



## 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 (CAPPS)
- 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 System (DMS/FileNet)
- Employer Reserve System (ERS)
- File Tracking System (FTS)
- HPB PA Billing
- 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 System, & Volunteer Firefighters' Award System (JLVO) Monetary Credits
- Judges' and Legislators' Retirement System, & Volunteer Firefighters' Award System (JLVO) 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
- 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 (BND)
- SmartDesk
- Transaction Editing System (for Legacy Retired Judges (JUD))
- Transaction Log (TLOG) Interface
- Voluntary Data Sharing Agreement (VDSA)

### 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)
- RoboInfo
- 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 PROJECT PORTAL AT [PSR.CALPERS.CA.GOV](http://PSR.CALPERS.CA.GOV).



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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. There are 23 Phases and 6 Milestones at which the PSR Project will demonstrate progress toward achievement of Strategic Goals.

CONTRACT

**Contract Amount:** \$199,797,094  
**Contract Type:** Fixed Price  
**Number of Deliverables:** 165

SCHEDULE AND MILESTONES

**Start Date:** October 10, 2006  
**Expected System Implementation Date:** November 30, 2009

TARGET	MILESTONE	COMPLETED
05/10/2007	Initiation Phase	05/31/2007
05/31/2007	Planning Phase	05/31/2007
05/30/2008	General Design	
09/10/2008	PSR Enterprise Technical Architecture	
10/13/2009	Application Development	
11/30/2009	System Implementation	
03/05/2010	Final System Acceptance	

PROJECT LEADERSHIP TEAM

CALPERS

**Terry Bridges**, *Project Manager*  
**David Duarte**, *Deputy Project Manager*  
**Anthony Suine**, *Business Deputy Project Manager*  
**Jacque Silver**, *Project Office Manager*  
**Steve Howe**, *Senior Project Advisor*

ACCENTURE

**Tom Hartman**, *Project Manager*  
**Owen Davies**, *Deputy Project Manager*  
**Lulu Fou**, *Project Office Manager*

GOVERNANCE STRUCTURE

PROJECT EXECUTIVES

**Jarvio Greivous**, *Deputy Executive Officer, Benefits Administration*  
**Gloria Moore Andrews**, *Deputy Executive Officer, Operations*  
**Ron Seeling**, *Chief Actuary*

STEERING COMMITTEE

**Kathie Vaughn**, *Assistant Executive Officer, Member and Benefits Services (Chair)*  
**Teri Bennett**, *Assistant Executive Officer, Information Technology Services*  
**Gregory Franklin**, *Assistant Executive Officer, Health Benefit Services*  
**John Hiber**, *Assistant Executive Officer, Administrative Services*  
**Pat Macht**, *Assistant Executive Officer, Office of Public Affairs*  
**Ken Marzion**, *Assistant Executive Officer, Actuarial and Employer Services*  
**Loren Suter**, *Executive Consultant*

BUSINESS OWNERS COMMITTEE

**Lori McGartland**, *Division Chief, Employer Services (Chair)*  
**Holly Fong**, *Division Chief, Employer and Member Health Services (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.
2. The Enterprise Architecture and Enterprise Transition Management projects will meet their commitments to PSR according to schedule.

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.

DEPENDENCY PROJECTS

- 21st Century Project (State Controller's Office)
- Document Management Migration & Print Queue Implementation
- Enterprise Identity and Access Management (EIAM)
- Enterprise Transition Management (ETM)
- Enterprise Management of Billing and Accounts Receivable Collections (EMBARC)
- Government-to-Government (G2G)
- my|CalPERS Integration
- PeopleSoft Requirements & Gap Analysis