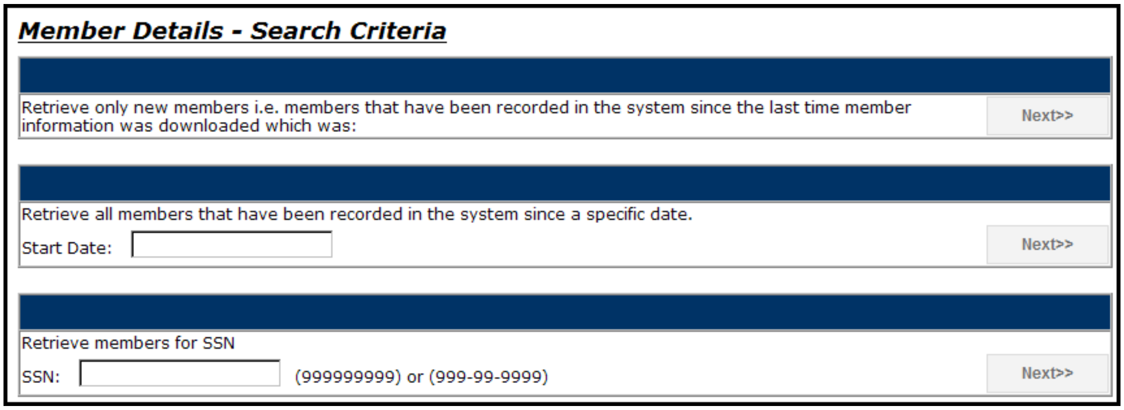
Step 1— Highlight to select **Download Member ID** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>> .



The **Member Details – Search Criteria** screen will appear.

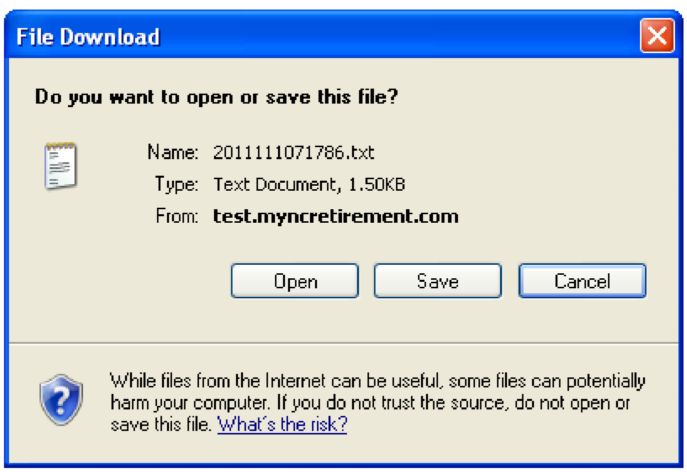


Step 3—Enter the employee's SSN in the **Retrieve Members by SSN** box.

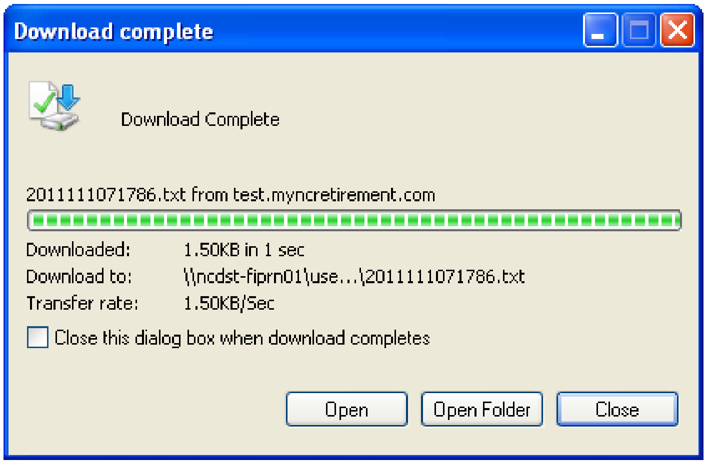
Step 4— Click Next>> beside the **Retrieve Members by SSN** box located at the bottom of the **Member Details – Search Criteria** screen.

The **Member Details** page will appear listing the member information for the SSN including the **Member ID, SSN, Name, Create Date** and **Download Date.**

Step 5— To return to the **Search Criteria** page, click Return to Search Criteria. To download the file of new member ID numbers, click Download File. The **File Download** box will appear.



Step 6— To exit without viewing or saving, click Cancel. To view the list, click Open. To save this file locally, click Save. The Save As box will appear. Save the file at the desired location. The **Download Complete** box will appear.



Step 7— Click Open to view the downloaded file. Click Open Folder to go directly to the file location. Click Close to exit.

Step 8— To print the results, click on the **"Click here to view the printer friendly version of this page for your records"** link at the bottom of the page.

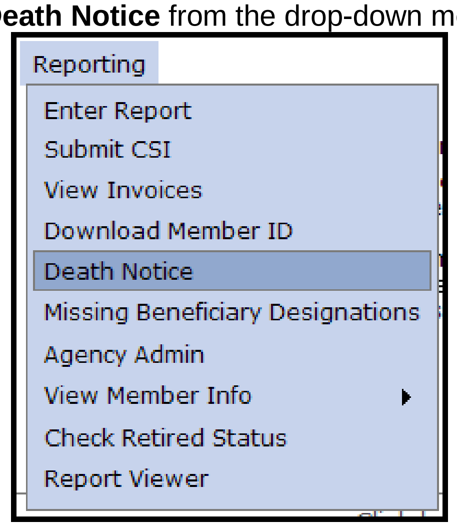
2.6 Death Notice

The Employer Self-Service Death Notice function allows an Employer to report the deaths of its members to the Retirement Systems Division without direct contact with RSD staff or personnel. The death information is then stored in the ORBIT record for the deceased member(s).

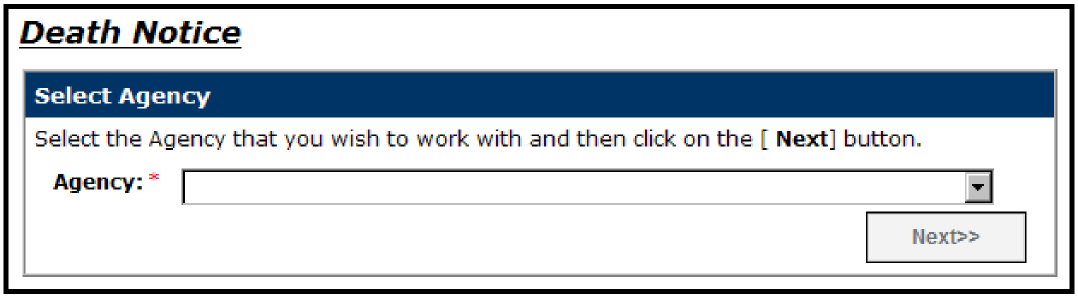
- **Report a Death**

The Death Notice function allows an Employer to report the deaths of employees online. This function captures the employee's date of death; the name of the person reporting the death; and an Employer point of contact for questions that RSD may have regarding the deceased employee.

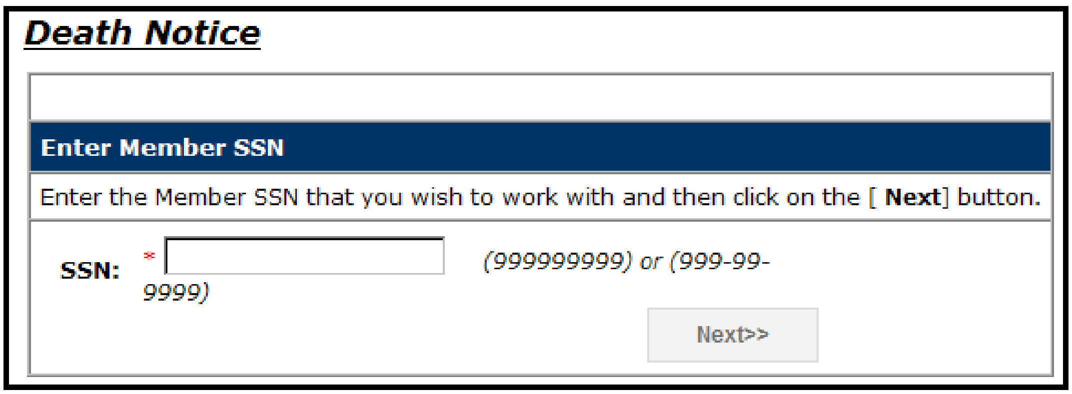
Step 1— Highlight to select **Death Notice** from the drop-down menu under the **Reporting tab.**



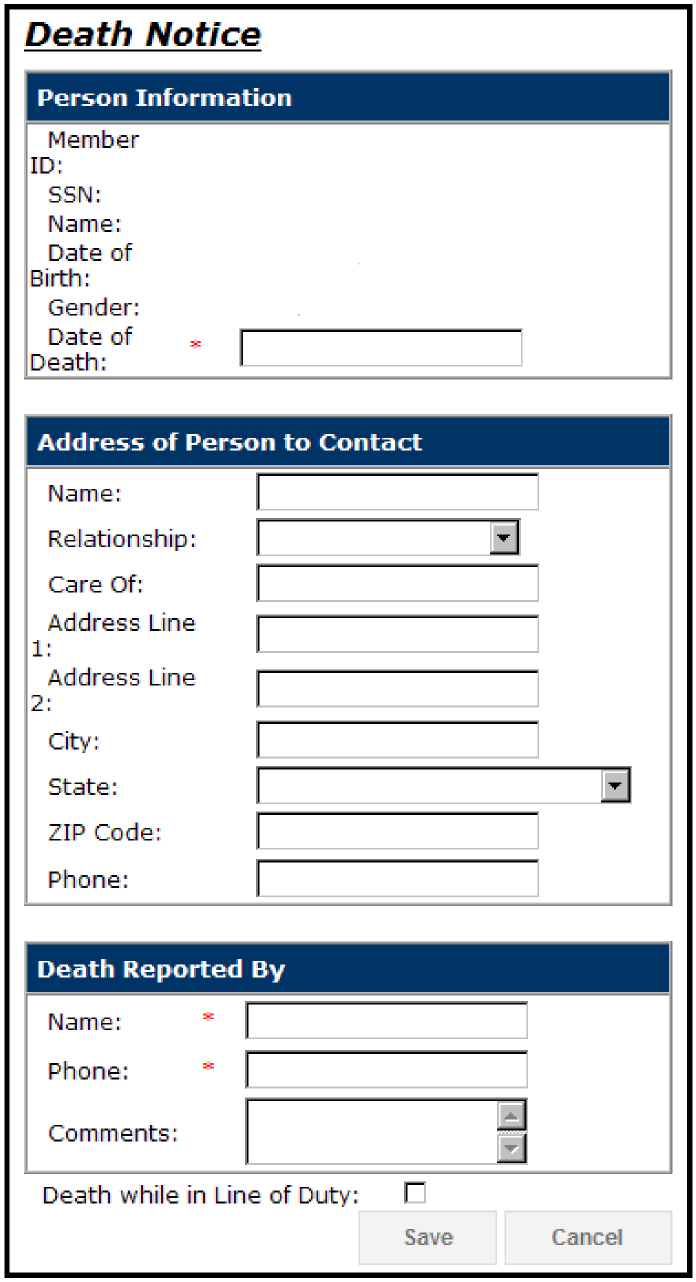
Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>> .



Step 3—Enter the SSN of the deceased employee. (**<u>Note</u>:** The Social Security number that is entered must be for an **active** employee of the Employer that is logged on to ORBIT. The SSN must also be a number that already exists in ORBIT.)



Step 4—Click Next>> . The Person Information will be pre-populated with personal information.



Death Notice

Person Information

Member ID:
SSN:
Name:
Date of Birth:
Gender:
Date of Death: *

Address of Person to Contact

Name:
Relationship:
Care Of:
Address Line 1:
Address Line 2:
City:
State:
ZIP Code:
Phone:

Death Reported By

Name: *
Phone: *
Comments:

Death while in Line of Duty:

Save Cancel

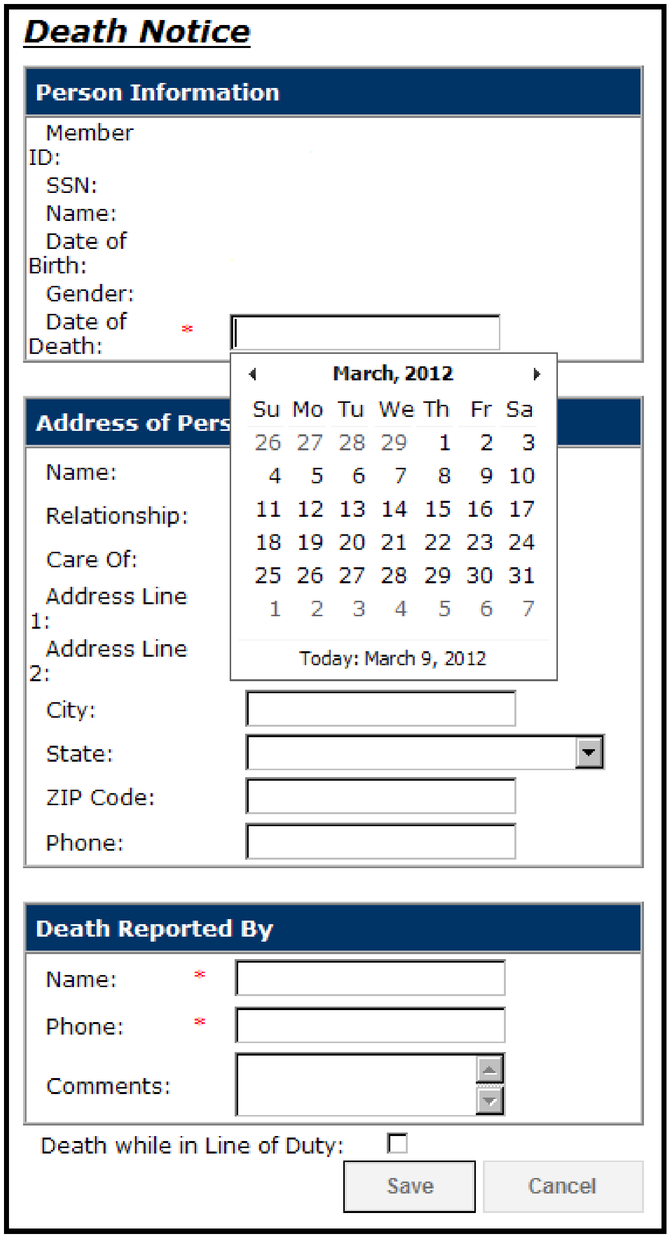
(**Note:** If Address Line 1--City, State, or Zip Code is already populated, the following fields are also required to be populated:

- Address Line 1
- City
- State
- Zip Code

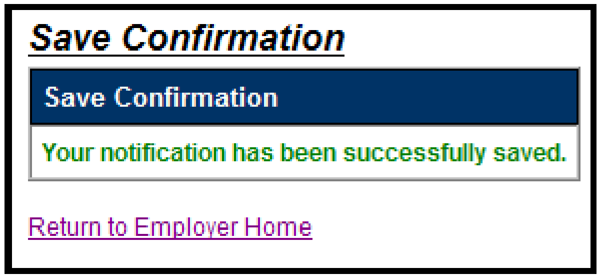
Click 

to return to the **Enter SSN** page.

Step 5—Select the date of death by clicking in the Date of Death box, the **Calendar** pop up will appear defaulting to the current month. Use the left and right arrows to scroll to a different month. Click on the appropriate date and the date will appear in the box in the MM/DD/YYYY format.



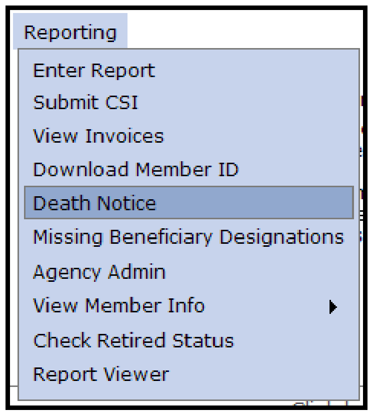
Step 6—Enter the remaining information in the corresponding fields and click Save when finished. The confirmation screen will appear. Click the **Return to Employer Home** link to return to the system Home Page.

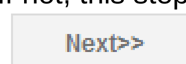


- ## View a Reported Death

The Death Notice function also allows an Employer to view any reported deaths for its agency. This function captures the employee's name; date of death; the person who reported the death; and an Employer point of contact for any questions RSD may have regarding the deceased employee.

Step 1— Highlight to select **Death Notice** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click 

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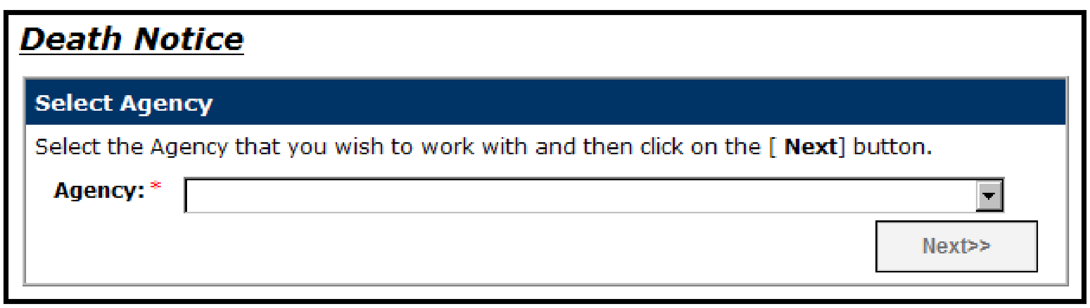
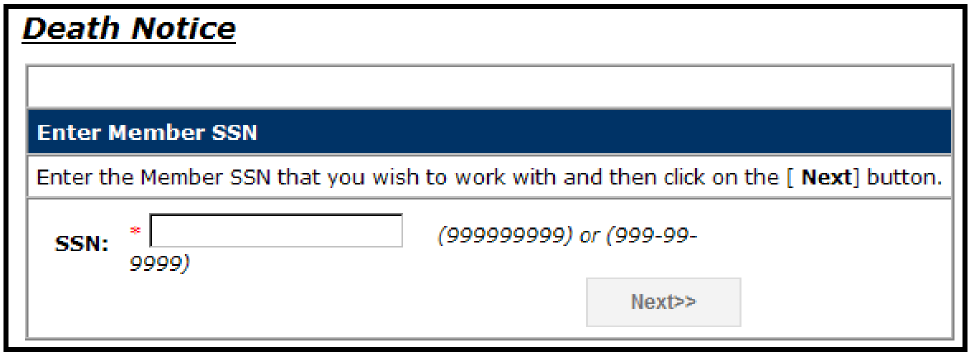
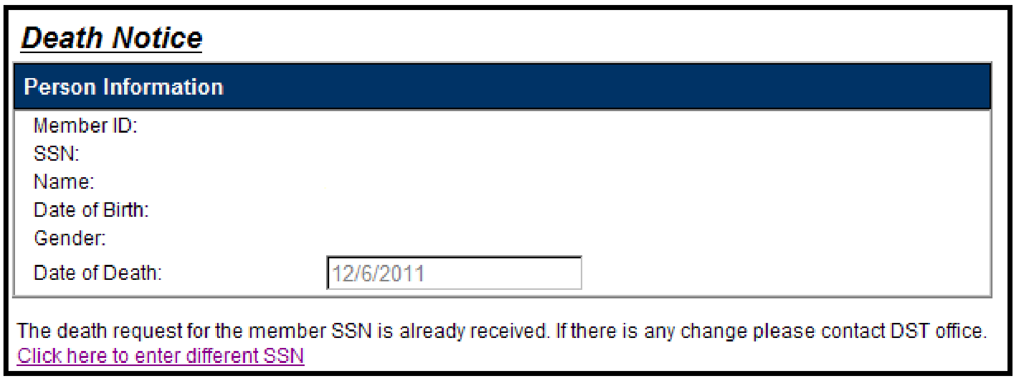


Step 3—Enter the SSN of the deceased employee. (**<u>Note</u>:** The Social Security number that is entered must be for an **active** employee of the Employer that is logged on to ORBIT. The SSN must also be a number that already exists in ORBIT.)



