



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 21

MEETING DATE: August 21, 2024

SUBJECT: Technology Report—Second Quarter 2024

SUBMITTED FOR: Consent Deliberation and Action Receive and File

RECOMMENDATION

Receive and file the Technology Report for the quarter ended June 30, 2024.

PURPOSE

This item supports the Strategic Management Plan to leverage technology to continuously improve performance, productivity, and efficiency in fulfillment of the SCERS' mission.

DISCUSSION

The Technology Report is provided to ensure oversight of the organization's technological progress, ensuring it aligns with strategic objectives. This report offers a snapshot of technological advancements, system implementations, and digital transformation updates. It serves to inform decisions on current and future technology initiatives.

This quarterly report reflects a 3-month review of 2024 performance.

ATTACHMENT

- Board Order
- Technology Report—Second Quarter 2024
- Technology Report—Second Quarter 2024 Presentation

Prepared by:

/s/

Timothy Taylor
Chief Technology Officer

Reviewed by:

/s/

Margo Allen
Chief Operations Officer

/s/

Eric Stern
Chief Executive Officer



Retirement Board Order

Sacramento County Employees' Retirement System

Before the Board of Retirement
August 21, 2024

AGENDA ITEM:

Technology Report—Second Quarter 2024

THE BOARD OF RETIREMENT hereby accepts the recommendation of staff to receive and file the Technology Report for the quarter ended June 30, 2024.

I HEREBY CERTIFY that the above order was passed and adopted on August 21, 2024 by the following vote of the Board of Retirement, to wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

ALTERNATES:
(Present but not voting)

Board President

Eric Stern
Chief Executive Officer and
Board Secretary

Technology Report—Second Quarter 2024

Digital Transformation - Year 0				FY 23/24 Budgeted Amount - \$1,000,000		
ID	Initiative Name	Target Date	Status	Budgeted	Expended	Annual Cost
0.1	Enterprise Resource Planning Committee	2023 - Q4	Completed	\$ -	\$ -	\$ -
0.2	SCERS.gov Transition	2024 - Q2	Completed	\$ -	\$ -	\$ -
0.3	Online Appointment Scheduling	2024 - Q1	Completed	\$ 230	\$ 230	\$ 230
0.4	Direct Deposit Member Notification	2024 - Q2	Development	\$ -	\$ -	\$ -
0.5	Member Portal - Phase I	2024 - Q2	Testing	\$ 603,500	\$ 597,816	\$ 110,200
0.6	Member Engagement Platform	2024 - Q2	Completed	\$ 5,580	\$ 5,580	\$ 5,580
0.7	Online Death Reporting	2024 - Q3	Not Started			
0.8	Workflow Management: Retirement Pipeline	2024 - Q2	Development			
0.9	Online Retirement Application	2024 - Q3	Development	\$ 197,000	\$ -	\$ 50,000
0.9.1	Secure File Upload	2024 - Q3	Development			
0.10	Business Continuity/Single Device Strategy	2024 - Q4	Initiated	\$ 105,000	\$ 32,625	
Year 0 Sub Total				\$ 911,310	\$ 636,251	\$ 166,010

Digital Transformation - Year 1				FY 24/25 Budgeted Amount - \$1,750,000		
ID	Initiative Name	Target Date	Status	Budgeted	Expended	Annual Cost
0.5	<i>Member Portal - Phase I (Continued)</i>	<i>2024 - Q3</i>	<i>Testing</i>	\$ 5,684	\$ 5,643	\$ -
0.10	<i>Business Continuity/Single Device Strategy</i>	<i>2024 - Q4</i>	<i>In Progress</i>	\$ 72,375	\$ 70,963	\$ -
1.1	Member Portal - Phase 2					
1.2	Online Service Purchase Calculator					
1.3	Back Office Transformation: Retirement Pipeline					
1.4	Workflow Management/Transformation: Service Purchase					
Year 1 Sub Total				\$ 78,059	\$ 76,606	\$ -

