



**North Carolina Retirement Systems**

***Retirement Monitor – TSERS Special Edition,  
March 25, 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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**Reminder: Welcome Packets for Newly Hired Retirement System Members Online**

The NC Retirement Systems has modified the Welcome Packet process for newly hired, first-time employees to provide a quicker and easier way for new retirement system members to complete their retirement system beneficiary designations, and to learn about the retirement system to which they belong and the benefits available to them. Welcome Packets are only available to new members electronically and are no longer mailed.

**How the Process Works**

- After the ORBIT payroll deadline, each employer should obtain a list of new employees by performing the following steps:
  1. Click on “Download Member ID” and select the option to “Retrieve Only New Members.” (Note: It is best to save the report to your work computer for future reference.)
  2. The employer should then communicate the Member Identification (ID) number to each newly hired employee, and instruct the employee to log on to ORBIT to activate his or her personal account and designate a beneficiary(ies).
- If the employer has not saved the report and wishes to retrieve the list of new employees, the employer must perform the following steps:
  1. Click on “Download Member ID” and select the option to “Retrieve Members By Date.” (Note: It is best to save the report to your work computer.)
  2. The employer should then communicate the Member ID number to each newly hired employee, and instruct the employee to log on to ORBIT to activate his or her personal account and designate a beneficiary(ies).
- When the member designates his or her beneficiary(ies), and enters an e-mail address in ORBIT, an e-mail notification will be sent to the member and will include a Welcome Packet and an electronic acknowledgement letter listing a designated beneficiary(ies). There is no need to send a paper form to the Retirement Systems Division after designating beneficiaries online.
- If the member does not enter an e-mail address in ORBIT, he or she will not receive a confirmation notice. The information will be updated in the member’s personal ORBIT account.

- If the member chooses to complete the beneficiary designation process by completing a paper form – Form 2C – *Designating Beneficiary(ies) for Retirement System Contributions and the Death Benefit* or Form 276 – *Designating Beneficiary(ies) for the Separate Insurance Benefit Plan for Law Enforcement*, and mailing it to the Retirement System, shortly after receipt of the form(s), the Retirement System will mail an acknowledgement letter to the member.
- Employers may assist members who choose not to log on to ORBIT by providing a paper copy of the Welcome Packet to new members. PDF copies of the Welcome Packet information are available to employers in the “Employers” section of the Retirement Systems’ Web page at [www.myncretirement.com](http://www.myncretirement.com). Just click on the “Welcome Packet” link for the appropriate retirement system and print the packet materials.

Welcome Packet materials include:

- a letter from the Treasurer,
- a fact sheet about the retirement system to which the member belongs, and
- a fact sheet on the supplemental retirement plans.

Please remember, only a member with less than 10 years of service may designate or make changes to his or her beneficiaries in ORBIT. Employees with 10 years or more of service must use the Form 2C, available on the Retirement Systems’ Web site, [www.myncretirement.com](http://www.myncretirement.com), under “Applications and Forms.”

As always, we appreciate the important role of employers in helping employees by providing necessary information to the Retirement Systems Division.

Employers with questions about the Welcome Packet or Beneficiary Designation process should contact the NC Retirement Systems’ Member Services unit at [nc.retirement@nctreasurer.com](mailto:nc.retirement@nctreasurer.com) or call (877) 807-3131 (for outside Raleigh area) and (919) 807-3131 (Raleigh area only).

### **Reminder: 2009 Annual Benefits Statements**

For the first time, 2009 Annual Benefits Statements will be available to active members in ORBIT only; statements will not be mailed. The annual statements are scheduled to be available in members’ personal ORBIT accounts May 2010, in the following order:

- State agencies,
- Local agencies, and
- Educational institutions (K-12, community colleges and universities).

To access the statements, employees must log-on to their personal retirement account in ORBIT, or register if this is the first time the employee is accessing his or her account.

Neither Retirement Systems representatives nor employers have access to members’ Annual Benefits Statement. We ask that you please provide computer access for employees who do not have access to a computer at the work place.

As with past years, frequently asked questions and a user guide will be available April 1 on the “Employers” section of the Retirement Systems’ Web pages at [www.nctreasurer.com/dsthome/RetirementSystems/Employers](http://www.nctreasurer.com/dsthome/RetirementSystems/Employers) to help you better answer your employees’ questions.

### **New Retirement Systems Law Book Available Online**

The 2009 edition of the Retirement Systems Law Book, a collection of the North Carolina General Statutes governing the retirement systems and other public employee benefit plans, is now available at [www.nctreasurer.com/dsthome/RetirementSystems/Employers](http://www.nctreasurer.com/dsthome/RetirementSystems/Employers) under “Guidance

Publications.” The 2009 volume includes all changes to the laws made during the 2009 legislative session.

### **Disability Training Session**

The Retirement Systems Division’s Educational Retirement Group will hold a TSERS disability training session on April 27, 2010. The session will be held from 8:30 a.m. to 4:30 p.m. at:

Department of State Treasurer  
Albemarle Building, 4<sup>th</sup> Floor Conference Room  
325 N Salisbury St  
Raleigh, NC

Since seating is limited, registration is required. Please register to secure your seat (reserved on a first come, first served basis) by sending an e-mail to:

[Jeannie.Alston@nctreasurer.com](mailto:Jeannie.Alston@nctreasurer.com).

### **2010 Retirement Planning Conferences Schedule**

The Educational Retirement Group of the Retirement Systems Division with the Department of State Treasurer conducts retirement conferences for members of the Teachers’ and State Employees’ Retirement System and the Local Governmental Employees’ Retirement System. 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 N.C. 401(k) and N.C. Deferred Compensation (457) plans. Registration is not required. Some locations may charge a parking fee.

For members unable to attend their local conferences who 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 Web site under “Retirement Planning Resources.”

There are two presentations: one for Teachers’ and State Employees’ Retirement System (TSERS) members and one for Local Governmental Employees’ Retirement System (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 Web site at [www.myncretirement.com](http://www.myncretirement.com). **We request that members who plan to attend a conference please check our Web site 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.

**March 31, 2010**

**Salisbury Civic Center**  
315 S Martin Luther King St  
Salisbury, NC

**April 7, 2010**

**Sandhills Community College**  
Owens Auditorium  
3995 Airport Rd  
Pinehurst, NC

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| <b>April 13, 2010</b> | <b>Robeson Community College</b><br>ADL Auditorium<br>5160 Fayetteville Rd<br>Lumberton, NC                                     |
| <b>April 20, 2010</b> | <b>City of Charlotte</b><br>Street Maintenance Division Building, Room 301<br>4411 Northpointe Industrial Blvd<br>Charlotte, NC |
| <b>April 28, 2010</b> | <b>Southwestern Community College</b><br>Myers Auditorium, Room 148-B<br>447 College Dr<br>Sylva, NC                            |
| <b>April 29, 2010</b> | <b>Mountain Horticultural Crops Research and Extension Center</b><br>Auditorium<br>455 Research Dr<br>Mills River, NC           |

**Retirement Systems Contact Information**

- Employers with ORBIT Payroll Reporting questions should call 1-877-NC-ORBIT (outside the Raleigh area) 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](mailto: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).

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

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*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 10<sup>th</sup> largest public pension plan in the United States.*