



## COMET | PENSION SYSTEM RESUMPTION (PSR) PROJECT INFORMATION SHEET

### Systems To Be Replaced

- Amendment Tracking Log
- Automated Communications Exchange System (ACES)
- Benefit Equity System (BES)
- Benefit Payee System (BPS)
- Business Solutions Workflow
- CalPERS Online Member and Employer Transactions (COMET)
- Common Inquiry System (CIS)
- Community Property System
- Complementary Annuitant Premium Payment System (CAPP)
- Complementary Health Premium Program (CHPP)
- Computer Aided Receipt Processing System (CARPS)
- Contracts Golden
- Contribution Reporting System (CRS)
- Customer Information Control System (CICS)
- Death Case Management System
- Dental Database
- Disability Retirement System
- Document Management Capture (DMC)
- Document Management System (DMS/FileNet)
- Employer Reserve System (ERS)
- File Tracking System (FTS)
- Investment Office (INVO) – Invoice Control
- Judges' Accumulated Contribution System (JAC) – JRS
- Judges' Current Contributions System (JCC) – JRSII
- Judges Estimate System (JES)
- Judges' and Legislators' Retirement Systems (JLRS) Monetary Credits
- Judges' and Legislators' Retirement Systems (JLRS) Viewer
- Judges Retirement System (JUD)
- Legacy Employer (EPR)
- Legacy Member (MBR)
- Legislators Retirement System (LRS)
- Manual Tax Refunds
- MEM202
- Member Calculation Program
- Member Self Service (MSS)
- Option 4 Tracking System
- Payroll Correction System
- Pension Audit System
- Public Agency (PA) Billing
- Retirement Application Processing System (RAPS)
- Retirement Estimates
- Retirement Information and Benefits System (RIBS)
- Retirement Planning Calculator System (RPCS)
- Service Credit Buyback Accounting System (SCBA)
- Service Credit Cost Estimator (SCCE)
- SLIP (BNSD)
- SmartDesk
- Transaction Editing System (for Legacy Retired Judges (JUD))
- Transaction Log (TLOG) Interface

### Out of Scope

- Annual Member Statement (AMS) Infocenter
- Employer Manuals
- Employer Training System
- Frozen Employer/Frozen Member Access
- Governmental Accounting Standards Board (GASB) Data Extract
- Investment Operations & Systems
- Requirements to replace Actuarial Valuation System (AVS)
- Personnel Information Management System (PIMS)
- my|info
- Single Sign On (SSO) Personal Identification Number (PIN)
- Volunteer Firefighters' Length of Service Award System (VFLSAS)

For more detailed information about the project, please visit the PSR/ETM Portal at [psretm.calpers.ca.gov](http://psretm.calpers.ca.gov).



## COMET PENSION SYSTEM RESUMPTION PROJECT

INFORMATION SHEET - JULY 25, 2012



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### Scope

PSR sets the foundation for CalPERS vision to use the Internet as a primary channel for conducting its business. The foundation for the vision is a technology infrastructure that provides the flexibility, expandability, and scalability required to grow the business in the coming decades. The PSR Project lays the foundation for this technology infrastructure by implementing key components of the enterprise architecture; replacing the legacy Contribution Reporting and Benefit Payment Systems; converting the Judicial and Legislative Retirement Systems to the new technology base; and completing the corporate database.

### Approach

The PSR Project is based on a business-driven model, utilizing a phased approach to deliver critical business functionality on a highly flexible architecture. Deliverables are approved phase by phase, resulting in an aggregated achievement of Milestones. Implementation will consist of a multi-release strategy where the new myCalPERS is first introduced to internal staff and business partners, followed by the member community.

### Contract

**Contract Amount:** \$276,689,184

**Contract Type:** Fixed Price

### Schedule

**Start Date:** October 10, 2006

**Initial System Launch Date:** September 19, 2011

Target	Key Event	Completed
05/31/2007	Initiation Phase	05/31/2007
05/31/2007	Planning Phase	05/31/2007
05/30/2008	General Design	05/20/2008
09/30/2008	PSR Enterprise Technical Architecture	09/18/2008
07/30/2010	Application Refactoring Phase	07/30/2010
11/30/2010	Recovery Phase	11/30/2010
03/14/2011	End to End Test	04/12/2011
09/19/2011	Initial System Launch	09/19/2011
03/25/2012	Release 2 - Judges & Legislators	03/25/2012
07/29/2012*	Member Self-Service	
09/04/2012*	Release 3 - Enhanced Features	

