



North Carolina
Total Retirement Plans



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
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SUBMIT REPORT
EMPLOYER SELF-SERVICE USER GUIDE

Feb 2017

State of North Carolina
Department of State Treasurer
Retirement Systems Division

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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 (**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 on-line without having to call or correspond with the ORBIT Employer Reporting Group for answers. ORBIT was also put into place 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 and may be used as a reference tool in support of the online Employer Self-Service software applications. The applications covered in this Guide are as follows:

- **Submit 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)**

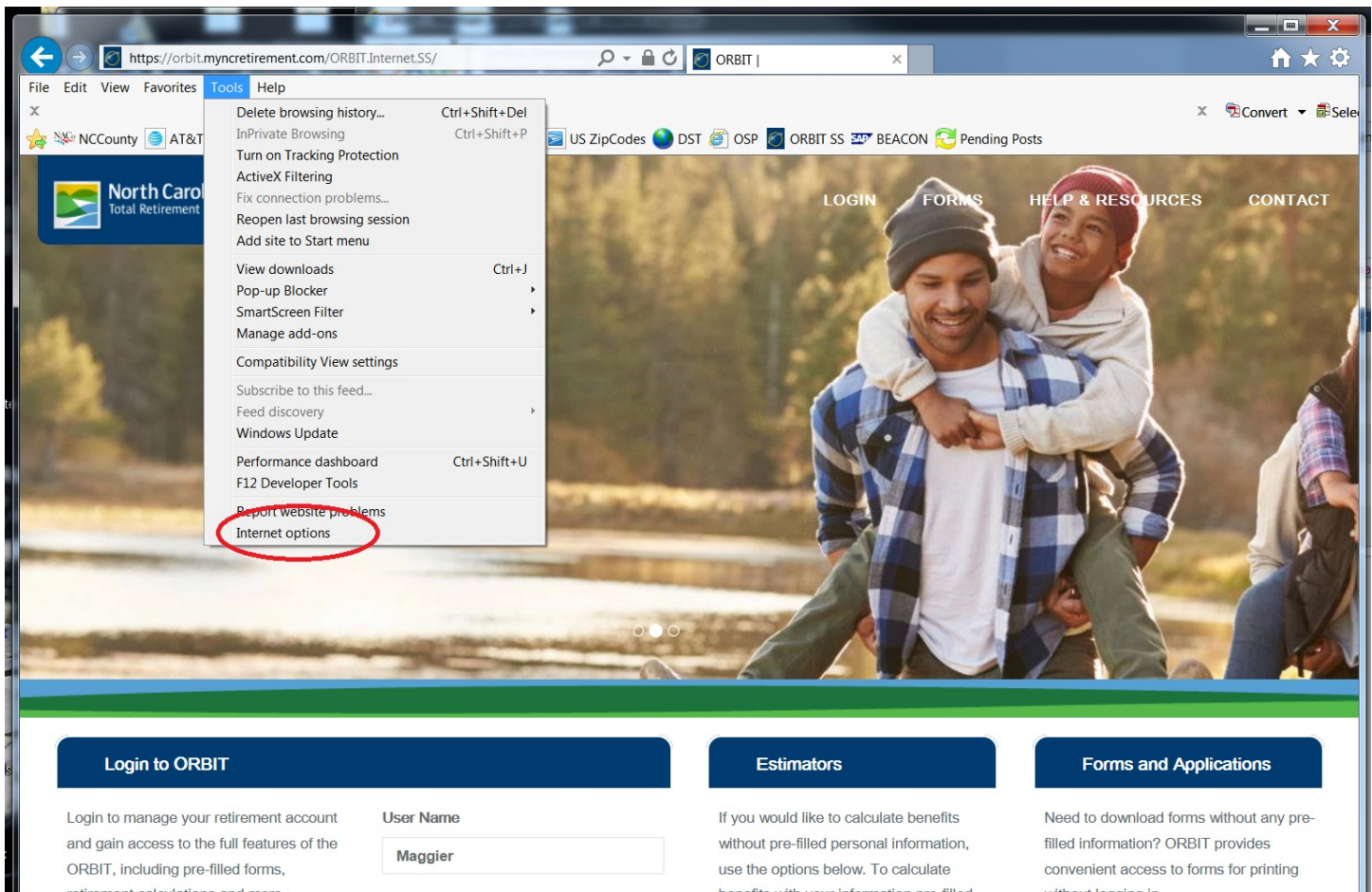
- **Access to a printer for in-house copies**



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 should clear your cache:

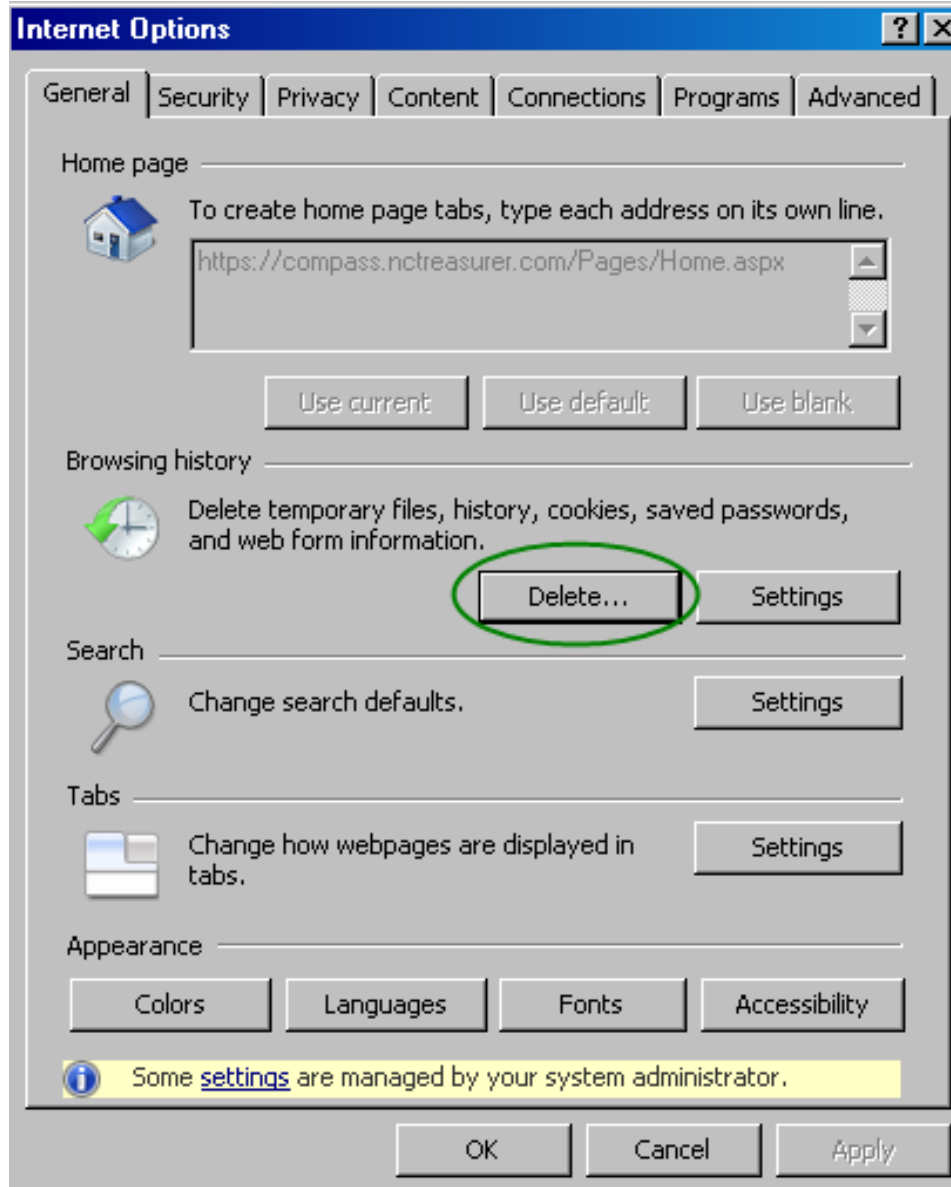
Step 1--On the ORBIT Login page, click on **Tools> Internet Options.**



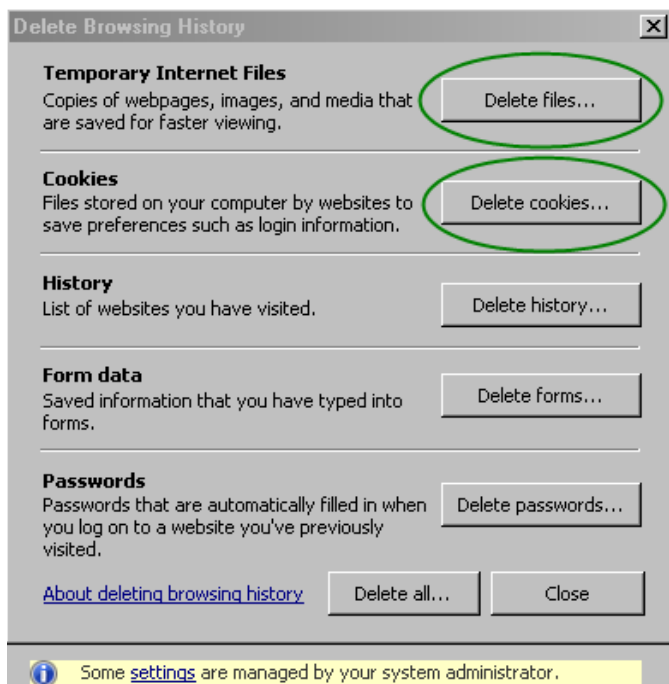
The screenshot shows a web browser window with the address bar displaying <https://orbit.myncretirement.com/ORBIT.Internet.SS/>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The Tools menu is open, showing various options. The 'Internet options' option at the bottom of the menu is circled in red. The background of the browser window shows the ORBIT login page, which includes a navigation menu with 'LOGIN', 'FORMS', 'HELP & RESOURCES', and 'CONTACT'. Below the navigation menu, there are three main sections: 'Login to ORBIT', 'Estimators', and 'Forms and Applications'. The 'Login to ORBIT' section has a 'User Name' field containing the text 'Maggier'. The 'Estimators' section contains text about calculating benefits. The 'Forms and Applications' section contains text about downloading forms.

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

Delete...



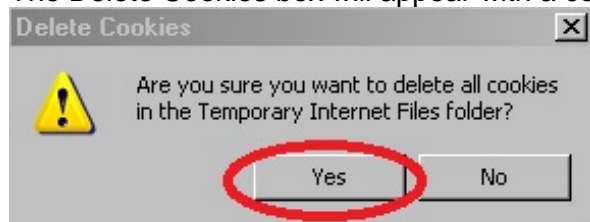
Step 3--The Delete Browsing History box will appear. Your goal is to clear out the **Temporary Internet Files** and the **Cookies** on your computer.



1. Click .
 - a. The Delete Files box will appear with a confirmation, click .

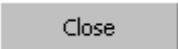



- b. A status box will appear while the temporary internet files will be deleted.
 - c. When complete, the status box will automatically close.
 - d.
 2. Click .
 - a. The Delete Cookies box will appear with a confirmation, click .



- 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  to close the Delete Browsing History box.

Step 5—Click  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**.



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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**.

The screenshot shows the North Carolina Department of State Treasurer website. The header includes the logo, navigation links (Contact Us, Careers, Search), and a search bar. The main navigation menu is highlighted, with "Retirement & Savings" circled in red. Below the menu, the "My NC Retirement" page is displayed, featuring a sidebar with various links, a main content area with a welcome message and news items, and a right-hand sidebar with login and event information.

North Carolina Department of State Treasurer
Learn. Invest. Grow. Prosper.

Contact Us | Careers | Search this site...

Home Inside the Department Divisions **Retirement & Savings** State and Local Government Finance NC Cash Program

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

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

Having Trouble Contacting Us?

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

ORBIT Redesign Launched January 28

On January 28, 2017, the NC Department of State Treasurer launched its redesigned ORBIT site. ORBIT provides members secure access to their personal retirement account information 24 hours a day, seven days a week.

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

North Carolina Total Retirement Plans | ORBIT

Manage your retirement account online through ORBIT!

[click here to login](#)

ORBIT Information

- [Active Employee ORBIT Flier](#)
- [Retiree ORBIT Flier](#)

Upcoming Events

- [Retirement Planning Conference - TSERS Webinar](#)
February 9, 2017 - 9:30 a.m. - 11:30 a.m.
- [Retirement Planning Conference - LGERS Webinar](#)
February 9, 2017 - 1:30 p.m. - 3:30 p.m.
- [Retirement Planning Conference](#)

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
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- ▶ Frequently Asked Questions

Active Government Employees

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Retirement and Savings 101

Stay Connected



North Carolina | My NC Retirement
Total Retirement Plans



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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.

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Home | Inside the Department | Divisions | **Retirement & Savings** | State and Local Government Finance | NC Cash Program

Home ▶ Retirement and Savings ▶ Government Employers ▶ **Employers ORBIT Information**

My NC Retirement

Active Government Employees

Government Benefit Recipients

Government Employers

- ▶ Manuals and Newsletters
- ▶ **Employers ORBIT Information**
- ▶ Laws and Legislation
- ▶ Discontinued Service Retirement
- ▶ Current Retirement Systems Laws
- ▶ LGERS Pension Spiking
- ▶ TSERS Pension Spiking

Retirement and Savings 101

Stay Connected

North Carolina Total Retirement Plans | Government Employers

Employers ORBIT Information

This section provides North Carolina government employers with information about ORBIT.

What is ORBIT?

Established in October 2007, **ORBIT** is a system that grants employers, employees and retirees online access to retirement accounts and transactions. Each employer is responsible for:

- Enrolling all new eligible members into the Retirement System by introducing Employee Self Service to all new members. Please refer to the [Member ID File](#) for guidance on how to download new member IDs.
- Submitting the required Employee and Employer contributions via the monthly Contribution Summary Instructions (CSI) by **4:30 p.m. on the 4th business day of the month** along with the monthly ORBIT payroll report. Please refer to the [Schedule for Submitting Contribution Summary Instructions](#) to avoid a late fee.
- Certifying employee termination information on the monthly ORBIT payroll report and, under specific circumstances, on the Form 5.
- Reporting retirees who return to work as State Retirees Subject to Restrictions (STRS) or Local Retirees Subject to Restrictions (LOCRS) on the monthly ORBIT payroll report. Please refer to the [ORBIT Employer Reporting Invoices and Penalties](#) document to see how to avoid a penalty fee.

North Carolina Total Retirement Plans | **ORBIT**
Manage your retirement account online through ORBIT!
[click here to login](#)

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

North Carolina
Total Retirement Plans | **ORBIT**

LOGIN FORMS HELP & RESOURCES CONTACT

Login to ORBIT

Login to manage your retirement account and gain access to the full features of the ORBIT, including pre-filled forms, retirement calculations and more.

Passwords are case-sensitive.

[Forgot your Password](#)
[Forgot your User Name](#)

Are you a first-time user?
If so, you will need to register to create your account.

User Name

Password

Log in

Register

Estimators

If you would like to calculate benefits without pre-filled personal information, use the options below. To calculate benefits with your information pre-filled, please login.

Retirement Benefit

NC 401(k)/457 Transfer Benefit

Service Purchase

Forms and Applications

Need to download forms without any pre-filled information? ORBIT provides convenient access to forms for printing without logging in.

NOTE: To access forms with your information pre-filled, please login.

Forms and Applications

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 only for access to individual members' accounts, not Employers. 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.

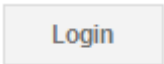
2--EMPLOYER SELF SERVICE

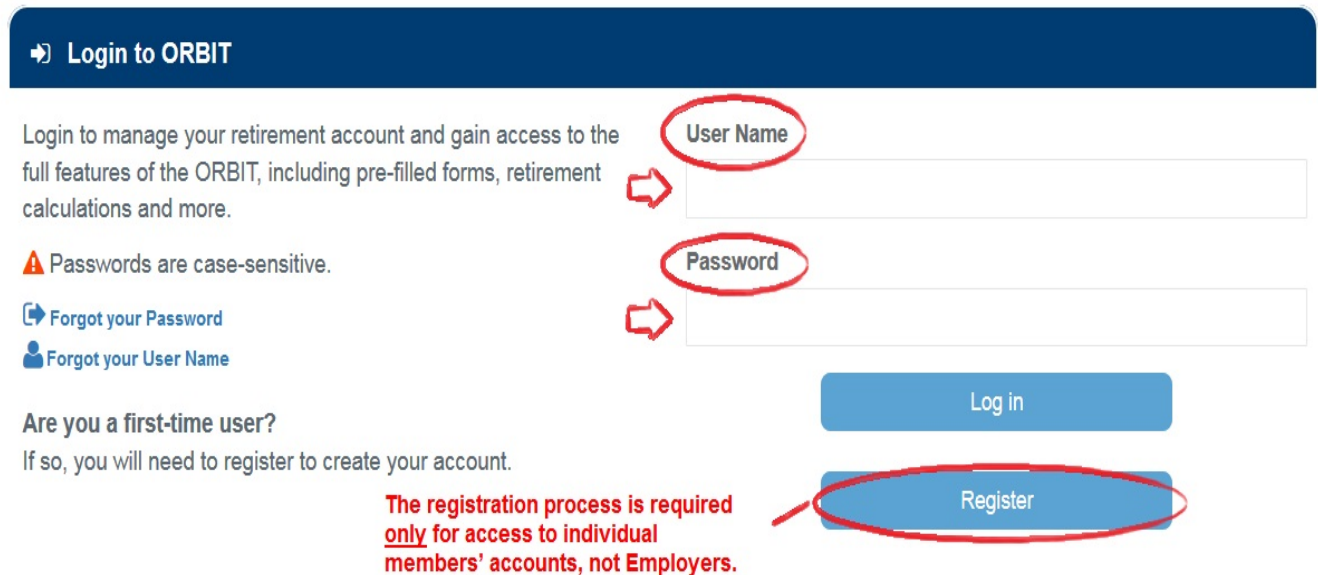
2.1 Login

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**  .