Step 4—Click 

. ORBIT will display this screen indicating that the employee's death has already been reported:

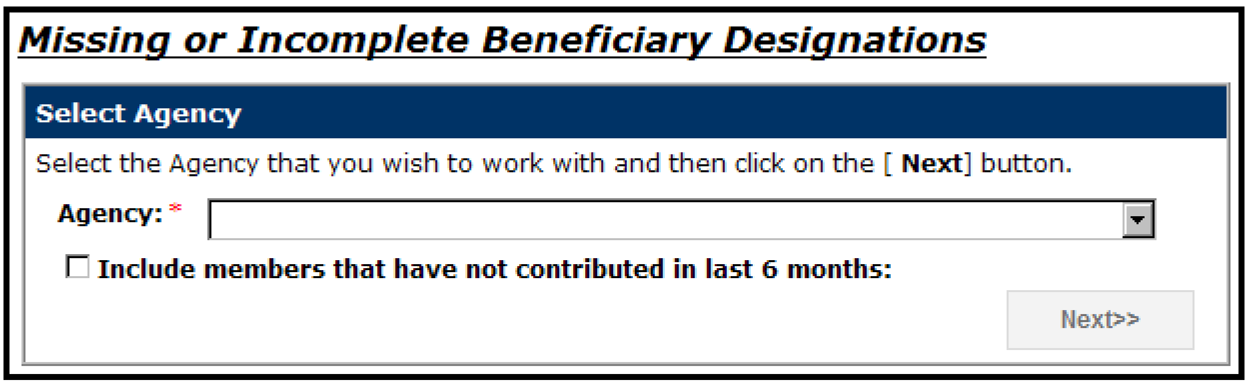


2.7 Missing Beneficiary Designations

This function of Employer Self-Service allows an Employer to view the members who have not yet designated a beneficiary for their retirement accounts. The Employer may then notify its employees that need to complete the necessary beneficiary designation forms; and, enables the Employer to keep an up-to-date record of this information.

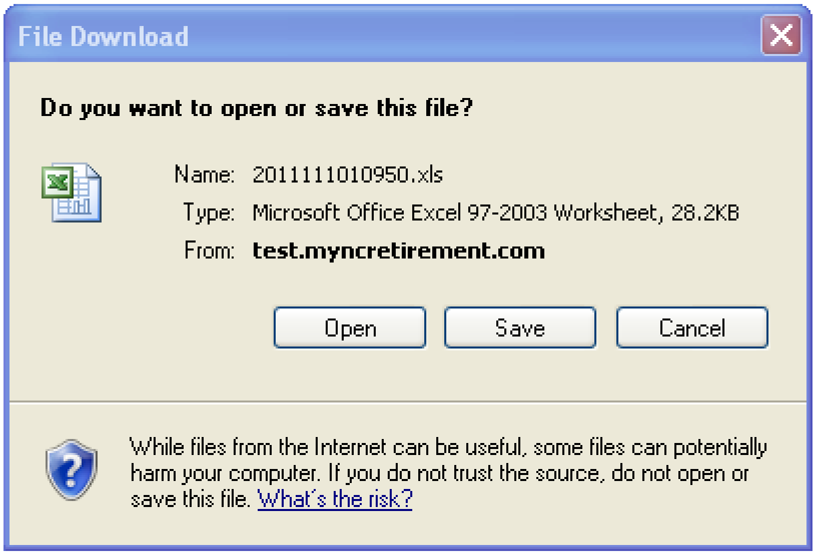
Step 1— Highlight to select **Missing Beneficiary Designations** from the drop-down menu under the **Reporting tab.**

Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>>. To include members that have not actively contributed in the last 6 months, check the checkbox.

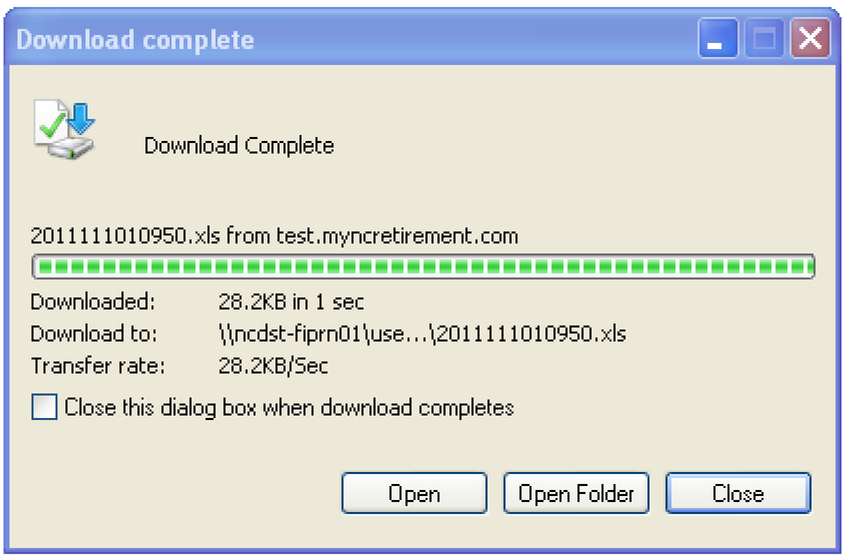


A list of employees that are missing beneficiary designation forms as of today will appear including **Member ID, Name, SSN, Date of Birth** and **Date of Hire**.

Step 3—To remove the members that have not contributed in the last 6 months, click the checkbox to remove the checkmark and click Refresh. To download the list to Excel, click Download to Excel. The **File Download** box will appear.



Step 4—To exit without viewing or saving, click Cancel. To view the list in Excel, click Open. To save this file locally, click Save. The Save As box will appear. Save the file at the desired location. The Download Complete box will appear.



Step 5— Click Open to view the downloaded file. Click Open Folder to go directly to the file location. Click Close to exit.

Step 6— To print the results, click on the **"Click here to view the printer friendly version of this page for your records"** link at the bottom of the page. After printing the report, click the **Return to Normal Format** link.

2.8 Agency Administration

The Agency Administration function of Employer Self-Service allows an Employer to manage its own user registration, as well as the level of access its employees have to the system independent of RSD. The functions available to the Employer include: adding new users, assigning or changing roles of users, and deleting users.

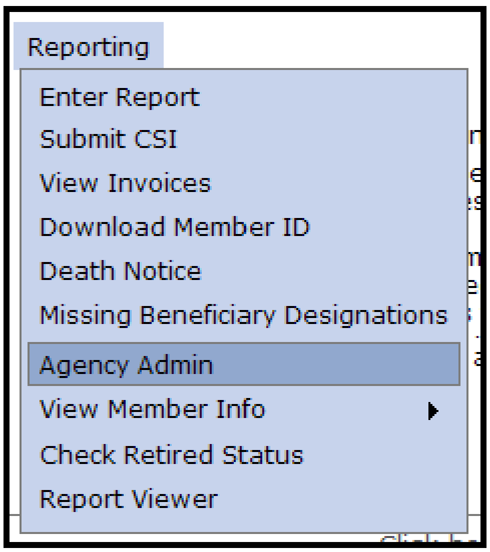
Certain Employers may be responsible for submitting the monthly ORBIT reports for more than one agency. Each agency's access information for Employee Self-Service is maintained through the ORBIT line of business application. Each user will be assigned to the agency(s) access information by the Super User.

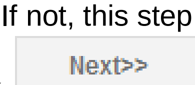
Only users with the role of Super User will have access to the Agency Administration function.

- ## View a List of Users

This function allows the Employer to view a list of users for a specified agency.

Step 1— Highlight to select **Agency Admin** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click 

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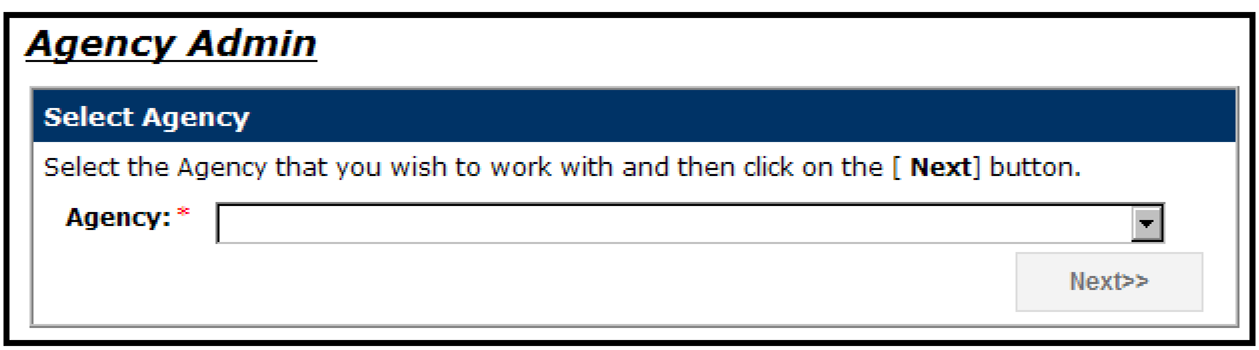
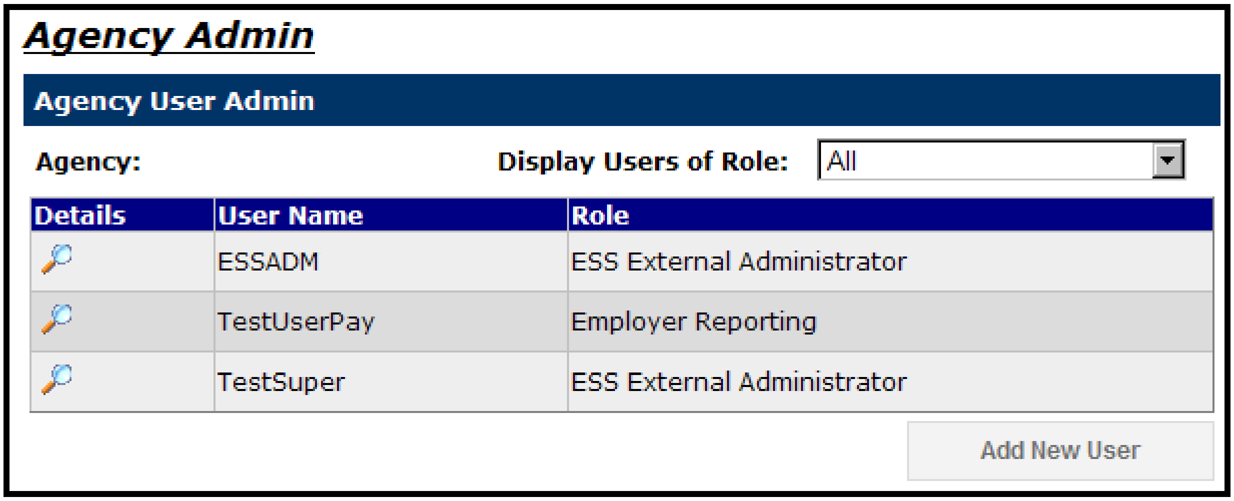


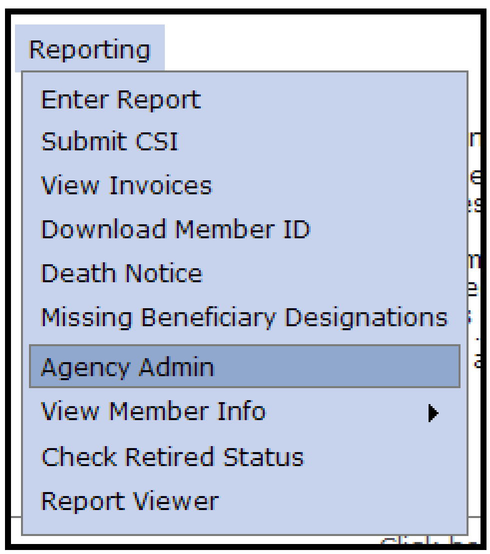
ORBIT will then display all users who have access to this agency on the Employer Self Service website showing Details, User Name and Role.



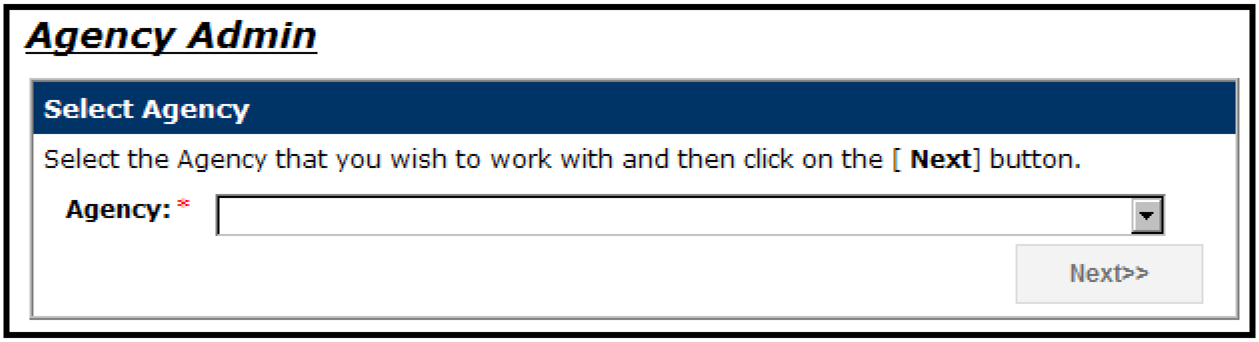
- **Add a New User**

Employers have the ability to add new users to the System.

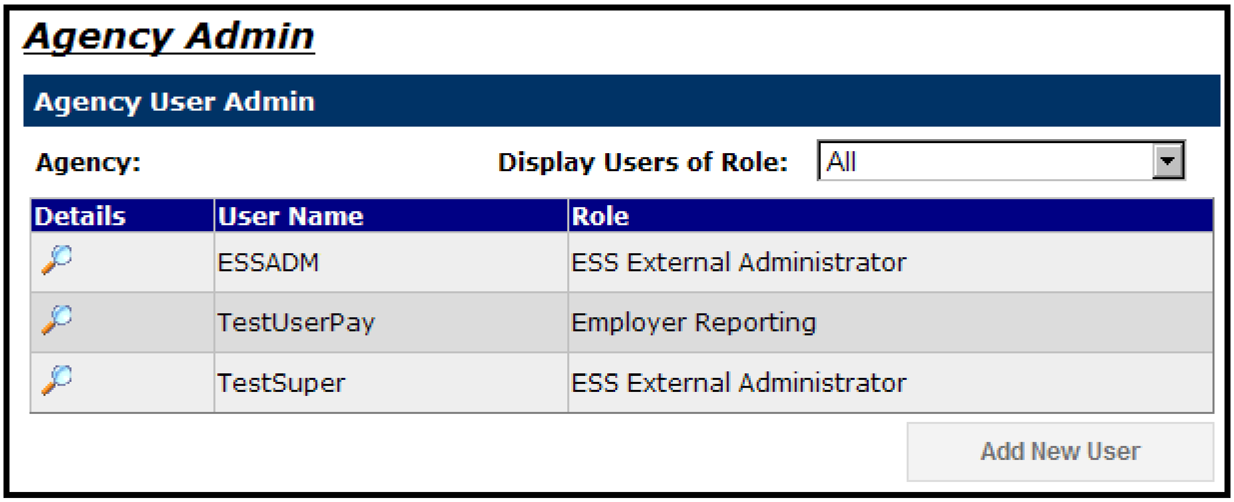
Step 1— Highlight to select **Agency Admin** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>> .

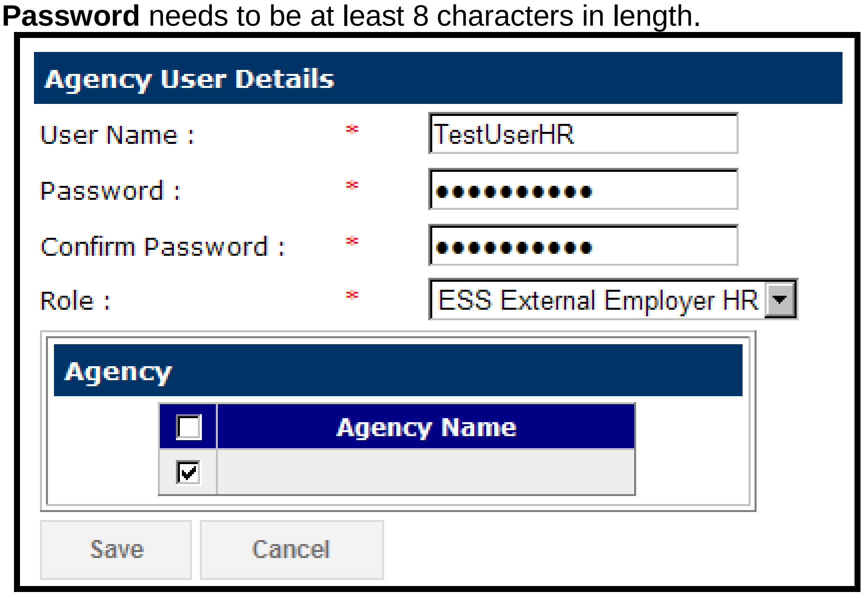


ORBIT will display all users that have access to this specific agency on the Employer Self-Service website.



Step 3—To add a new user, click Add New User located in the bottom right of the screen.