\* Estimated dates

### Deliverables

**Number of Deliverables:** 202

**Number of Deliverables Completed:** 192

**Number of Deliverables Remaining:** 10

### Project Leadership Team

#### CalPERS

**Karen Ruiz**, *Project Director, Pension System Resumption (PSR) Project*  
**Christian Farland**, *Project Manager, Enterprise Transition Management (ETM)*  
**Quoc Ha**, *Manager, Technical Services And Testing (TSAT)*  
**Anthony Suine**, *Manager, Business Services And Testing (BSAT)*  
**Virginia Kayoda**, *Project Manager, Release 2-3*  
**Tacey Derenzy**, *Manager, Project Communications*

#### Accenture

**Dan Boxwell**, *Project Manager*  
**Ryan Cowen**, *Development Lead*  
**Kevin Peterson**, *Test Lead*  
**John Nichols**, *Senior Project Advisor*  
**Scott Cleland**, *Project Advisor*

### Governance Structure

#### Project Executives

**Ann Boynton**, *Deputy Executive Officer, Benefit Programs Policy & Planning*  
**Robert Glazier**, *Deputy Executive Officer, External Affairs*  
**Peter Mixon**, *General Counsel*

#### Steering Committee

**Donna Lum**, *Deputy Executive Officer, Customer Services & Support (Chair)*  
**Lori McGartland**, *Chief, Customer Service & Outreach (Vice-Chair)*  
**Russell Fong**, *Acting Chief Financial Officer*  
**Matthew Flynn**, *Chief, Investment Servicing*  
**Dale Jablonsky**, *Assistant Executive Officer, Information Technology*  
**Brad Pacheco**, *Chief, Office of Public Affairs*  
**Kathleen Webb**, *Chief Officer, for Risk, Compliance, and Ethics*

#### Business Owners Committee

**Kim Malm**, *Chief, Operations & Support Services (Chair)*  
**Karen DeFrank**, *Chief, Customer Account Services Division (Vice-Chair)*



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### Strategic Project Goals

1. Provide an information system addressing all of the business requirements of California's public pension system.
2. Create a Web self service environment that facilitates "one stop shopping" including access to and management of current customer account information.
3. Eliminate the dependency on paper documents by providing the ability to accept information and process transactions electronically.
4. Increase the integrity of pension related information by reducing multiple data stores and the manual entry of data.
5. Reduce the information technology costs related directly to the support of the retirement line of business.
6. Reduce the time to implement required pension system changes.
7. Reduce the work load devoted to data clean-up and reconciliation.
8. Apply business rules uniformly across all business components to ensure CalPERS adheres to all mandated laws, regulations, and policies.
9. Facilitate the movement to a more analytical work environment by automating more routine tasks.
10. Provide consistent presentation of pension related information across all CalPERS business processes.

### Successful Completion Criteria

1. PSR is implemented and operational in accordance with approved schedule.
2. Cost is managed to contract negotiated price and within negotiated changes approved through governance.
3. Solution-specific detailed requirements are:
  - a. accepted and approved by CalPERS;
  - b. traceable from a legislative requirement, an existing business process, or a preferred business process; and,
  - c. forward and reversibly traceable to the business requirements.
4. Independent verification and validation confirms deliverables meet PSR Project objectives, requirements and specifications.
5. CalPERS personnel are trained and assessed as being capable to operate systems delivered.
6. CalPERS has decommissioned 100 percent of targeted systems.

### Assumptions and Constraints

#### Assumptions

1. CalPERS business and technical organizations will be able to meet their resource commitments.

#### Constraints

1. The PSR Project will impose significant resource requirements upon the current CalPERS business, technical, and support organizations for the purpose of requirements definition, business process analysis, workforce transformation, and personnel retraining. Maintaining continuous involvement and support of these organizations will be critical to the final success and acceptance of the completed pension system.
2. The PSR Project will put significant stress and demand on the CalPERS technical support organization for supporting development and testing environments for the PSR Project as well as playing a critical role in the data migration and decommissioning of existing systems.

### Associated Projects

- Business Partner Contingency Options for File Readiness
- Document Capture (DC)
- Document Imaging Migration Project
- Virtual Information Systems Architecture (VISA)