The screenshot shows the ORBIT login interface. At the top, there is a dark blue header with a white arrow icon and the text "Login to ORBIT". Below the header, the main content area is white. On the left side, there is a paragraph: "Login to manage your retirement account and gain access to the full features of the ORBIT, including pre-filled forms, retirement calculations and more." Below this paragraph is a warning icon (a triangle with an exclamation mark) and the text "Passwords are case-sensitive." There are two links: "Forgot your Password" with a key icon and "Forgot your User Name" with a person icon. At the bottom left, there is a question "Are you a first-time user?" followed by the text "If so, you will need to register to create your account." In the center, there are two input fields. The top field is labeled "User Name" and the bottom field is labeled "Password". Both labels are circled in red. Red arrows point from the labels to their respective input fields. To the right of the input fields, there are two blue buttons: "Log in" and "Register". The "Register" button is circled in red. Below the "Register" button, there is a red text box that says "The registration process is required only for access to individual members' accounts, not Employers."

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

Department of State Treasurer | NC Retirement Systems Logout

North Carolina | **ORBIT**
Total Retirement Plans | State Treasurer Dale R. Folwell, CPA

[Employer](#) [Forms](#) [Educate Yourself](#) [Contact Us](#)

Reporting

[Employer Home](#)

A message from State Treasurer Dale R. Folwell, CPA:

Welcome to ORBIT, a web-based tool that will provide you with full access to your employer reporting information. ORBIT is designed to improve your access to payroll accounting information.

North Carolina provides retirement benefits and savings for more than 820,000 North Carolinians, including teachers, state and local public sector employees, firefighters, police officers, and other public workers. You are an important part of keeping track of all of those employees that make up our systems.

Thank you for taking an active role in helping your employees learn about their retirement, disability, and death benefits. I hope you will find ORBIT to be a convenient tool for managing your payroll process.

-Dale R. Folwell, CPA

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

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

2.2 Submit Report

Employers who have more than 50 employees most commonly use this method of submitting monthly ORBIT reports. Under this method, an Employer uploads a file containing the agency's monthly data and sends it to RSD in the required ORBIT format. The file will be rejected if it is not uploaded and sent in the correct ORBIT file format.

The steps shown below describe how to use the **Submit Report** method:

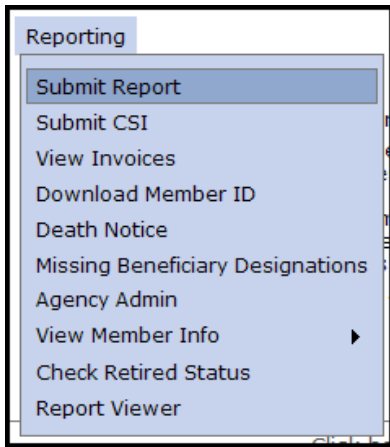
Step 1—Highlight to select **Submit Report** from the drop-down menu under the **Reporting** tab.

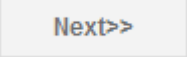


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STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA



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  .

(NOTE: ORBIT will display the *Select Agency* screen only for Employers that have access to more than one agency. For Employers with access to only one agency, the *Submit Report screen* will come up automatically.)

Step 3 - Choose the correct report month from the drop-down list under the **Select Report Month**.

Before the Employer can submit its monthly ORBIT detail report using the **Submit Report** method, a monthly file must be prepared with all of the required fields of information completed. It is a requirement that the Employer name this file with the following format: **yearMMXXXXX.cnt** (year month agency number.cnt) and save the file with the same name.

Report Date	Status	Submission Date
03/01/2012	CREATE	

Display All

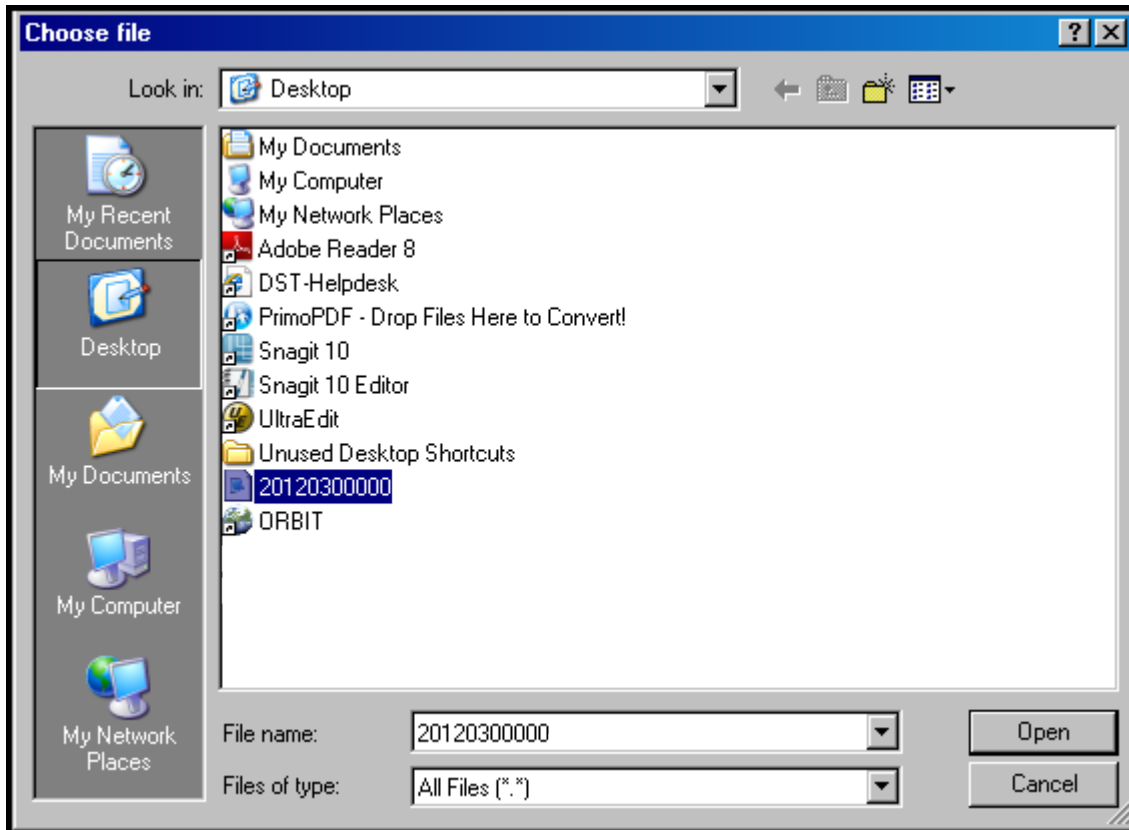
Select Report Month:

Select File to Submit:

- The submitted file will be renamed to the Retirement System Division format
- Report Months for which there are no corresponding Contribution Summary will not appear as a Report Month value to select from.



Step 4 - Click **Browse...** to upload the file and select the appropriate file from the computer's files. ORBIT will display the screen shown below.



Step 5 - Select the file by double-clicking on the desired file. The file name will be displayed in the text box corresponding to the **Select File to Submit** field. Click **Open**. The screen will appear as:

Submit Report

Report Date	Status	Submission Date
03/01/2012	CREATE	

Display All

Select Report Month: 03/01/2012

Select File to Submit: *C:\Documents and Settings\ret0006\Desktop\20120300000.cnt **Browse...** **Submit**

- The submitted file will be renamed to the Retirement System Division format
- Report Months for which there are no corresponding Contribution Summary will not appear as a Report Month value to select from.

Step 6- Confirm the file is correct. Click **Submit**. The **Submit Confirmation** screen will appear. Click the **Continue** link to enter and submit the **Contribution Summary Instructions** (Payment).



North Carolina
Total Retirement Plans

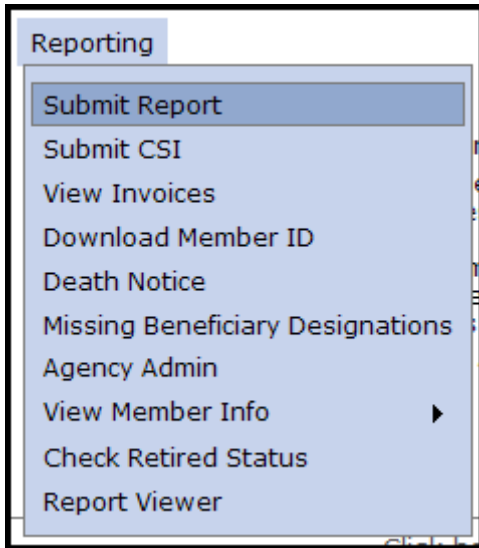


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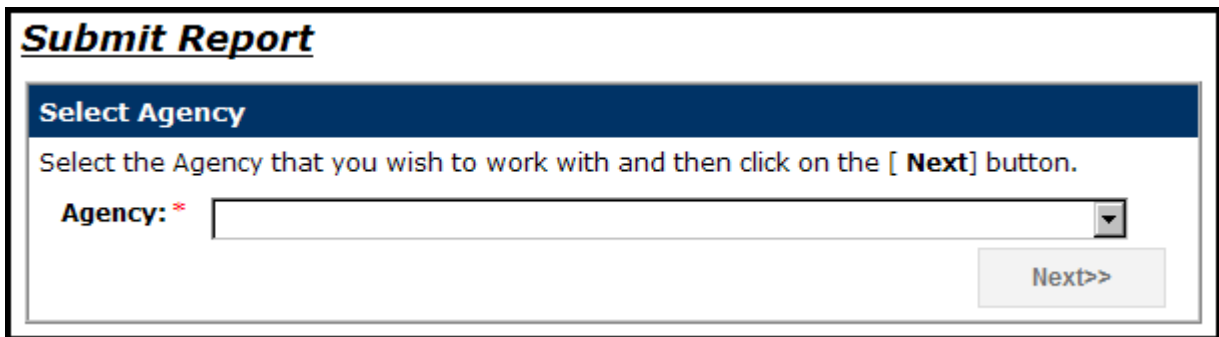
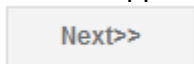
- **Unsubmit Report**

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 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



Step 3- The **Enter Report – Payroll Summary** screen will appear showing the summary in chart format for the current month. Click **Unsubmit**.

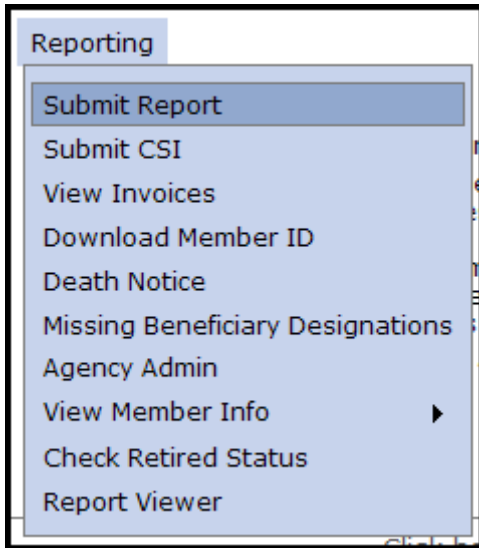


Step 4 - The Unsubmit Confirmation screen will appear. Click **Continue** to return to the **Submit Report** screen. The report status will change to **CREATE**.

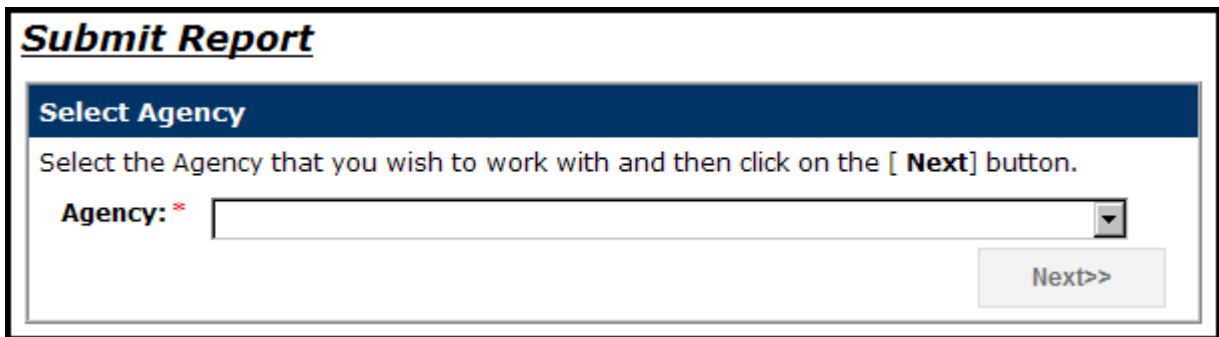
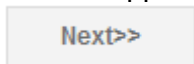
- **View Previous Payroll Reports**

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

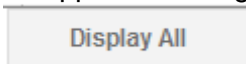
Step 1 - Highlight to select **Submit Report** from the drop-down menu under the **Reporting** tab.



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



Step 3- The **Submit Report** screen will appear showing the summary in chart format for the current month. To view all past reports, click



Submit Report

Report Date	Status	Submission Date	
02/01/2012	SUBMIT	02/29/2012	Unsubmit

Display All

Step 4 - A chart will appear of all previous payroll reports will appear showing Report Date, Status, and Submission Date.

2.3 Submit Contribution Summary Instructions

Each month, immediately after monthly ORBIT report details have submitted, a second part of the report is required called the **Contribution Summary Instruction Report, or CSI report**. The CSI report is how Employers send the total amount of money on the report. The CSI report is your second step and submitted online through Employer Self-Service. The total amount on the monthly CSI report **must match** the Salaries and 6% contribution amounts on the monthly ORBIT detail report.

The CSI module also provides a way for Employers to pay any outstanding invoices at the time the monthly CSI submits. Invoice balances (added or deducted from to the total NET amount) on the CSI report and should be reflected on the Payment amount. Actual **hard checks not accepted**, these get **returned** to the Employer.

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

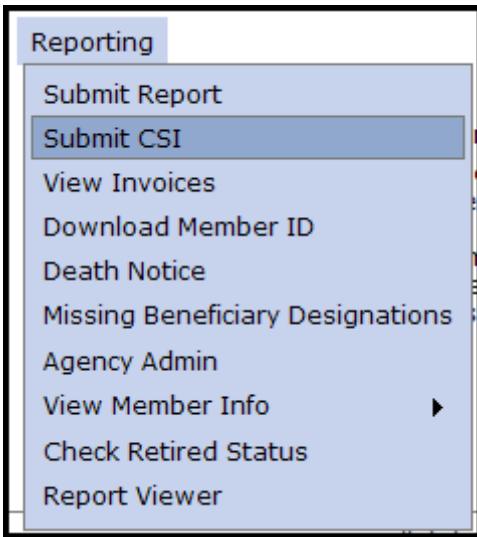
Regardless of whether the Employer uses the **Enter Report** or the **Submit Report** method to send in the monthly ORBIT detail report, all Employers are required to submit a monthly **CSI Report/Payment**.

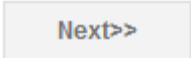
*(NOTE: There is **NO** requirement on the part of the Employer to call **ADP** (Automatic Data Processing) to report the total contribution amount. When the CSI report is sent to RSD, RSD will automatically generate a payment file to send to ADP to accomplish the funds transfer.)*

- **Submit Contribution Summary Instruction (CSI)**

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

Step 1- 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, skip this step. Select the appropriate 5-digit agency code from the drop down box. Click  .

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

	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: <input type="checkbox"/> *				
<hr/>				
Select >>	<u>Action</u>	<u>Invoice Number</u>	<u>Invoice Type</u>	<u>Invoice Amount</u>
<hr/>				
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	
<input type="checkbox"/>		3480145	02/02/2012	\$283.89	\$283.89	CSI Penalty Invoice	View	
<hr/>								
1								
							Save	Cancel

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.

Invoices				
Override Payment of Invoices: <input type="checkbox"/> *				
<hr/>				
Select >>	<u>Action</u>	<u>Invoice Number</u>	<u>Invoice Type</u>	<u>Invoice Amount</u>
	View	3480145	CSI Penalty Invoice	\$283.89
<hr/>				
Net Invoice Amount				\$283.89

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.