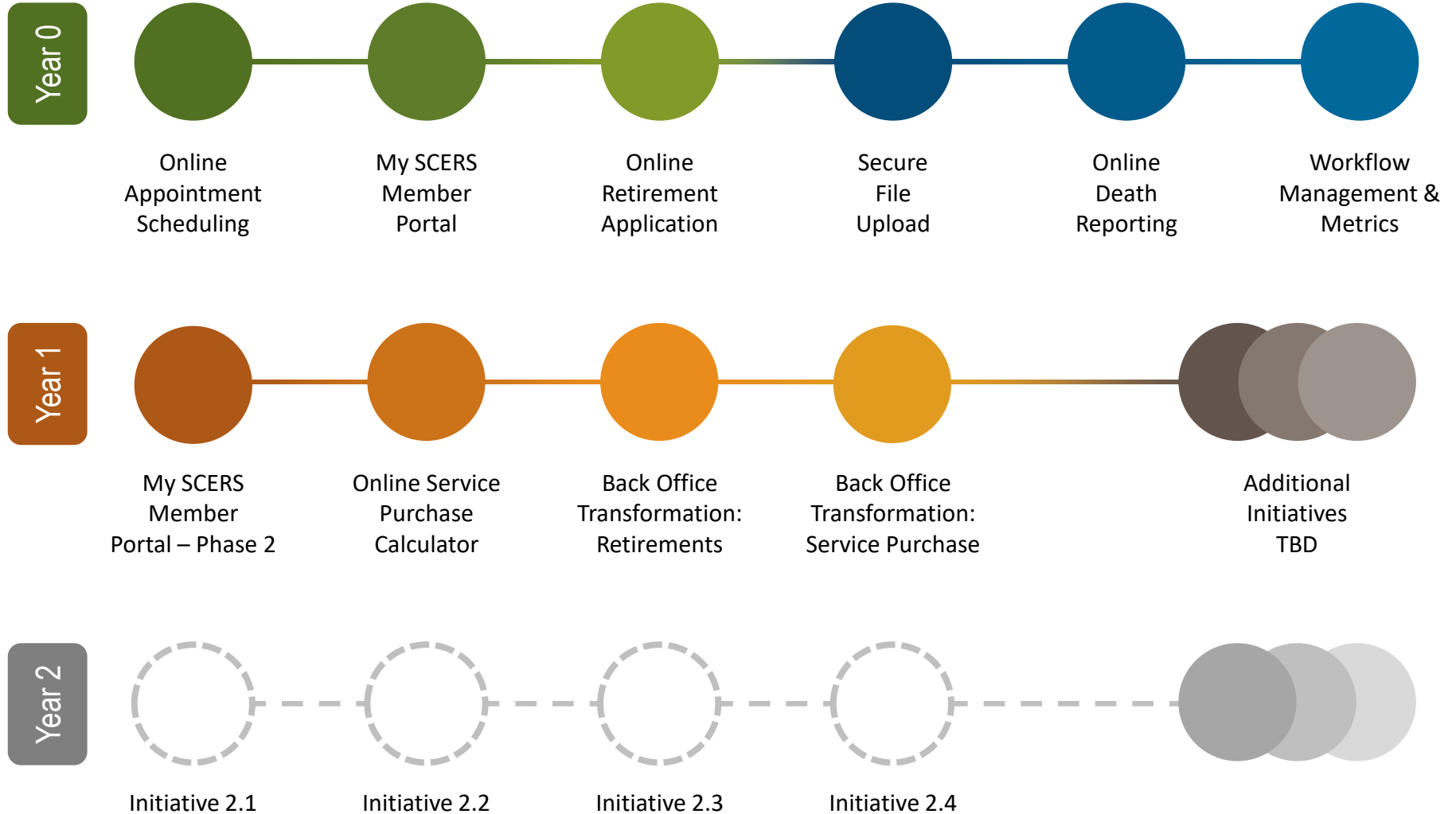


Technology Report

Second Quarter 2024

August 21, 2024

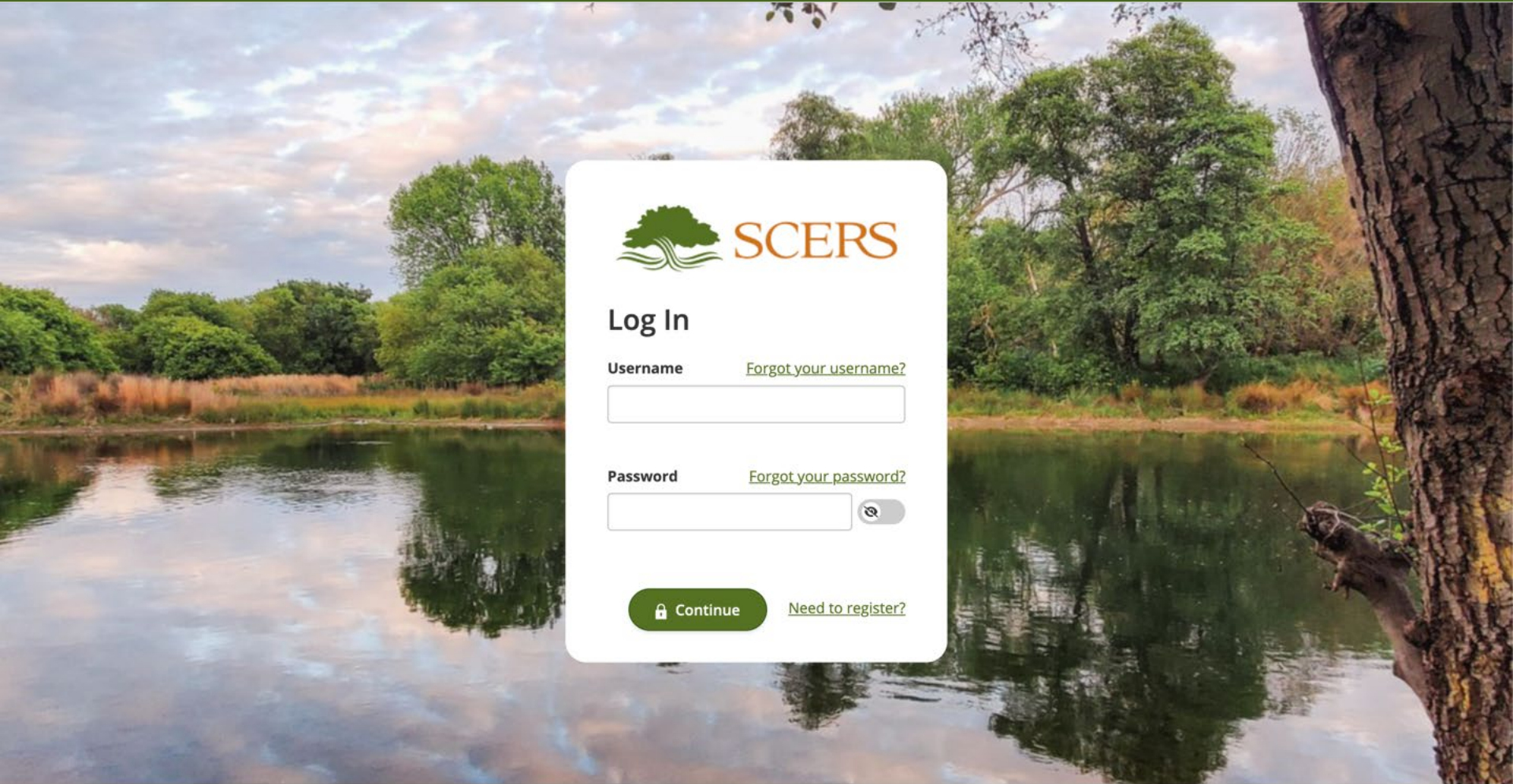
High Level Roadmap Refined



Digital Transformation – 2024 Q2 Update

- Single Device Strategy Initiated
- Member Engagement Platform Implemented
- Online Retirement Application (ORA) and Secure File Upload in Development
- MySCERS Portal in Testing

MySCERS Overview – *my.scers.gov*





Log In

Username [Forgot your username?](#)

Password [Forgot your password?](#)

[Need to register?](#)

MySCERS Overview - Registration



Registration Steps

- Terms and Conditions of Use
- Identify Yourself**
- Confirm address
- Create Account
- Activate Account

Identify Yourself

Please provide us with the information we will need to set up your secure online account.

First Name

Last Name

Date of Birth

mm/dd/yyyy

 / /

Social Security Number

9 digits, no dashes or other characters



Continue



Registration Steps

- Terms and Conditions of Use
- Identify Yourself
- Confirm address**
- Create Account
- Activate Account

Confirm Your Mailing Address

Below is the mailing address SCERS has on file for you. Click "Continue" if it is correct.