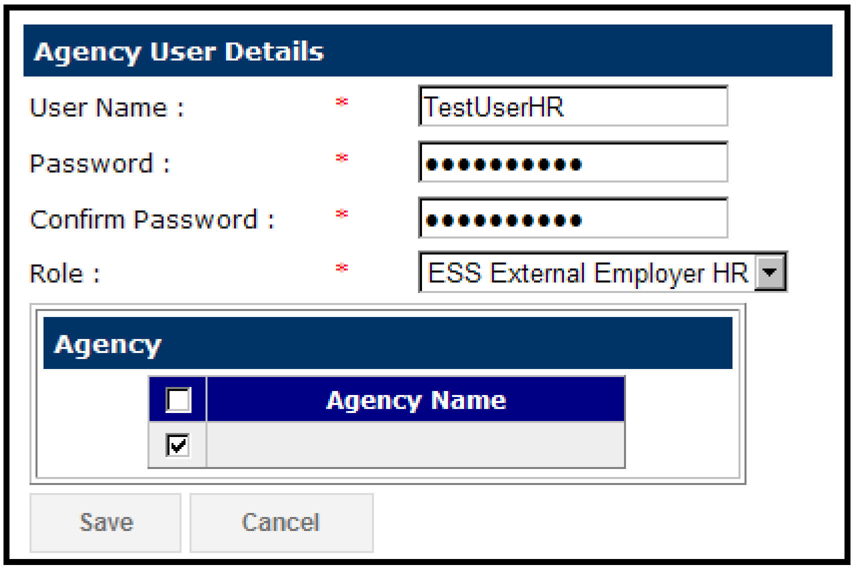
Step 4—Enter the **User Name** and **Password** in the space provided, as well as a **Password** in the **Confirm Password** field. Please note: the **User Name** cannot have any spaces or symbol characters. The **Password** needs to be at least 8 characters in length.



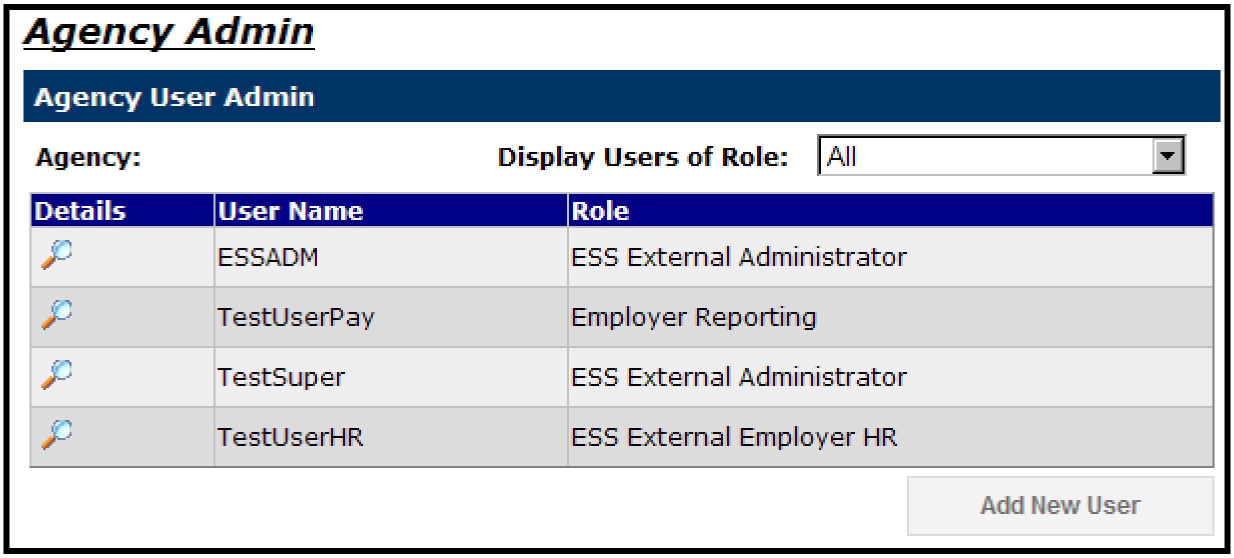
Step 5—Select from the **Role** drop-down menu. The roles include:

- Employer Reporting – This role is for the contact responsible for generating and submitting the ORBIT Payroll Report and CSI Payment. It provides access to all menu items the HR role has plus **Enter Report** and **Submit CSI**.
- ESS External Administrator – This role is the Agency Super User and has access to the entire Employer Self Service menu including **Agency Admin**.
- ESS External Employer HR – This role is for Agency HR users. It provides access to **View Invoices, Download Member ID, Death Notice, Missing Beneficiary Designations, View Member Info, Check Retired Status and Report Viewer.**

Step 6—Choose the agency (or agencies) that the new user may access by clicking the **Check Boxes** beside the available corresponding agencies.



Step 7—Click Save when finished. Or click Cancel to exit without adding a new user. The screen will return to the main **Agency Admin** page and display the new user (if applicable).



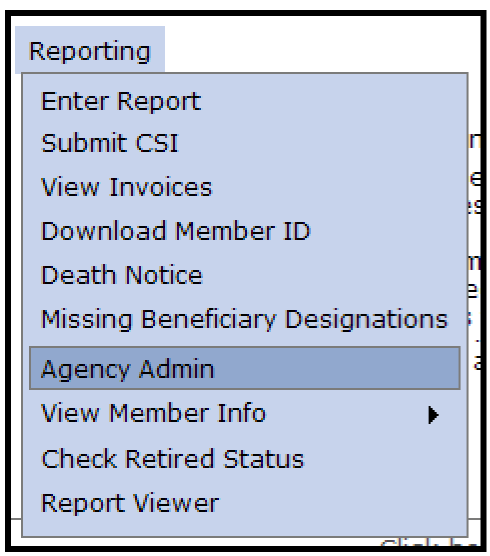
Click on the next to the user to view the information that has been entered.

(**<u>Note</u>:** ORBIT will allow an Employer to change only the **Role** of the **User**—not the **User Name** once the user has been saved.)

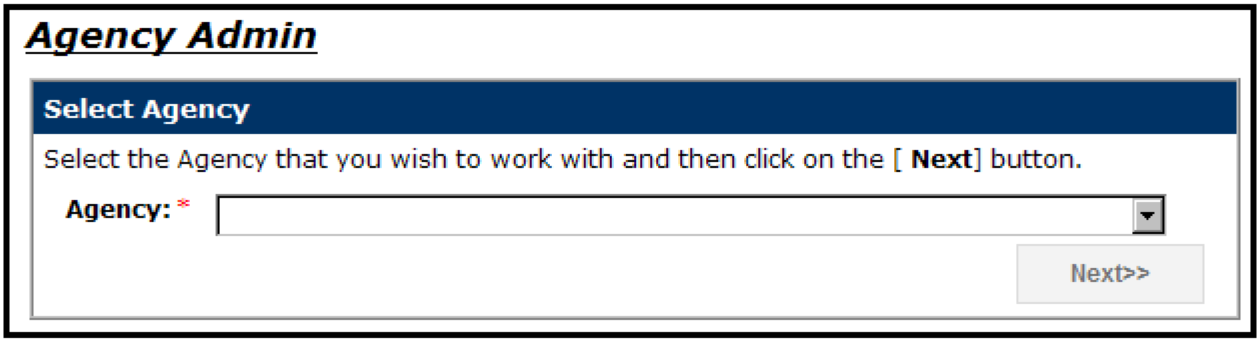
- ## Update User Role and/or Agency Access

Once the Employer has successfully logged on to the Employer Self-Service website, the Employer will have the capability to update user access in the system from either the ESS **Super User** to **Employer User** or vice versa.

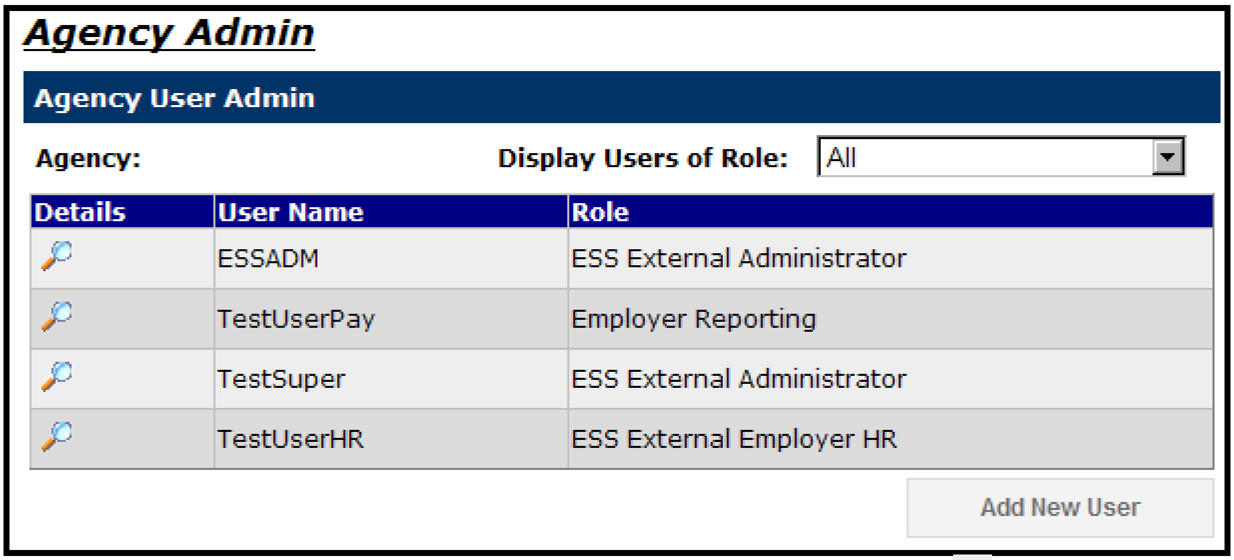
Step 1— Highlight to select **Agency Admin** from the drop-down menu under the **Reporting tab.**



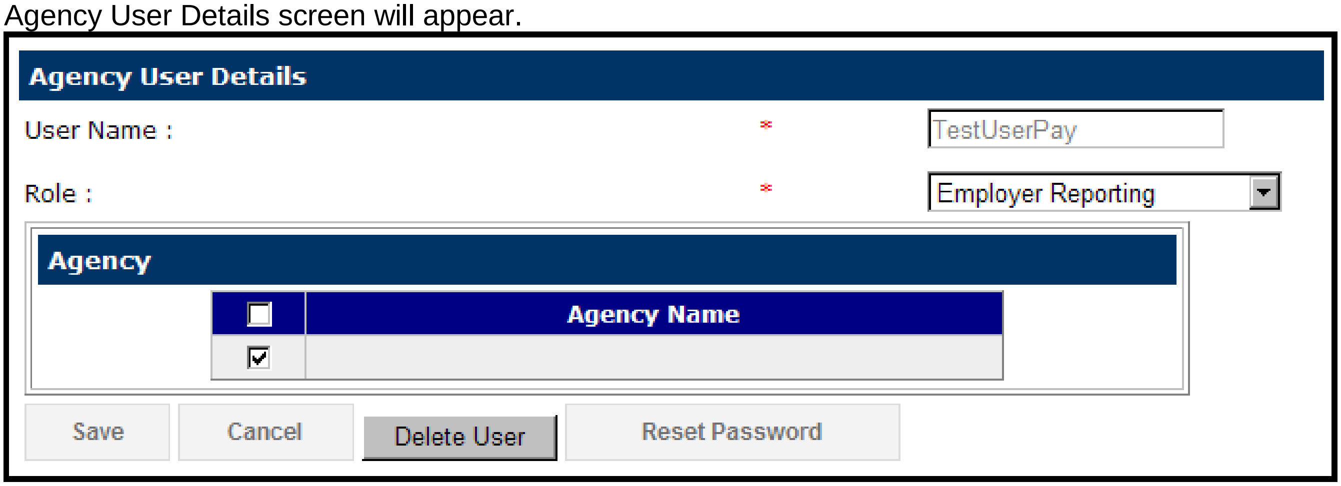
Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>> .



ORBIT will then display all users that have access to this specific agency on the Employer Self-Service website.



Step 3—To update a **User's Role or Agency Access**, click on the next to the user. The Agency User Details screen will appear.



Step 4—To select a different **User Role,** select a different **User Role** from the drop-down menu that corresponds to the role field.

Step 5— The list of agencies to select from is based on the Employer's access as the Administrator. Choose the agency (or agencies) by clicking the **Check Boxes** beside the available corresponding agencies.

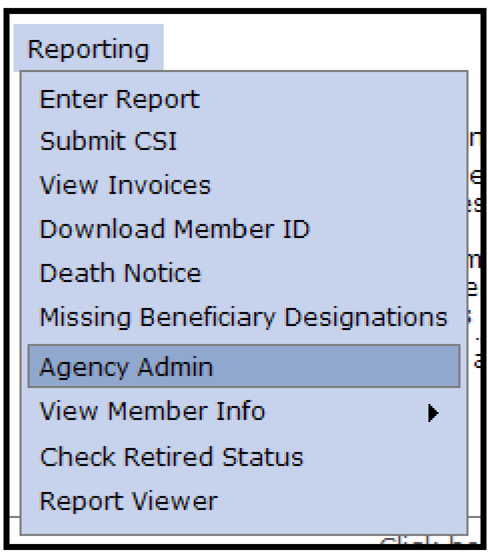
Step 6— Click Save when finished. Or click Cancel to exit without adding a new user. The screen will return to the main **Agency Admin** page and display the updated Role.

● Reset a User Password

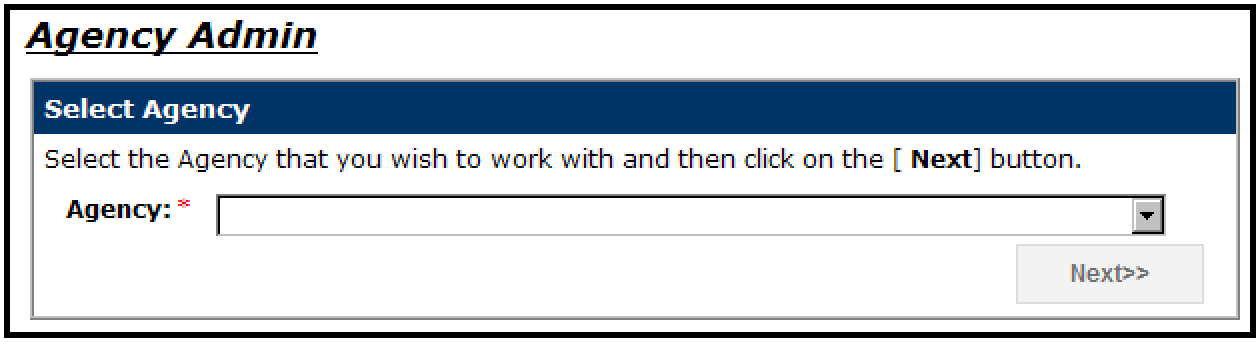
Once successfully logged into the Employer Self-Service website, an Employer has the ability to reset a password for a User who has forgotten their password. The Employer also has the capability of resetting their password.

The steps shown below explain how to reset a password in the Employer Self-Service website using the **Agency Administration** link.

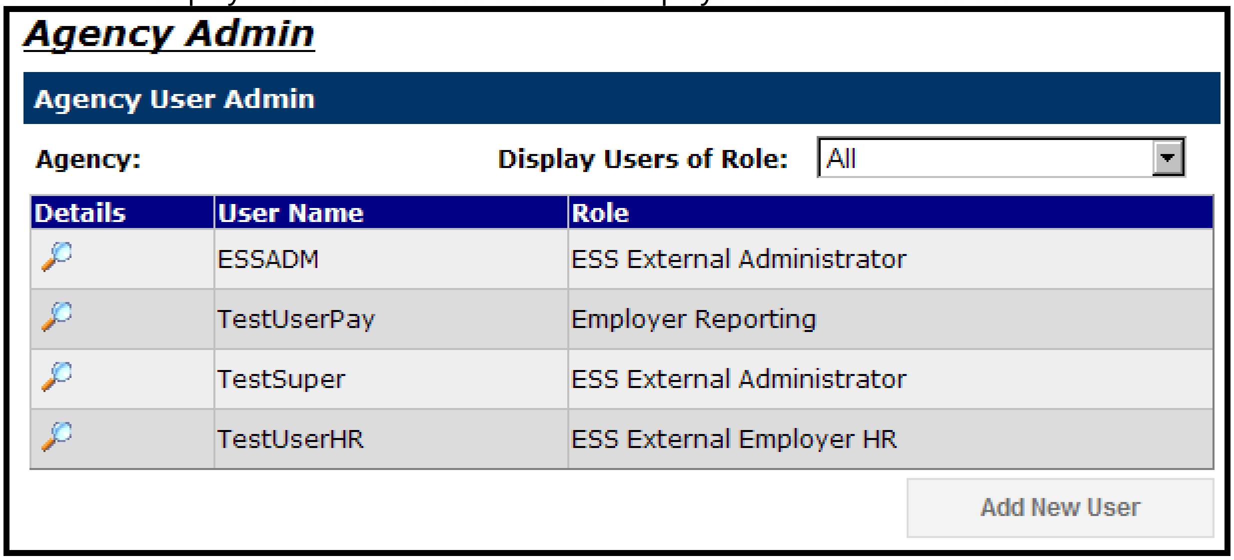
Step 1— Highlight to select **Agency Admin** from the drop-down menu under the **Reporting tab.**



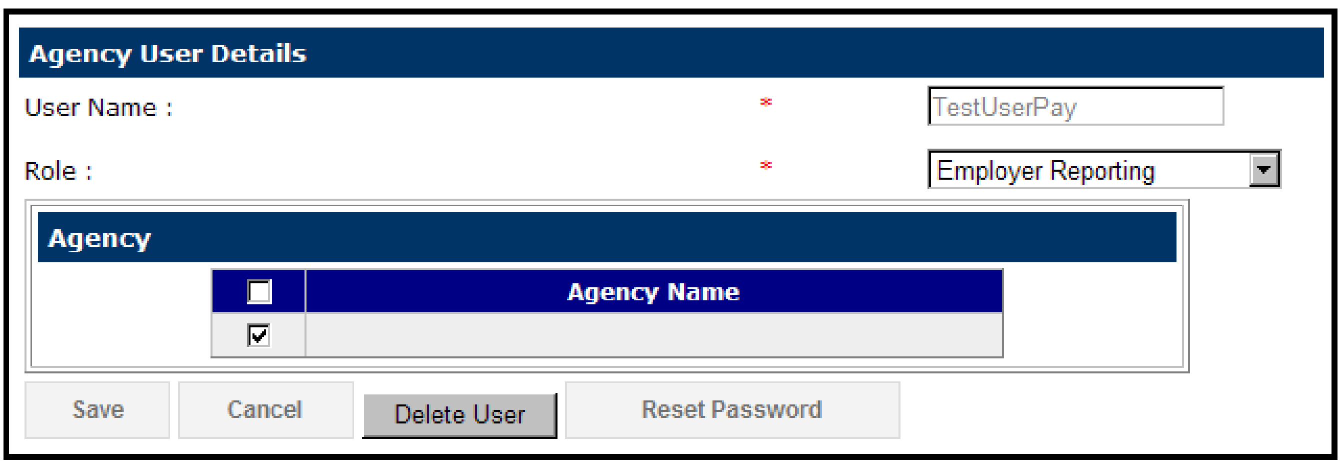
Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>> .