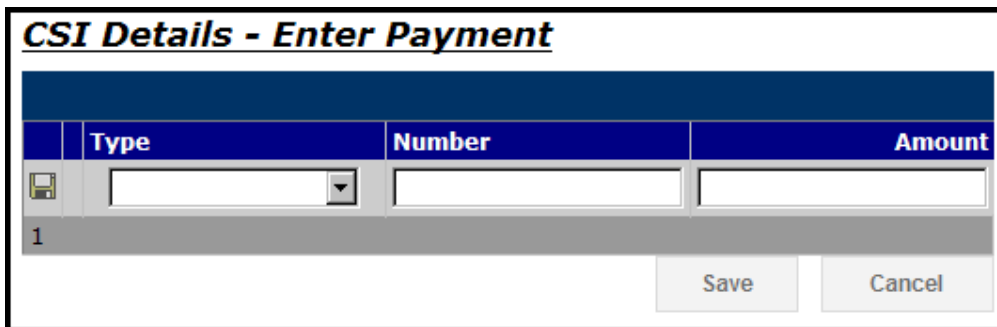
North Carolina
Total Retirement Plans




Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

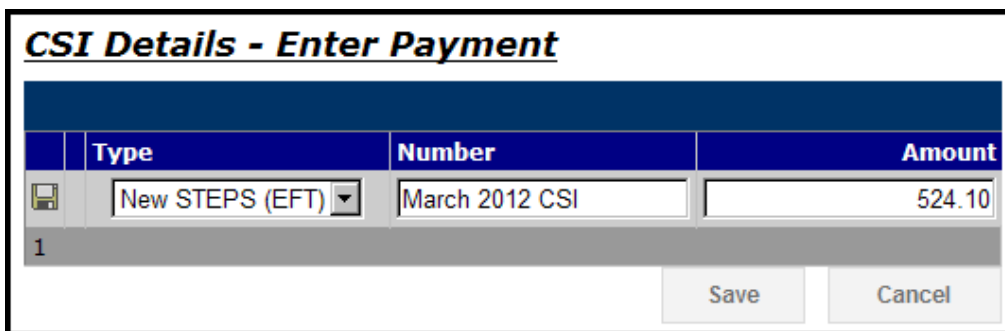
Step 8 - Confirm the **Net Amount** to be sent to the Retirement System. To submit the **CSI Report Summary**, the Employer must enter the **Payment** information which is the last section on the screen


and click . The **Enter Payment** screen will appear.




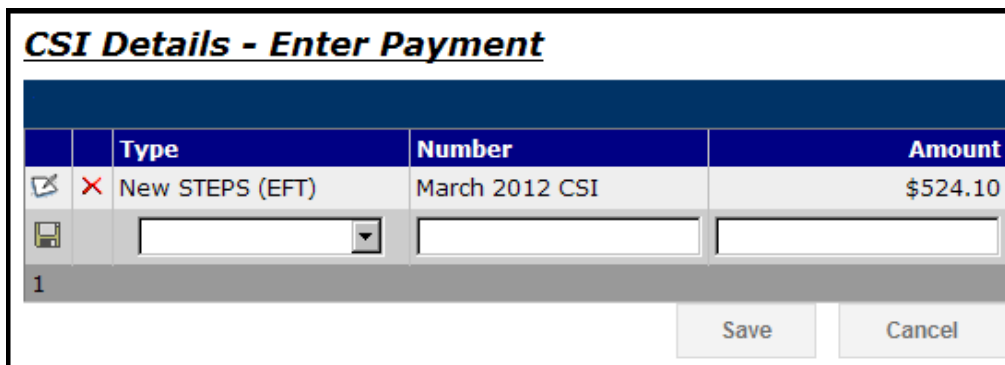
CSI Details - Enter Payment			
	Type	Number	Amount
	<input type="text"/>	<input type="text"/>	<input type="text"/>
1			
			<input type="button" value="Save"/> <input type="button" value="Cancel"/>



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.





CSI Details - Enter Payment			
	Type	Number	Amount
	New STEPS (EFT)	March 2012 CSI	524.10
1			
			<input type="button" value="Save"/> <input type="button" value="Cancel"/>

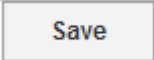
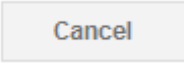
Click the  on the left of the screen. ORBIT will display this screen:

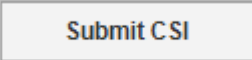


CSI Details - Enter Payment			
	Type	Number	Amount
	✗ New STEPS (EFT)	March 2012 CSI	\$524.10
	<input type="text"/>	<input type="text"/>	<input type="text"/>
1			
			<input type="button" value="Save"/> <input type="button" value="Cancel"/>

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.

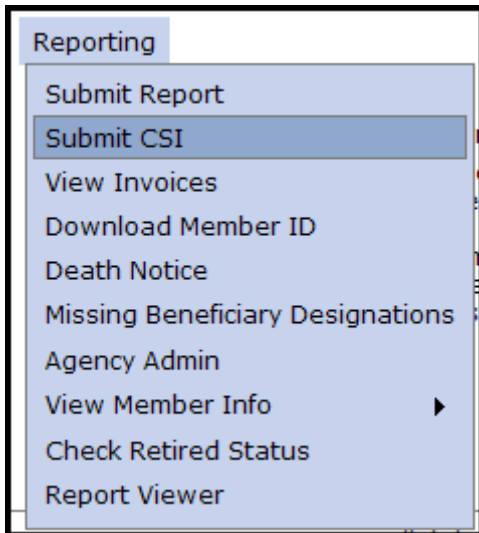
Step 11 - When all of the payment information is completed, click  or click  to return to the **CSI Details** page.

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

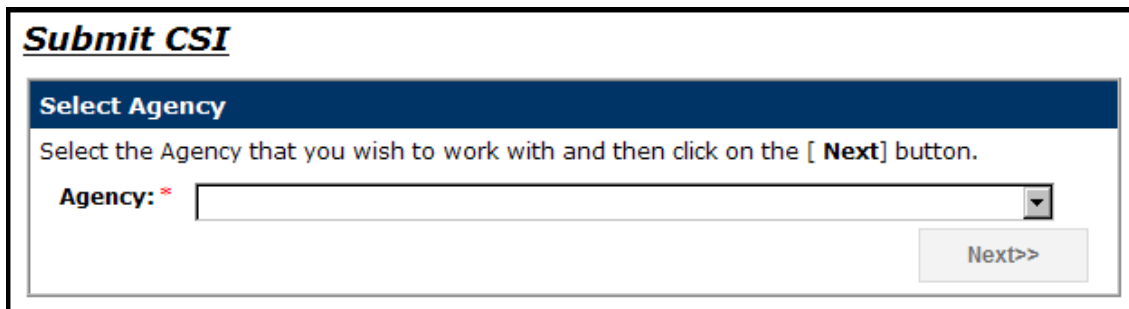
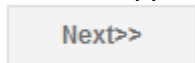
- **Unsubmit CSI Employer Report**

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, it can no longer be unsubmitted or reversed.

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 otherwise this step can be skipped. If applicable, select the appropriate 5-digit agency code from the drop down box. Click

A screenshot of a web form titled 'Submit CSI'. The form has a dark blue header with the text 'Select Agency'. Below the header, there is a text prompt: 'Select the Agency that you wish to work with and then click on the [Next] button.' Underneath this is a label 'Agency: *' followed by a dropdown menu. To the right of the dropdown menu is a 'Next>>' button.

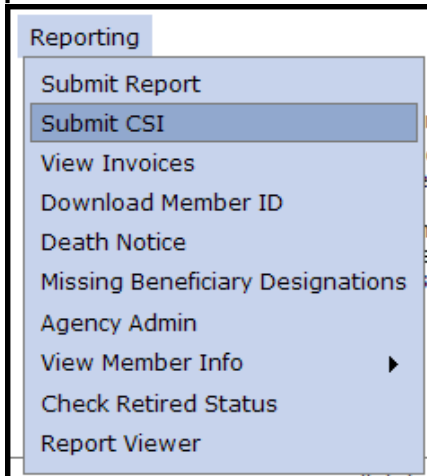
Step 3 - The **CSI – Employer Reports** screen will appear. Click on **Unsubmit** on the left side of the screen.

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

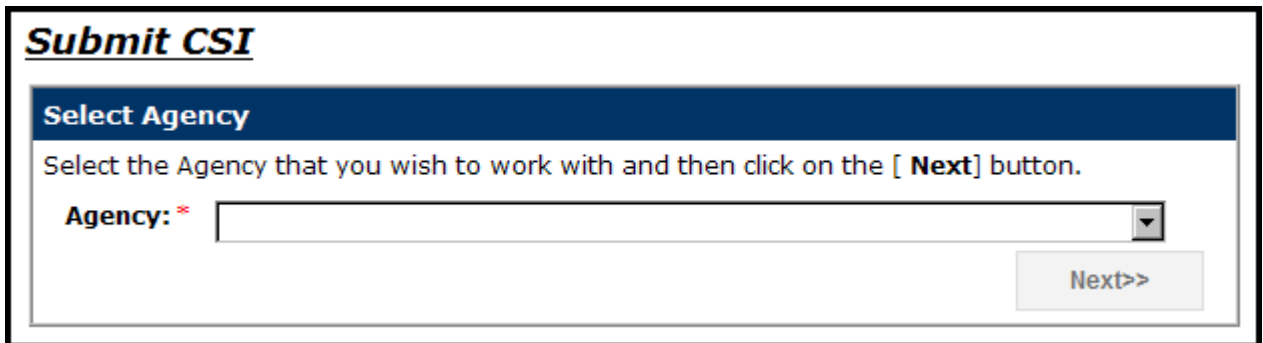
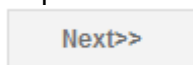
- **View Previous History of Employer CSI Reports**

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

Step 1 - 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. Otherwise, this step can be skipped. Select the appropriate 5-digit agency code from the drop down box. Click



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 . The 'Display All' button is a rectangular button with a light gray background and the text 'Display All' in a dark gray font.

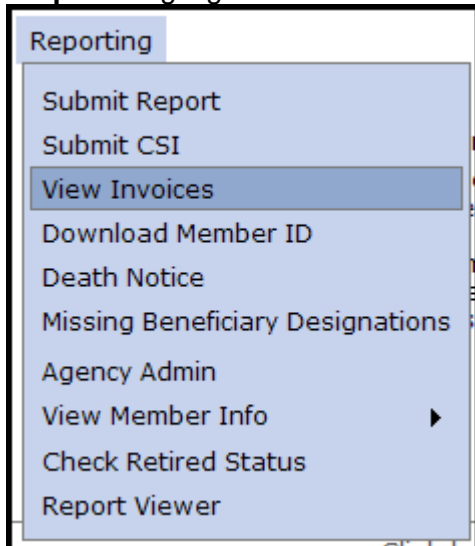
Step 4 - A chart will appear of all previous CSI Employer Reports will appear showing Report Period, Salary, Employee Contributions, Employer Contributions, Invoice Total, Net Amount, Status and Submission Date.

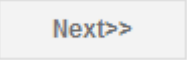
To view details of a specific report, click **View** located to the left of the report of interest.

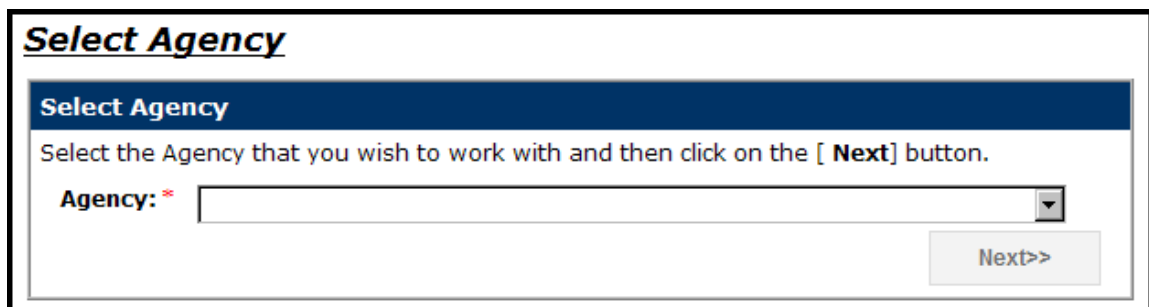
2.4 View Invoices

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. Otherwise, skip this step. Select the appropriate 5-digit agency code from the drop down box. Click  .

A screenshot of a web form titled 'Select Agency'. The form has a blue header with the text 'Select Agency'. Below the header, there is a text box with the instruction: 'Select the Agency that you wish to work with and then click on the [Next] button.' Below this, there is a label 'Agency: *' followed by a dropdown menu. To the right of the dropdown menu is a 'Next>>' button.

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 include:

Adjustment Invoice- When records flagged in error; an account representative corrects these into member accounts. Once it completes the transaction this invoice is Auto-generated.

Amended Adjustment Invoice- When records deleted in error and are then restored and posted into the members account; this invoice is Auto-generated

Contribution Summary Adjustment- When underpayments/overpayments or rounding issues result in a change affecting employer and/or employee contributions this invoice is Auto-generated.

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.

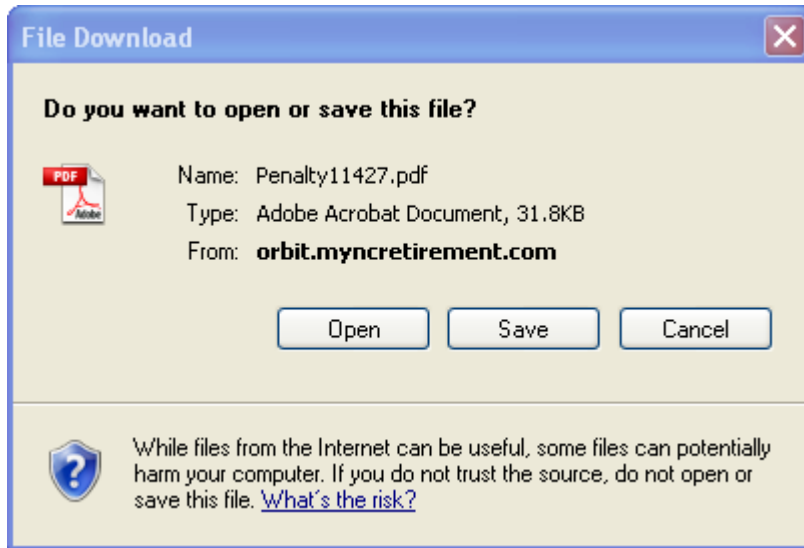
Manual Invoice- Reasons for this type vary. Please refer to the comment section on the invoice. Currently, this includes penalty invoices due to legislative changes.

Variance Invoice- When posted records to member accounts are corrected, invoice is generated.

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

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

2.5 Download Member ID

Employer Self-Service allows Employers to view and display the **ORBIT member ID numbers** for all of its agency 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 continue to be used for RSD tax reporting purposes.

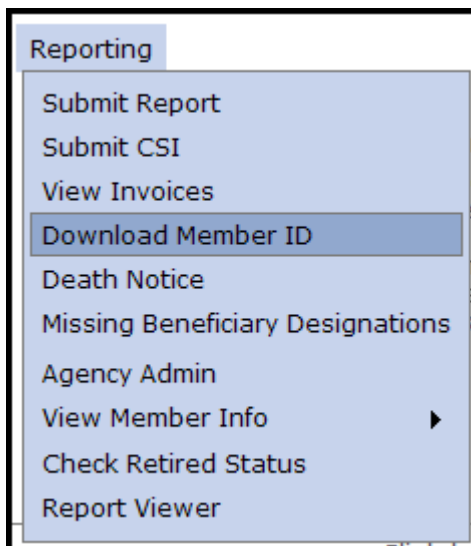
Employers have **three ways** to Download Member IDs:

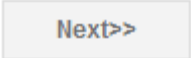
- *Retrieve Only New Members*
- *Retrieve Members By Date*
- *Retrieve Members by SSN*

• Retrieve Only New Members

This method allows an Employer to download the **Member ID numbers**, uploaded or created within the past month. The Employer has the option of printing the results **or** downloading the file onto their 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. Otherwise, skip this step. Select the appropriate 5-digit agency code from the drop down box. Click  .

Download Member ID

Select Agency

Select the Agency that you wish to work with and then click on the [**Next**] button.