8864 [REDACTED] WAY, SACRAMENTO, CA 95828

[This address is not correct.](#)

MySCERS Overview - Registration



Registration Steps

- ✓ Terms and Conditions of Use
- ✓ Identify Yourself
- ✓ Confirm address
- **Create Account**
- Activate Account

Create Your Account

Please select a username and password for your online account.

Username and Password

Username

Must be at least five characters long, start with a letter, and can only contain letters and numbers. Usernames are not case sensitive.

Enter Password

Must be at least eight characters in length and is case sensitive. Your password should include at least one numeric character, one capital letter, one lowercase letter, and one special character (e.g. @~#\$(^)_+=-!.,?'').



Re-Enter Password



Contact Information

As an additional layer of security, we require multifactor authentication to access your account. Multifactor authentication is a method of verifying your identity using multiple factors, such as a password and a verification code sent to your mobile device or email.

Email Address

MySCERS Overview - Registration



Registration Steps

- ✓ Terms and Conditions of Use
- ✓ Identify Yourself
- ✓ Confirm address
- ✓ Create Account
- **Activate Account**

Activate Your Account

SCERS sent a verification email to the address you provided. Follow the instructions in the message. Once your email address is verified, an authorization code will be sent via postal mail. Use this code to complete the account activation process.

✓ **Email Address Verified**
[redacted] has been verified

✓ **Authorization Code Verified**
Your authorization code has been verified

[Go To MySCERS](#)

MySCERS Overview – Active View



My Account ▾

[Home](#) [Tools & Resources](#) [Contact Info](#)

Hello, [Redacted]

Account information as of 06/22/2024

Account Summary

Name	[Redacted]
Employee ID	[Redacted]
Member Since	10/28/2006
Current Status	Active
Current Plan	Miscellaneous Tier III
Current Employer	Sunrise Park District
SSN	XXX-XX- [Redacted]

Service Credit

18.4000
Years

Vesting Status

Congratulations,
you are fully vested!

Retirement Calculator



Estimate your future pension benefits today!
Use our Retirement Benefit Calculator and plan
your retirement with confidence.

[Start Your Estimate](#)

Service Credit History

Miscellaneous Tier III - Current Plan
18.4000 Years

Contributions

\$65,269.34

Interest

\$10,565.35

Contributions & Interest

\$75,834.69

MySCERS Overview – Retiree View



My Account ▾

[Home](#) [Tools & Resources](#) [Contact Info](#)

Hello, [blacked out]

Account Summary

Name Kristine Waggoner
Member Since
Account Type Retiree
Current Status Retiree
Retiree PIN [blacked out]
SSN XXX-XX-[blacked out]

Monthly Pay Advice



Stay informed about your finances! Click here to view your monthly pay advice and keep track of your retirement income with ease.

[View Your Pay Advice](#)

1099R Statement



Access your financial history now! View your 1099R statement, ensuring you have all the details you need for a smooth tax season.

[View Your 1099R](#)

Tax Withholding



Take control of your taxes! Review or change your tax withholdings, tailoring your retirement income to fit your financial needs.

[Update Your Withholdings](#)

MySCERS Overview – Retiree Pay Advices

SAP Pay Advices: 01/31/2024

◀ Previous Statement ▶ Next Statement

Overview and Selection

Show: Last 3 months

Payment Date	Payment Amount
01/31/2024	1,111.73 USD
12/29/2023	1,105.48 USD

Salary Statement

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County of Sacramento - Payroll History Information - Pay Date: [REDACTED]

