



North Carolina
Total Retirement Plans

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STATE TREASURER OF NORTH CAROLINA
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Firefighters' and Rescue Squad Workers' Pension Fund Advisory Panel

May 9, 2019

Operations Update

Jennifer Hargrove

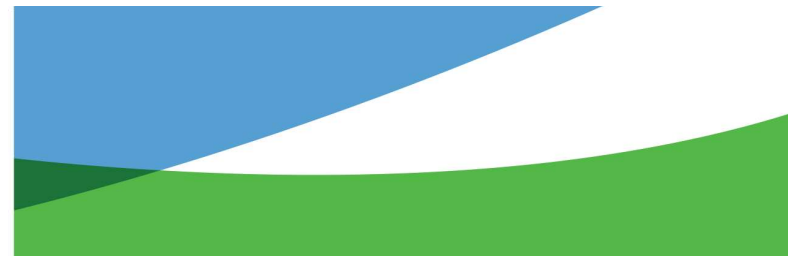


Team Metrics

Task	March 2018 - March 2019 (yearly total and average turnaround time)
Purchase Calculations	807 within an average of 6.4 days
Retirements	835 within an average of 6.3 days
Death Processing	848 within an average of 8.2 days
Refunds	1671 within an average of 3 days
Turnaround Documents (TADs)	3187 within an average of 2 days
Incoming Calls	8299
Call Abandonment Rate	3.45%

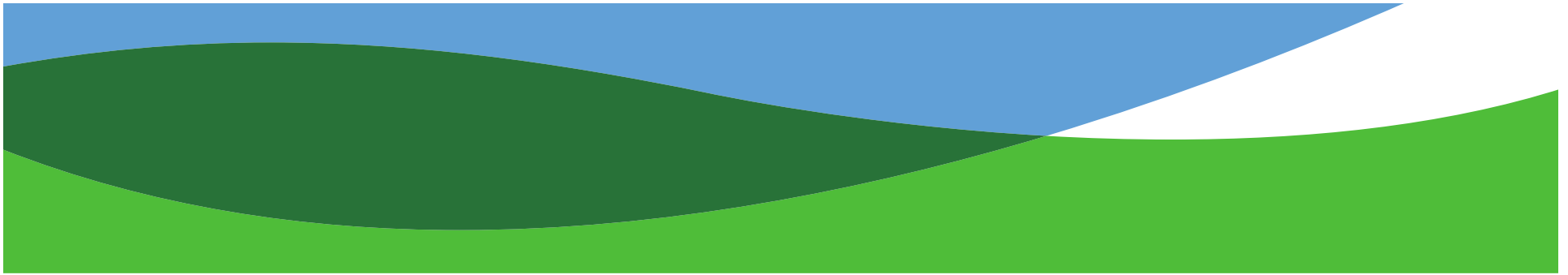


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North Carolina State Treasurer



- Fourth issue released December 2018
- Emailed to 18,839 LGERS units, Pension Fund members and departments/squads who have emails on file
- Included information:
 - Roster service requirements and deadlines
 - Death Benefits and payments to Beneficiaries
 - Online TAD submission updates





Turnaround Documents

- Phase I of the Online TAD began March 2019
- Internal staff began processing TADs received online
- Development of Department/Squad electronic submission began late 2018
- Pilot with departments/squads will be completed prior to launch
- After launch, departments will be able to:
 - Administer access for designated staff
 - Add, delete or reset any user access and password
 - Enter contribution amounts through ORBIT for each member of your department/squad who has met service and training requirements
 - Enroll new members using Self Service functionality
 - Remove non-contributing members from the TAD
 - Mail a check for total contributing members identified on the TAD screen



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Thank you