Agency: *

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

Member Details - Search Criteria

Retrieve only new members i.e. members that have been recorded in the system since the last time member information was downloaded which was:

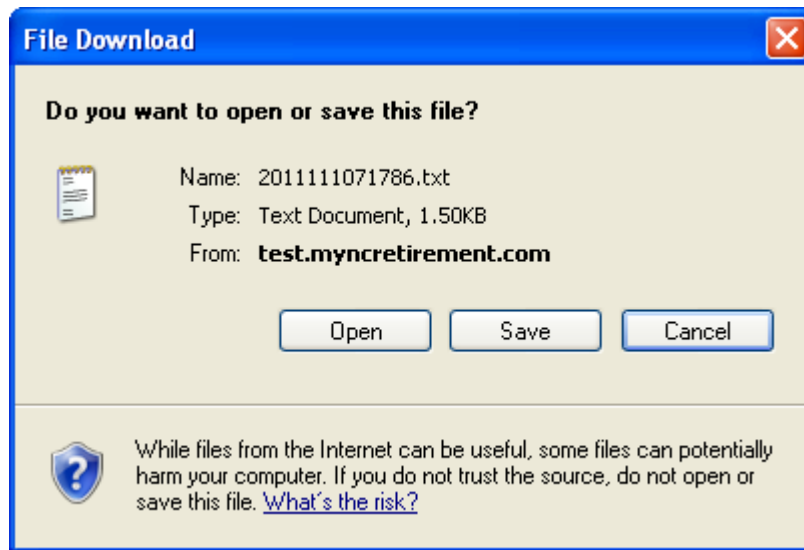
Retrieve all members that have been recorded in the system since a specific date.
Start Date:

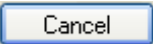
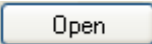

Retrieve members for SSN
SSN: (999999999) or (999-99-9999)

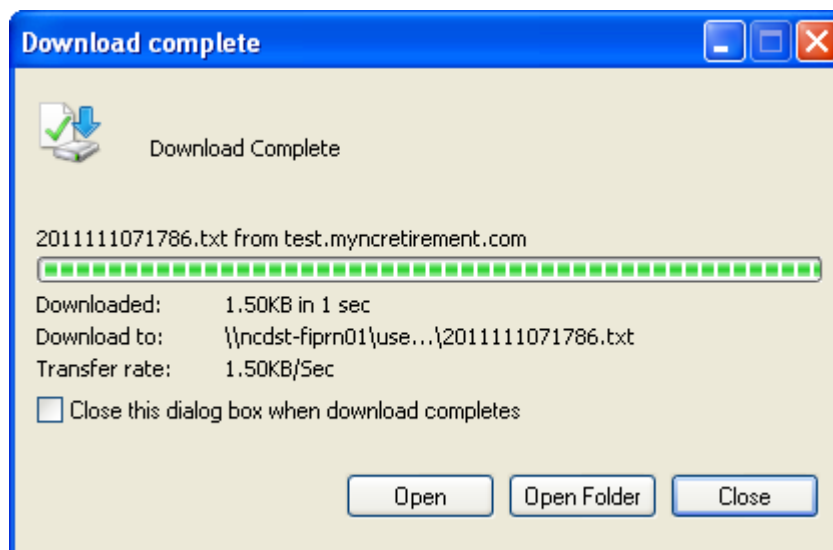
Step 3 - Click beside the **Retrieve Only New Members** box located at the top of the three boxes on the **Member Details – Search Criteria** screen.

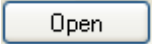

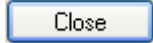
The **Member Details** page will appear listing all new member ID numbers loaded in the past month including the **Member ID, SSN, Name, Create Date** and **Download Date**.

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



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



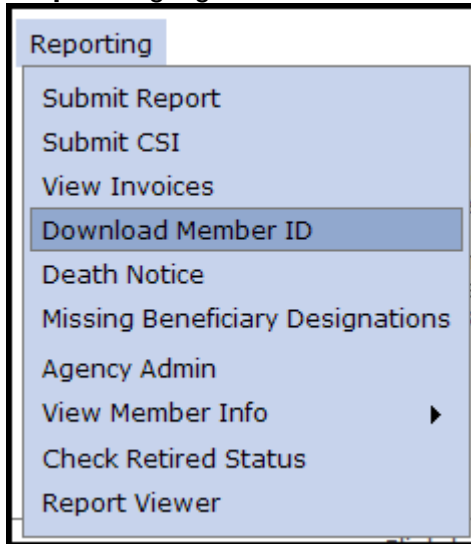
Step 6 - Click  to view the downloaded file. Click  to go directly to the file location. Click  to exit.

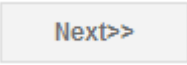
Step 7 - To print the results, click on the “**Click here to view the printer friendly version of this page for your records**” link at the bottom of the page.

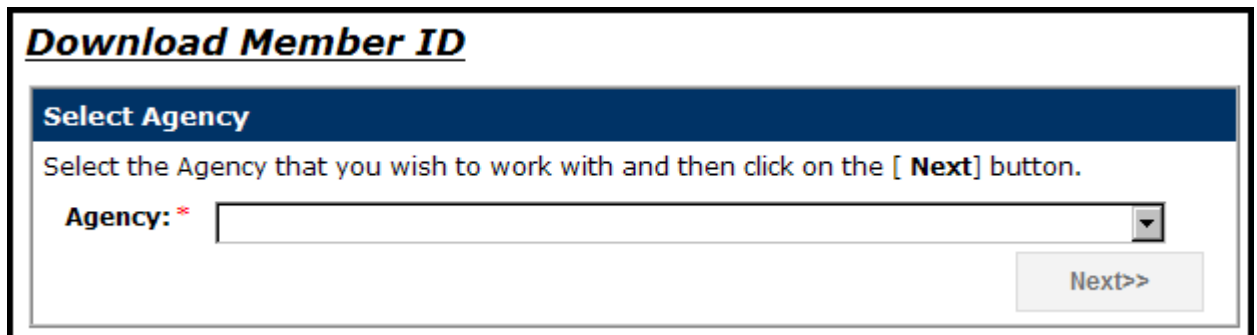
- **Retrieve Member by Date**

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 to their 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. Otherwise, skip this step. Select the appropriate 5-digit agency code from the drop down box. Click 

A screenshot of a web application screen titled 'Download Member ID'. Below the title is a dark blue header with the text 'Select Agency'. Underneath, there is a message: 'Select the Agency that you wish to work with and then click on the [Next] button.' Below this message is a label 'Agency: *' followed by a dropdown menu. To the right of the dropdown menu is a 'Next>>' button.

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



Member Details - Search Criteria

Retrieve only new members i.e. members that have been recorded in the system since the last time member information was downloaded which was: Next>>

Retrieve all members that have been recorded in the system since a specific date.

Start Date: Next>>

Retrieve members for SSN

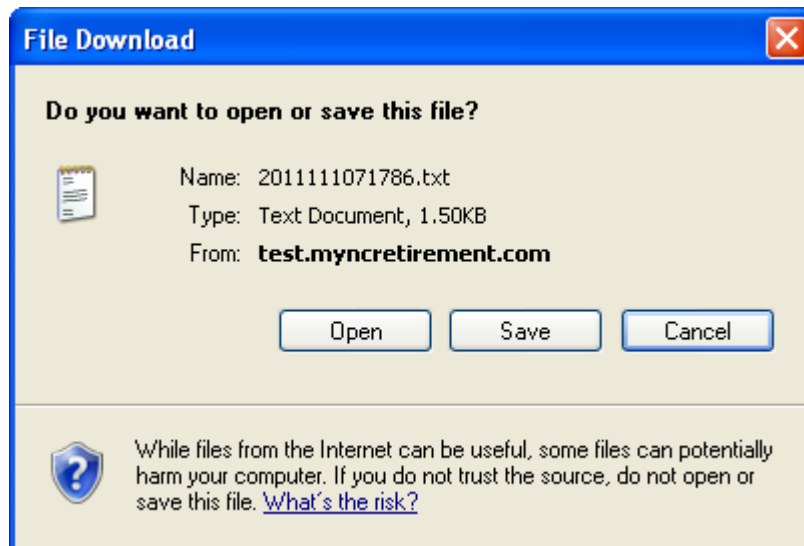
SSN: (999999999) or (999-99-9999) Next>>

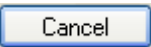
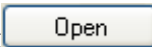
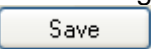
Step 3 - Enter a **Start Date** in the text box located in the **Retrieve Member by Date** field using **MM/DD/YEAR** format or select the date using the calendar icon that appears once you click inside the box.

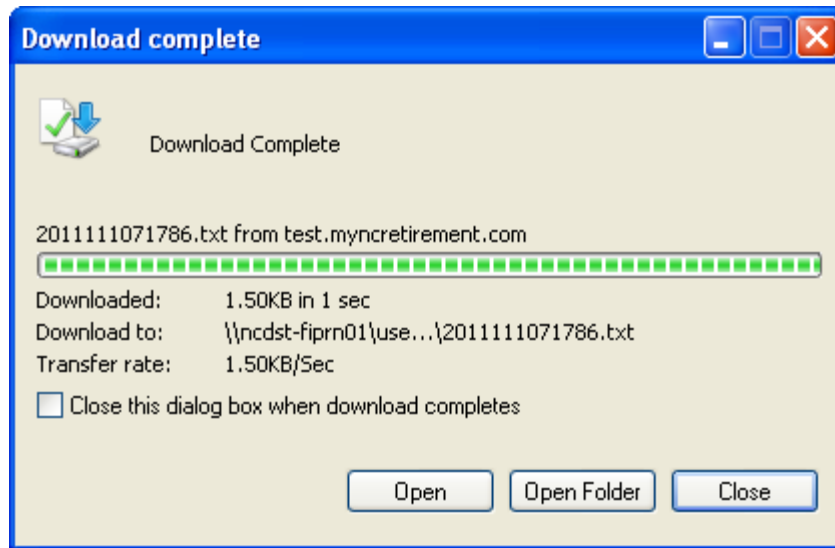
Step 4 - Click Next>> beside the **Retrieve Members by Date** box located in the middle of the **Member Details – Search Criteria** screen.

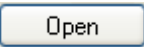

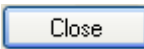
The **Member Details** page will appear listing all new member ID numbers recorded since that date including the **Member ID, SSN, Name, Create Date** and **Download Date**.

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 . To view the list, click . To save this file locally, click . The Save As box will appear. Save the file at the desired location. The **Download Complete** box will appear.



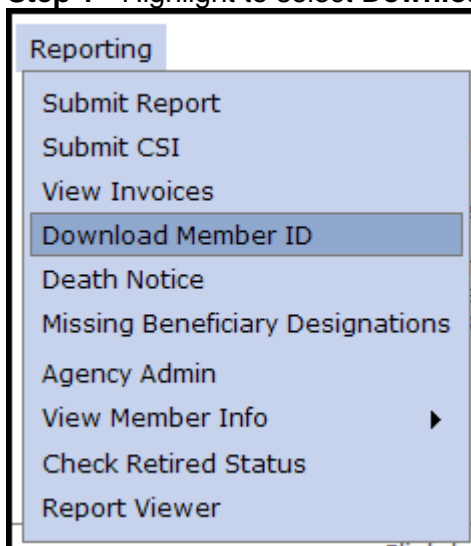
Step 7 - Click  to view the downloaded file. Click  to go directly to the file location. Click  to exit.

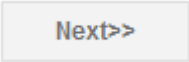
Step 8 - To print the results, click on the **“Click here to view the printer friendly version of this page for your records”** link at the bottom of the page.

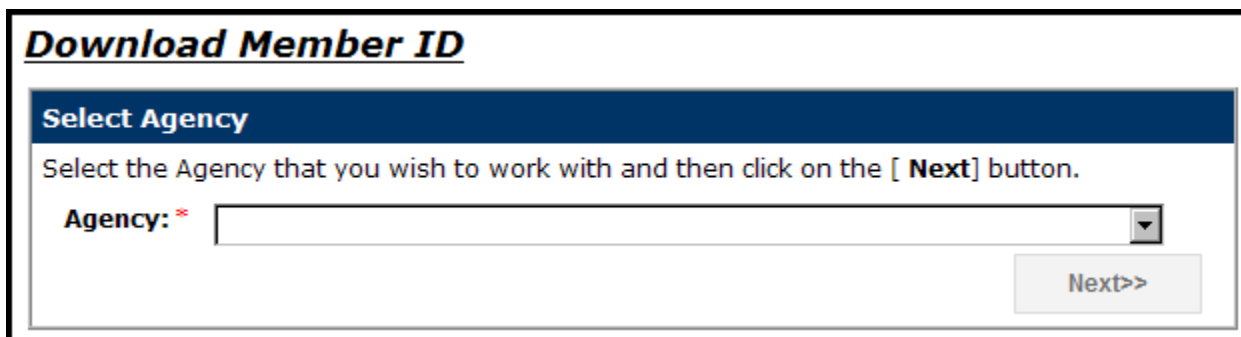
Retrieve Members by SSN

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.

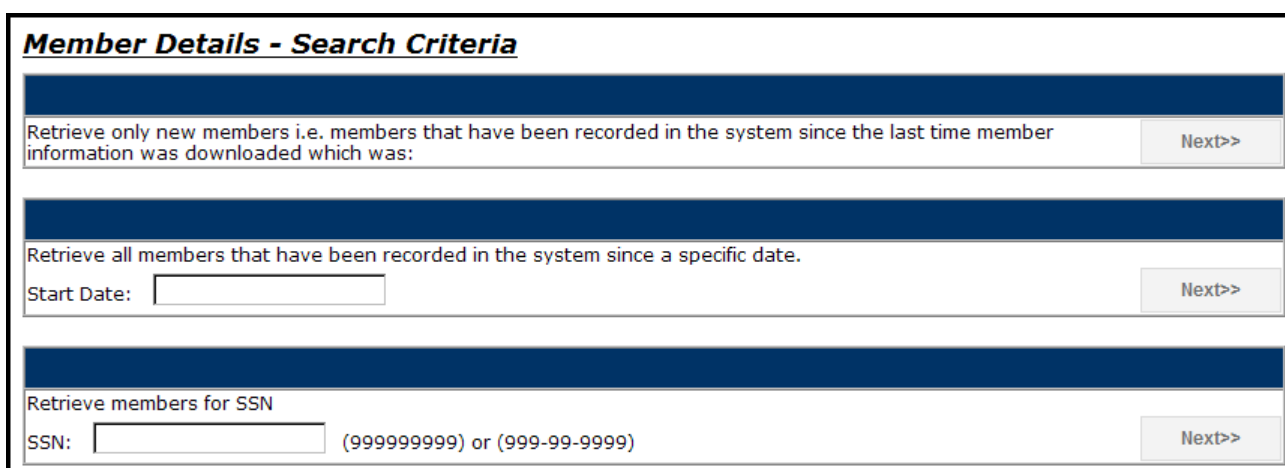
Step 1 - Highlight to select **Download Member ID** from the drop-down menu under the **Reporting** tab.



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



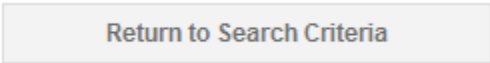
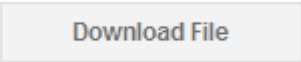
The **Member Details – Search Criteria** screen will appear.



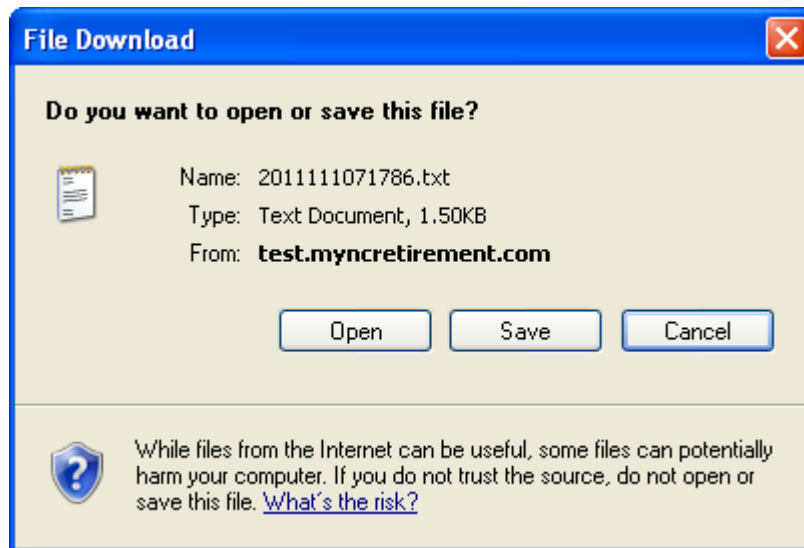
Step 3 - Enter the employee's SSN in the **Retrieve Members by SSN** box.

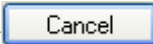


Step 4 - Click  beside the **Retrieve Members by SSN** box located at the bottom of the **Member Details – Search Criteria** screen.

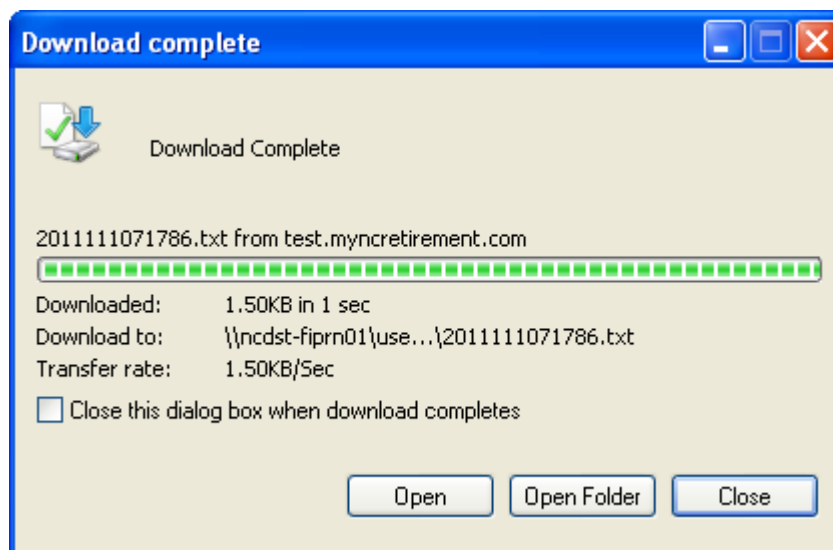
The **Member Details** page will appear listing the member information for the SSN including the **Member ID, SSN, Name, Create Date and Download Date**.