ORBIT will display all users with access on the Employer Self-Service website.

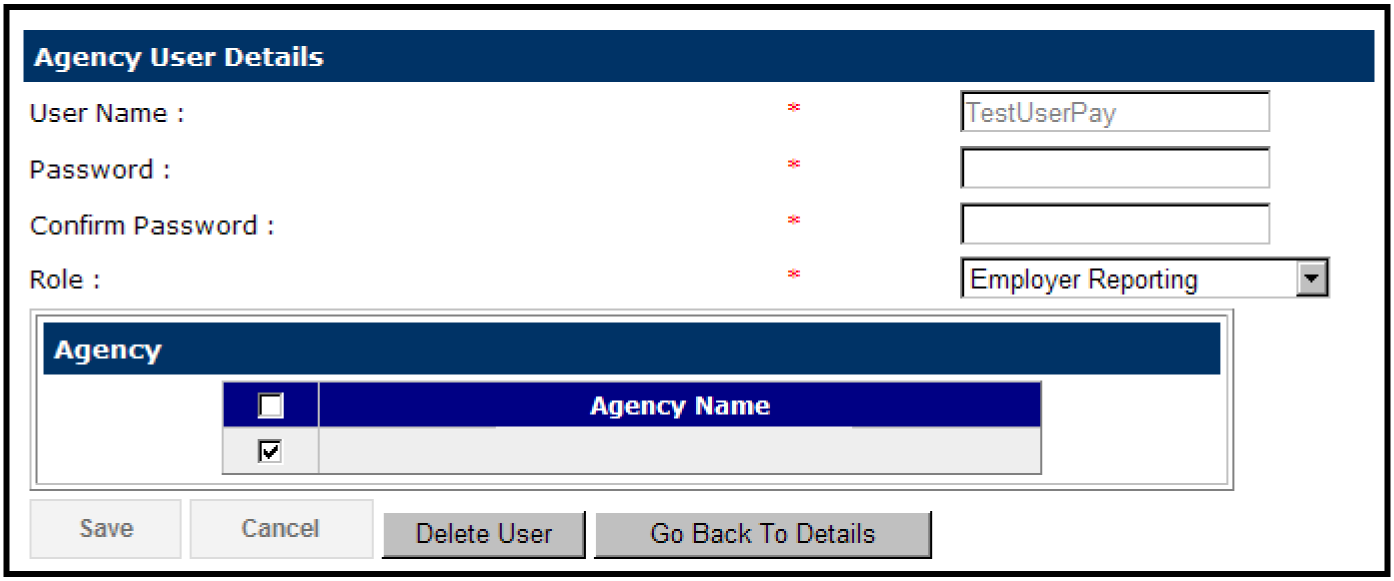


Step 3—To reset a **User's password**, click on the next to the user. The Agency User Details screen will appear.



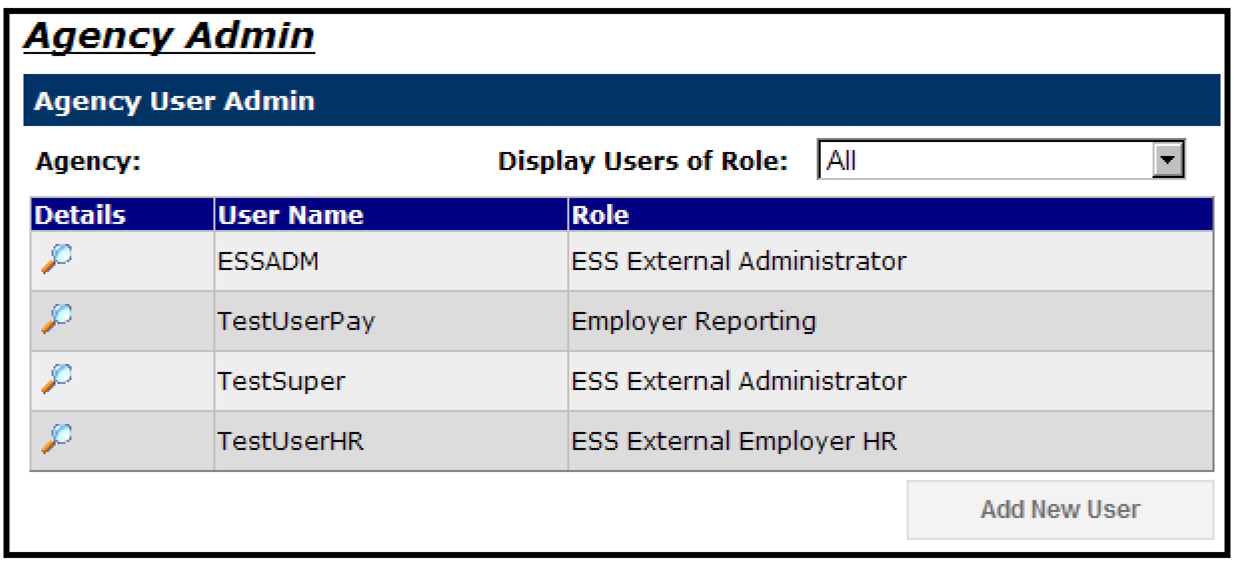
Step 4—Scroll down to the bottom of the page, and **click** Reset Password .

Step 5—Enter the new password for the User in the **Password** and **Confirm Password** text boxes.



To navigate back to the **Agency User Details** page without making changes, scroll down to the bottom of the screen and **click** Go Back To Details or Cancel **before** clicking Save.

Or **click** Save to reset the password**. After** the password has been changed, the main **Agency Admin** page will appear.

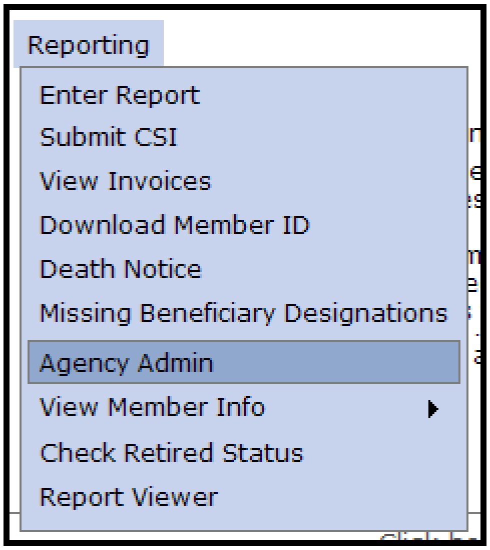


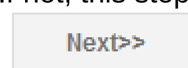
- **Delete a User**

Once successfully logged into the Employer Self-Service website, an Employer has the ability to delete any User in the system. Once the User has been deleted, the User will no longer have access to the Agency's information on the website.

The steps shown below explain how an Employer may delete a User from the ESS website using the **Agency Administration** link.

Step 1— Highlight to select **Agency Admin** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click 

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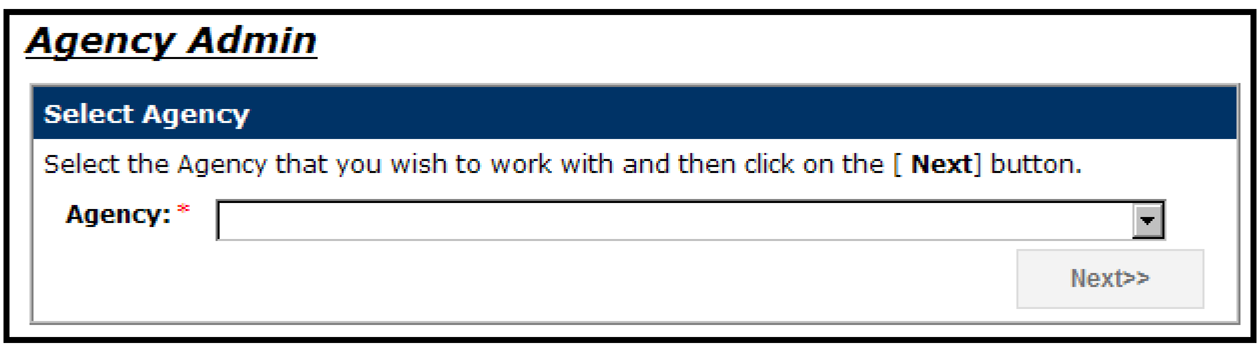
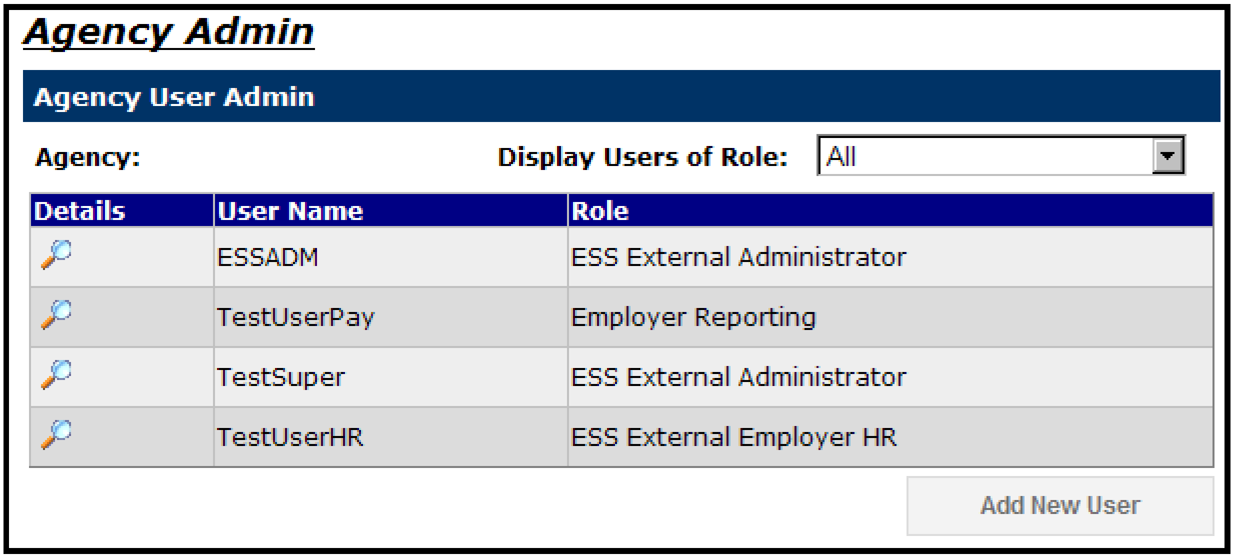
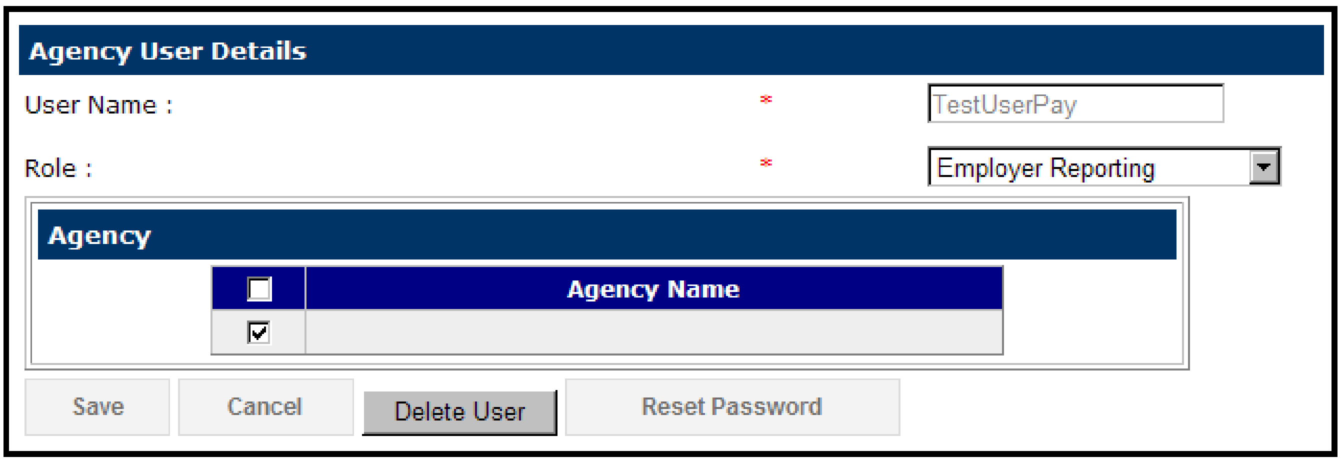


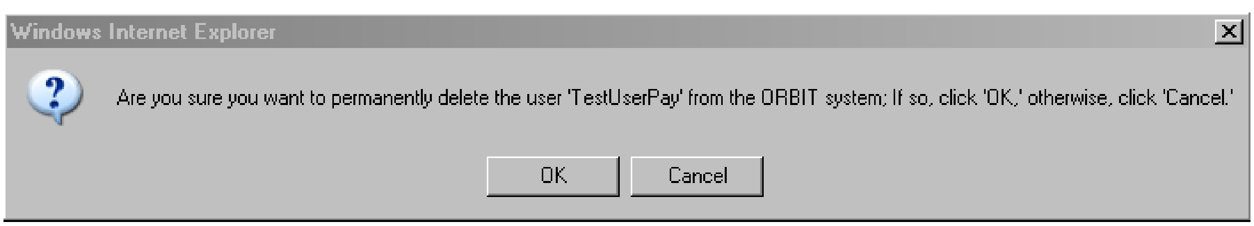
ORBIT will display all users with access on the Employer Self-Service website.



Step 3—To **delete an User**, click on the next to the user. The Agency User Details screen will appear.



Step 4—Scroll down to the bottom of the page, and **click** Delete User. The confirmation screen will appear.



Step 5—**Click** OK to delete the User. **Click** Cancel to exit without deleting the User. Once the User has been deleted, the main **Agency Admin** page will appear and the deleted User will no longer be listed.

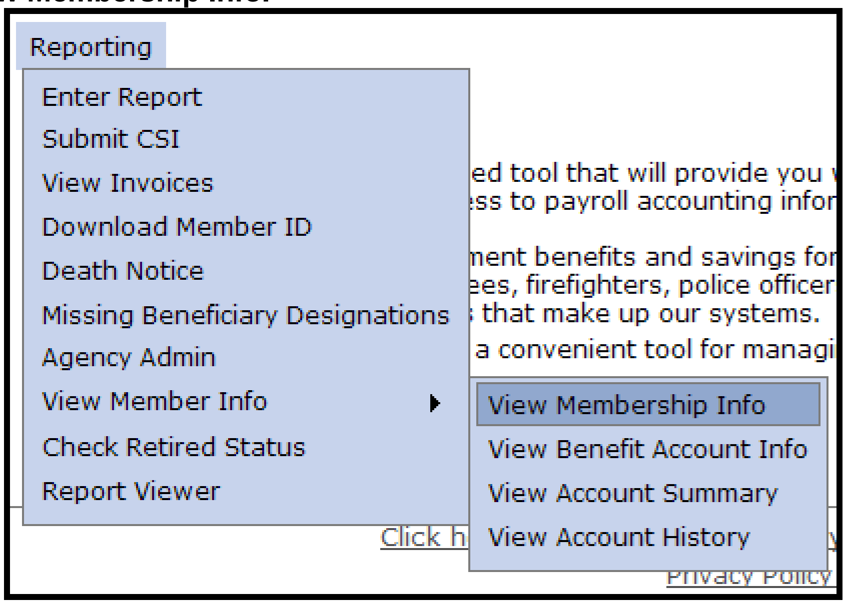
2.9 View Member Info

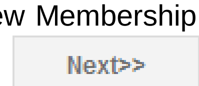
Employer Self-Service allows an Employer to view the employee information of those who work for a specific agency. Through the ESS website, an Employer may answer general account information questions regarding its employees.

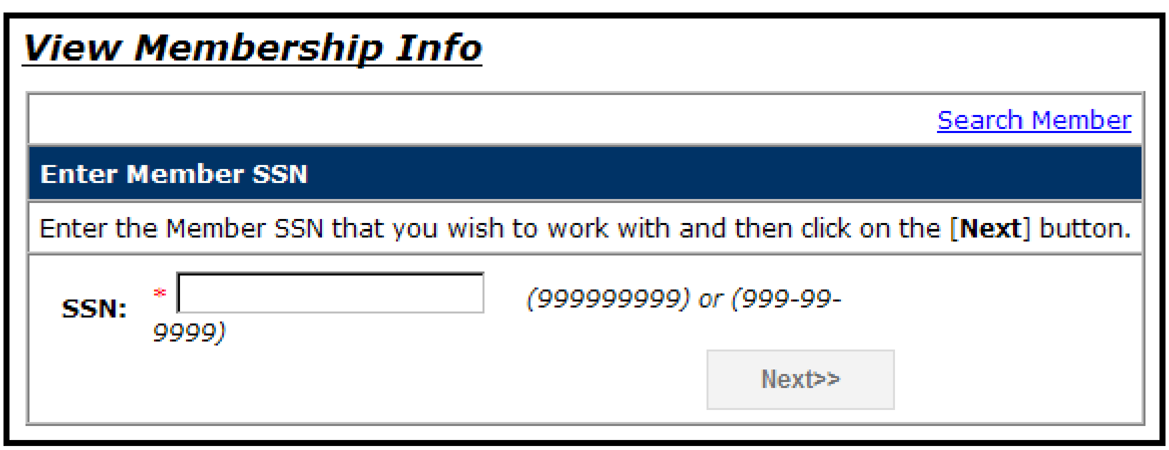
- **View an Employee's Membership Info**

The Employer Self-Service website allows an Employer to view the membership information of its active employees.

