

Converge Program Update

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Agenda

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Overview

Critical Readiness Activities	Overall Status
Data Readiness	On Track
Payroll Office Readiness	On Track
Security	On Track
Service Readiness (e.g., People, Process, Platform)	On Track
Participant Communications	On Track

Data Readiness

Test Load Data Progress

- Test Load 4 was our first rehearsal that ran over a 3-week period in 3 phases
- Test Load 4 proved-out data analysis and correction processes installed as a result of Test Load 3
- Test Load 4 identified additional process and system efficiencies

Highlights & Key Outcomes

- The 3 phases associated with Test Load 4 have been fully executed
- Additional efficiencies will further accelerate data conversion activities
- A final rehearsal will take place in April to validate that all steps and improvements yield expected outcomes ahead of production cut-over

Payroll Office & Service Readiness

- **Interconnection Security Agreements (ISAs)**



- 94% of ISAs have been signed and fully executed

- **Testing & Training**



- 94% of Phase 1 computer-based training has been completed by Agency users
- 46% of Data Testing and concurrent Phase 2 “hands on” training has been completed
 - ✓ Target to complete all Phase 2 training is 5/20

- **Performance Assessment**



- Involves the period prior to go-live that will be used to test end-to-end processes
- This activity is on track and will be used to confirm overall readiness

Participant Communications

- **Campaign 1 is Complete!**

- Mailing, four emails, web portal, and four tweets are all live
- A “Communications Toolkit” was distributed to FRTIB Partner Agencies / Services and ETAC to use in communicating upcoming changes


- **Campaign 2 in In-Progress**

- Transition / blackout notice was distributed via mail and email on 3/29
- Additional participant communications include:
 - Emails, tweets, *Thrift Savings Planner*
 - Updated TSP.gov/new-tsp-features web content with key transition dates
 - Training team presentations

- **Go-live Communications**

- Campaign 3 (It's Here!) content is in development
- Contingency communications scenario planning and asset development is in progress

March 2022



Important: Please read this entire message about upcoming TSP changes and key transition dates that may affect your account.

Expected transition dates
May 16 to the first week of June

All transactions temporarily unavailable
May 26 to the first week of June

Full access and transactions restored
First week of June

Dear Participant:

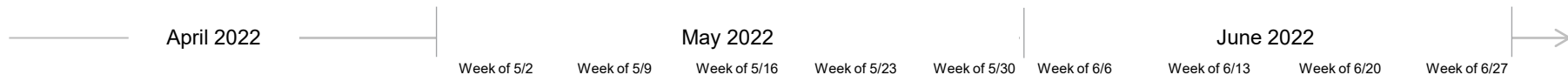
In order to add exciting new features to your TSP experience, we're transitioning administrative services to a new service provider later this year. You need to know how this transition might affect you, especially if you were planning to request a transaction soon. [Be sure to visit our website to see key transition dates](#) when we'll need to temporarily suspend certain transactions and services. Planned downtime like this is typical of major, complex processes, and you may remember a similar situation when we added flexible withdrawal options in 2019.

We expect to complete the transition the first week of June. You'll still have access to the same low-cost TSP funds, account management tools, and participant services you enjoy now. You'll also be able to use new features that give you more choices, more layers of security, and more efficient ways to manage your retirement income with us.

Participant Communications (cont.)



Critical Events Leading up to Go Live



★ April 29 (9pm ET)

- Forms: Last day to request paper forms and plan materials through the ThriftLine.

Transition: May 16 – first week in June

★ 5/16 through first week of June:

Key transactions temporarily unavailable*

- Loan requests
- Withdrawal and distributions
- Rollovers/Transfers

★ 5/26 through first week of June:


All transactions and services temporarily unavailable, including My Account and ThriftLine





★ First week of June:

Transition complete - full access and transactions restored

Converge Delivery Milestones

✓ Program Governance Model Created 12/11/20	UAT Executed 12/31/21
✓ Approve and establish governance model for RKSA transition.	Execution of User Acceptance Testing, not including findings or remediations.
✓ Transition Planning Complete 02/26/21	Recordkeeping Data Conversion Round 3 02/03/22
✓ Finalize planning activities, including initial meetings, standup of PMO, and establishing transition governance.	Initial data conversion of non-anonymized system data in preparation for go-live.
✓ Recordkeeping Data Conversion Round 1 06/30/21	ATO Granted 02/28/22
✓ Initial data conversion test including partial data and additional anonymized data sets to validate functionality.	FRTIB validates compliance with H.27 and grants ATO for Accenture.
✓ Recordkeeping Data Conversion Round 2 09/30/21	Business Continuity Exercise 04/08/22
✓ Secondary data conversion test featuring anonymized data sets for the full scope of RKSA.	Validation of business continuity exercises outlining FRTIB operations including physical recovery, communications, and alternate logistics.
✓ System Test Complete 11/30/21	Recordkeeping Data Conversion Round 4 04/15/22
✓ Final validation of the data conversion round two success and technical approval for data conversion round three (Completed 2/25/22).	Final data conversion of non-anonymized system data in preparation for go-live.
✓ ATO Submitted 11/30/21	Performance Targets Achieved 05/13/22
✓ ATO submission by Accenture for FRTIB approval.	Validation final configuration of Converge meets the pre-agreed upon performance targets prior to go-live.

	Go-Live June 2022
	Operational go-live for Converge including delivery of all promised features.

-  Complete
-  On Track
-  At Risk
-  Missed

Questions?