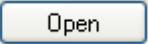

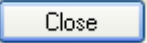
Step 5 -To return to the **Search Criteria** page, click  . To download the file of new member ID numbers, click  . The **File Download** box will appear.





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



Step 7- Click  to view the downloaded file. Click  to go directly to the file location. Click  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.

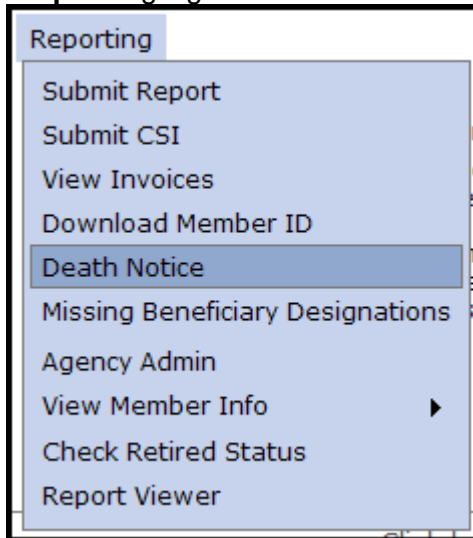
2.6 Death Notice

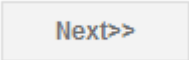
The Employer Self-Service Death Notice function allows an Employer to report the deaths of its members to the Retirement Systems Division without direct contact with RSD staff or personnel. The death information is then stored in the ORBIT record for the deceased member(s).

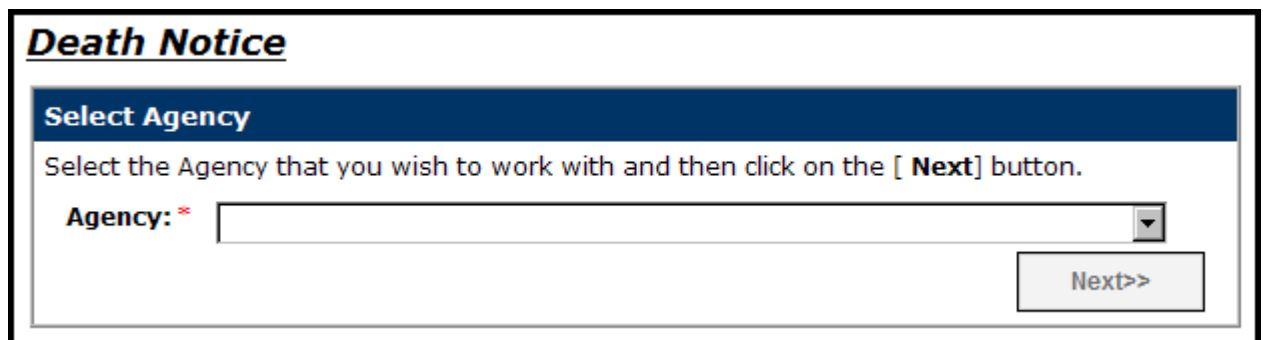
• Report a Death

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, skip this step. Select the appropriate 5-digit agency code from the drop down box. Click  .

A screenshot of the 'Death Notice' web form. The title 'Death Notice' is at the top. Below it is a dark blue header with the text 'Select Agency'. The main instruction reads: 'Select the Agency that you wish to work with and then click on the [Next] button.' There is a label 'Agency: *' followed by a dropdown menu box. To the right of the dropdown is a 'Next>>' button.

Step 3 - Enter the SSN of the deceased employee. (**Note:** The Social Security number entered must be for an **active** employee of the Employer that is logged into ORBIT. The SSN must also be a number that already exists in ORBIT.)

Death Notice

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)

Step 4 - Click . The Persons Information will pre-populate 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:

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

- Address Line 1
- City
- State
- Zip Code



Cancel

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.

Death Notice

Person Information

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

Address of Person

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

The screenshot shows a web form titled "Death Notice" with three main sections: "Person Information", "Address of Person", and "Death Reported By". The "Date of Death" field in the first section has a calendar pop-up open, showing the month of March 2012. The calendar grid lists days from 1 to 31, with the current date, March 9, 2012, highlighted. The "Death Reported By" section includes fields for Name, Phone, and Comments, with red asterisks indicating required fields. At the bottom, there is a checkbox for "Death while in Line of Duty" and two buttons: "Save" and "Cancel".

Save

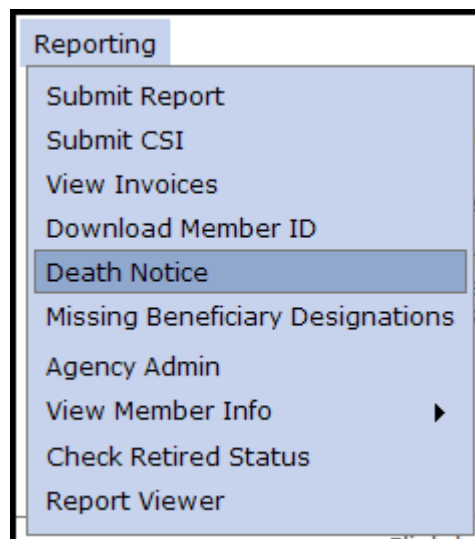
Step 6 - Enter the remaining information in the corresponding fields and click **Save** when finished. The confirmation screen will appear. Click the **Return to Employer Home** link to return to the system Home Page.



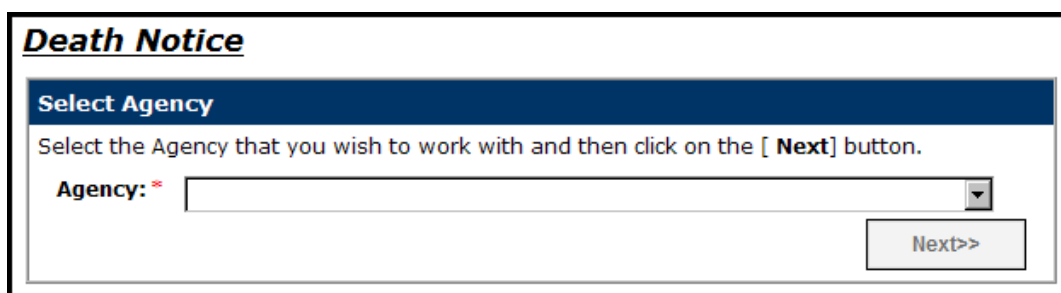
- **View a Reported Death**

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, skip this step. Select the appropriate 5-digit agency code from the drop down box. Click **Next>>**.



North Carolina
Total Retirement Plans



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

Step 3 - Enter the SSN of the deceased employee. (**Note:** The Social Security number entered must be for an **active** employee of the Employer logged into ORBIT. The SSN must also be a number that already exists in ORBIT.)

Death Notice

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)

Step 4 - Click . ORBIT will display this screen indicating that the employee's death previously has been reported:

Death Notice

Person Information

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

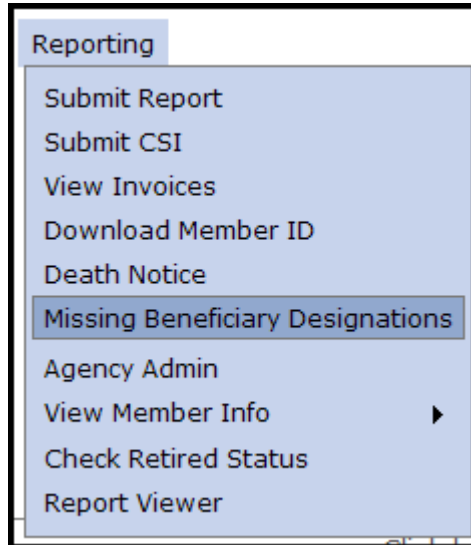
The death request for the member SSN is already received. If there is any change please contact DST office.
[Click here to enter different SSN](#)

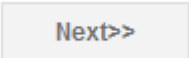


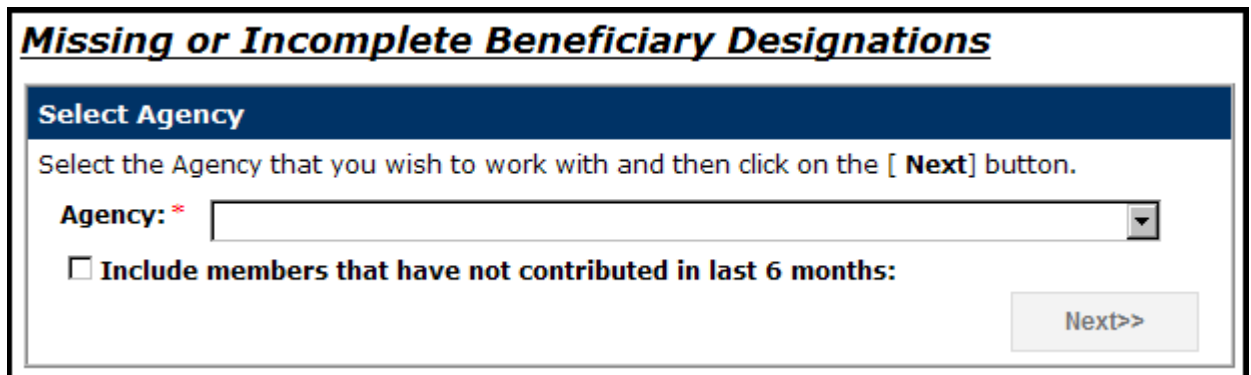
2.7 Missing Beneficiary Designations

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.


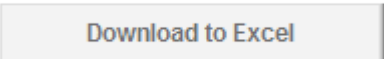
Step 1- Under the **Reporting tab** Highlight to select **Missing Beneficiary Designations** from the drop-down menu.



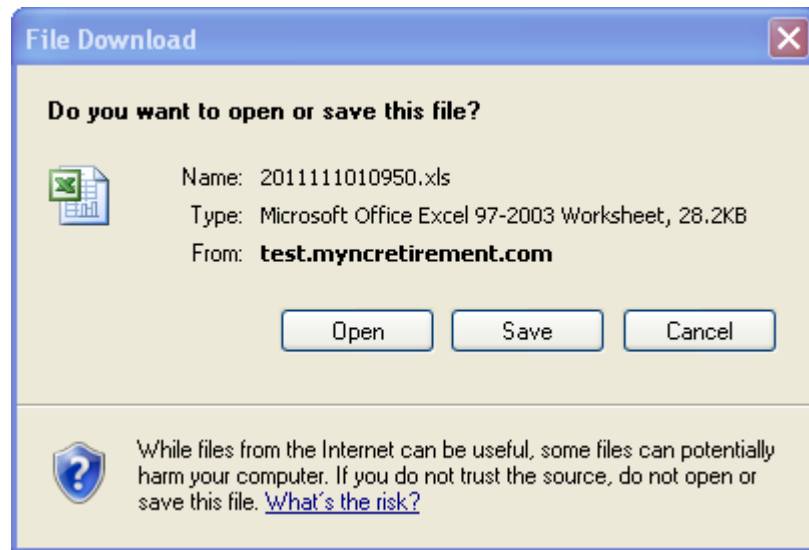
Step 2 - The Select Agency box will appear if you have access to multiple agencies. If not, Skip this step. Select the appropriate 5-digit agency code from the drop down box. Click . To include members that have not actively contributed in the last 6 months, check the checkbox.

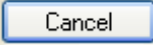
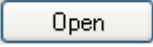
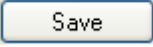
A screenshot of a web form titled 'Missing or Incomplete Beneficiary Designations'. The form has a dark blue header with the title in white. Below the header, there is a section titled 'Select Agency' with a dark blue background. Underneath, there is a text prompt: 'Select the Agency that you wish to work with and then click on the [Next] button.' Below this is a label 'Agency: *' followed by a dropdown menu. At the bottom of the form, there is a checkbox labeled 'Include members that have not contributed in last 6 months:' and a 'Next>>' button on the right side.

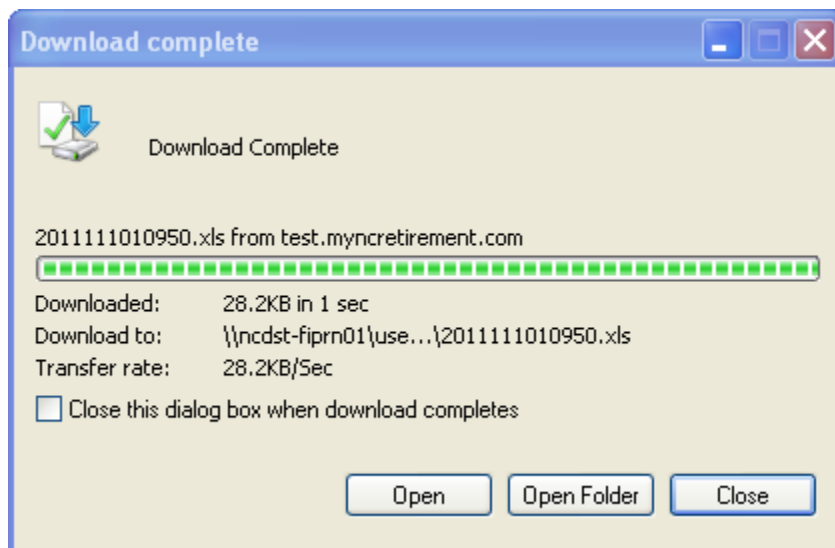
A list of employees that are missing beneficiary designation forms as of today will appear including **Member ID, Name, SSN, Date of Birth and Date of Hire.**

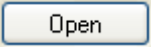

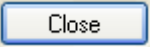
Step 3 - To remove the members that have not contributed in the last 6 months, click the checkbox to remove the checkmark and click . To download the list to Excel, click . The **File Download** box will appear.





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



Step 5 - Click  to view the downloaded file. Click  to go directly to the file location. Click  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.

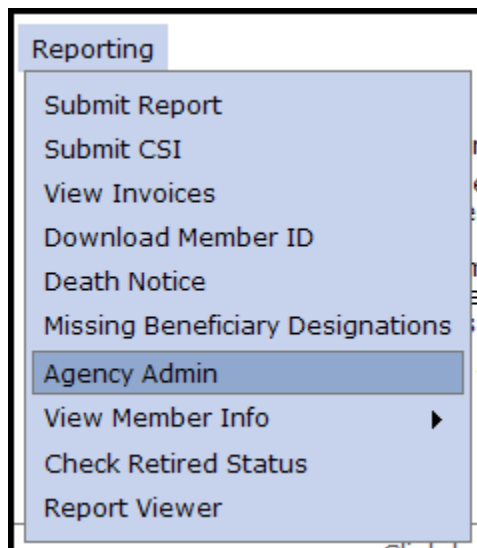
Certain Employers may be responsible for submitting the monthly ORBIT reports for more than one agency. Each agency manages and maintains individual access information to Orbit Self-Service is at the agency level. The employer’s Super User administrates the agency(s) access information by their staff members.

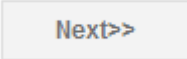
Note: Only users with the role of Super User will have access to the Agency Administration function.

• View a List of Users

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

Step 1 - 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, skip this step. Select the appropriate 5-digit agency code from the drop down box. Click  .

Agency Admin

Select Agency

Select the Agency that you wish to work with and then click on the [**Next**] button.

Agency: *




Next>>

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

Agency Admin

Agency User Admin

Agency: Display Users of Role:

Details	User Name	Role
	ESSADM	ESS External Administrator
	TestUserPay	Employer Reporting
	TestSuper	ESS External Administrator

Add New User

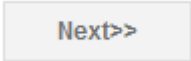
• **Add a New User**

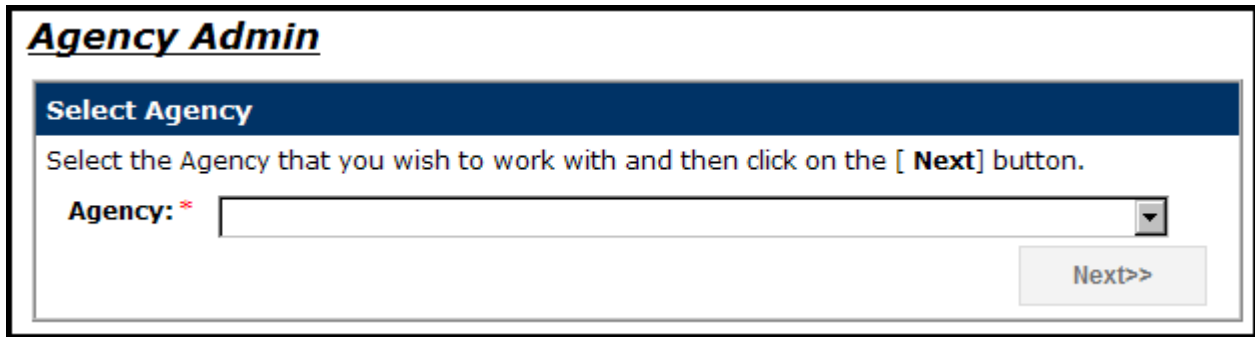
Employers have the ability to add new users to the System.

