

NORTH
Dakota
Be Legendary.

Retirement & Investment

NDSBA/TFFR VIRTUAL SESSION

11/15/2023

INTRODUCING THE NEW TFFR PENSION ADMINISTRATION SYSTEM (MyTFFR)



AGENDA

- Timeline of pension system project
- Technical aspects of new system
- Improvements and advantages for member and pensioners
- Improvements and advantages for business partners
- Required operational changes for business partners
- Training and educational plan for users

PENSION ADMINISTRATION SYSTEM TIMELINE

1st QTR
CY2022 –
Requirements
Confirmation
with vendor

4th QTR CY2023 –
Complete system
design meetings

2nd QTR
CY2024 –
Member
education
begins

3rd QTR CY2022 -
Begin system
design meetings

4th QTR CY2023 –
Business partner
education and
system testing
begins

4th QTR CY2024 –
New pension
administration
system goes live

PENSION ADMINISTRATION SYSTEM TECHNICAL ASPECTS



- System is cloud based and mobile compliant, no software needed
- Updates are done without service interruption
- Can be accessed from anywhere there's internet



- Fast access using your existing ND.Gov login
- System has guaranteed up time of 99.6%
- Real time acknowledgement of transactions



- System is built on Microsoft Azure security platform, cutting edge security
- Multi-factor authorization for increased security
- All data is encrypted

IMPROVED MEMBER EXPERIENCE

Think of it like a mobile banking app

- **Customer focused build**

- Uses existing nd.gov login
- Simple to navigate
- Streamlines communication with TFFR staff
- Step-by-step process illustrations and status updates
- Possible DB vs. 401k comparison tool

- **Complete account transparency**

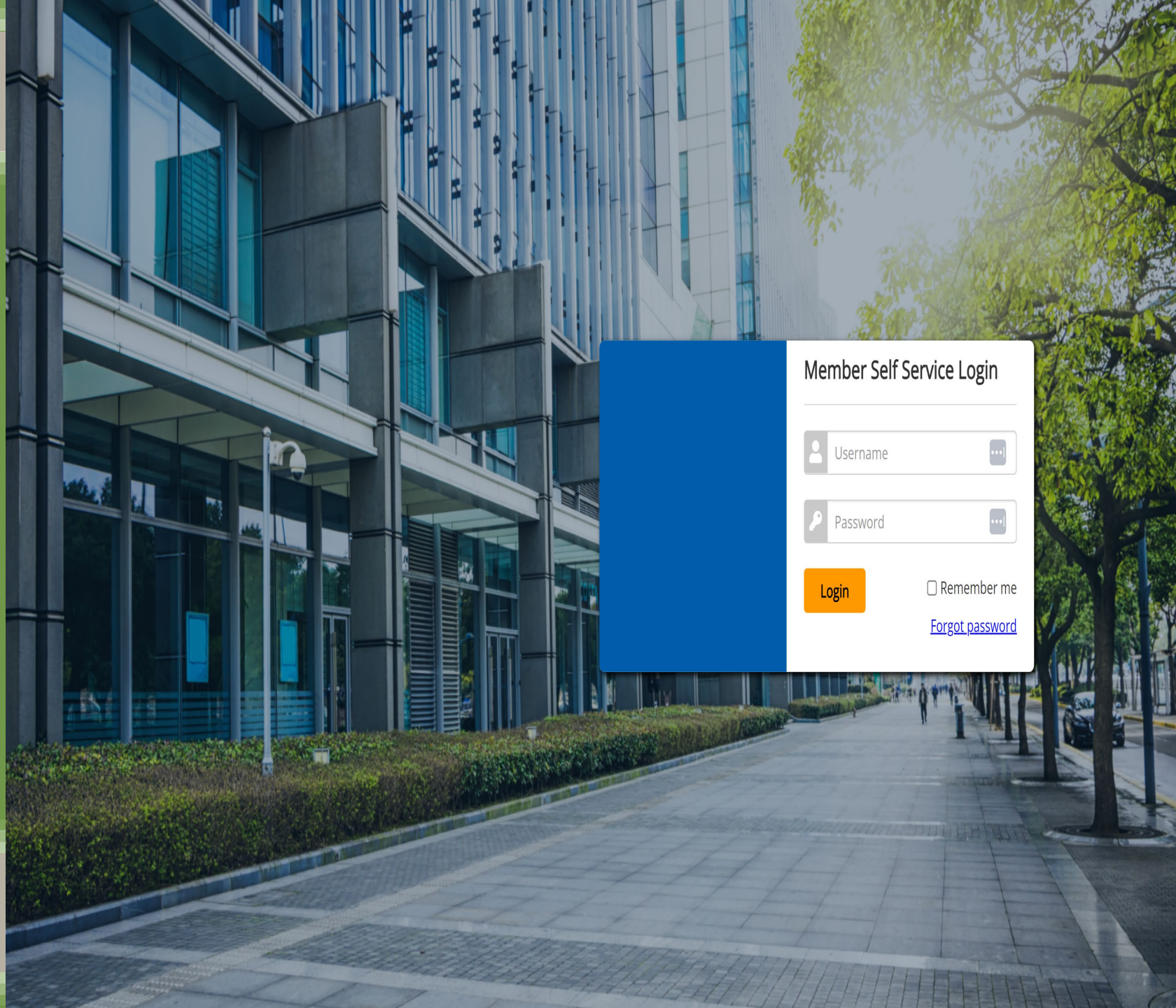
- Real time account balances
- Detailed transaction info
- Calculators to estimate benefits and payment options and RTT options

