



Firefighters' and Rescue Squad Workers' Pension Fund Advisory Panel

June 7, 2018

Operations Update

Donna Boyette



North Carolina
Total Retirement Plans



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Team Metrics

TASK	May 2017 – April 2018 (Monthly average and Turnaround Time)
Purchase Calculations	77 within 6.2 days
Retirements	62 within 6.6 days
Death Processing	61 within 13.7 days
Refunds	464 within 4.3 days
Turnaround Documents (TADs)	224 within 3.2 days
Incoming Calls	915 calls 82% answered within 30 seconds
Call Abandonment Rate	6.1%



Metrics *continued*

	6/2015 – 4/2017	5/2017 – 4/2018	Total Cases resolved/paid
Refunds	2,507	5,560	8,067
Retirements	1,653	751	2,404
Deaths	1,461	769	2,230

Team Dynamics

- Five full-time permanent employees
- One full-time temporary employee supporting Operations
- Two full-time temporary employees assigned to the Lapsed Service Project



Lapsed-Service Project

- Identify members who will not likely serve until retirement
- Began lapsed-service clean-up project May 8, 2017
- Hired two full-time temporaries dedicated to the lapsed-service project
- Funds provided by General Assembly to reach 15,177 members
- Completed contact with members in December 2017; increase in refunds and retirements
- In late December 2017, began contacting remaining 10,065 that did not respond
- Project ended May 31, 2018



FRSWPF Newsletter

- Third issue released January 2018
- Emailed to all LGERS units, Pension Fund members and departments/squads
- Included information:
 - Overpayments incurred in any of the seven RSD systems now subject to pension offsets
 - Overpayments incurred with the State Health Plan also subject to pension offsets
 - Roster upload deadlines
 - 2017 Contribution deadlines



Turnaround Documents (TADs)

- Rewrite/redesign of ORBIT project was interrupted due to online retirement project, Self Service upgrades and 2017 legislative changes
- IT focus to improve TADs and provide electronic submission began January 2018



Turnaround Documents (TADs) *continued*

After launch in late 2018, departments will be able to:

- Submit contribution allocations for members in Self Service using secured login step
- Enroll new members using same Self Service feature
- Mail check for total represented by their entries in the TAD screen
- Access web-based training and phone support

Upon receipt of check, FRSWPF staff will verify entries. Entries will post to member accounts in ORBIT overnight.





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Thank you