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

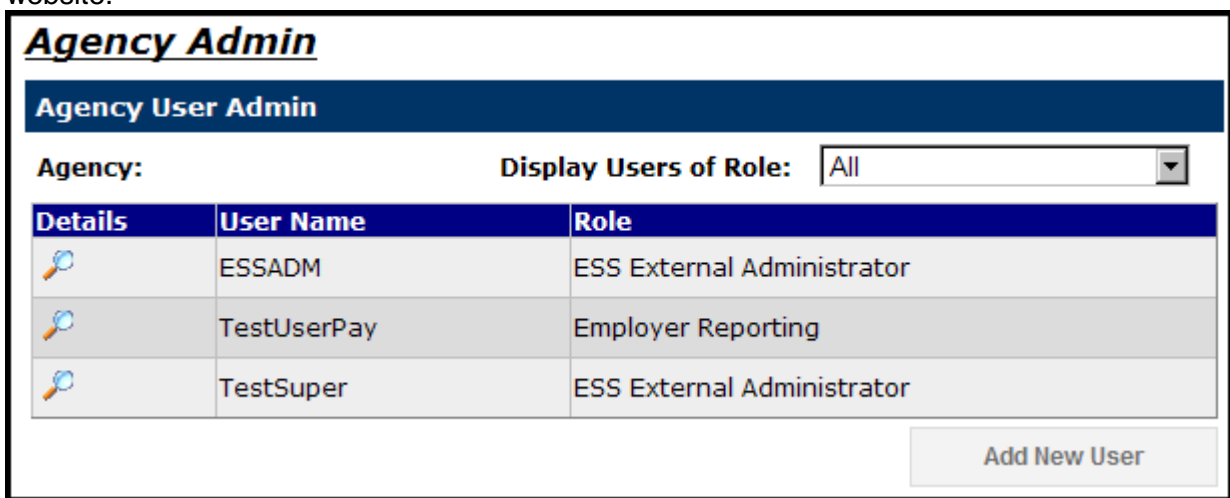
Reporting




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

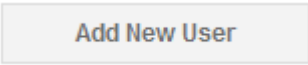
Step 2—The Select Agency box will appear if you have access to multiple agencies. If not, skip this step. Select the appropriate 5-digit agency code from the drop down box. Click  .



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



Details	User Name	Role
	ESSADM	ESS External Administrator
	TestUserPay	Employer Reporting
	TestSuper	ESS External Administrator

Step 3 - To add a new user, click  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.

Save

Cancel

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).

Agency Admin

Agency User Admin

Agency: _____ Display Users of Role:

Details	User Name	Role
	ESSADM	ESS External Administrator
	TestUserPay	Employer Reporting
	TestSuper	ESS External Administrator
	TestUserHR	ESS External Employer HR

Click on the next to the user to view the information added.

(Note: ORBIT will allow an Employer to change only the **Role** of the **User**—not the **User Name** once the user is saved.)

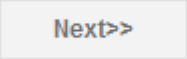
Update User Role and/or Agency Access

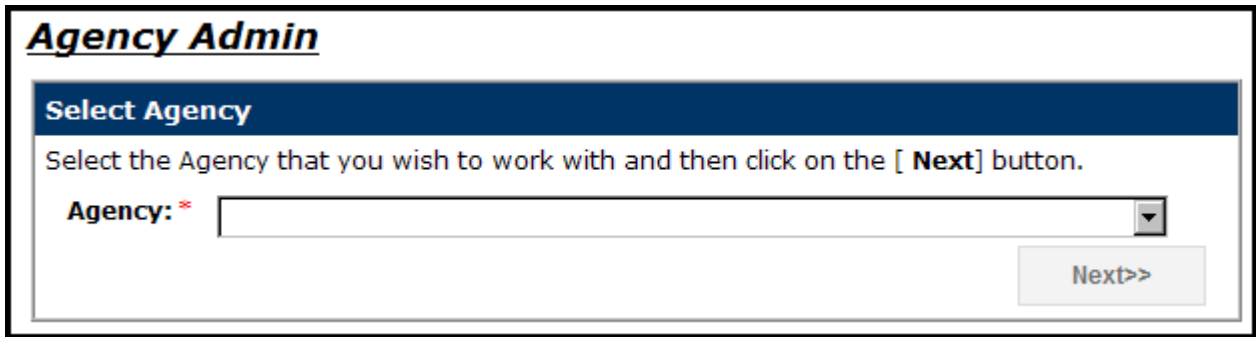
Once the Employer has successfully logged on to the Employer Self-Service website, the Employer will have the capability to update user access in the system from either the ESS **Super User** to **Employer User** or vice versa.

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

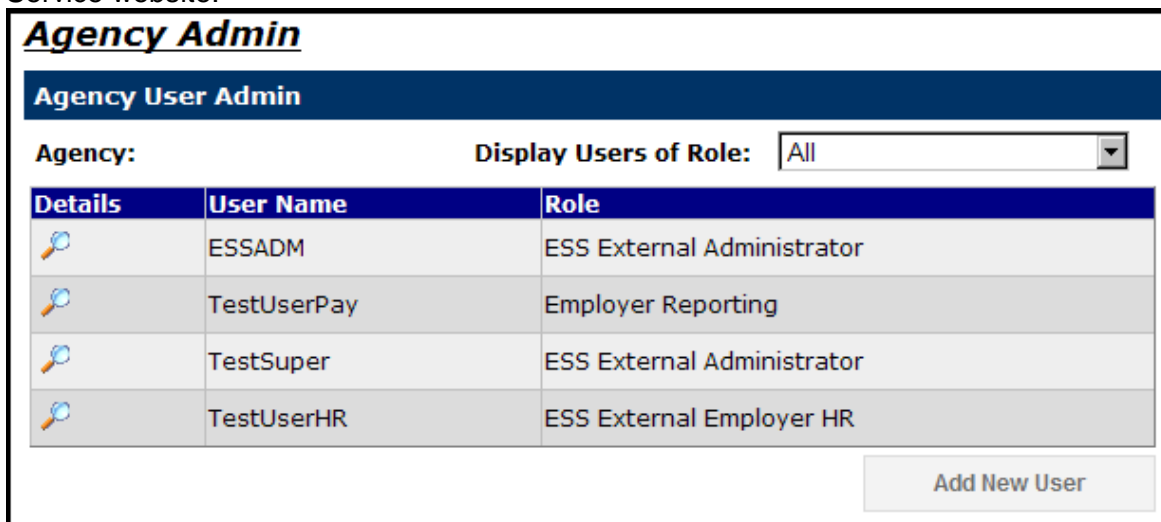
Reporting





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

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  .

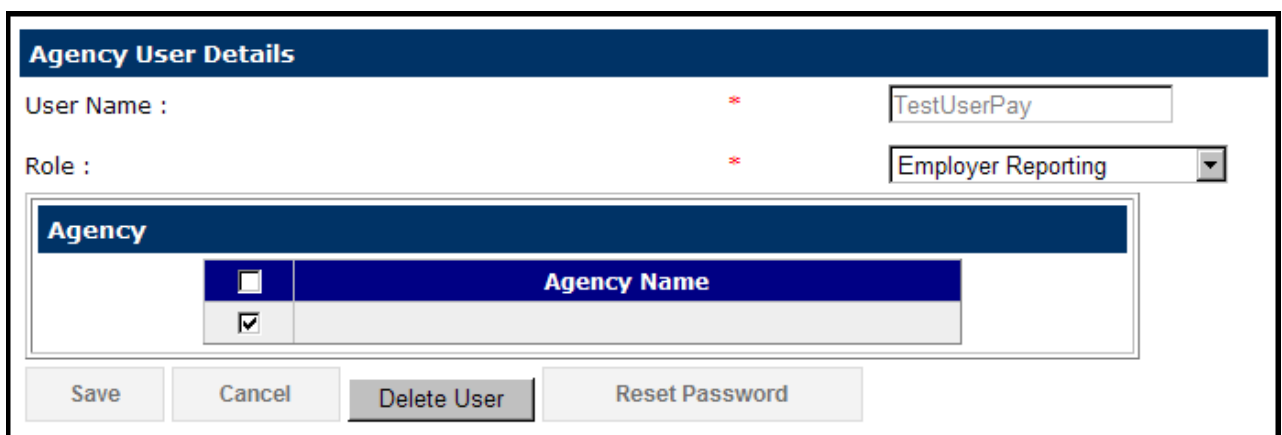


ORBIT will then display all users that have access to this specific agency on the Employer Self-Service website.



Details	User Name	Role
	ESSADM	ESS External Administrator
	TestUserPay	Employer Reporting
	TestSuper	ESS External Administrator
	TestUserHR	ESS External Employer HR

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.



Agency	
<input type="checkbox"/>	Agency Name
<input checked="" type="checkbox"/>	

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.

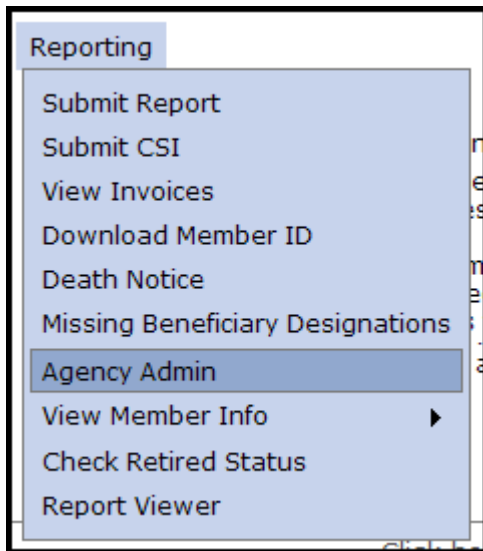
Step 6 - Click  when finished. Or click  to exit without adding a new user. The screen will return to the main **Agency Admin** page and display the updated Role in the right column.

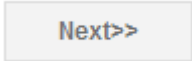
● **Reset a User Password**

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 unique 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 .



Agency Admin

Select Agency

Select the Agency that you wish to work with and then click on the [**Next**] button.

Agency: *





Next>>

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


Agency Admin

Agency User Admin

Agency: Display Users of Role:

Details	User Name	Role
	ESSADM	ESS External Administrator
	TestUserPay	Employer Reporting
	TestSuper	ESS External Administrator
	TestUserHR	ESS External Employer HR

Add New User

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

Agency User Details

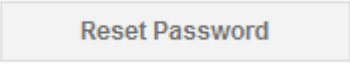
User Name : *

Role : *

Agency

<input type="checkbox"/>	Agency Name
<input checked="" type="checkbox"/>	

Save Cancel Delete User Reset Password

Step 4 - Scroll down to the bottom of the page then **click** 

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



Agency User Details

User Name : *

Password : *

Confirm Password : *

Role : *

Agency

	Agency Name
<input type="checkbox"/>	
<input checked="" type="checkbox"/>	

Save
Cancel
Delete User
Go Back To Details

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** changing password, the main **Agency Admin** page will appear.

Agency Admin

Agency User Admin

Agency: Display Users of Role:

Details	User Name	Role
	ESSADM	ESS External Administrator
	TestUserPay	Employer Reporting
	TestSuper	ESS External Administrator
	TestUserHR	ESS External Employer HR

Add New User

- **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 is 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.

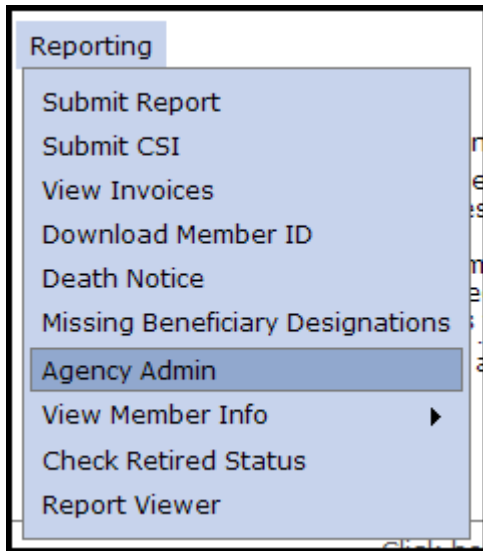


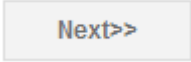
North Carolina
Total Retirement Plans



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

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



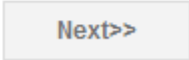
Step 2 - The Select Agency box will appear if you have access to multiple agencies. If not, skip this step. Select the appropriate 5-digit agency code from the drop down box. Click  .

Agency Admin

Select Agency

Select the Agency that you wish to work with and then click on the [**Next**] button.

Agency: *







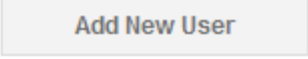
ORBIT will display all users with access on the Employer Self-Service website.

Agency Admin

Agency User Admin

Agency: **Display Users of Role:**

Details	User Name	Role
	ESSADM	ESS External Administrator
	TestUserPay	Employer Reporting
	TestSuper	ESS External Administrator
	TestUserHR	ESS External Employer HR




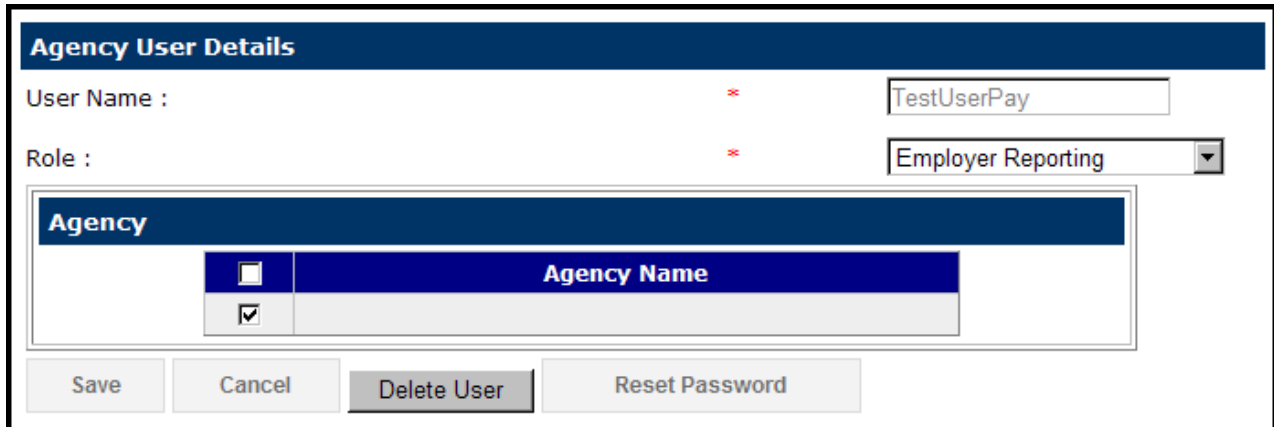


North Carolina
Total Retirement Plans



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

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



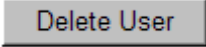
Agency User Details

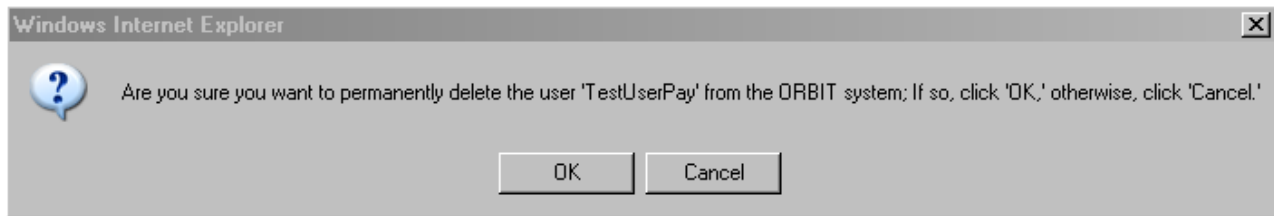
User Name : * TestUserPay

Role : * Employer Reporting

Agency	
<input type="checkbox"/>	Agency Name
<input checked="" type="checkbox"/>	

Save Cancel Delete User Reset Password

Step 4 - Scroll down to the bottom of the page, and click . The confirmation screen will appear.



Windows Internet Explorer

Are you sure you want to permanently delete the user 'TestUserPay' from the ORBIT system; If so, click 'OK,' otherwise, click 'Cancel.'

OK Cancel

Step 5 - Click  to delete the User. Click  to exit without deleting the User. Once the User deletes the main **Agency Admin** page will appear and the deleted User is removed.

