

N O R T H  
**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

1<sup>st</sup> QTR  
CY2022 –  
Requirements  
Confirmation  
with vendor

4<sup>th</sup> QTR CY2023 –  
Complete system  
design meetings

2<sup>nd</sup> QTR  
CY2024 –  
Member  
education  
begins

3<sup>rd</sup> QTR CY2022 -  
Begin system  
design meetings

4<sup>th</sup> QTR CY2023 –  
Business partner  
education and  
system testing  
begins

4<sup>th</sup> 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**

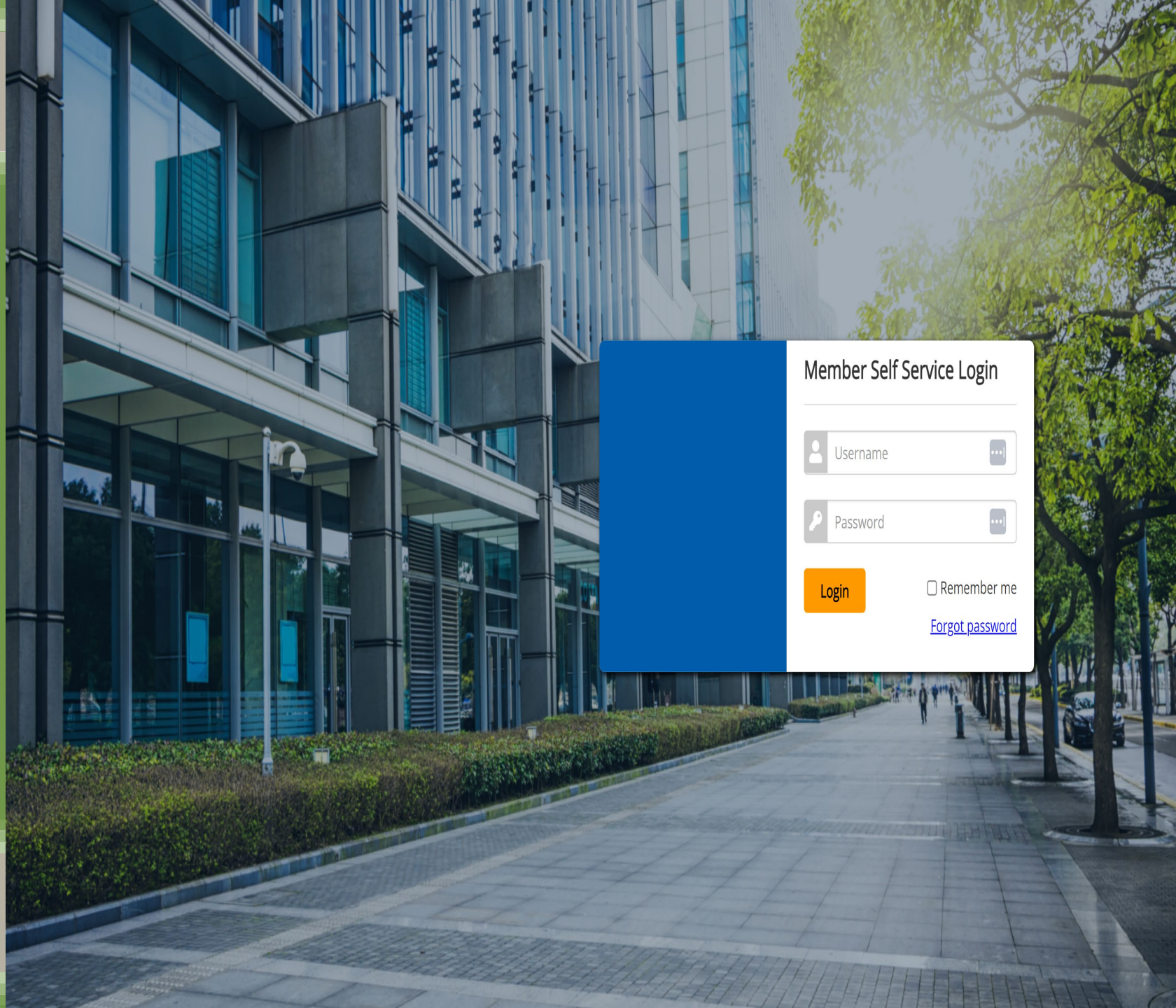
- Real time account balances
- Detailed transaction info
- Calculators to estimate benefits and payment options and RTT options