<table border="0"> <thead> <tr> <th>COMPENSATION</th> <th>Rate</th> <th>Hours</th> <th>This Period</th> <th>Year-to-Date</th> </tr> </thead> <tbody> <tr> <td>Misc 3 CPI</td> <td>0.00</td> <td></td> <td>284.75</td> <td>284.75</td> </tr> <tr> <td>Misc 3 SDB</td> <td>0.00</td> <td></td> <td>1,061.62</td> <td>1,061.62</td> </tr> <tr> <td colspan="5">-----</td> </tr> <tr> <td>Total Compensation</td> <td></td> <td></td> <td>1,346.37</td> <td>1,346.37</td> </tr> <tr> <td colspan="5">.....</td> </tr> <tr> <td colspan="5" style="text-align: center;">TAXES PAID</td> </tr> <tr> <td>IncTax-Federal</td> <td></td> <td></td> <td>184.64</td> <td>184.64</td> </tr> <tr> <td>IncTax-California</td> <td></td> <td></td> <td>50.00</td> <td>50.00</td> </tr> <tr> <td colspan="5">-----</td> </tr> <tr> <td>Total Taxes</td> <td></td> <td></td> <td>234.64</td> <td>234.64</td> </tr> <tr> <td colspan="5">.....</td> </tr> <tr> <td>Total Net Pay</td> <td></td> <td></td> <td>1,111.73</td> <td>1,111.73</td> </tr> <tr> <td colspan="5">=====</td> </tr> </tbody> </table>	COMPENSATION	Rate	Hours	This Period	Year-to-Date	Misc 3 CPI	0.00		284.75	284.75	Misc 3 SDB	0.00		1,061.62	1,061.62	-----					Total Compensation			1,346.37	1,346.37					TAXES PAID					IncTax-Federal			184.64	184.64	IncTax-California			50.00	50.00	-----					Total Taxes			234.64	234.64					Total Net Pay			1,111.73	1,111.73	=====					<table border="0"> <thead> <tr> <th colspan="5">OTHER INFORMATION</th> </tr> </thead> <tbody> <tr> <td>Employee ID</td> <td colspan="4">[REDACTED]</td> </tr> <tr> <td>Schedule/Department</td> <td>SPECIAL</td> <td colspan="3">[REDACTED]</td> </tr> <tr> <td>Payroll Area/Period</td> <td>M1</td> <td colspan="3">01/2024</td> </tr> <tr> <td>Pay Period Date</td> <td colspan="4">01/01/2024-01/31/2024</td> </tr> <tr> <td>Loc. Code/Pers. Subarea</td> <td>9999</td> <td colspan="3">2002</td> </tr> <tr> <td colspan="5">W4 Tax Profile</td> </tr> <tr> <td>Federal</td> <td>Single</td> <td>00</td> <td>100.00</td> <td>Add'l Ta</td> </tr> <tr> <td>California</td> <td>Single</td> <td>99</td> <td>50.00</td> <td>Add'l Ta</td> </tr> </tbody> </table>	OTHER INFORMATION					Employee ID	[REDACTED]				Schedule/Department	SPECIAL	[REDACTED]			Payroll Area/Period	M1	01/2024			Pay Period Date	01/01/2024-01/31/2024				Loc. Code/Pers. Subarea	9999	2002			W4 Tax Profile					Federal	Single	00	100.00	Add'l Ta	California	Single	99	50.00	Add'l Ta
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MySCERS Overview – Retiree 1099-R

SAP 1099R Statement

< Previous Statement Next Statement >

Overview and Selection

Personnel Number	Tax Year
■■■■	2022
■■■■	2021
■■■■	2020
■■■■	2019
■■■■	2018

1099R Statement

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Form 1099-R CORRECTED (if checked) OMB No. 1545-0119 **2022**

1 Gross distribution 2a Taxable amount **Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**

\$ 15762.00 \$ 15762.00

2b Taxable amount not determined Total distribution 12 FATCA filing requirement 13 Date of payment

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

Sacramento County Employees' Retirement
980 9th Street, Suite 1900
Sacramento, CA 95814 916-874-9119

PAYER'S TIN RECIPIENT'S TIN

3 Capital gain (included in box 2a) 4 Federal income tax withheld 5 Employee contributions/Designated Both contributions or insurance premiums

\$ \$ 2363.94 \$

6 Net unrealized appreciation in employer's securities 7 Distribution code(s) IRA/SEP/SIMPLE 8 Other %

3

Form 1099-R CORRECTED (if checked) OMB No. 1545-0119 **2022**

1 Gross distribution 2a Taxable amount **Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**

\$ 15762.00 \$ 15762.00

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PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

Sacramento County Employees' Retirement
980 9th Street, Suite 1900
Sacramento, CA 95814 916-874-9119

PAYER'S TIN RECIPIENT'S TIN

3 Capital gain (included in box 2a) 4 Federal income tax withheld 5 Employee contributions/Designated Both contributions or insurance premiums

\$ \$ 2363.94 \$

6 Net unrealized appreciation in employer's securities 7 Distribution code(s) IRA/SEP/SIMPLE 8 Other %

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High Level Roadmap Refined