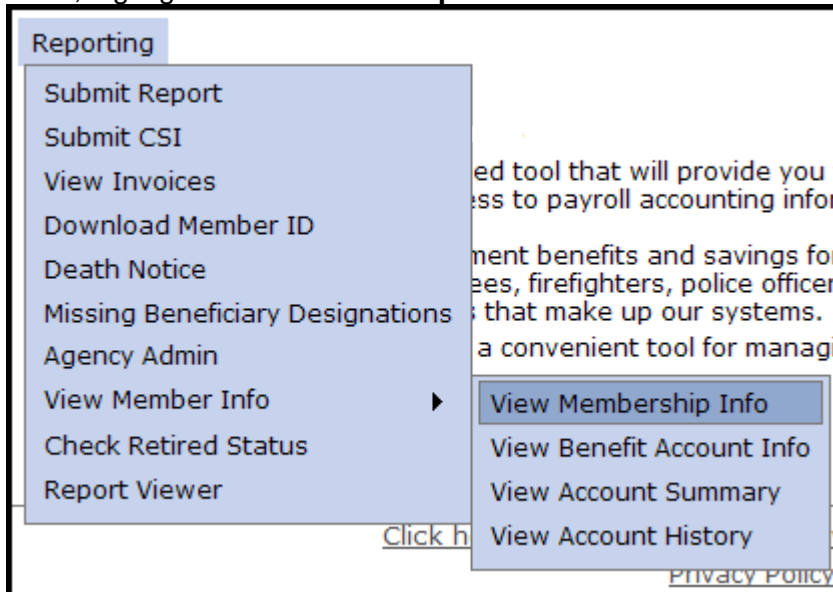
2.9 View Member Info


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.

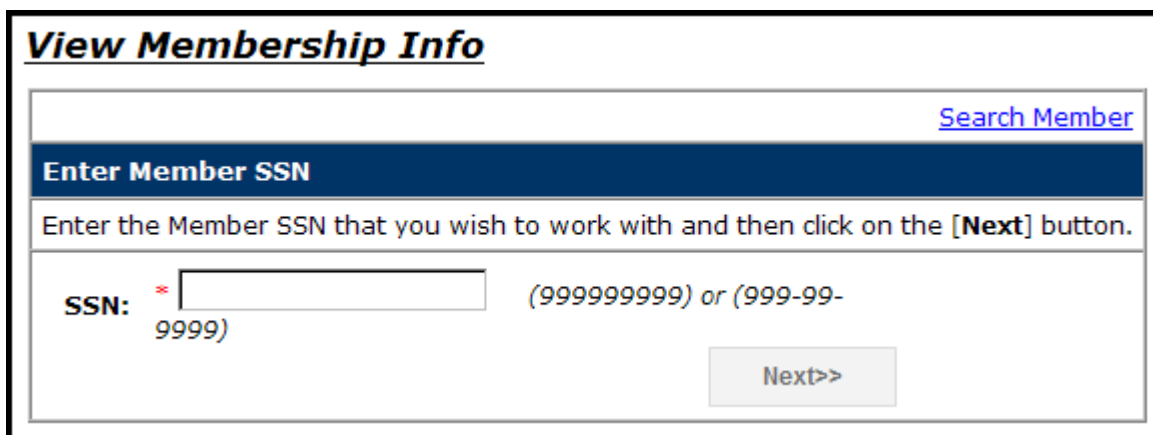
- **View an Employee's Membership Info**

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 .

A screenshot of the 'View Membership Info' form. The title 'View Membership Info' is at the top left. A 'Search Member' link is at the top right. Below the title is a dark blue header with the text 'Enter Member SSN'. The main instruction reads: 'Enter the Member SSN that you wish to work with and then click on the [Next] button.' Below this is a form field for the SSN, labeled 'SSN: *' with a red asterisk. The field contains a white box. To the right of the box is the text '(999999999) or (999-99-9999)'. A 'Next>>' button is located at the bottom right of the form.

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**.

Reporting

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

ed tool that will provide you
 ss to payroll accounting infor

ment benefits and savings for
 es, firefighters, police officer
 s that make up our systems.
 a convenient tool for managi

- View Membership Info
- View Benefit Account Info
- View Account Summary
- View Account History

Click h

Privacy Policy

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.

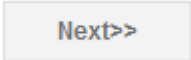
Member Name:	Member ID:	Date of Birth:
Account Info:		
Benefit Account Information		
Member ID:		
Retirement System:		
Account Type:		
Retirement Date:		
Retirement Option:		
Last Plan Code:		
Last Employment Date:		
Initial Payment Date:		
State of NC Withholding Status:		
Age at Retirement:		
Total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

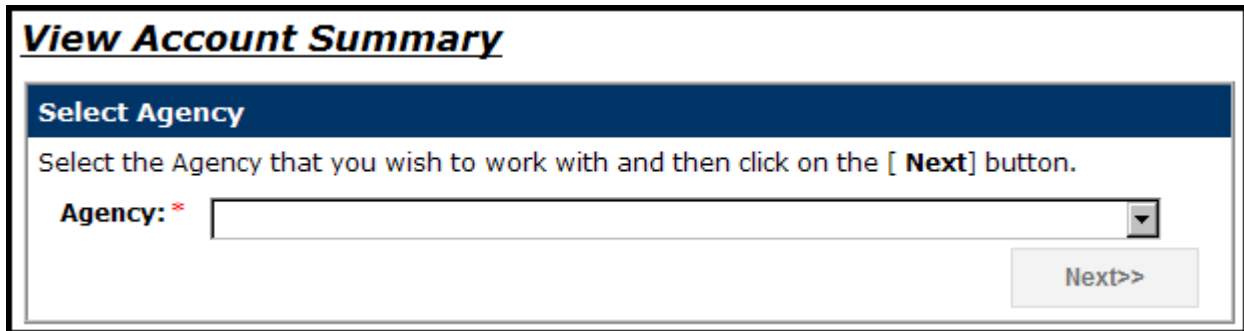
- **View Account Summary**

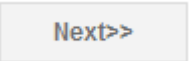
Employer Self-Service allows an Employer to view employees' account summary.

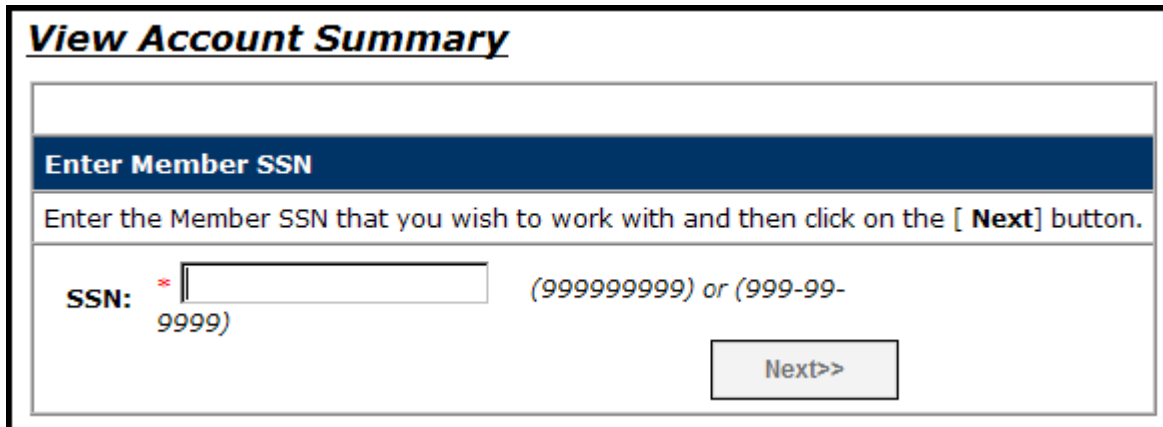
Step 1— Highlight to select **View Member Info** from the drop-down menu under the **Reporting** tab. Then, highlight **View Account Summary**.

The screenshot shows a web interface with a 'Reporting' tab selected. A dropdown menu is open, listing several options. The 'View Account Summary' option is highlighted in blue. Below the menu, there is a 'Click here' link and a 'Privacy Policy' link.

Step 2 - The Select Agency box will appear if you have access to multiple agencies. If not, skip this step. 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's 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**.



Reporting

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

ed tool that will provide you
 ss to payroll accounting info

ment benefits and savings fo
 es, firefighters, police offic
 that make up our systems.
 a convenient tool for manag

- View Membership Info
- View Benefit Account Info
- View Account Summary
- View Account History

Click h

PRIVACY POLICY

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>>](#).

View Account History

Select Agency

Select the Agency that you wish to work with and then click on the [**Next**] button.

Agency: *

[Next>>](#)

Step 3 - The View Account Summary screen will appear. Enter the member's Social Security number of interest and click [Next>>](#).

View Account History

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 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**.

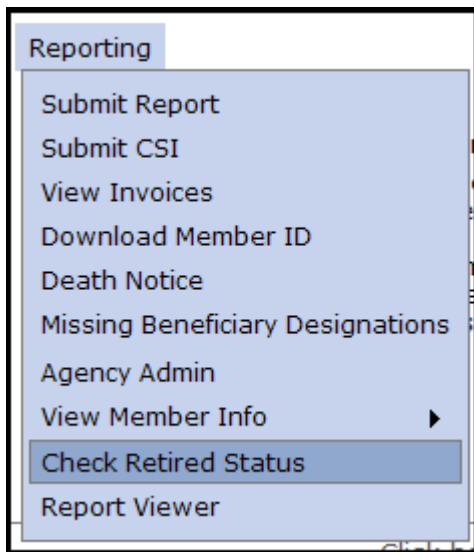
2.10 Check Retired Status

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):

[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 . Click 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 to add more SSNs. Click

to exit.



North Carolina
Total Retirement Plans

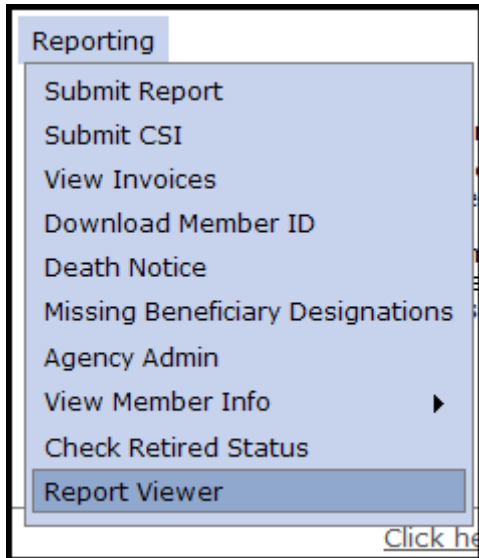


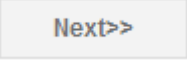
Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

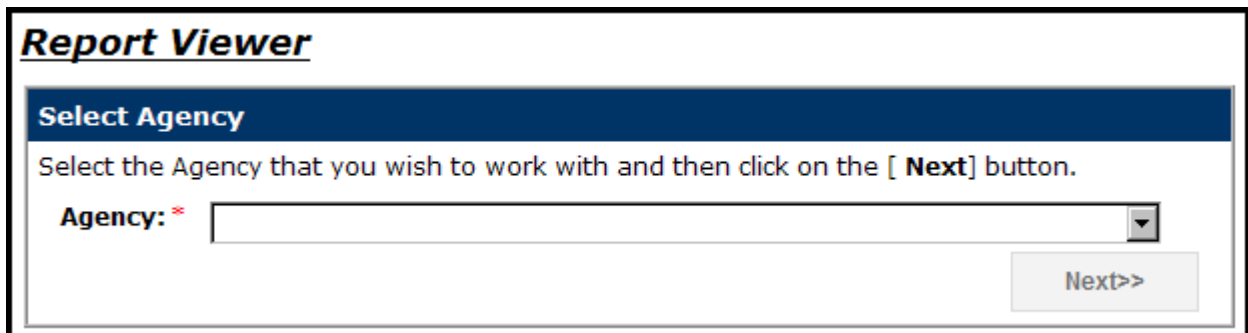
2.11 Report Viewer

- **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  .

A screenshot of the 'Report Viewer' interface. At the top, the title 'Report Viewer' is displayed in a blue header. Below the header, there is a section titled 'Select Agency' with a dark blue background. The text below reads: 'Select the Agency that you wish to work with and then click on the [Next] button.' There is a label 'Agency: *' followed by a text input field and a dropdown arrow. A 'Next>>' button is located at the bottom right of the form.

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.

Select Report Type

Accounting Report

Select Report Name

Accounting Report - Salary and Contributions by Member Agency

Description:
Salary and Contributions by Member Agency

From Date : * 3/9/2012

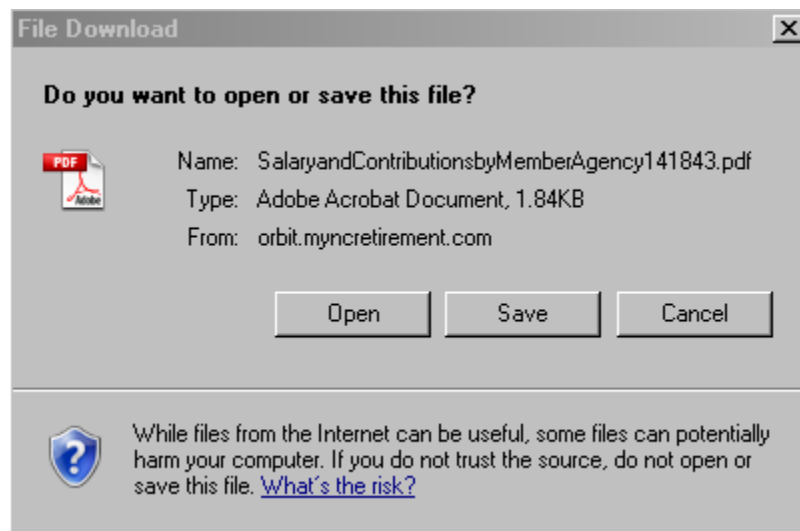
Select Export Type

Adobe PDF

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

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

- a. The File Download box will appear.



- b. Click to view the report on the screen. Click to save the report to the computer. Click to exit without running the report.

Select Report Type
Accounting Report

Select Report Name
Accounting Report - Salary and Contributions by Member Agency

Description:
Salary and Contributions by Member Agency

From Date : * 3/9/2012

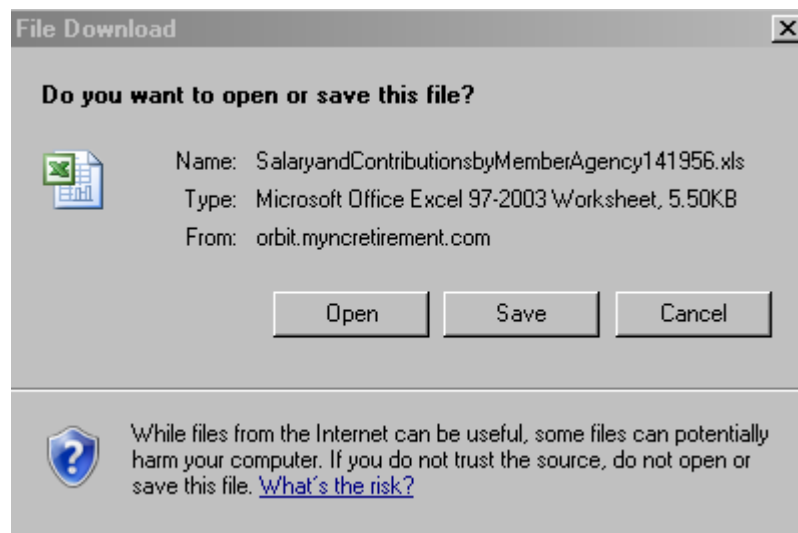
Select Export Type
Microsoft Excel

View Report

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

View Report

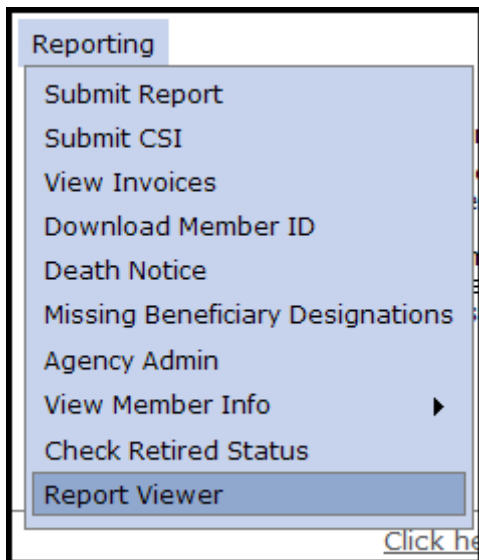
- a. The File Download box will appear.

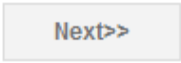


- b. Click **Open** to view the report on the screen. Click **Save** to save the report to the computer. Click **Cancel** to exit without running the report.

- **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, skip this step. Select the appropriate 5-digit agency code from the drop down box. Click  .

A screenshot of the 'Report Viewer' web page. The page title is 'Report Viewer'. Below the title is a section titled 'Select Agency' with a dark blue header. The text below the header reads: 'Select the Agency that you wish to work with and then click on the [Next] button.' There is a label 'Agency: *' followed by a dropdown menu. A 'Next>>' button is located to the right of the dropdown menu.

