

# **ORBIT Online Retirement Application**

**Launch Date: November 13, 2018**

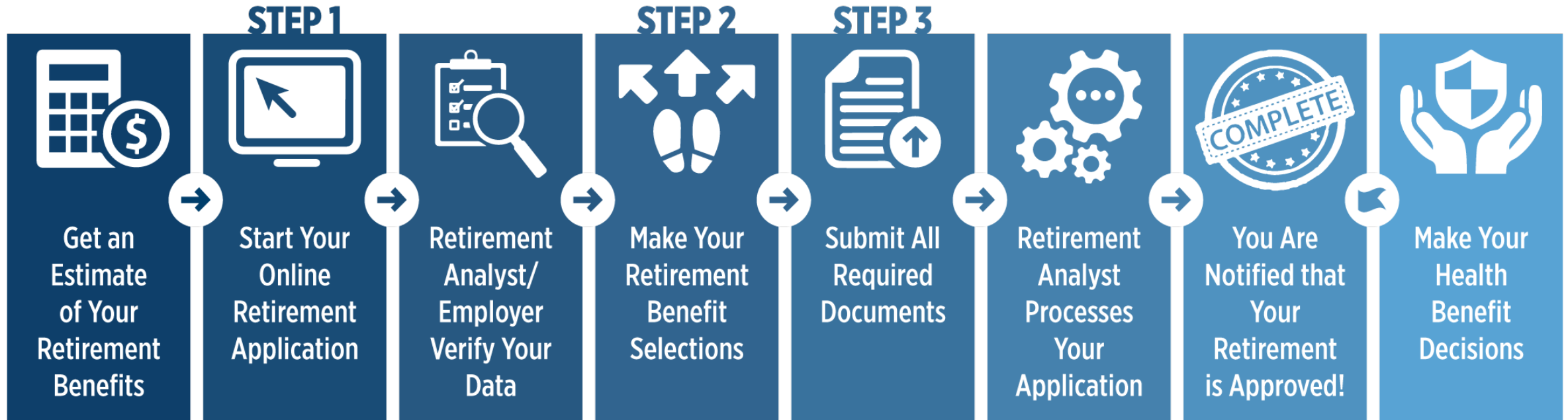


**North Carolina**  
Total Retirement Plans



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STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

## Online Retirement Application Process



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# Online Retirement Application

## Member benefits

- Integrated into existing ORBIT member website, a platform already familiar to members
- Increased understanding of retirement process
- Integrated help topics increases likelihood that members make informed decisions

## Administrative benefits

- Increase likelihood of accurate data
- Decrease back-and-forth exchanges with members to ensure proper execution of members' wishes



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## Member Experience

- Wizard-like, step-by-step guide through retirement application
- Ability to “play with the numbers” allows members to see how changes to a survivor beneficiary impact retirement payments

### Apply for Retirement in Three Easy Steps!

Your retirement is only a few steps away! With our interactive, online process, you'll be able to track your progress as you move along.



You are about to move through a series of screens. If at any time you need to go back to a previous screen use the **Back** button.

Get Started →



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Easy-to-Understand Integrated Help and Videos

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Step 1 Step 2 Step 3 Complete

Step 2: Make Benefit Selections and Provide Information

Progress toward completing Step 2:

Let's take a minute to understand your beneficiary and retirement benefit amount options.

In just a few moments, you will be able to select your Survivor Beneficiary and retirement amount from a list of options. This selection will affect the benefit amount you receive each month, and how much your beneficiary (if applicable) will receive after you death.

In order to make the best choice for you and your family, it is important that you understand each option. The following video provides a brief overview of your beneficiary and retirement options. As you scroll down, you will see a chart with sample data.

Understanding Your Retirement Benefit Payment Options

EXAMPLE: Selecting Your Retirement Benefit Option

The retirement benefit option you choose will affect the amount you receive each month. You will be presented with options similar to those in the table below.

	Monthly Benefit	Survivor Benefit
<input type="radio"/> Maximum Allowance	\$1,579.87	\$0.00
<input type="radio"/> Option 2 - 100% Survivorship	\$1,489.03	\$1,489.03

Beneficiary selected for this option: Mary Jane Smith



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Members can see options based on the information they provide and change their decisions throughout

## Select Your Retirement Benefit Amount



Select an Option	Monthly Benefit	Survivor Benefit
<input type="radio"/> Maximum Allowance	\$1,509.00	N/A
<input type="radio"/> Option 2 - 100% Survivorship Beneficiary selected for this option: Mary Jane Smith	\$1,426.00	\$1,426.00
<input type="radio"/> Option 3 - 50% Survivorship Beneficiary selected for this option: Mary Jane Smith	\$1,466.00	\$733.00
<input type="radio"/> Option 4 - Social Security Leveling To age 62 After age 62	\$1,915.00 \$1,115.00	N/A N/A
<input type="radio"/> Option 6-2 - Modified 100% Survivorship Beneficiary selected for this option: Mary Jane Smith	\$1,417.00	\$1,417.00
<input type="radio"/> Option 6-3 - Modified 50% Survivorship Beneficiary selected for this option: Mary Jane Smith	\$1,461.00	\$731.00
<input type="radio"/> I have reviewed my estimate of retirement benefit options, and I have decided that I want to cancel my current application for retirement and apply for retirement at a later date.		

Clear Options and Re-Calculate

If you would like to calculate options based on a different beneficiary, click the **Clear Options and Re-Calculate** button and re-enter your information. Please note that this action will erase all information on the previous screen, including any Social Security information entered.