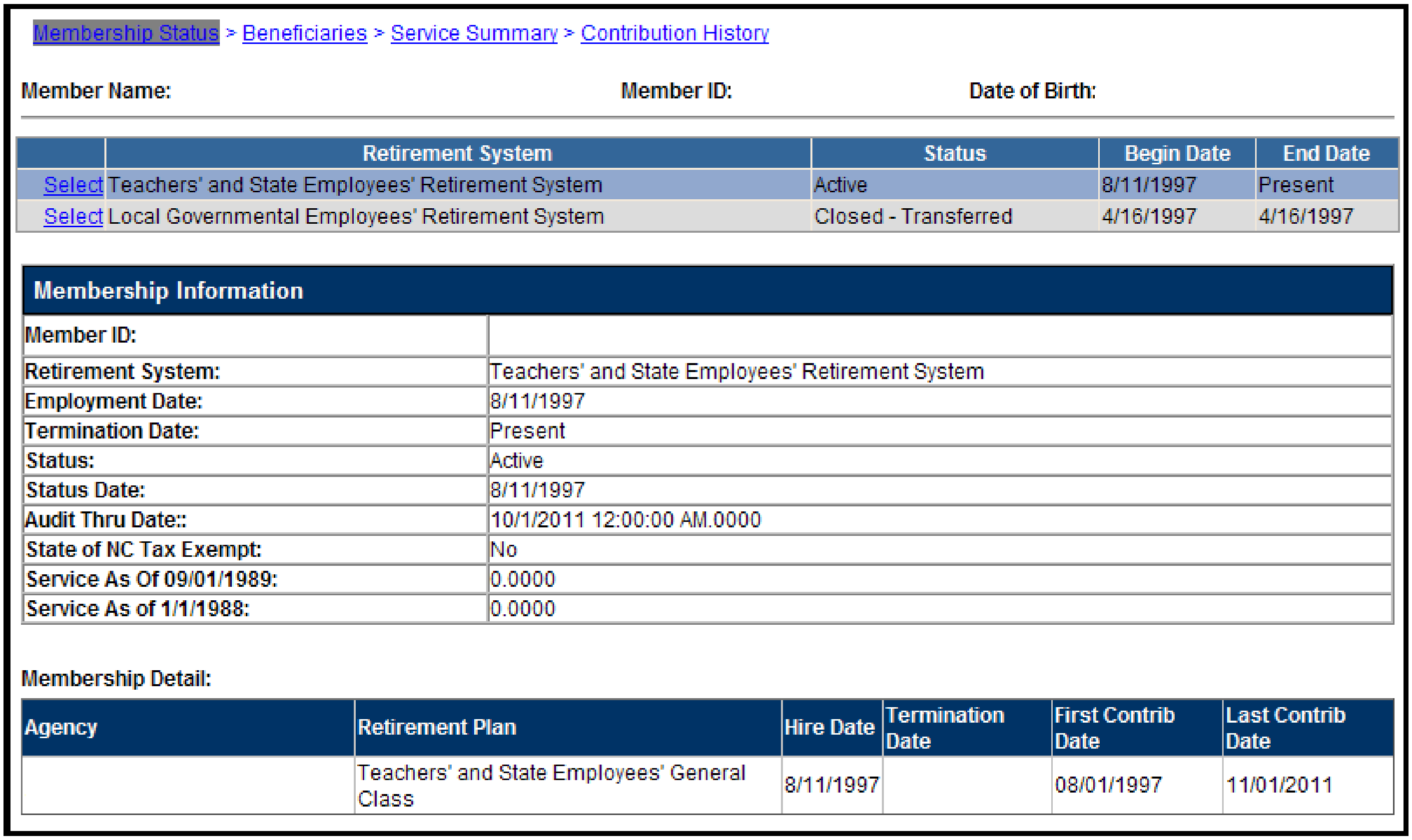
Step 1— Highlight to select **View Member Info** from the drop-down menu under the **Reporting tab.** Then, highlight **View Membership Info.**



Step 2—The View Membership Info screen will appear. Enter the Member Social Security Number of interest and click  .



Step 3— The Member's Membership Info will appear. Another way to navigate between the screens is to click directly on the links at the top of the page: **Membership Status> Beneficiaries>Service Summary>Contribution History.**



Membership Status > Beneficiaries > Service Summary > Contribution History

Member Name: Member ID: Date of Birth:

	Retirement System	Status	Begin Date	End Date
Select	Teachers' and State Employees' Retirement System	Active	8/11/1997	Present
Select	Local Governmental Employees' Retirement System	Closed - Transferred	4/16/1997	4/16/1997

Membership Information	
Member ID:	
Retirement System:	Teachers' and State Employees' Retirement System
Employment Date:	8/11/1997
Termination Date:	Present
Status:	Active
Status Date:	8/11/1997
Audit Thru Date::	10/1/2011 12:00:00 AM.0000
State of NC Tax Exempt:	No
Service As Of 09/01/1989:	0.0000
Service As of 1/1/1988:	0.0000

Membership Detail:

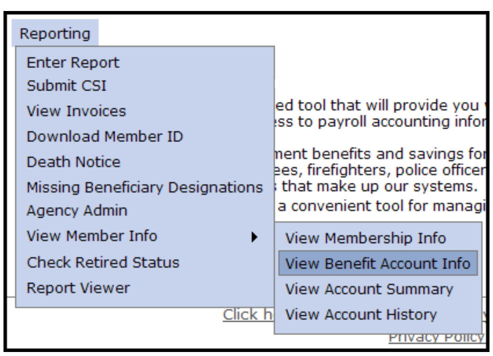
Agency	Retirement Plan	Hire Date	Termination Date	First Contrib Date	Last Contrib Date
	Teachers' and State Employees' General Class	8/11/1997		08/01/1997	11/01/2011

Step 4—Any service purchases available to the member will be shown at the bottom of the screen. An Employer should click on the **here** button under the **Services available for purchase section** to learn more about service purchases.

- ## View Benefit Account Info

Employer Self-Service allows an Employer to view employees' benefit account information of retired employees.

Step 1— Highlight to select **View Member Info** from the drop-down menu under the **Reporting tab.**



Then, highlight **View Benefit Account Info.**

Step 2—The View Benefit Account Info screen will appear. Enter the Member Social Security number of interest and click Next>> .

View Benefit Account Info

Search Member

Enter Member SSN

Enter the Member SSN that you wish to work with and then click on the [**Next**] button.

SSN: * *(999999999) or (999-99-9999)*

Next>>

Step 3—The **Benefit Account History** screen will appear.

Member Name: **Member ID:** **Date of Birth:**

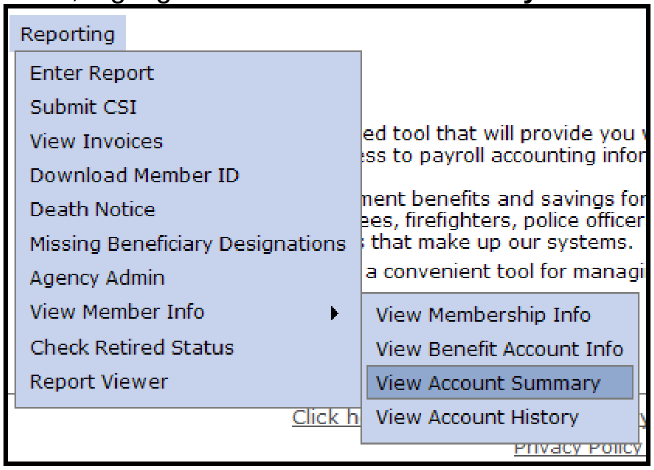
Account Info:

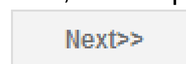
Benefit Account Information
Member ID:
Retirement System:
Account Type:
Retirement Date:
Retirement Option:
Last Plan Code:
Last Employment Date:
Initial Payment Date:
State of NC Withholding Status:
Age at Retirement:
Total SVC:
AFC:
Initial Benefit:
Initial Maximum Benefit:
Benefit at Age 62:
Survivor Benefit Factor:
Total Years Of Service:

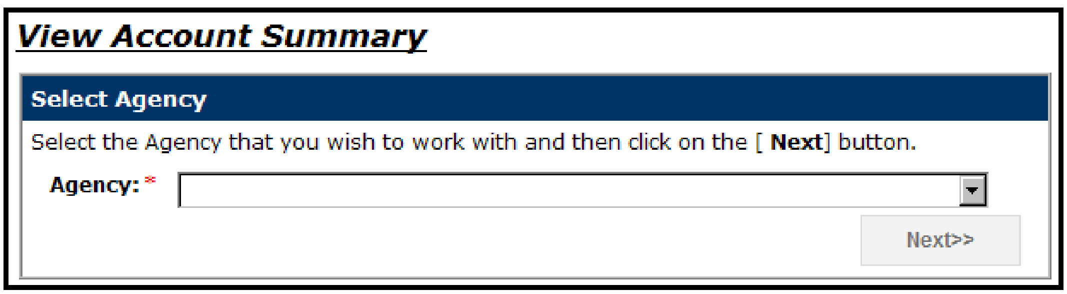
- ## View Account Summary

Employer Self-Service allows an Employer to view employees' account summary.

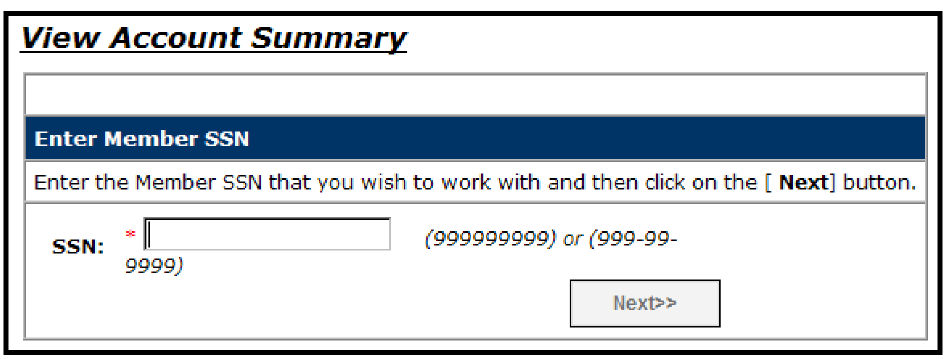
Step 1— Highlight to select **View Member Info** from the drop-down menu under the **Reporting tab.** Then, highlight **View Account Summary.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click .



Step 3—The View Account Summary screen will appear. Enter the Member Social Security number of interest and click .



Step 4—The **View Account Summary** screen will appear populated with the member's information.

View Account Summary

Member Name: **Member ID:** **Date of Birth:**

You have more than one account with the North Carolina Retirement Systems Division. In order to view the details for each account, please click the "Select" to the left of the one you wish to view.

	Retirement System	Status	Begin Date	End Date
Select	Local Governmental Employees' Retirement System	Active	3/23/2004	Present
Select	Rescue Squad Workers' Pension Fund	Active	4/1/1978	Present
Select	Local Governmental Employees' Retirement System	Closed - Withdrawn	9/1/1987	5/3/1989
Select	Local Governmental Employees' Retirement System	Closed - Withdrawn	3/17/1986	12/1/1986
Select	Local Governmental Employees' Retirement System	Closed - Withdrawn	8/1/1983	11/1/1985
Select	Local Governmental Employees' Retirement System	Closed - Pension Transferred	1/1/1993	12/10/1996

Account Information	
Member ID:	
Retirement System:	
Most Recent Plan:	
Most Recent Employer:	
Status:	
State of NC Tax Exempt:	
Begin Date:	
End Date:	
Service at 1/1/1988:	0.0000

Beneficiary Information:

If you elected "multiple" beneficiaries for either of the following benefits prior to October 1, 2007, your designated beneficiaries will remain on file with the Retirement Systems Division; however, the beneficiary fields below will not display your specific designations.

Return of Contributions Beneficiary(ies)

Name	Date of Birth	Designation	Designation Date	Social Security	Relationship

Death Benefit Beneficiary(ies)

Name	Date of Birth	Designation	Designation Date	Social Security	Relationship

Instructions:

When updating beneficiaries online, it is not necessary to submit Forms 2RC and 2DB to the Retirement System.

Requests to change beneficiary(ies) designations can be done online, unless your service exceeds 10 years. If your service exceeds more than 10 years then you must submit Forms 2RC and 2DB and/or Form 276 to the Retirement Systems Division by fax or mail.

Click here to access the form 2RC
Click here to access the form 2DB
Click here to access the form 276

Service Summary Information:

Your current service (as of Jan,2012) is below

Plan	Service Credit (Years)
Local LEO Class	7.9166
Total	**7.9166**

Service Credit Available for purchase:

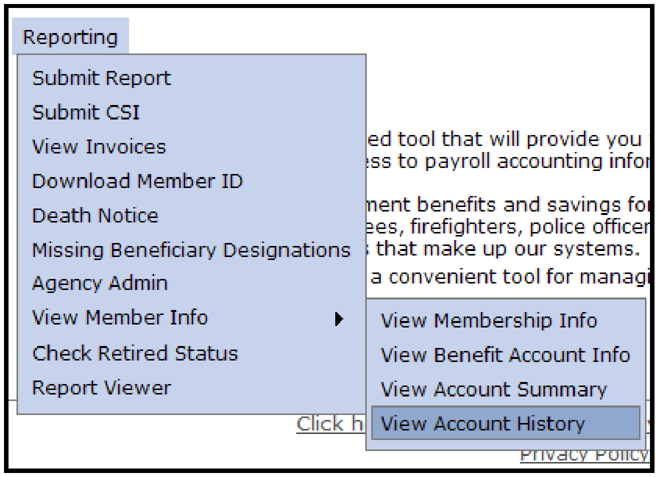
Currently you do not have any service credit available for purchase on file.
For more information on types of service available for purchase, please review the retirement benefits handbook. Click here

View Images

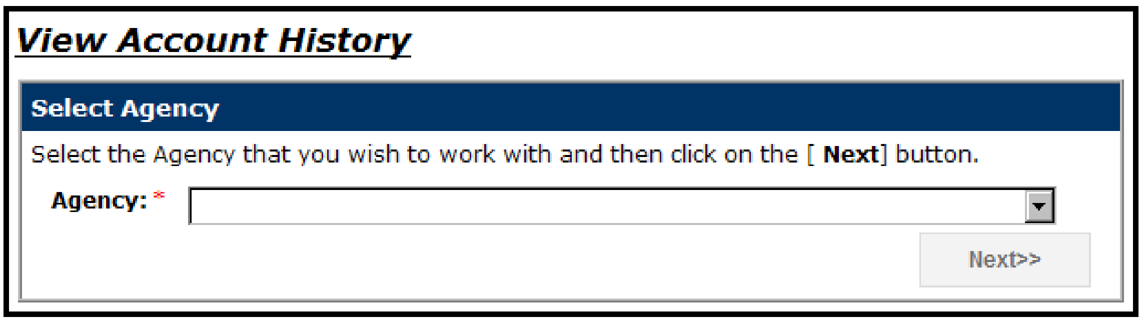
- ## View Account History

Employer Self-Service allows an Employer to view employees' account history.

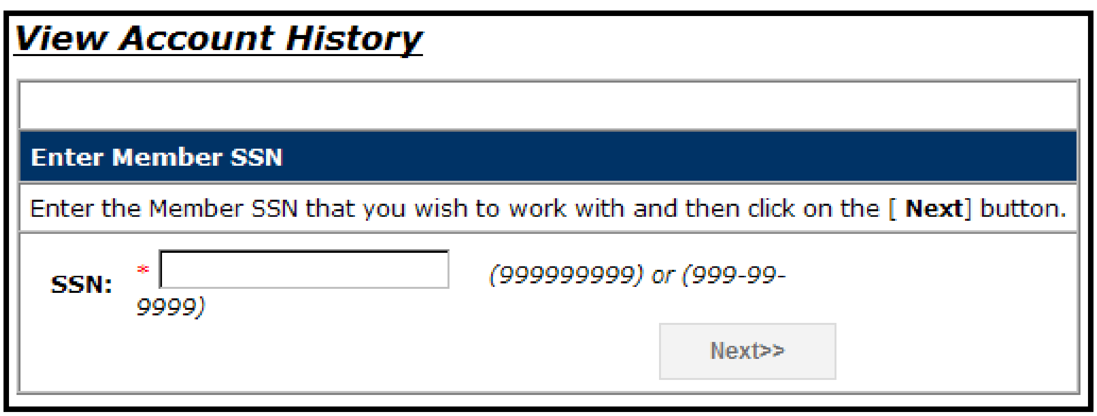
Step 1— Highlight to select **View Member Info** from the drop-down menu under the **Reporting tab.** Then, highlight **View Account History.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>>.



Step 3—The View Account Summary screen will appear. Enter the Member Social Security number of interest and click Next>>.



Step 4—The **View Account History** screen will appear populated with the member's information including **Retirement System Plan (s), Account Information, Service Summary** and **Contribution History**.

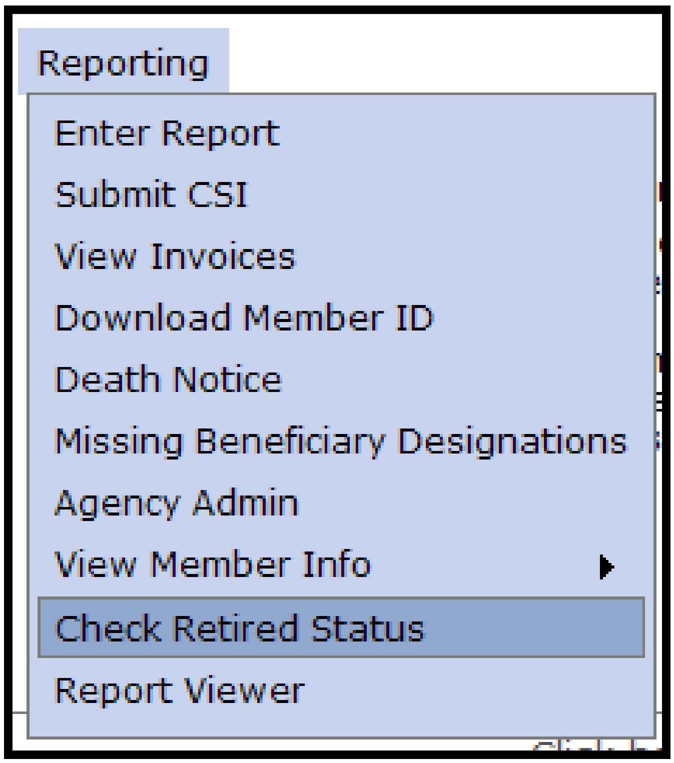
2.10 Check Retired Status

House Bill 642, effective July 1, 2009, requires employers to report all rehired retirees to the Retirement System on a monthly basis. If the report is not received by the Retirement System within 90 days of the end of each month in which a beneficiary is reemployed, the Retirement System is required to assess a penalty of 10% of the compensation of the unreported reemployed retirees during the months the employer did not report the reemployed retirees, with a minimum penalty of $25.