- **Elimination of paper-based processes**

- Applying for retirement
- Applying for disability
- Updating account, bank, tax, and beneficiary information

MEMBER LOGIN SCREEN

- No need to create a new login
- Users can use their existing ND.gov login to access the system.
- Existing users will automatically be registered in the new system
- Easy to reset password



Member Self Service Login

Username


Password

Login




Remember me

[Forgot password](#)

MEMBER DASHBOARD – VIEW 1



Real time account balance and service credit




Options ▾

My Dashboard ✕ ← →

MEMBERSHIP ACCOUNTS < 1 2 3 **4** >


Teachers Tier 1 Grandfathered			Account # : 50421	Status : Active ▾
Benefit Service Credit	Eligibility Service Credit	Account Balance		
35.340098	35.340098	\$317,365.36		

Health			Account # : 59979	Status : Review ▾
Coverage Type – Plan Type	Premium Amount	Start Date		
Member Only-Gold	\$300.00	04/21/2020		

TO DO LIST < **1** 2 >

- ✓ [Please complete your 401\(k\) Plan enrollment. Click here to make it so](#)
- ✓ [Please complete your 403\(b\) Plan enrollment. Click here to make it so](#)
- ✓ [Please complete your 457\(b\) Plan enrollment. Click here to make it so](#)

MESSAGES AND OPPORTUNITIES


 [Member Message Board Notification](#)


Direct communication to and from TEFR


MY SERVICE REQUESTS


Request Type	Request Date	Status
Process Pension Benefit Program Enrollment	04/21/2020	In Progress


I WANT TO



View My Accounts



View My Relationships



Upload a File


View My Profile


View and Submit Documents


View My Invoices


Submit a Payment


View My Statements

MEMBER DASHBOARD – VIEW 2

Record displayed.

Welcome to your portal, Tracie



Accounts



Relationships



Upload Files



My Information



Documents



Invoices



Payments



Statements



Messages



Forms and Publications



Meetings



Contact Us



Benefit Estimate



Withdrawal



Retirement



Service Credit Purchase



Benefit Payments



Income Verification



Tax Forms



Tax Calculator

MEMBER RETIREMENT APPLICATION

Retirement Applications X ← →

Record displayed.

Retirement Applications

New Open

Application Number Benefit Program Benefit Type Benefit Option Retirement Date Application Received Date Application Status

No records to display.

Application Progress

Application :

Application Status:Not Started



Benefit Calculation Status:Not Started



Payment Account Status:Not Started



IMPROVED BUSINESS PARTNER EXPERIENCE

- **All reporting done through system**

- New member enrollment
- Monthly Contribution reporting
- Monthly enrollment reporting
- ACH payments through system

- **Reduced reporting errors equals less time spent on TFFR reporting**

- Built-in error checking
- Real-time alerts and corrections
- Real-time report acceptance notification

- **Added features for business partners**

- Account transactions detail
- Messaging with TFFR through portal
- Account notifications
- Ad hoc report creation
- Model change calculator...maybe

BUSINESS PARTNER LOGIN SCREEN

- No need to create a new login
- Users can use their existing ND.gov login to access the system.
- Existing users will automatically be registered in the new system
- Easy to reset password



BUSINESS PARTNER DASHBOARD – VIEW 1

My Dashboard x ← →

INVOICES

< 1 2 3 4 >

Employer Payroll Final	Invoice ID : 8495	Status: Open :
Invoice Balance	Due Date	Days Late
\$226.74	03/31/2018	1928

Miscellaneous	Invoice ID : 7015	Status: Partially Paid :
Invoice Balance	Due Date	Days Late
\$750.00	05/19/2018	1879

EMPLOYER PAYROLL REPORTS

< 1 2 3 ... 8 9 >

Teachers - Tier 1 Grandfathered	Pay Date : 01/31/2016	Status: Review :
--	-----------------------	------------------