- **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



My Dashboard   

MEMBERSHIP ACCOUNTS

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

BENEFIT PAYMENT ACCOUNTS

Teachers Tier 1 Grandfathered

Account # : 1031

Status : Suspended

Gross Benefit

Net Benefit


Next Payment Date

\$0.00


\$0.00

07/11/2023


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


TO DO LIST

 [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](#)

MY SERVICE REQUESTS

Request Type	Request Date	Status
<a href="#">Process Pension Benefit Program Enrollment</a>	04/21/2020	In Progress

Real time account balance and service credit

Direct communication to and from TEFR



# 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 ✕ ⬅ ➡

Record displayed.

Retirement Applications ▾

NewOpen

☐Application NumberBenefit ProgramBenefit TypeBenefit OptionRetirement DateApplication Received DateApplication 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





Options 

My Dashboard   

### 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](#)

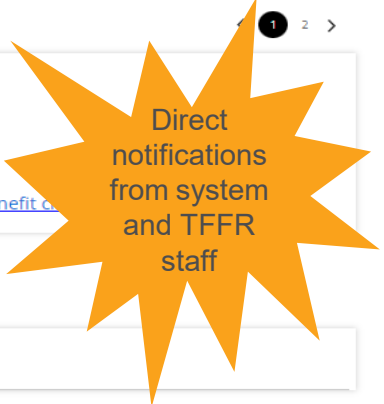
### MESSAGES AND OPPORTUNITIES

 [Employer Message Board Notification](#)


### MY SERVICE REQUESTS

< 1 2 3 ... 37 38 >

Request Type	Request Date	Status
<a href="#">Create Pension Enrollments via File Upload</a>	02/07/2018	In Progress
<a href="#">Create Pension Enrollments via File Upload</a>	02/07/2018	In Progress
<a href="#">Process Pension Benefit Program Enrollment</a>	02/07/2018	In Progress



Direct notifications from system and TFFR staff



Service ticket creation and notification center

# 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 : 

Select options 


Status : 

Select options 

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
	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

# BUSINESS PARTNER CONTRIBUTION REPORTING SCREEN

Reporting Organization :

Employer Organization :

Benefit Program :

Pay Period Type : 

Select options

Header Status : 

Select options

Submitted Status: 

Select options

Ready To Post : 

Select options

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

Reset

Store Search

Search Results

Open

Export to Excel

View Chart

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"/>	<a href="#">9848</a>	<a href="#">64784</a>	<a href="#">Bismarck City Schools</a>	<a href="#">Bismarck City Schools</a>	Teachers Tier 1 Grandfathered	04/01/2018	04/30/2018	04/30/2018	Valid		5000	1000
<input type="checkbox"/>	<a href="#">9845</a>	<a href="#">64781</a>	<a href="#">Bismarck City Schools</a>	<a href="#">Bismarck City Schools</a>	Teachers Tier 1 Grandfathered	03/01/2018	03/31/2018	03/31/2018	Processed	12/07/2022	6000	1200
<input type="checkbox"/>	<a href="#">9834</a>	<a href="#">64765</a>	<a href="#">Bismarck City Schools</a>	<a href="#">Bismarck City Schools</a>	Teachers Tier 1 Grandfathered	01/01/2018	01/31/2018	01/31/2018	Valid		2000	400
<input type="checkbox"/>	<a href="#">9833</a>	<a href="#">64765</a>	<a href="#">Bismarck City Schools</a>	<a href="#">Bismarck City Schools</a>	Teachers Tier 1 Grandfathered	03/01/2018	03/31/2018	03/31/2018	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