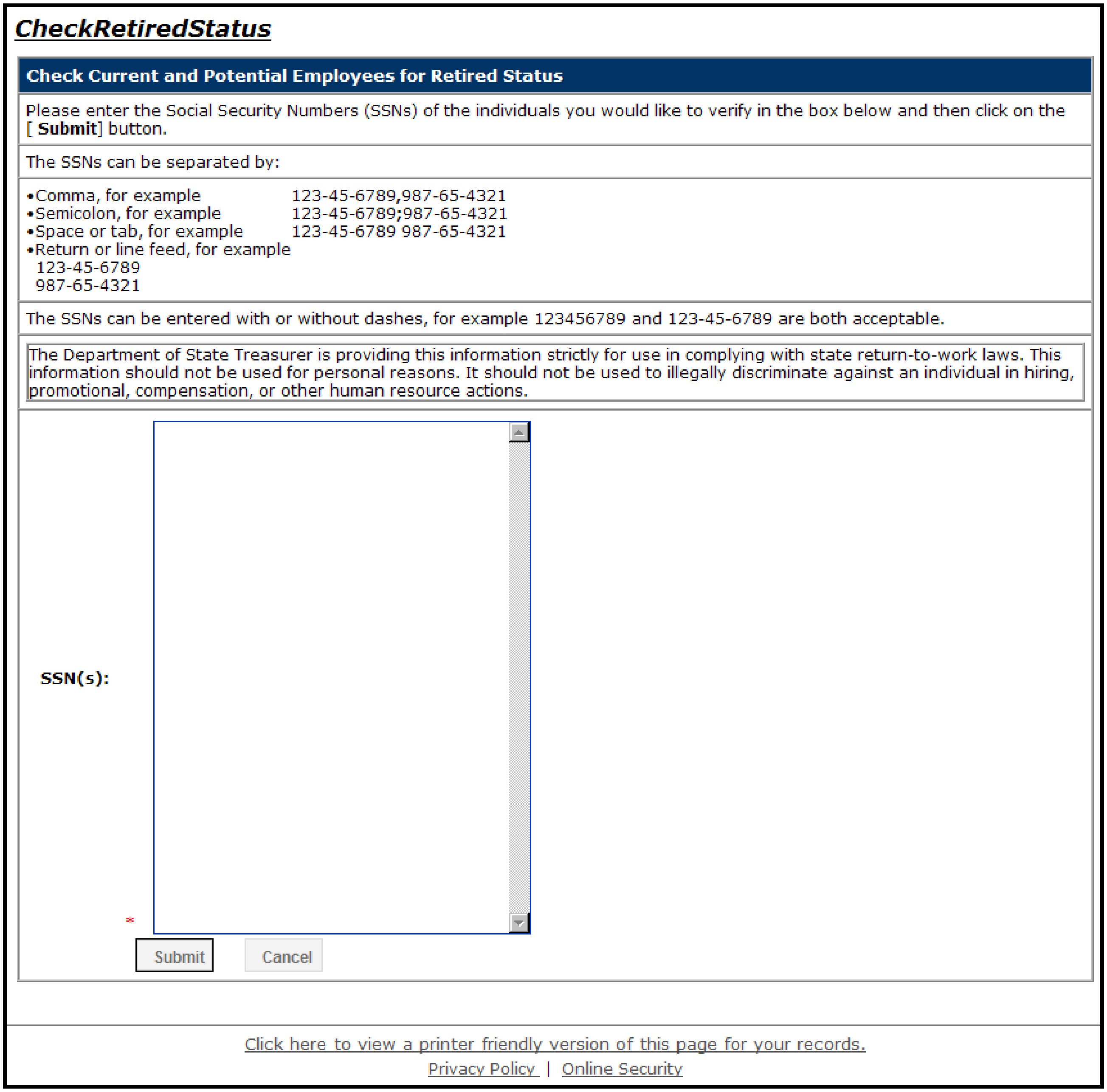
This tool was designed to assist employers in reporting all rehired retirees and avoiding the penalties required under the provisions of House Bill 642.

Check Retired Status will run employee information against the Retirement System retiree list to generate a report of members who are actively receiving a benefit from the Teachers' and State Employees' Retirement System or the Local Governmental Employees' Retirement System. This rehired retiree list should be reported to the Retirement System via the monthly ORBIT payroll report.

Step 1— Highlight to select **Check Retired Status** from the drop-down menu under the **Reporting tab.**



Step 2— The Check Retired Status page will appear.



CheckRetiredStatus

Check Current and Potential Employees for Retired Status

Please enter the Social Security Numbers (SSNs) of the individuals you would like to verify in the box below and then click on the [**Submit**] button.

The SSNs can be separated by:

- Comma, for example 123-45-6789,987-65-4321
- Semicolon, for example 123-45-6789;987-65-4321
- Space or tab, for example 123-45-6789 987-65-4321
- Return or line feed, for example
  123-45-6789
  987-65-4321

The SSNs can be entered with or without dashes, for example 123456789 and 123-45-6789 are both acceptable.

The Department of State Treasurer is providing this information strictly for use in complying with state return-to-work laws. This information should not be used for personal reasons. It should not be used to illegally discriminate against an individual in hiring, promotional, compensation, or other human resource actions.

SSN(s): *

Submit Cancel

Click here to view a printer friendly version of this page for your records.

Privacy Policy | Online Security

Step 3— Enter the Social Security numbers (SSNs) of the individuals you would like to verify in the **SSN(s)** box.

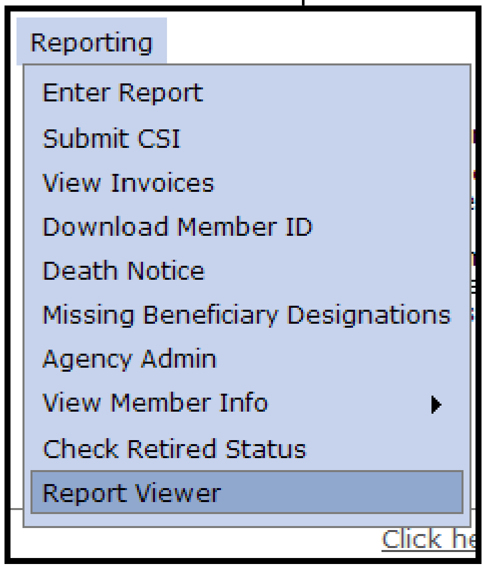
Step 4— Click Submit. Click Cancel to exit. A chart will appear showing **Social Security Number, Retirement System, Last Reported Plan Code, Person ID, Benefit Type, Effective Date of Benefit** and **Benefit Status**.

Step 5— Click Search More SSNs to add more SSNs. Click Return to Main Menu to exit.

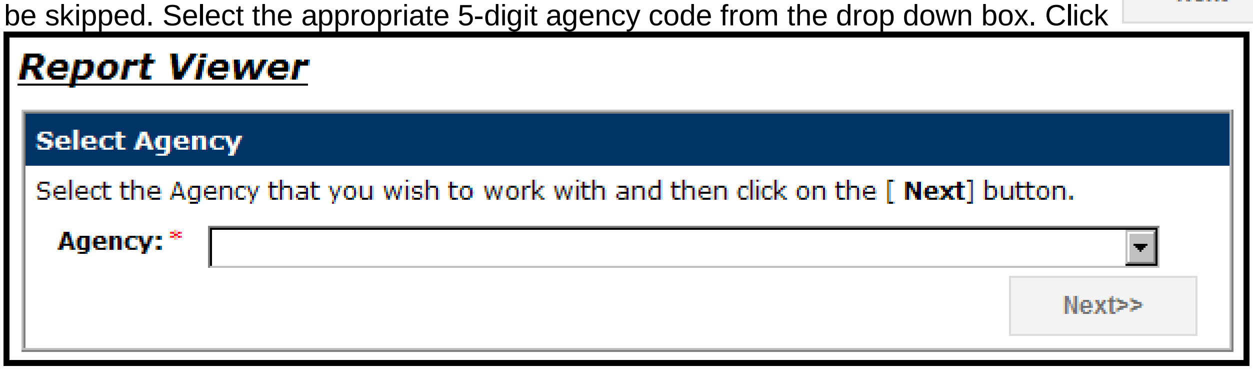
2.11 Report Viewer

- **Total Salary and Contributions Report**

Step 1— Highlight to select **Report Viewer** from the drop-down menu under the **Reporting tab.**



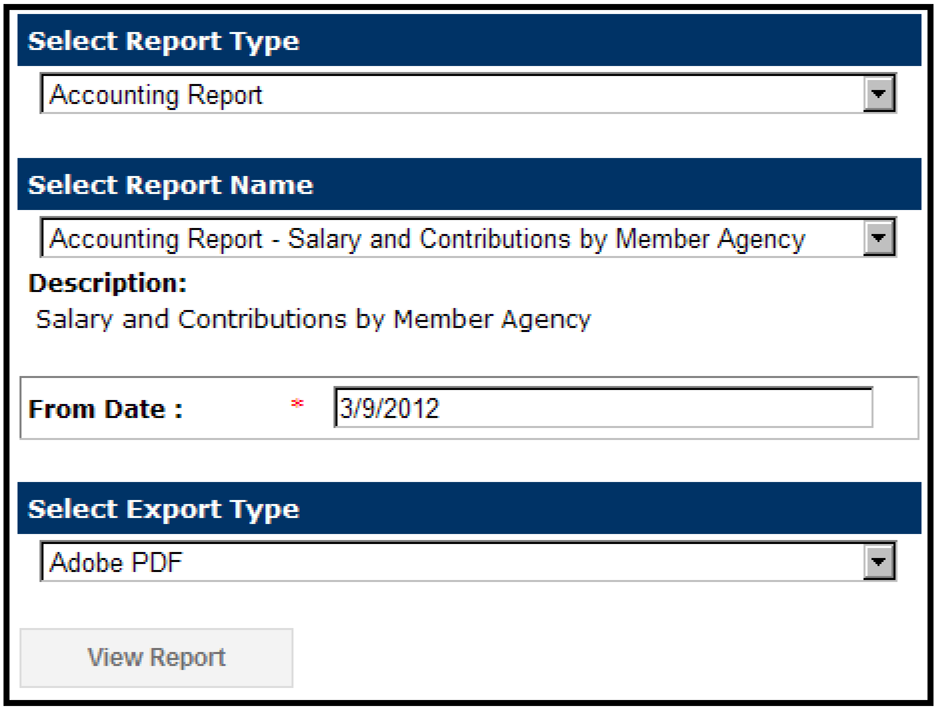
Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click Next>> .



Step 3— The Report Viewer will appear. Highlight to select **Accounting Report** from the drop-down menu under the **Select Report Type.**

Step 4-- Highlight to select **Accounting Report – Salary and Contributions by Member Agency** from the drop-down menu under the **Select Report Name.**

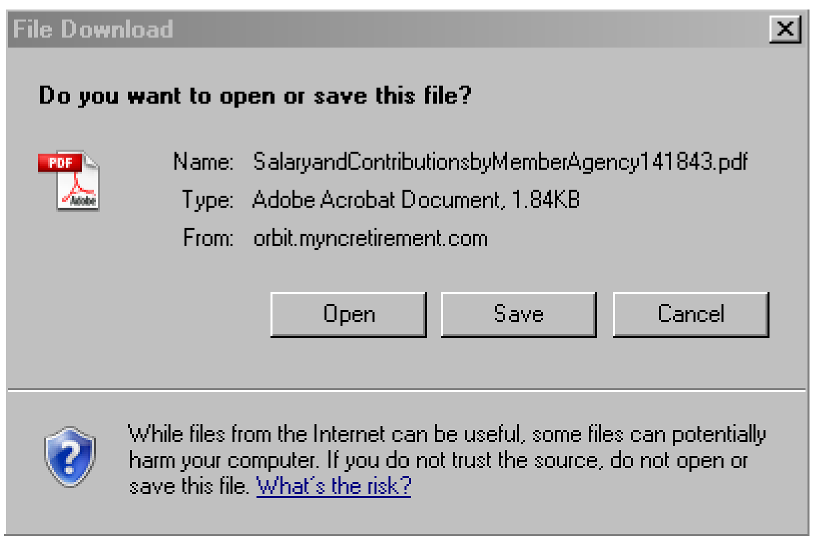
Step 5-- Enter the **From Date** of interest.



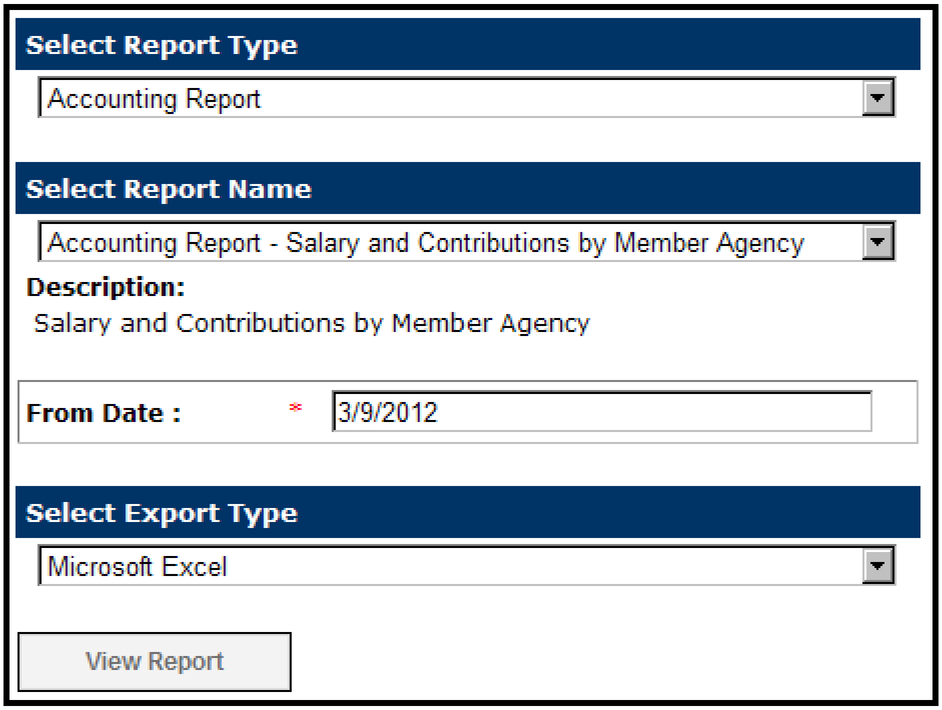
Step 6--Under **Select Export Type**, select **Adobe PDF** to view and print the report in PDF format. Click View Report.

OR go to the next page to view instructions on downloading the report to Excel.

a. The File Download box will appear.

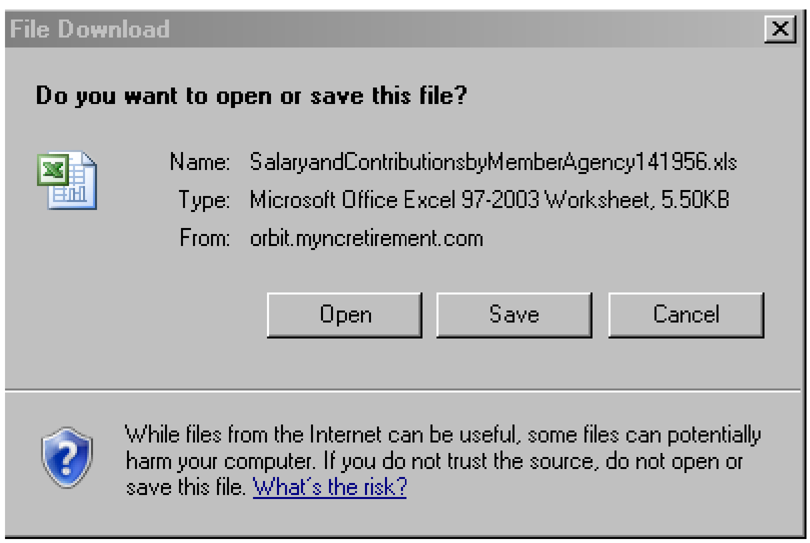


b. Click Open to view the report on the screen. Click Save to save the report to the computer. Click Cancel to exit without running the report.



Step 7--Select **Microsoft Excel** to download the report into Microsoft Excel. Click View Report.

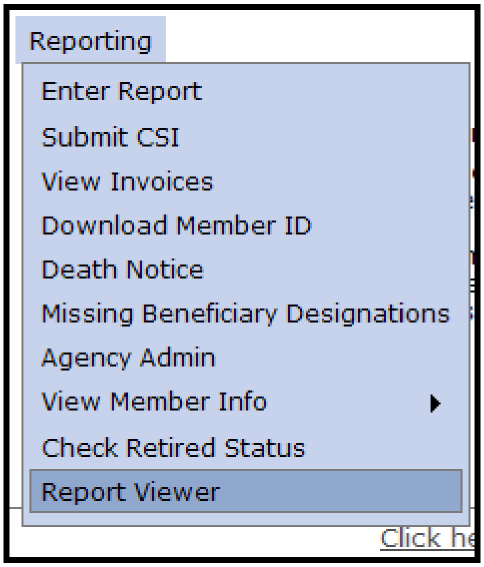
a. The File Download box will appear.

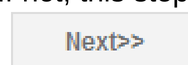


b. Click Open to view the report on the screen. Click Save to save the report to the computer. Click Cancel to exit without running the report.