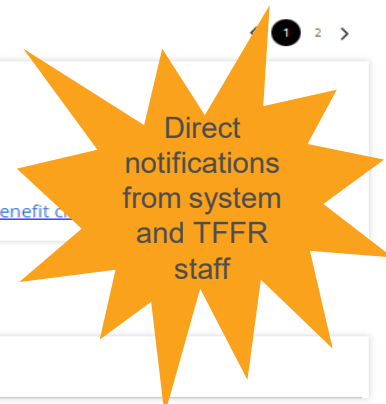
Teachers - Tier 1 Grandfathered	Pay Date : 09/30/2017	Status: Valid :
--	-----------------------	-----------------

Teachers - Tier 1 Grandfathered	Pay Date : 09/30/2017	Status: Valid :
--	-----------------------	-----------------

TO DO LIST

< 1 2 >

- ✓ [You have 62 employer payroll reports that are overdue. Click here to view the reports.](#)
- ✓ [You have 8 Invoices that are overdue. Click here to view the Invoices.](#)
- ✓ [Termination of employment is required for Margaret Hayes due to the submission of a benefit c...](#)



MESSAGES AND OPPORTUNITIES

- ✉ [Employer Message Board Notification](#)

MY SERVICE REQUESTS

< 1 2 3 ... 37 38 >

Request Type	Request Date	Status
Create Pension Enrollments via File Upload	02/07/2018	In Progress
Create Pension Enrollments via File Upload	02/07/2018	In Progress
Process Pension Benefit Program Enrollment	02/07/2018	In Progress



BUSINESS PARTNER DASHBOARD – VIEW 2

Record displayed.

Welcome to your portal, Bjorn



Employer Payroll Reporting



Upload Files



Enrollments



Employees



Invoices



Payments



Statements



Benefit Program



Messages



Forms and Publications



Meetings



Contact Us

Documents on this website require Adobe Acrobat Reader® for viewing/printing. The reader is available as a [free download](#) from Adobe. In addition, you may wish to consult our [.pdf help page](#) for instructions on printing or saving an Adobe Acrobat (.pdf) document.

BUSINESS PARTNER DASHBOARD MENU

- Organization Information
 - Organization Details
 - Organization Benefit Program
 - Organization Contacts
 - Organization Profile
 - Organization Postal Address
 - Child Organization Search
- Employees
 - Employee Search
 - Enrollments
 - Enrollment Summary
- Employer Payroll Reporting
 - Employer Payroll Summary
 - Employer Payroll Header
 - Employer Payroll Detail
- Finance
 - Invoice
 - Request
 - Organization Bank
- File Upload
 - Upload Files
 - View Processed

Invoice Type :

Status :

Invoice Date (To) :

Due Date (To) :

Search

Results 1 - 10 of 25

	Invoice Date	Due Date	Invoice Amount	Total Amount Paid	Status
bill	06/30/2016	07/30/2016	\$1,000.00	\$1,154.25	Closed
bill	05/31/2016	06/30/2016	\$1,000.00	\$1,171.35	Closed
bill Final	05/31/2016	06/30/2016	\$1,000.00	\$1,193.96	Closed
bill	01/31/2017	02/28/2017	\$1,000.00	\$800.00	Closed
bill	06/30/2016	07/30/2016	\$1,000.00	\$1,237.35	Paid
bill	03/19/2018	05/19/2018	\$1,000.00	\$1,020.00	Closed

BUSINESS PARTNER DETAILS SCREEN

Organization Details

Profile

Organization Name : Bismarck City Schools Organization Code : SOCR1 Organization Status : Active

Communication Information

Website : <https://www.bismarckschools.org/> Primary Phone Number : Primary Email : test@test.com
Primary Contact Name : Bjorn Larson Primary Contact Phone Number : (345) 435-4355 Primary Contact Email : bjorn.larson@sagitec.com
Primary Postal Address :

Reporting Organization Details

Reporting Organization Name : Bismarck City Schools Reporting Organization Code: SOCR1 Reporting Organization Email : test@test.com
Reporting Organization Contact Name : Bjorn Larson Reporting Organization Contact Phone Number : (345) 435-4355 Reporting Organization Contact Email : bjorn.larson@sagitec.com

Parent Organization Details

Parent Organization Name : Bismarck City Schools Parent Organization Code : SOCR1 Parent Organization Email : test@test.com
Parent Organization Contact Name : Bjorn Larson Parent Organization Contact Phone Number : (345) 435-4355 Parent Organization Contact Email : bjorn.larson@sagitec.com

Other Details

- Organization Type - Organization Sub-Type | Postal Addresses | Contacts | Benefit Programs | Banks

Organization Type	Organization Sub-Type
Employer	Local School
Non-Employer	Reporting Organization/ Payroll Provider

Audit Information

Created : christopher.linen 11/08/2016 02:43 AM Modified : Adgaonkar, Rohan 07/11/2023 08:00 PM

BUSINESS PARTNER MEMBER ENROLLMENT SCREEN

[Record displayed. Please make changes and press SAVE.]

