North Carolina Retirement Systems

Fire and Rescue Advisory Panel

June 3, 2015

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ORBIT Project Review

North Carolina Retirement Systems

In Scope:

- Plan, design, build, test and implement a Fire and Rescue module within ORBIT that complies with North Carolina state statutes

- Enhance ORBIT Self-Service to be more customer-friendly to Fire and Rescue Pension Fund members
    - View fully credited service, contributions paid to-date
    - Calculate service purchase estimates

- Add ORBIT Self-Service capabilities for Fire and Rescue Squad Agencies
    - Process member contributions (Turn Around Document)
    - Contribute using electronic funds transfer

- Enhance the Roster Process to provide more information
    - Begin and end dates of service

- Fire and Rescue data clean-up

ORBIT Project Review

North Carolina Retirement Systems

Issues and Constraints:

- Developer, Business Analyst and Subject Matter Experts resource constraint continues to exist due to our move to a new building

- Competing projects (i.e., pension spiking, health insurance, new legislation)

- End of year operational priorities (reconciliation, 1099s, ABS, Public Data) compete for resources

- Lack of Business User time to sign-off on data clean-up

- Budget constraint to hire contract developers and business analyst

ORBIT Project Review

Status of Work in Progress

	Approved Requirements	BA Require-ments	BA Test Case Draft	Comm Text Review	IT Design	IT Develop-ment	Unit Testing
1	Member Self-Service	100%	100%	75%	75%	0%	0%
2	Enrollment	100%	100%	0%	10%	0%	0%
3	Maintain Agency	100%	40%	N/A	100%	10%	0%
4	Maintain EFT	100%	0%	0%	100%	0%	0%
5	Maintain Contact Info - SS	100%	100%	N/A	100%	10%	0%
6	Roster Load Process	100%	0%	N/A	0%	0%	0%
7	Process Contributions (TAD)	100%	0%	0%	0%	0%	0%
8	Join – Add Existing Pension Fund Member	100%	0%	N/A	0%	0%	0%
9	Roster Look-Up Screen SS	100%	100%	N/A	0%	0%	0%
	Overall Completion Project-To-Date	**38%**	**19%**	**4%**	**17%**	**1%**	**0%**

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Remaining Process Requirements:

10	EFT Insufficient Fund Process
11	Process Contribution History Screen (SS)
12	Maintain Deposits
13	Fully Credited Service Process
14	Roster Service Audit
15	Service Audit/Contribution Audit
16	Retirement
17	Cancel Retirement
18	Service Purchase
19	Refunds
20	Merge Agency
21	Roster Look-up Screen LOB
22	Updates from Associations for Roster Issues
23	Place Member on LOA screen with begin and end dates

ORBIT Project Review

Project Timeline:

- **Initial Estimated Total Project Hours 22,700**
  - Multi-year effort

- **Project Team Resources Required**
  - Project Manager
  - Developers
  - Business Analyst
  - Data Base Analyst

- **Once the physical move is completed in September, we will have a better idea of an estimated project timeline**
  - Rehire contractors
  - IT availability
  - RSD availability

ORBIT Project Review

Data Clean-Up

- **Scope:**
  - Correct Roster Service
  - Eliminate duplicate FPF/RSWPF accounts
  - Combined Fire and Rescue system codes in ORBIT
  - Verify monies paid are appropriately applied

- **Accomplished To-Date:**
  - Added ~ 900+ years of roster service to members

- **Next Steps:**
  - Continue to move forward with the scope in preparation for go live

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Questions?