Glossary of Terms for the Pension Solution Update

Business Scenario Groups (BSGs): A prioritized list of BenefitConnect functionalities to focus both the CalSTRS and Sagitec teams on throughput of workload/PIR resolutions. The prioritization focuses on foundational system function and progresses through the member lifecycle with inclusion of core functionality.

Code Merge – The combining of three separate code streams originally designated for three different functional rollout phases. In an effort to improve efficiencies, quality, and reduce schedule constraints leading up to Go Live.

Conversion refers to the work required to move data from an old computer system (the "legacy" system) to a new computer system.

Design PIR refers to Problem Incident Reports (PIRs) noting differences between the design documentation and the intended functionality of the new system (BenefitConnect).

Employer Readiness Environment (ERE): A non-production system environment utilized by employers during Soft Launch, between October 2019, and Go Live.

Employer Support Portal: A website that employers visit to be a one-stop-shop for everything CalSTRS related. Employers can access the current Secure Employer Website, PALMS (Pension Administration Learning Management System) and the Employer Readiness Environment from the landing page. Employers will also have access to tools and resources such as job aids and file specification documents. Employers have a Message Board where they can learn about key items from CalSTRS.

Encumbrances: Commitment of funding for legally authorized expenditures. Recording an encumbrance is the initial step in legal/budgetary accounting for expenditures.

IPOC:
- Independent Project Oversight Consultants. Guidehouse has served as the board oversight vendor since acquiring Grant Thornton in 2022. Grant Thornton has served as the board oversight vendor since 2011.
- IPOC reports focus on project sponsorship, governance, project management, risk and issue management, organizational change and training management, and vendor and contract management.

IV&V:
- Independent Verification and Validation.

- MAXIMUS has served as the Pension Solution IV&V consultant since 2015.
- The IV&V reports typically focus on six project areas, including requirements, system development, interfaces, deliverable review, and data conversion and reconciliation.

Interim Services Period (ISP): The period of time from July 1, 2022, through June 30, 2023, where Sagitec Solutions is providing essential services (e.g., fixes to design and development and system testing) in collaboration with CalSTRS for the ongoing development of the BenefitConnect system.

ISSV: Implementation Support Services Vendors are the vendors who will be responsible for managing the implementation of the project for the remainder of the project, along with providing services such as training, testing, and business cutover.

JAMA: The Pension Solution project requirements management repository.

Joint Application Design Sessions (JAD) are the meetings in which the vendor and CalSTRS staff work through the process of aligning business requirements with technological design specifications to design the system. These sessions will begin again after the FR3 Fit/Gap.

NeoTrack - NeoTrack is Sagitec's tool to track Neospin functionality through testing except UAT. It provides traceability and coverage for requirements, designs, test cases, and defects.

NeoTrack is used to perform the following:
- Writing Test Cases
- Executing Test Cases
- Creating PIRs
- Generating Test Results

Operational Reports: Standard operational reports monitor basic operations such as workflow metrics, user access trace audit logs, problem incident reports, and many more. Most of the standard reports do not require any customization. Additionally, Neospin tracks basic operational transaction response times, including online transactions, batch jobs, query execution time, screen access timestamp, and user information. Operational Reports are intended to be statistical in nature providing metrics not found in Benefit Connect.

Parallel Testing: Testing performed to confirm that the BenefitConnect system is functioning properly based on comparisons with the existing CalSTRS legacy system(s). Parallel testing confirms that key business processes (e.g., monthly payroll and benefits recalculations) that are tested side-by-side with legacy systems return results that either match or have explainable and acceptable differences (i.e. due to changes in edit rules or other planned functional changes).

Problem Incident Report (PIR): Documentation that is submitted when a defect is discovered. A "defect" refers to any instance in which the system in the test environment does not function according to the design specification (DS) or when the actual result does not match the expected result.

Resources: Project resources means people resources, including staff and contractors.

Soft Launch: The FR1 Soft Launch of the employer readiness environment was implemented October 2019. This environment is intended for the employer reporting partners to gain familiarity with the new system and to test the new file formats in advance of the production implementation. Improvement idea to release FR1 BenefitConnect functionality to the applicable CalSTRS and Employer community to allow them to become familiar with and use the product prior to Go Live. The idea came about due to the challenges of keeping START (current record system) and BenefitConnect synchronized for an extended period while both systems are in production.

Software defects, also known as Problem Incident Reports (PIRs), are descriptions of problems with software that block it from performing the business functions they were designed to execute.

Spending Authority: Authorizes the project to expend appropriated funds based on the approved project budget.

Strengthen Our Foundation – 10 Bricks Approach during the ISPsolidify project structure and processes and implementt best practices to build a stronger project foundation by focusing on the following:

1. Establish a test approach based on best practices
2. Acquire project management services (Develop plans, policies, and processes)
3. Sagitec to resolve critical data conversion Problem Incident Reports (defects or enhancements)
4. Update the tools to include data that facilitates tracking project progress
5. Pilot test approach
6. Conduct sessions to grow understanding of system functionality
7. Establish metrics for ISP bricks
8. Implement the top 10 Project Improvements from lessons learned
9. Prioritize Design PIRs for 'Go Live'
10. Refine design specifications to address design PIRs

User Acceptance Testing (UAT) is formal testing of CalSTRS business processes to verify the new system, BenefitConnect, meets organizational needs and is ready for production. UAT is performed by CalSTRS and supported by the implementation vendor.