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Summary presents members with all their data in one place to ensure they're comfortable with the decision they're making before submission



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Profile: **Active Employee**  
[Change Retirement Profile](#)





 My Personal Information

 My Account Summary

 My Account History

 Apply for Retirement Online 

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Step 1  Step 2  Step 3  Complete 

## Apply for Retirement Online

### Step 2 Summary

If any information is incorrect or incomplete, please contact us toll free at 877-627-3287.

#### Personal and Retirement Information

Personal Information, Retirement Date and Last Day of Work			
Name	John A. Smith	Retirement Date	January 15, 2017
Date of Birth	December 1, 1960	Number of Sick Leave Days	125
		Last Day of Work	December 31, 2016

#### Survivor Beneficiary and Retirement Payment Amounts

Survivor Beneficiary			
Name	Jane A. Smith	Is this Person Your Spouse?	Yes

Retirement Option and Payment Amounts			
Retirement Option	Option 2: 100% Survivorship	Survivor Monthly Benefit	\$2,500.00
My Monthly Benefit	\$2,500.00		

#### Guaranteed Refund Beneficiaries


Principal Guaranteed Refund Beneficiary #1			
Name	Joseph M. Smith	Type	Living Person

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# Member can choose submission format

## Required documents customized based on member choices



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Profile: Active Employee  
[Change Retirement Profile](#)

My Personal Information

My Account Summary

My Account History

Apply for Retirement Online

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Step 1Step 2Step 3Complete

Apply for Retirement Online

Step 3: Print, Notarize and Submit Documents

Progress toward completing Step 3:

Choose Your Document Submission Method

Be sure your document(s) meet the specified requirements ([view document requirements](#)). Once you have gathered your document(s), make your selection below.


☒ I want to upload my document(s).

☐ I want to fax or mail my document(s).

**NOTE: If you make this choice, you will not be able to upload your document(s) later.**


Fax: (919) 855-5800  
Mail to: NC Department of State Treasurer  
Retirement Systems Division  
3200 Atlantic Avenue  
Raleigh, NC 27604

Upload Required Document(s)



For each required document, click the **Upload File** button to the left to find and select the file on your computer. You can upload more than one file for each required document. [View guidelines for scanning and preparing documents](#).

Accepted file types: .pdf, .jpg, .jpeg, .png, .gif, .tiff

 You are uploading to a secure site

	Required Document	File Name	Actions
<a href="#">Upload File</a>	Government-issued proof of age and legal name for Jane A. Smith	Proof_of_insurance-jane_smith.pdf	<a href="#">View</a> <a href="#">Delete</a>
<a href="#">Upload File</a>	Government-issued proof of age and legal name for Survivor beneficiary: John P. Smith	Drivers_License-john_smith.pdf	<a href="#">View</a> <a href="#">Delete</a>
<a href="#">Upload File</a>	Your Option 4 Social Security form with benefit amount indicated	SSN_Form-jane_smith.pdf	<a href="#">View</a> <a href="#">Delete</a>
<a href="#">Upload File</a>	Government-issued proof of your Social Security number		



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Status messages give members an idea of where they are in the process, will reduce calls from members seeking a status update

Allows for messaging related to other key decision points



If you are a member of one of the North Carolina Total Retirement Plans: NC 401(k), 457 and 403(b), [click here](#) to learn about what you can do with your supplemental retirement account when you retire.



Please note: If you are eligible, the State Health Plan will automatically enroll you into a health plan, even if you did not have coverage as an active employee. You will receive a letter from the State Health Plan outlining your health plan options and any necessary actions. For more information, please read the [Planning for Retirement page](#) on the State Health Plan website.



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Profile: Active Employee  
Change Retirement Profile

My Personal Information  
My Account Summary  
My Account History  
Apply for Retirement Online

Apply for Retirement Online

Step 1 Step 2 Step 3 Complete

Start Retirement

Your retirement application is being processed by an analyst.

You will be notified by email if additional information is required and/or when your application is approved for retirement.

If you have any questions or need to make any changes to your application, you must call us at (877) 627-3287. Remember, any changes you make may impact your retirement benefit payment amount and will not be visible in your online application.

Re-Print Online Retirement Benefit Election Document

If you would like another copy of your Online Retirement Benefit Election, click the button below.

Re-Print Your Online Retirement Benefit Election

Upload Additional Requested Document(s)

Below is a list of all files previously uploaded with your retirement application along with the date and time that they were uploaded. If you are prompted by the Retirement Systems Division to provide additional documentation, click the **Upload File** button below. Please note that you will not be able to view or delete a document once you've uploaded it. [View guidelines for scanning and preparing documents.](#)

Accepted file types: .pdf, .jpg, .jpeg, .png, .gif, .tiff

You are uploading to a secure site

File(s) Uploaded	Upload Date and Time (EST)
Proof_of_insurance-jane_smith.pdf	May 1, 2017 4:45:03 PM
Drivers_License-john_smith.pdf	May 1, 2017 6:55:22 PM
SSN_Form-jane_smith.pdf	May 15, 2017 8:07:55 AM

Upload File

NOTE: If you try to upload a file, and it does not appear in the list above, it may be corrupted in some way and unreadable by our system. Try uploading the document again. If you are still unsuccessful, contact the Retirement Systems Division's Call Center for further instructions.

REMEMBER: Your retirement is not finalized and your first benefit check will not be issued until we have received and approved all of the documentation you have submitted. You will be notified via email once your application has been approved. If you qualify, your retirement payment will be retroactive to the retirement date you selected, regardless of your approval date.

If you are a member of one of the North Carolina Total Retirement Plans: NC 401(k), 457 and 403(b), [click here](#) to learn about what you can do with your supplemental retirement account when you retire.

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# Questions



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# Thank you



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