1 Enrollment Type

2 Employer Detail

3 Employee Detail

4 Employment Details

5 Enrollment Summary

Enrollment Type

What kind of Enrollment do you want to create?

*Enrollment Type :

- Employment Change
- New Enrollment
- Return To Payroll
- Termination

Previous

Next

Submit

BUSINESS PARTNER CONTRIBUTION REPORTING SCREEN

Reporting Organization :

Employer Organization :

Benefit Program :

Pay Period Type :

Header Status :

Submitted Status :

Ready To Post :

Employer Payroll Summary ID :

Employer Payroll Header ID :

Tier :

Pay Period Start Date From :

Pay Period End Date From :

Pay Period Pay Date From :

Posted Date From :

Employer Payroll File :

Sub-Tier :

Pay Period Start Date To :

Pay Period End Date To :

Pay Period Pay Date To :

Posted Date To :

Search Results

First Prev 1 2 3 ... 9 10 Next Last Results 1 - 10 of 100

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Employer Payroll Header ID	Employer Payroll Summary ID	Reporting Organization Name	Employer Organization Name	Benefit Program/Tier/Sub-Tier	Pay Period Start Date	Pay Period End Date	Pay Period Pay Date	Header Status	Posted Date	Total Reported Salary	Total Reported Contributions
<input type="checkbox"/>	9848	64784	Bismarck City Schools	Bismarck City Schools	Teachers Tier 1 Grandfathered	04/01/2018	04/30/2018	04/30/2018	Valid		5000	1000
<input type="checkbox"/>	9845	64781	Bismarck City Schools	Bismarck City Schools	Teachers Tier 1 Grandfathered	03/01/2018	03/31/2018	03/31/2018	Processed	12/07/2022	6000	1200
<input type="checkbox"/>	9834	64765	Bismarck City Schools	Bismarck City Schools	Teachers Tier 1 Grandfathered	01/01/2018	01/31/2018	01/31/2018	Valid		2000	400

BUSINESS PARTNER CONTRIBUTION MAINTENANCE SCREEN

Employer Payroll Header

Organization Name : [Bismarck City Schools](#) Employer Payroll Header ID : 9848 Status : Valid
Benefit Program : Teachers Tier : Tier 1 Grandfathered Sub-Tier :
Pay Period Start Date : 04/01/2018 Pay Period End Date : 04/30/2018 Pay Period Pay Date : 04/30/2018
Pay Period Type : Regular Total Record Count : 1 Is Validated :
Submitted By : nagrajgada.s Submitted Date : 11/15/2022 Submitted : Y
Total Reported Salary : \$5,000.00 Total Reported Contributions : \$1,000.00 Remittance Status : Balanced
Last Interest Grant Date : 07/01/2020
Suppress Warning :

- Copy Forward
- Download Excel Report
- Download Pdf Report
- Create Invoice

Contributions Totals

Payroll Detail Transaction Type :		Filter Transaction Type	
Contribution Type	Total Reported Amount	Total Calculated Amount	Discrepancy
Pre Tax EE Contribution :	\$200.00	\$200.00	\$0.00
Post Tax EE Contribution :	\$0.00	\$0.00	\$0.00
Pre Tax ER Contribution :	\$0.00	\$0.00	\$0.00
Post Tax ER Contribution :	\$300.00	\$300.00	\$0.00
Employer Pickup :	\$500.00	\$500.00	\$0.00
Interest :		\$133.71	
Total :	\$1,000.00	\$1,133.71	

OPERATIONAL CHANGES FOR BUSINESS PARTNERS

- **Prior to “Go-live”**

- Format change for enrollment and contribution forms
- All invoices due must be paid prior to switch-over
- System training sessions
- Transition to ACH payments

- **After “Go-live”**

- All transactions and reporting must be done through the system
- Contribution payment must be made with contribution reporting

- **After “Go-live”**

- Communications related to reporting and contributions will be done through the system
- Possible trainings for system improvements or additions

TRAINING PLAN FOR USERS

- **Business partners**
 - Overview presentations
 - NDCEL Fall Conference Presentation
 - NDSBA Fall Conference Presentation
 - NDCEL Virtual Event - Nov. 9th
 - Vendor will present demo of system
 - NDSBA Virtual Event - Nov. 15th
 - Vendor will present demo of system
 - Hands-on training – TBD
- **Members**
 - Education and training will begin in Spring of 2024
 - Training will be delivered virtually and on-demand



