Blended Retirement Project

Office of the Chief Operating Officer
Senior Advisor, Uniformed Services

Enterprise Project Management Office (EPMO)
Office of Enterprise Planning

Outline

- Uniformed Services Update
- Accomplishments
- Schedule
- Risks

Blended Retirement

Uniformed Services Update

- DFAS DJMS-AC: Programming has been completed
- DFAS DJMS-RC: Programming almost completed
- Calculators to help Opt-In members with the decision to be released by March 31st
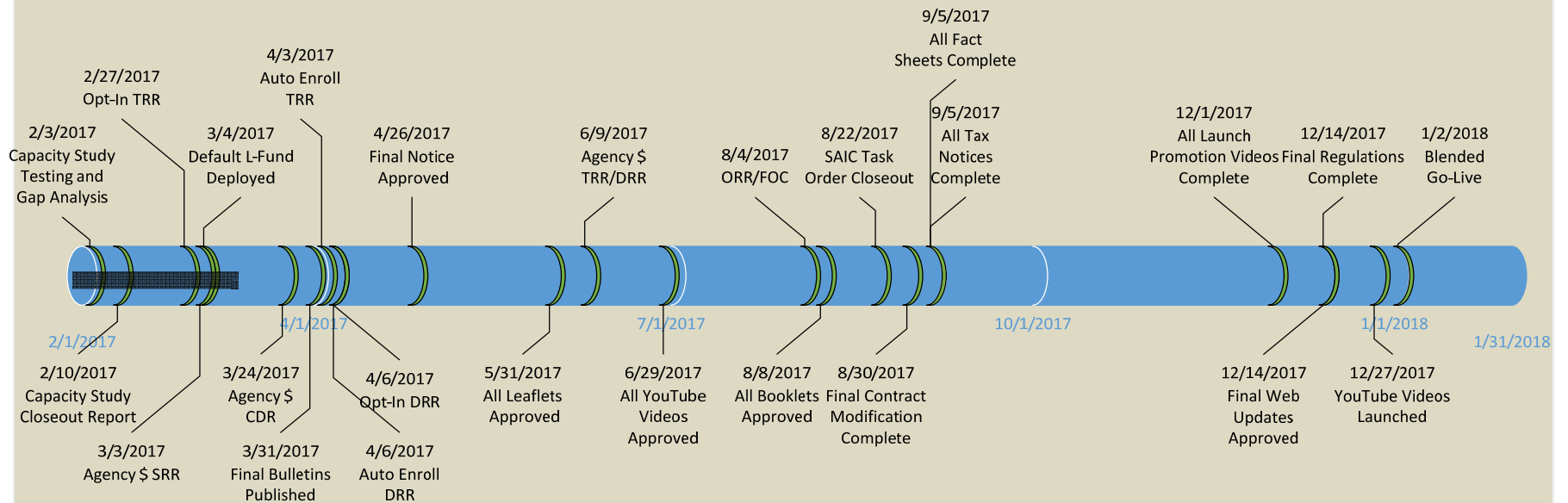- All indications the services are on track for January 1st, 2018