- ## Service Earned as of Specific Year Report

Step 1— Highlight to select **Report Viewer** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click 

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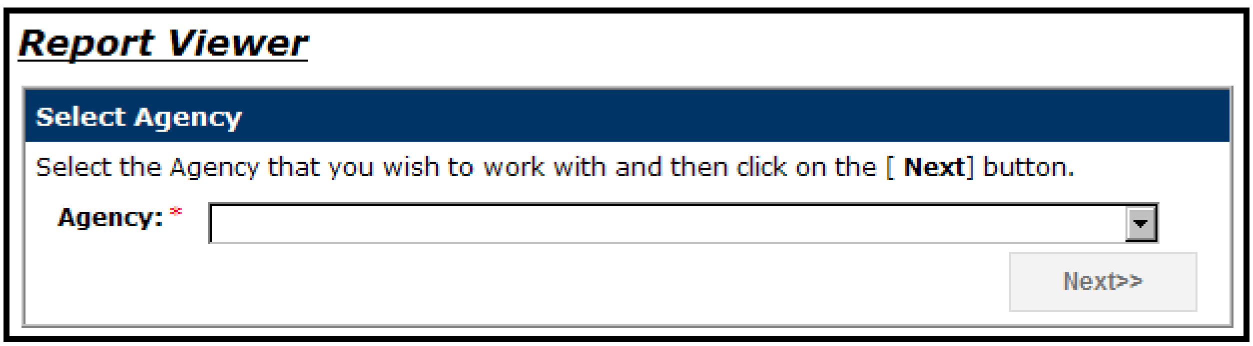
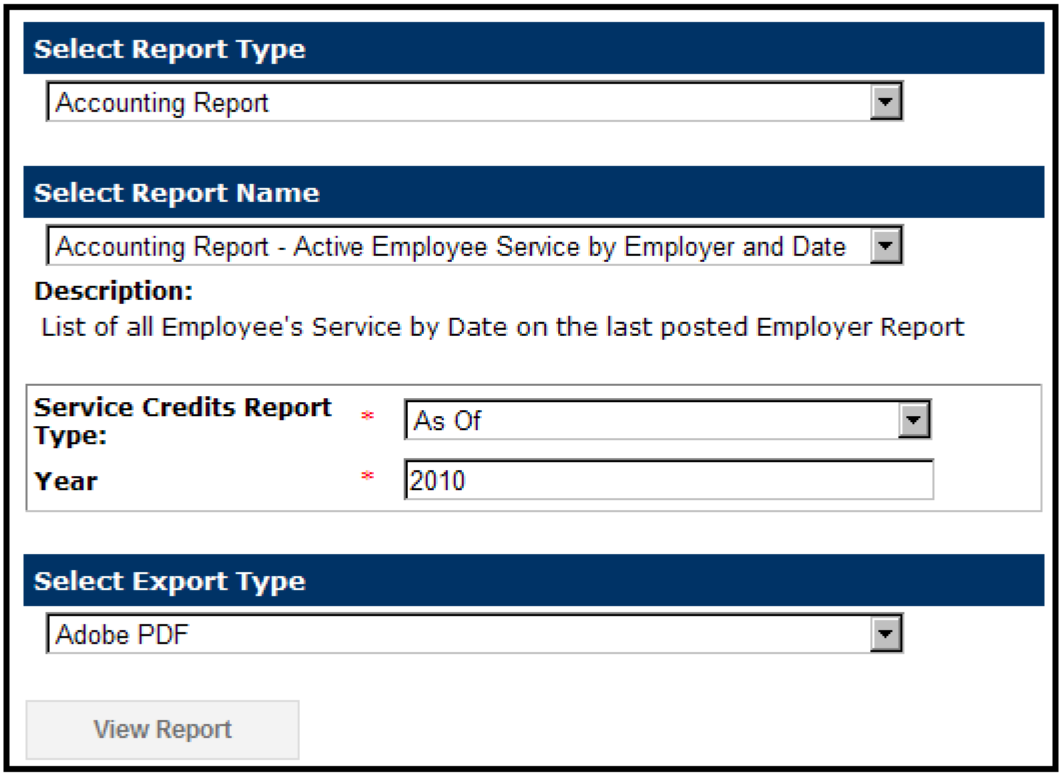


Step 3— The Report Viewer will appear. Highlight to select **Accounting Report** from the drop-down menu under the **Select Report Type.**

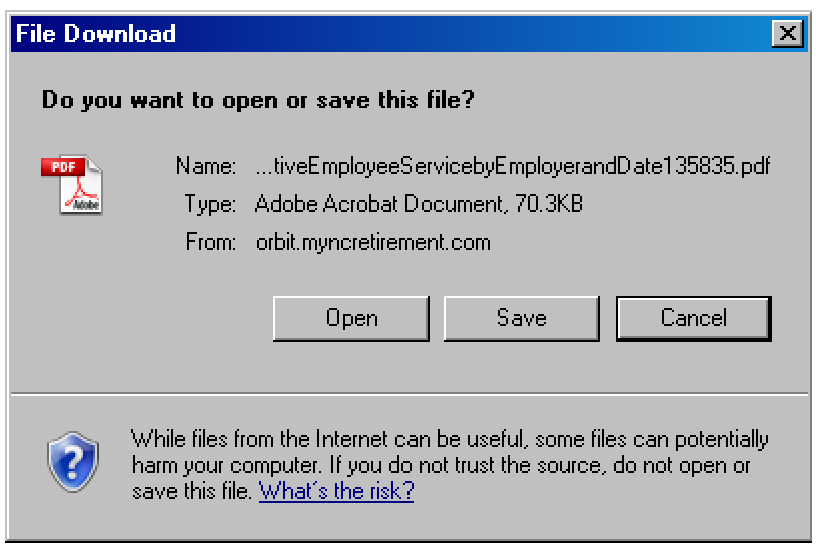
Step 4-- Highlight to select **General Report – Active Employee Service by Employer and Date** from the drop-down menu under the **Select Report Name.**

Step 5-- Highlight to select **Earned In** from the drop-down menu next to **Service Credits Report Type.** Enter the **Year** of interest.

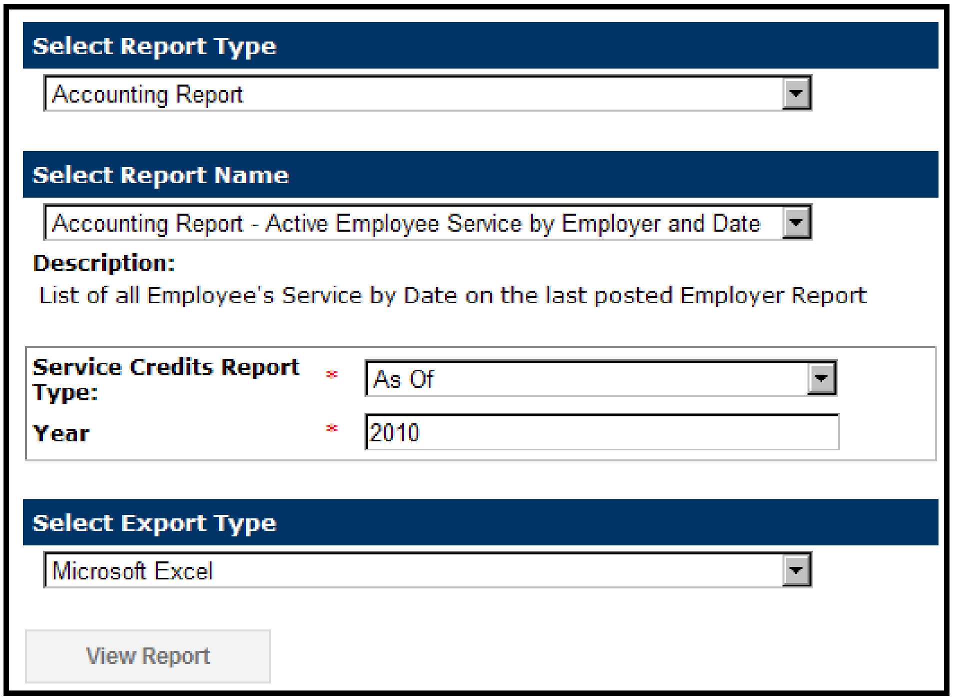


Step 6--Under **Select Export Type**, select **Adobe PDF** to view and print the report in PDF format. Click View Report . OR go to the next page to view instructions on downloading the report to Excel.

c. The File Download box will appear.

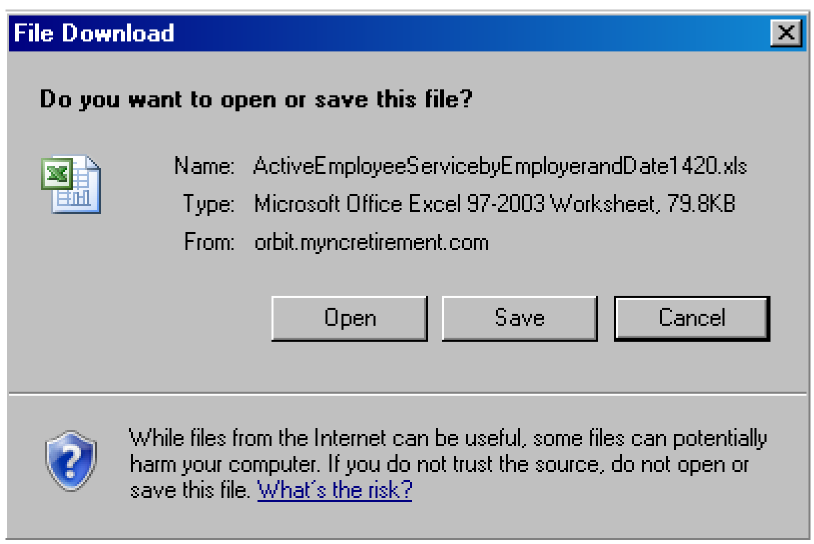


d. Click Open to view the report on the screen. Click Save to save the report to the computer. Click Cancel to exit without running the report.



Step 7--Select **Microsoft Excel** to download the report into Microsoft Excel. Click View Report.

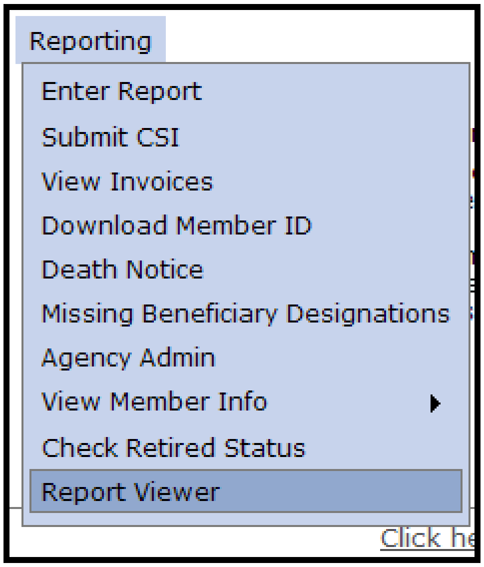
c. The File Download box will appear.

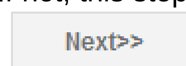


d. Click Open to view the report on the screen. Click Save to save the report to the computer. Click Cancel to exit without running the report.

• Service Earned in a Specific Year Report

Step 1— Highlight to select **Report Viewer** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click 

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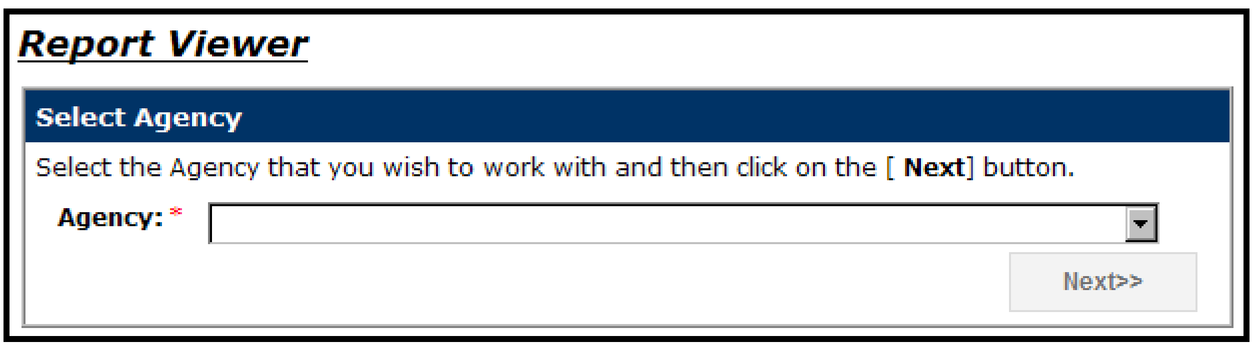
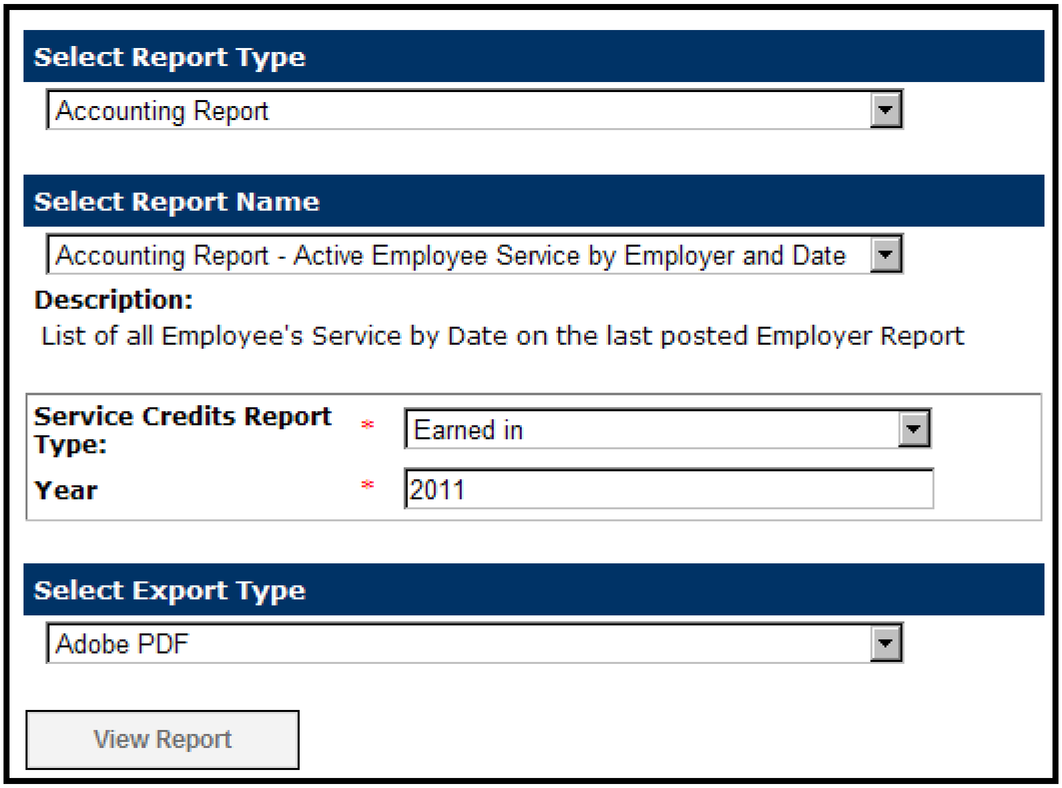


Step 3 - The Report Viewer will appear. Highlight to select **Accounting Report** from the drop-down menu under the **Select Report Type.**

Step 4 - Highlight to select **General Report – Active Employee Service by Employer and Date** from the drop-down menu under the **Select Report Name.**

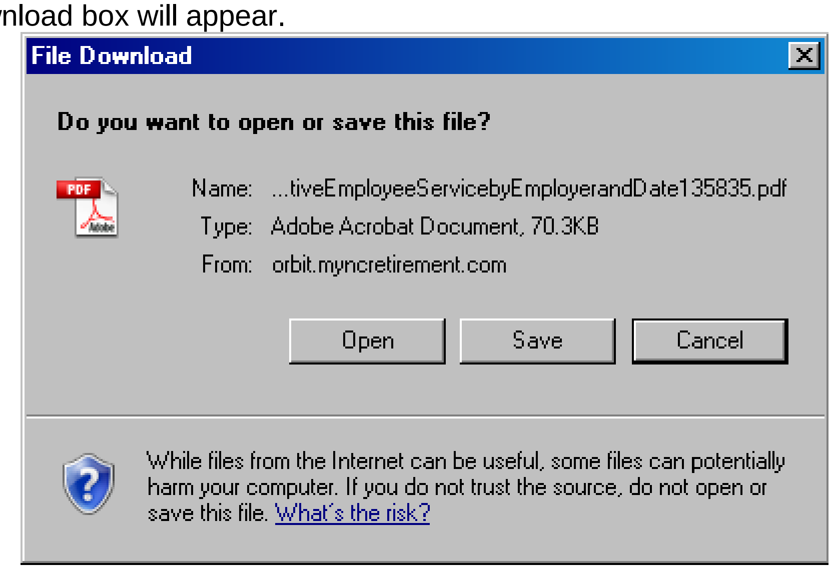
Step 5 - Highlight to select **Earned In** from the drop-down menu next to **Service Credits Report Type.** Enter the **Year** of interest.



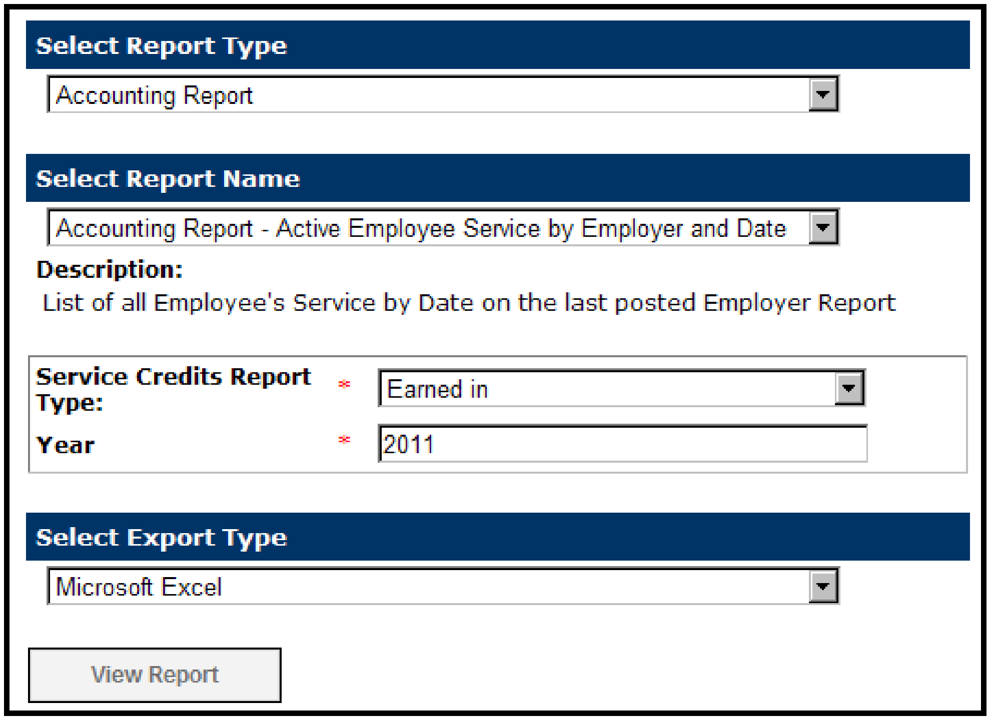
Step 6--Under **Select Export Type**, select **Adobe PDF** to view and print the report in PDF format. Click View Report.

OR go to the next page to view instructions on downloading the report to Excel.

e. The File Download box will appear.

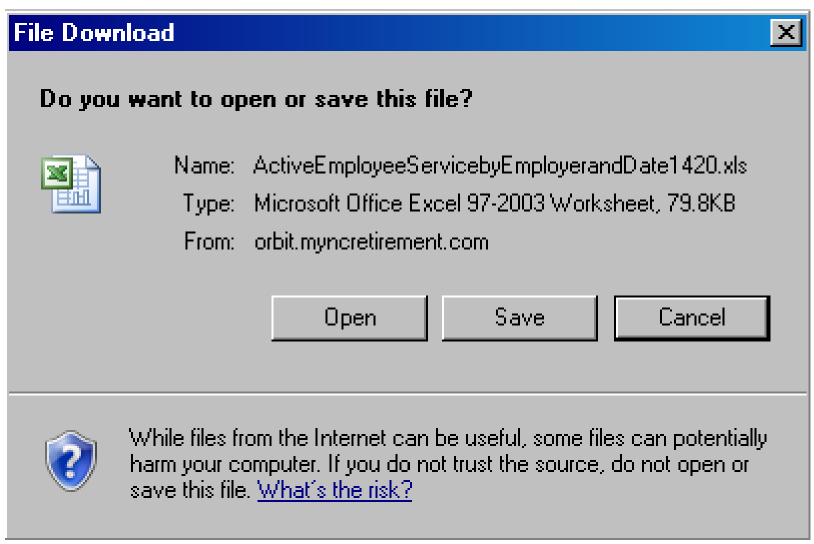


f. Click Open to view the report on the screen. Click Save to save the report to the computer. Click Cancel to exit without running the report.



Step 7--Select **Microsoft Excel** to download the report into Microsoft Excel. Click View Report.

