



North Carolina Retirement Systems

Retirement Monitor – April 26, 2010

A monthly newsletter for public sector human resources and payroll specialists from the Retirement Systems Division of the North Carolina Department of State Treasurer.

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Retirees Can Manage Health and Financial Needs with HR InTouch on ORBIT

In partnership with the State Health Plan, NC Retirement Systems is enhancing online capabilities and services for retirees with HR InTouch.

Available through ORBIT, HR InTouch provides 24-hour online access to health and financial wellness information and resources. Retirees can enroll and update information in the State Health Plan, and will find links to our partners, such as the NC Health and Wellness Trust Fund. There are also videos on health and wellness, and featured documents with information on financial management in retirement and Medicare enrollment.

The packet sent to members who apply for retirement will now contain *Instructions for Selecting Your Health Coverage Through the State Health Plan Online*, instead of the HM form. Members who wish to complete a paper form instead of enrolling online, can download a copy of the HM form and guides from the “Applications and Forms” section of www.myncretirement.com. Requests for mailed paper copies can be made to our Retirement staff. Please see contact information on page 3 of this newsletter.

Medicare-eligible employees may contact the State Health Plan directly for assistance. For information on Medicare eligibility, go to www.medicare.gov.

2009 Annual Benefits Statements

The 2009 Annual Benefits Statements will be available in mid-May to members in ORBIT only. **Statements will not be mailed.**

Any assistance you can provide to your employees who do not have access to a computer during the course of their work day is greatly appreciated, such as a centrally located computer workstation or kiosk.

The Annual Benefits Statement contains valuable information for you and your employees, including:

- Contributions to the NC Retirement System as of December 31, 2009.
- Beneficiary designation(s).
- A projected retirement benefit, for the member with at least one year of service.
- A Social Security estimate if the member’s projected retirement age is 62.
- A gap analysis – a projection of what the member may have saved toward retirement versus what the member may need in retirement.

To help you and your employees better understand the statement format and content, frequently asked questions and a user guide are now available on the "Employers" and "Active Employees" sections of the Retirement Systems' web pages at www.myncretirement.com.

Reminder: Certifying Employee Status Under Reemployment Laws

Under the provisions of House Bill 642, which was enacted by the General Assembly in 2009, employers must report all rehired retirees to the Retirement System each month. The Retirement System developed a form, Form ESRR (*Certifying Employee Status Under Retirement Reemployment Laws*), to assist employers in determining who is a rehired retiree. This form is located on Employer section of the Retirement System's website, www.myncretirement.com.

If a member falsifies Form ESRR by not reporting himself/herself as a benefit recipient, you will not be penalized if you provide the Retirement System with the member's falsified Form ESRR. However, if the employee exceeds his/her earnable allowance, or violates other return-to-work laws, the employee will be held fully responsible for repaying any overpayment to the Retirement System.

Employers are reminded that each completed Form ESRR should be kept in your employee files. They **do not** need to be returned to the Retirement System unless requested.

2010 Retirement Planning Conferences Schedule

The Educational Retirement Group of the NC Retirement Systems conducts retirement conferences for members of TSERS and the Local Governmental Employees' Retirement System (LGERS). The conferences provide an orientation for new members, pre-retirement planning information for members closer to retirement and educational information for personnel officers and others who handle retirement matters. The sessions also offer information on the NC 401(k) and NC Deferred Compensation (457) Plans. Registration is not required. Some locations may charge a parking fee.

For members unable to attend their local conferences that would still like to receive the information provided, the PowerPoint presentations shown at the conferences are available on the [Employers](#) and [Active Employees](#) sections of the Retirement Systems website under "Retirement Planning Resources."

There are two presentations: one for TSERS members and one for LGERS members.

Below is the schedule of Retirement Planning Conferences. **TSERS sessions will begin at 9:30 a.m. and LGERS sessions will start at 1:30 p.m.** All of the 2010 dates are available on the Employer section of the Retirement Systems website at www.myncretirement.com. **We request that members who plan to attend a conference please check our website regularly or contact Member Services (telephone numbers below) for schedule updates.**

Member Services employees at the Retirement Systems Division are happy to help with questions. Please call 1-877-627-3287 (toll-free) or 919-807-3050 (Raleigh area only). Members may also schedule an appointment to meet with a counselor. We ask that members request and receive a retirement estimate before scheduling an appointment. Members should complete a [Form 309](#) to request an estimate.

April 28, 2010

Southwestern Community College
Myers Auditorium, Room 148-B
447 College Dr
Sylva, NC

April 29, 2010

Mountain Horticultural Crops Research and Extension Center

Auditorium
455 Research Dr
Mills River, NC

May 5, 2010

Town of Cary
Council Chambers
(Parking in deck off Wilkinson Ave)
316 Academy St
Cary, NC

May 6, 2010

Beaufort County Community College
Building 8 Auditorium
5337 Hwy 264 East
Washington, NC

May 11, 2010

Pincroft Sedgefield Fire Department
Training Room
2239 Bishop Rd
Greensboro, NC

May 19, 2010

Watauga County Administration Building
Commissioners Board Room
814 King St
Boone, NC

May 25, 2010

Randolph Community College
R Alton Cox Learning Resources Center, Room 102
629 Industrial Park Ave
Asheboro, NC

June 2, 2010

Central High Building
Room 301
1141 Elizabeth Avenue
Charlotte, NC

Retirement Systems Contact Information

- Employers with ORBIT Payroll Reporting questions should call 1-877-NC-ORBIT (1-877-626-7248) or 919-807-3055 (Raleigh area only). For all other questions, contact the NC Retirement Systems Division's Employer Education and Services Unit at EESU@nctreasurer.com or call toll-free 1-877-807-3131 Option 2 (outside Raleigh area) or 807-3131 Option 2 (Raleigh area only).
- Active Employees with questions or in need of information or forms should contact the Division's Member Services unit toll-free at 1-877-627-3287 (for outside Raleigh area) and (919) 807-3050 (Raleigh area only).
- Retirees with questions or in need of information or forms should contact the Division's Member Services unit toll-free at 1-877-733-4191 (for outside Raleigh area) and (919) 733-4191 (Raleigh area only).

To better serve our Spanish-speaking customers, the NC Retirement Systems' Call Center is staffed with a representative who can assist members with translating Retirement Systems' information and addressing their retirement-related questions.

The Retirement Systems Division manages retirement benefits for more than 820,000 working and retired N.C. public employees. The North Carolina Retirement Systems continue to rank within the top five systems nationally. With approximately \$60 billion in assets, the Systems comprise the 10th largest public pension plan in the United States.