Accomplishments

L Fund Default
- First of the four IT work streams completed
- Successfully deployed into production on March 4th (on schedule)
- Functionality includes:
  - Newly enrolled Uniformed Services Members (USM) in the TSP are defaulted into an age appropriate Lifecycle (L) Fund as is currently done with civilian participants
  - Existing (Opt-In) participants will be defaulted into age appropriate Lifecycle (L) Fund when no contribution allocation is on file
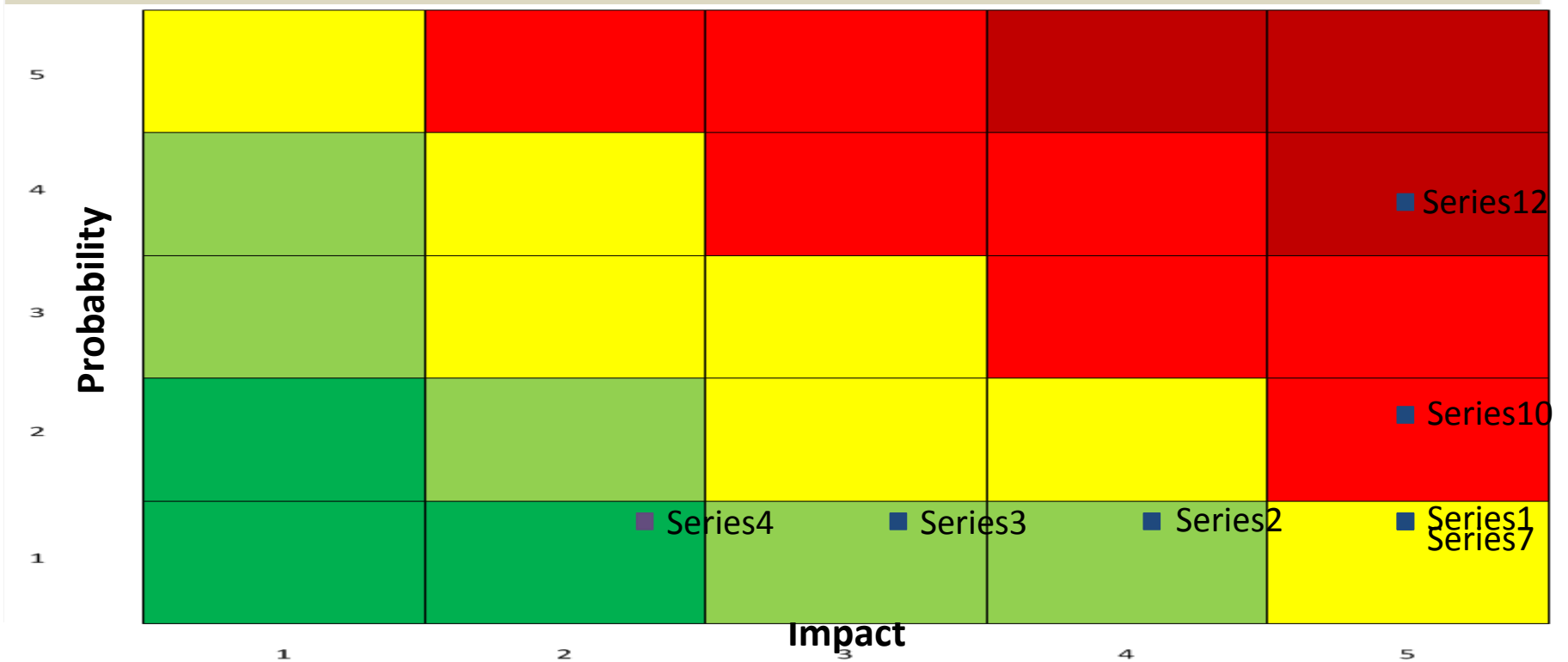 - 5 Applications had changes

Capacity
- More comprehensive capacity study received in February
- Capacity Mitigation has commenced, anticipated resolution September 2017
  - Storage upgrades for multiple applications
  - Two additional mainframe processing engines will be turned on
  - Additional capacity testing

Schedule

2/3/2017 Capacity Study Testing and Gap Analysis

2/27/2017 Opt-In TRR

4/3/2017 Auto Enroll TRR

3/4/2017 Default L-Fund Deployed

4/26/2017 Final Notice Approved

6/9/2017 Agency $ TRR/DRR

9/5/2017 All Fact Sheets Complete

8/4/2017 ORR/FOC

8/22/2017 SAIC Task Order Closeout

9/5/2017 All Tax Notices Complete

12/1/2017 All Launch Promotion Videos Complete

12/14/2017 Final Regulations Complete

1/2/2018 Blended Go-Live

2/1/2017

4/1/2017

7/1/2017

10/1/2017

1/1/2018

1/31/2018

2/10/2017 Capacity Study Closeout Report

3/24/2017 Agency $ CDR

4/6/2017 Opt-In DRR

5/31/2017 All Leaflets Approved

6/29/2017 All YouTube Videos Approved

8/8/2017 All Booklets Approved

8/30/2017 Final Contract Modification Complete

12/14/2017 Final Web Updates Approved

12/27/2017 YouTube Videos Launched

3/3/2017 Agency $ SRR

3/31/2017 Final Bulletins Published

4/6/2017 Auto Enroll DRR

Critical Risks

Risk #	Risk Description	Mitigation Strategy
J	If Payroll offices are not ready to go live on 01/01/2018, then a forced delay to implementation will be realized	External Risk; Track each Payroll Office Separately. Maintain communication with DFAS and DOD
L	If Thriftline is not upgraded to process higher volumes, then participant services will be impacted	A solution will be in place by May to increase volume by an estimated 30%. A fix to eliminate the hairpin turn which will allow us to handle BRS volumes is being worked on, waiting for a detailed schedule

Questions

Questions?