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.



Select Report Type

Accounting Report

Select Report Name

Accounting Report - Active Employee Service by Employer and Date

Description:
List of all Employee's Service by Date on the last posted Employer Report

Service Credits Report Type: * As Of

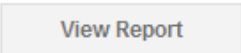
Year: * 2010

Select Export Type

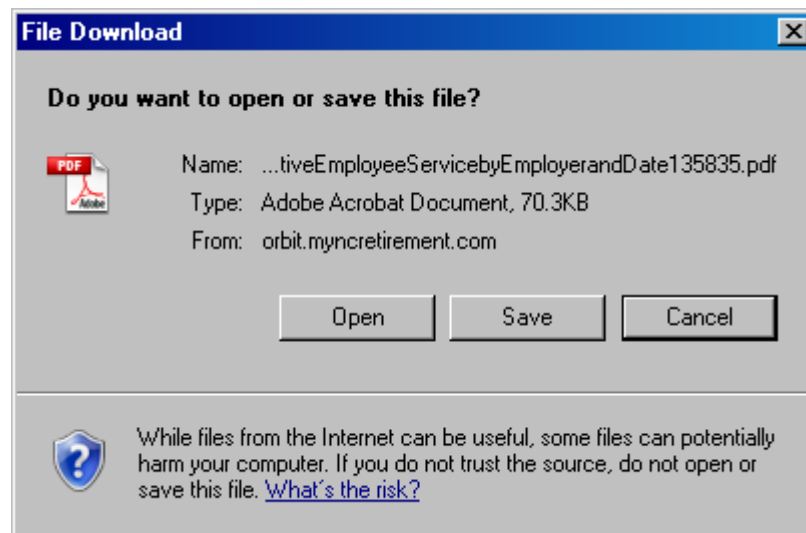
Adobe PDF


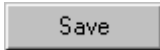

View Report

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

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

- a. The File Download box will appear.



- b. Click  to view the report on the screen. Click  to save the report to the computer. Click  to exit without running the report.



Select Report Type

Accounting Report

Select Report Name

Accounting Report - Active Employee Service by Employer and Date

Description:
List of all Employee's Service by Date on the last posted Employer Report

Service Credits Report Type: As Of

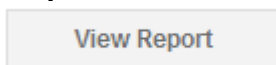
Year: 2010

Select Export Type

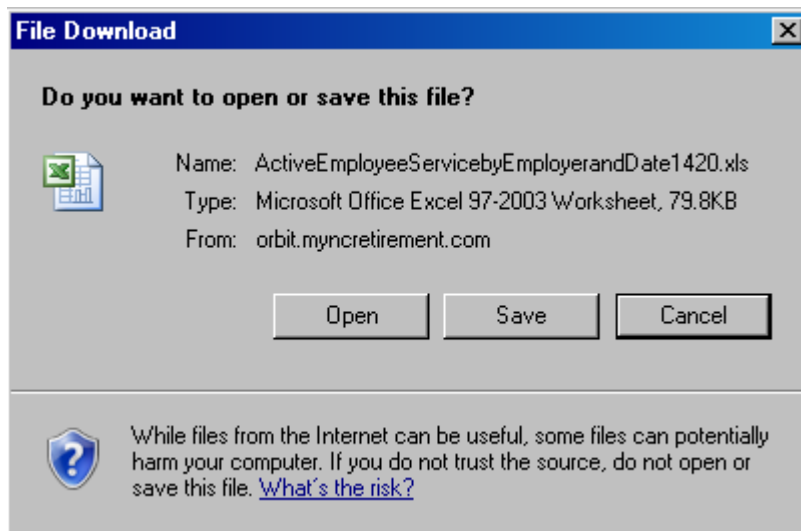
Microsoft Excel

View Report

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



a. The File Download box will appear.



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

- **Service Earned in a Specific Year Report**

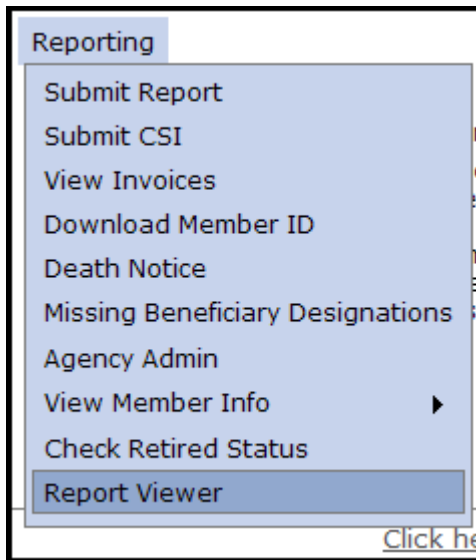
Step 1 - Highlight to select Report Viewer from the drop-down menu under the **Reporting tab**.

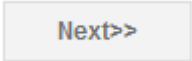


North Carolina
Total Retirement Plans



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA



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

A screenshot of the 'Report Viewer' web form. The title 'Report Viewer' is underlined. Below it is a dark blue header with the text 'Select Agency'. The main content area contains the instruction: 'Select the Agency that you wish to work with and then click on the [Next] button.' Below this is a label 'Agency: *' followed by a dropdown menu. A 'Next>>' button is located at the bottom right of the form.

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.



Select Report Type
Accounting Report

Select Report Name
Accounting Report - Active Employee Service by Employer and Date

Description:
List of all Employee's Service by Date on the last posted Employer Report

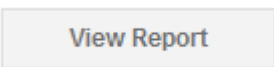
Service Credits Report Type: * Earned in

Year: * 2011

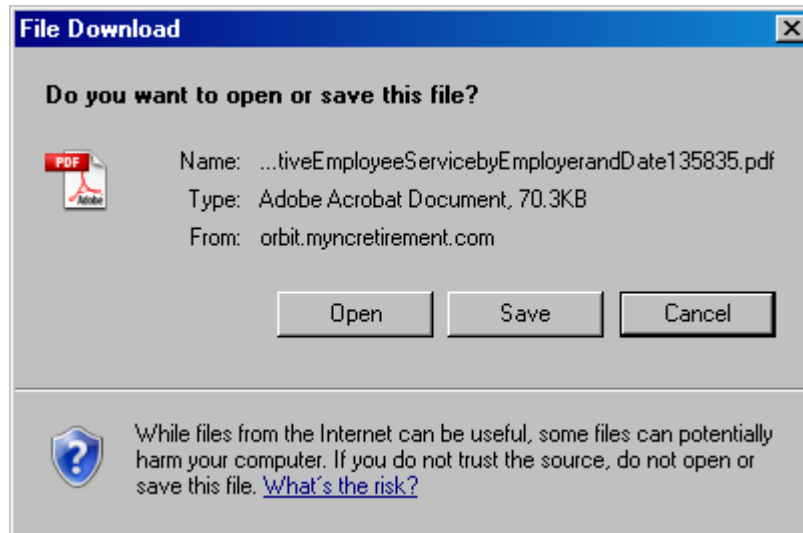
Select Export Type
Adobe PDF

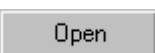
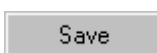
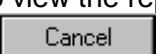
View Report

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

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

a. The File Download box will appear.



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

Select Report Type

Accounting Report

Select Report Name

Accounting Report - Active Employee Service by Employer and Date

Description:
List of all Employee's Service by Date on the last posted Employer Report

Service Credits Report Type: * Earned in

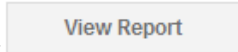
Year: * 2011

Select Export Type

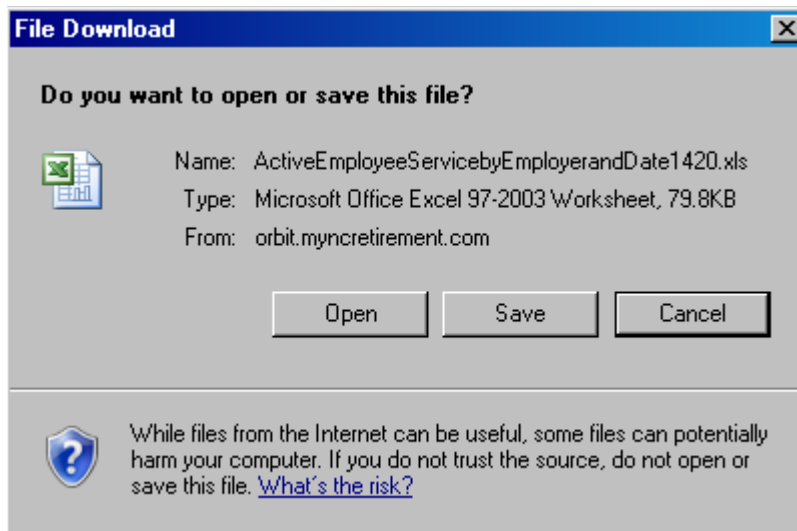
Microsoft Excel


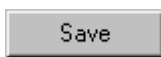

View Report

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



a. The File Download box will appear.

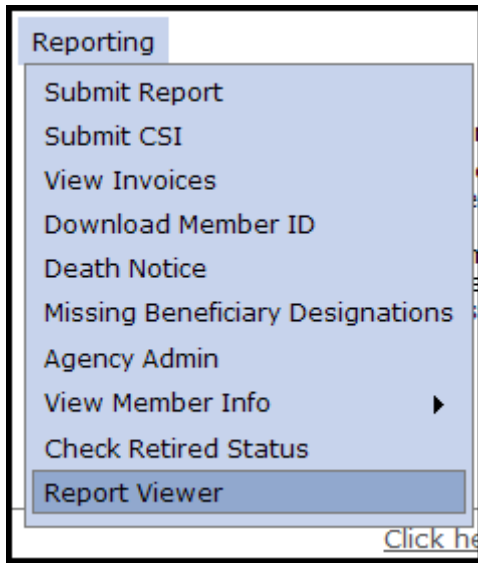


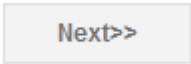
b. Click  to view the report on the screen. Click  to save the report to the computer. Click  to exit without running the report.

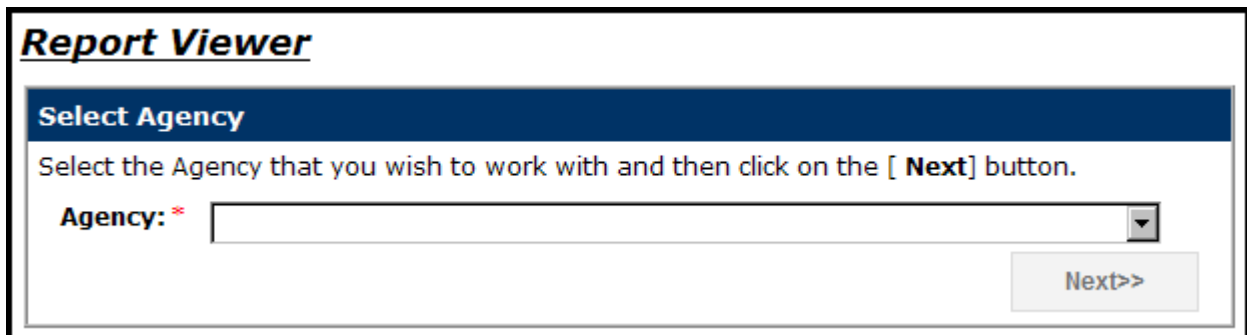


- **Total Service Earned Report (Active Employees Only)**

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, skip this step. Select the appropriate 5-digit agency code from the drop down box. Click  .



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**.



Select Report Type

General Report

Select Report Name

General Report - Active Employees by Employer

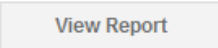
Description:
Active Employees by Employer

Select Export Type

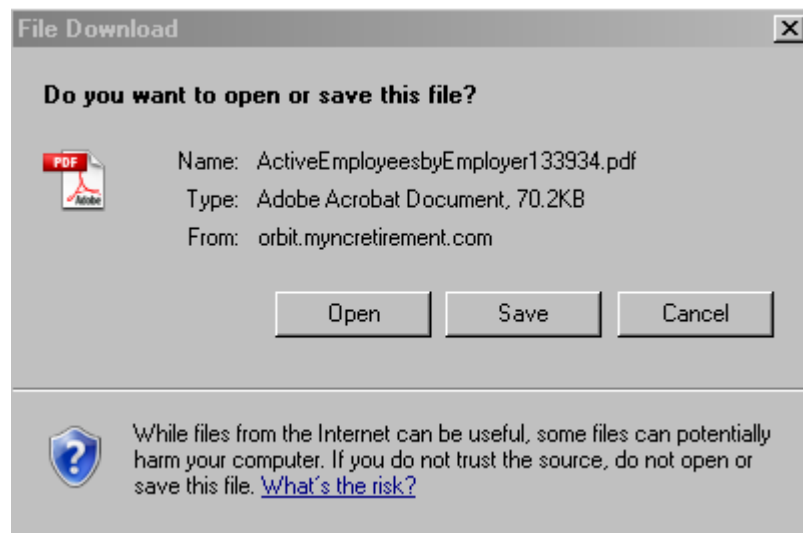
Adobe PDF


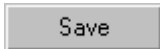

View Report

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

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

- a. The File Download box will appear.



- b. Click  to view the report on the screen. Click  to save the report to the computer. Click  to exit without running the report.

Select Report Type

General Report
▼

Select Report Name

General Report - Active Employees by Employer
▼

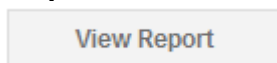
Description:
Active Employees by Employer

Select Export Type

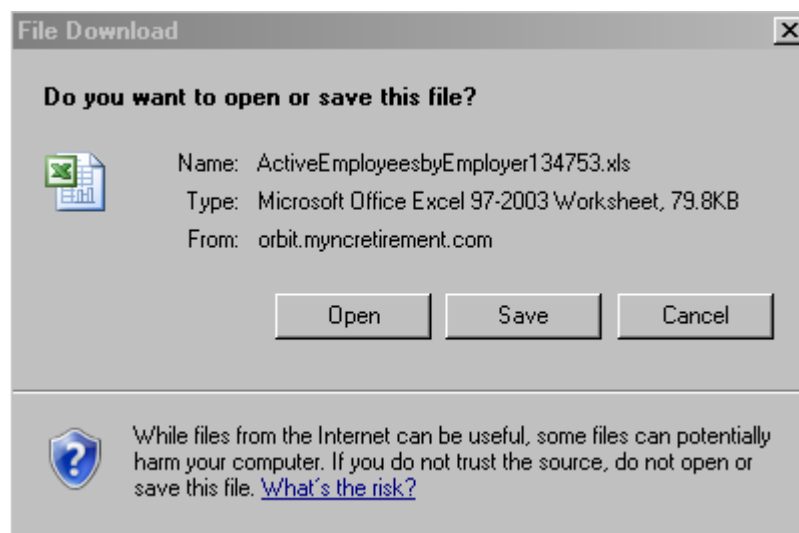
Microsoft Excel
▼


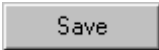

View Report

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



- a. The File Download box will appear.



- b. Click  to view the report on the screen. Click  to save the report to the computer. Click  to exit without running the report.

3 - TROUBLESHOOTING



North Carolina
Total Retirement Plans



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

Issue	Solution
Locked out of your account and/or exceeded the number of Password tries.	<ul style="list-style-type: none"> • Close out browser. Open a new ORBIT page without going through the Favorites link. • If above fails, 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.	<ul style="list-style-type: none"> • Contact ORBIT Employer Reporting at 877-626-7248 or 919-807-3055 (Local), or email oeer@nctreasurer.com to have a note placed in your account.
You receive an ORBIT Report Reminder or Not Received email.	<ul style="list-style-type: none"> • ORBIT Reporting is a two-step process. • Check your Payroll Detail Report status. It should say Submitted or Posted. Refer to 2.2 Submit 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.	<ul style="list-style-type: none"> • Each agency has an allowance threshold in errors. Once over the threshold, the report rejects. • Review the attached Error Report. Correct the errors and resubmit the report. • Contact ORBIT Employer Reporting at 877-626-7248 or 919-807-3055 (Local) for additional assistance.
You realize salary was previously omitted, or an underpayment was made.	<ul style="list-style-type: none"> • For <u>omitted salary</u>, 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 <u>additional salary</u>, 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.	<ul style="list-style-type: none"> • 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 post to withdrawn or refunded member accounts. Those records are deleted and an invoice will be generated.
You have a member changing Retirement plans, for example, going from ORP to TSERS or vice versa.	<ul style="list-style-type: none"> • Fax a letter on letterhead explaining the reason and the effective change of the plan change to 919-831-2135.
You have a Retiree returning to work.	<ul style="list-style-type: none"> • 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

	<p>LOCRS.</p> <ul style="list-style-type: none"> 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 oyer@nctreasurer.com or fax to 919-855-5801
You notice a service credit shortage in a specific year.	<ul style="list-style-type: none"> 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 oyer@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.	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> Contact Member Services for Employers at 877-627-3287 (select number 2, and option 2 from the menu).

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

Retirement Plans:

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)

Retirement Plan Codes:

TSERS:

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>	
LOGG	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