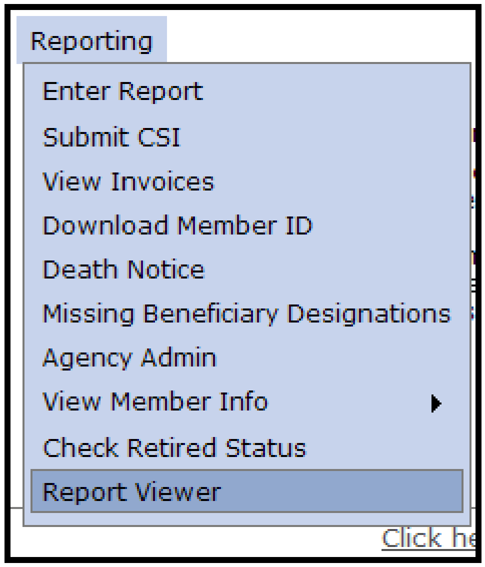
a. The File Download box will appear.

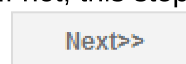


b. Click Open to view the report on the screen. Click Save to save the report to the computer. Click Cancel to exit without running the report.

● Total Service Earned Report (Active Employees Only)

Step 1— Highlight to select **Report Viewer** from the drop-down menu under the **Reporting tab.**



Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, this step will be skipped. Select the appropriate 5-digit agency code from the drop down box. Click 

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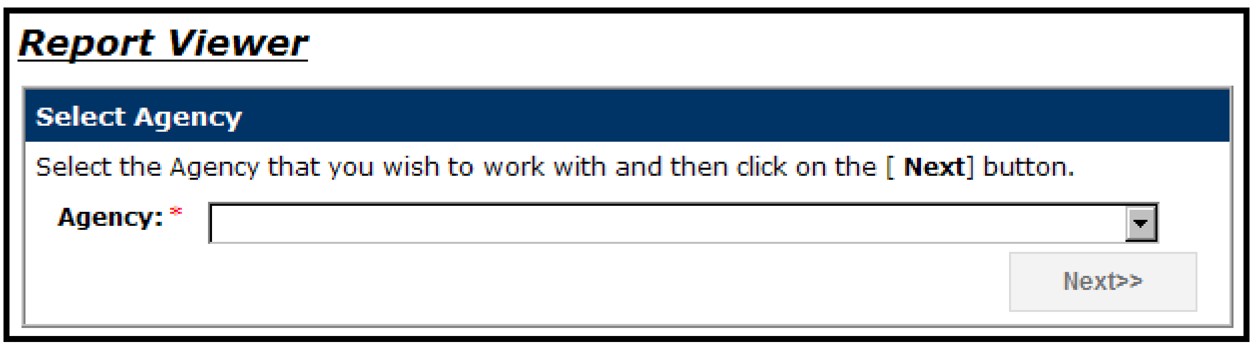
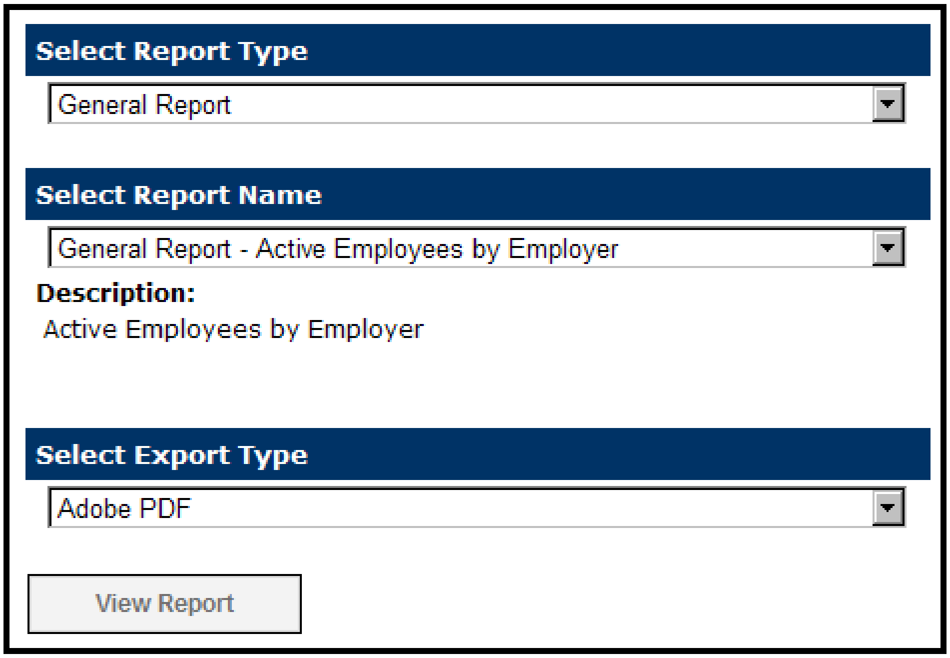


Step 3 - The Report Viewer will appear. Highlight to select **General Report** from the drop-down menu under the **Select Report Type.**

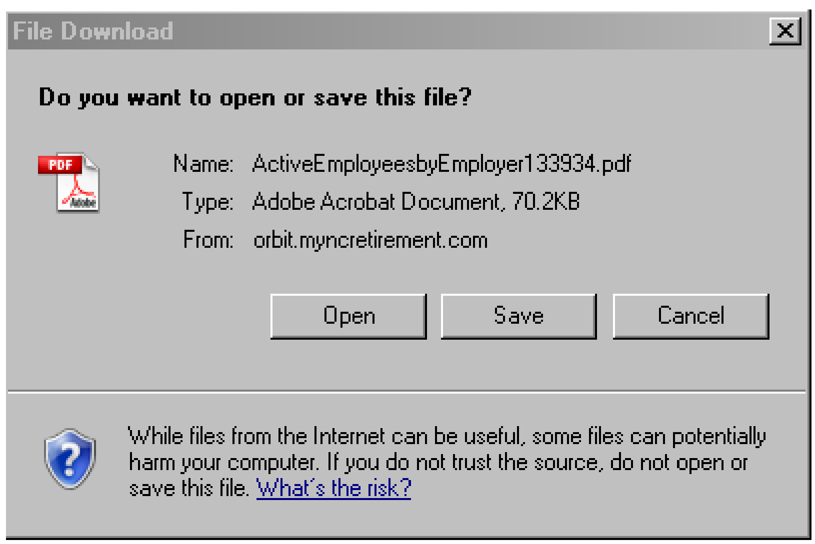
Step 4 - Highlight to select **General Report – Active Employees by Employer** from the drop-down menu under the **Select Report Name.**



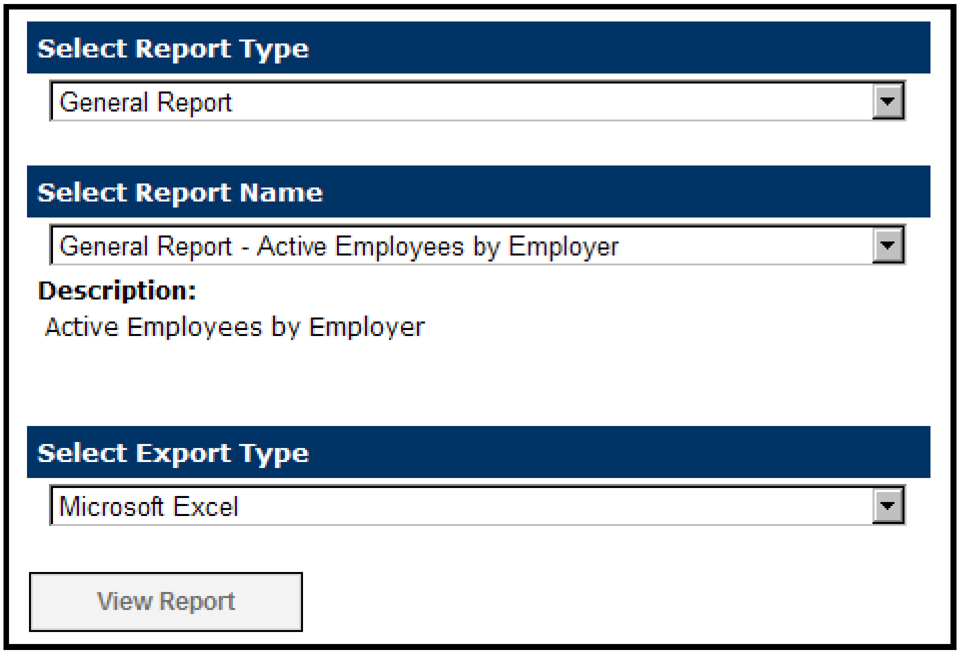
Step 5--Under **Select Export Type**, select **Adobe PDF** to view and print the report in PDF format. Click View Report.

OR go to the next page to view instructions on downloading the report to Excel.

g. The File Download box will appear.

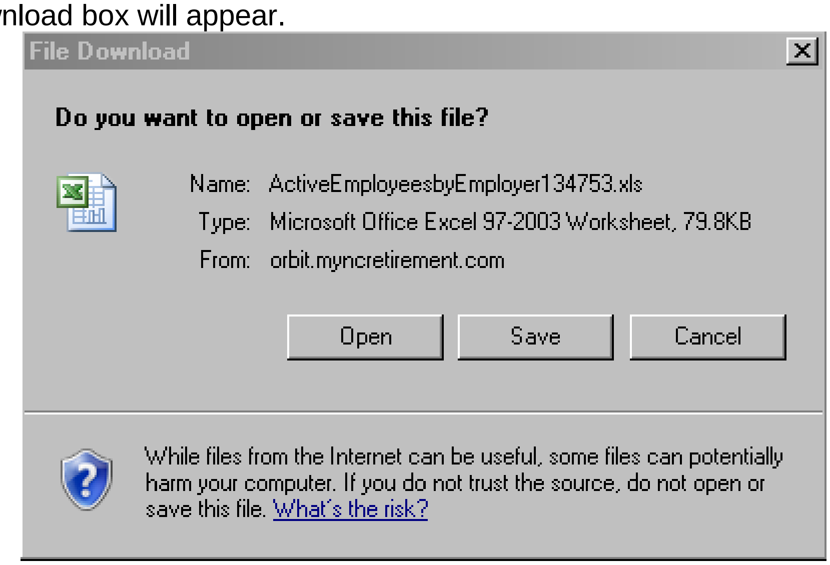


h. Click Open to view the report on the screen. Click Save to save the report to the computer. Click Cancel to exit without running the report.



Step 6--Select **Microsoft Excel** to download the report into Microsoft Excel. Click View Report.

c. The File Download box will appear.



d. Click Open to view the report on the screen. Click Save to save the report to the computer. Click Cancel to exit without running the report.

3-- TROUBLESHOOTING

Issue	Solution
You are locked out of your account and exceeded the number of Password tries.	• Close out browser. Open a new ORBIT page without going through the Favorites link. • If above doesn't work, clear the cache and cookies. Please refer to Section 1.2 Common Internet Problems.
You are experiencing system or computer problems resulting in a late submission.	• Contact ORBIT Employer Reporting at 877-627-3287, or email oer@nctreasurer.com to have a note placed in your account.
You receive an ORBIT Report Reminder or Not Received email.	• ORBIT Reporting is a two-step process. • Check your Payroll Detail Report status. It should say Submitted or Posted. Refer to 2.2 Enter Report. • Check your Contribution Summary Instructions (CSI) status. It should say Submitted or Posted. Refer to 2.3 Submit Contribution Summary Instructions.
You receive an ORBIT Report Rejected email.	• Each agency is allowed a threshold of errors. Once over the threshold, the report will be rejected. • Review the attached Error Report. Correct the errors and resubmit the report. • Contact ORBIT Employer Reporting at 877-627-3287 for additional assistance.
You realize salary has been omitted or an underpayment was made.	• For omitted salary, send a RETRO adjustment record in your current ORBIT report with the original pay period dates. The original pay period dates must be within 90 days of the ORBIT report date. If the adjustment record is outside the 90 days window, please complete a Form 466. • If reporting additional salary, send a PRIOR PERIOD adjustment record in your current ORBIT report with the original pay period dates. The original pay period dates must be within 90 days of the ORBIT report date. If the adjustment record is outside the 90 days window, please complete a Form 466.
You realize an overpayment was made.	• Send a negative PRIOR PERIOD adjustment record of the difference in your current ORBIT report with the original pay period dates and pay type. The adjustment record must match the original overpayment record exactly. Negative adjustment records cannot cross calendar years. If the adjustment record is outside the calendar year, please complete a Form 316. • Note: Negative adjustments cannot be posted to withdrawn or refunded member accounts. Those records will be deleted and an invoice will be generated.
You have a member changing Retirement plans, for example, going from ORP to TSERS or vice versa.	• Fax a letter on letterhead explaining the reason and the effective change of the plan change to 919-855-5801.

You have a Retiree returning to work.	• If the retiree is returning as a non-contributing member, refer to 2.10 Check Retired Status. Report the member's salary under STRS or LOCRS. • If the retiree is returning as a contributing member, report them on the current ORBIT report. We recommend you complete the Return to Work Form and send a copy of it to oer@nctreasurer.com or fax to 919-855-5801.
You notice a service credit shortage in a specific year.	• Run the Service Earned in a Specific Year Report under Report Viewer. Refer to Service Earned in a Specific Year Report. • Review the report and send to your assigned ORBIT Error Report team member or oer@nctreasurer.com the list of employees that need a service correction, a description of the problem and the written authorization for correction.
Your banking information has changed.	• Draft a letter on letterhead including your agency number, the effective date of change, the new routing number and the new account number. • Fax the letter to 919-855-5801.
Your ORBIT contact information has changed.	• Draft a letter on letterhead including your agency number, the effective date of change, and the new contact information. • Fax the letter to 919-855-5801.
You have a question regarding a Form 466 or Form 316.	• Contact Member Services for Employers at 877-627-3287.

4-- GLOSSARY OF TERMS

CSI	Contribution Summary Information (Employer uses for on-line submission of total monthly contributions)
DST	Department of State Treasurer
ESS	Employer Self Service website
FAQ	Frequently Asked Questions
FTP	File Transfer Protocol (Used for the transmission of the Employer's monthly detail file to RSD)
ORBIT	Online Retirement Benefits through Integrated Technology
RSD	Retirement Systems Division (One of the divisions within DST)
SSN	Social Security Number

<u>Retirement Plans</u>:

TSERS	Teachers'& State Employees' Retirement System
LGERS	Local Governmental Employees' Retirement System
LRS	Legislative Retirement System
CJRS	Consolidated Judicial Retirement System
F&R	Fire & Rescue Retirement Plan
ORP	Optional Retirement Plan (for University & some Community College personnel only-- **NOT** administered by RSD)

<u>Retirement Plan Codes</u>:

<u>TSERS</u>:

STG	TSERS General Class
STL	TSERS Law Enforcement Class (LEO's)
STMAX	Annual earnings for TSERS employees that have exceeded the Internal Revenue Service's limit within the calendar year

STRS	TSERS retirees that are rehired **part-time** six months after the retirement date from TSERS & are subject to an annual earnable allowance limit.
STDIS	TSERS employees that are out on Short-Term Disability

<u>LOCRS</u>:

LOCG	LGERS General Class
LOCL	LGERS Law Enforcement Class (LEO's)
LOCF	LGERS Firemen Class
LOCMAX	Annual earnings for LGERS employees that have exceeded the Internal Revenue Service's limit within the calendar year
LOCWP	LGERS probationary employees that are working under an employer-imposed waiting period
LOCROD	LGERS Register of Deeds Class (ROD's)

<u>CJRS</u>:

JUD1	CJRS Justices of the NC Supreme Court and Judges of the NC Court of Appeals
JUD2	CJRS Judges of the NC Superior Court and the Administrative Officers of the Courts
JUD3	CJRS Judges of NC District Courts, District Attorneys, & Clerks of Superior Courts

<u>LRS</u>:

LEGL	LRS Legislators (includes the NC House of Representatives & the NC Senate)

<u>ORP</u>:

ORPG	ORPG for Applicable University & some Community College personnel (**NOT** administered by the RSD)
ORPMAX	Annual earnings for ORPG employees that have exceeded the Internal Revenue Service's limit within the calendar year

5-- JOB CLASSIFICATION CODES

Job Classification Code	Job Classification Title	Job Classification Description
100	Education Professionals	Teachers; Teacher Aides; Coaches; Guidance Counselors; and, Librarians
102	Educational Executives	Superintendents; Assistant Superintendents
103	Educational Management	Principals; Assistant Principals; and, Educational Administrative Personnel
104	Educational Administrative Support Personnel	Office Support and Clerical staff
105	Educational Support Personnel	Bus Drivers; Custodians; and, Cafeteria Workers
200	Professionals	Engineers; Attorneys; Directors; Management; Business & Finance Professionals; Architects; Computer Specialists; and, County Librarians
201	Government Officials & Executives	Elected/Appointed Officials; Town Managers; County Managers; Judges; and Legislators
202	Administrative	Secretarial; Clerical Support; File Clerks; Stenographers; Receptionists; MSC/Mailroom Clerks; and, Computer Operators
203	Technical and Trades	Surveyors; Engineering Techs; Electricians; Plumbers; Welders; Truck Drivers; Machine Operators; Painters; Mechanics; Butchers; Chefs; Blacksmiths; Brick masons; and, Carpenters
204	Skilled Labor	Garbage Collectors; Construction Workers; Custodians; Transportation Workers; Elevator Attendants; Gardeners & Grounds Keepers; and Helpers
300	University & Community College Professionals	Professors and Instructors
301	University & Community College Executives	University Presidents; Community College Presidents; Deans of Education; and, Faculty Department Heads
302	University & Community College Mgt	Directors; Managers; and, Supervisors
303	University Agricultural (AG) Extension	AG Extension Agents and AG Employees
400	Local Firefighters	Firefighters (LOCF)
401	Local Emergency Workers	EMS; Paramedics; First Responders (Rescue Squad); and, Ambulance Drivers
500	State Highway Patrol Trooper	SHP Trooper (TSERS)
501	Police Officer	Police Officer (LOCL)
502	Public Safety Officer	Police Officer or Fireman who is also a paramedic
503	Sheriff	Elected County Law Enforcement Official (LEO)
504	Deputy Sheriff	County Law Enforcement Officer
505	Wildlife Officer	State LEO that reports to NC Wildlife Commission
506	Revenue Enforcement Officer	Collects overdue revenue

507	ALE Officer	ALE Officer
508	Jailer (Certified)	Jailer (Certified)
509	Protective Services (Non-Certified)	Correctional Officers; Jailers (Non-Certified); Dispatchers; Security Guards; Civilian Guards; Animal Control Workers; Lifeguards; and Parking Enforcement Workers
600	Healthcare Professionals	Doctors; Nurses; Physicians' Assistants; Therapists; Dentists; Pharmacists; and, Veterinarians
601	Social Service Professionals	Social Workers