## Table of Contents

Click a link to walk through a specific procedure.

### ALL MEMBERS AND PAYEES

#### 1 GETTING STARTED
- How do I register?
- How do I log on?
- How do I update security questions?
- How do I retrieve/reset my password?
- How do I retrieve my forgotten user name?
- How do I unlock my user account?
- How do I log off?
- How can I change my email address?
- What are the MSS Portal system requirements?

#### 2 NAVIGATING THE MEMBER PORTAL
- What is the News section for?
- What is the Alerts section for?
- Where are the Menu Links and what are they?
- Where are the Shortcut Links and what are they?

#### 3 PERSONAL INFORMATION AND ADDRESS PAGES
- Where can I view my contribution information?
- Where can I view my address/phone information?
- Can I edit my contact information?

#### 4 ACCESS FORMS, DOCUMENTS, AND FAQ
- How can I find common OCERS forms?
- Where can I find the document OCERS sent me?
- How do I use the FAQs?

#### 5 CHANGE BENEFICIARY
- How can I update one or more of my beneficiaries?
## ACTIVE AND DEFERRED MEMBERS

### 6 VIEW PARTICIPANT ACCOUNT DETAILS
- How can I view my contribution account details?
- How can I view my service credit purchase totals?
- How can I view my current contributions?
- How can I view my total contributions?
- How can I view my contributions tax summary?
- How can I view my current contributions?
- How can I save (export) my Current Summary Total, Tax Summary, and Contributions and Service?

### 7 ACCESS MEMBER STATEMENTS
- How can I get my most recent member/beneficiary statement?

### 8 REQUEST TO PURCHASE SERVICE CREDIT
- How can I send a request to purchase service credit?

### 9 INITIATE RETIREMENT
- How can I estimate my retirement?
- How can I complete a Service Retirement application?

## RETIRED MEMBERS AND PAYEES (SURVIVORS, BENEFICIARIES, ETC.)

### 10 VIEW BENEFITS, DIRECT DEPOSIT, TAX WITHHOLDING
- Where can I view my benefit and COLA information?
- Where can I view my direct deposit information?
- Where can I view my tax withholding information?
- How can I update my Direct Deposit information?
- How can I limit the number of results for my direct deposit or tax withholding records?
- How can I save (export) my direct deposit information in another format?
- How can I save (export) my tax withholding information in another format?

### 11 PAYMENT HISTORY AND 1099R INFORMATION
- Where can I view my payment history?
- How can I save (export) a list of 1099R records?
### All Members and Payees

#### 1 Getting Started

**HOW DO I REGISTER?**

1. Open a web browser and type the [https://www.ocers.org](https://www.ocers.org) web address to navigate to the OCERS website.

2. An MSS link on this page will take you to the Member Log In page (Figure 1):

   ![Member Log In](image)

   *Figure 1 Member Self-Service (MSS) Portal Log In page*

3. Click the Register link.
   
   The Terms of Service page opens.
4. Review and click **Accept** to continue to the **Verify Identity** page.

5. Type your social security number (with or without hyphens) in the **SSN** field.

6. Type your last name in the **Last Name** field.

7. Type your birthdate in the **Date Of Birth** field in the MM/DD/YYYY format or click the calendar icon to select the month, date and year.

8. Enter your Security PIN. This PIN will have a one time use during registration only.

9. Click **Validate**.
   The **Account Setup** page opens.
10. Type a user name in the **Username** field, using the following username requirements:
   - Eight character minimum to thirty two character maximum.

11. Type a new password in the **Enter New Password** field, using the following password requirements:
   - Eight character minimum.
   - Include a minimum of one numeric character, one capital letter, one lower case letter, and one special character (i.e., !, $).

12. Retype the new password in the **Confirm New Password** field.

13. In the **Security Questions** section, click the **Select First Security Question** drop-down list to select a security question to answer.

14. Type an answer to the security question in the **Enter Answer to First Question** field.

15. In the **Email Address** section, type an email address used in all communications with OCERS in the **Enter Email Address** field. **This should be a personal e-mail address and not a work e-mail.**

16. Type the email address again in the **Re-enter Email Address** field.

17. Click **Submit**.
   The application returns you to the **Member Log In** page and you will receive a confirmation email that confirms registration was successful.
Member Log In

User Name

Password

Log In

Register  |  Forgot User Name  |  Forgot Password  |  Help
**HOW DO I LOG ON?**

1. Open a web browser and type the [https://www.ocers.org](https://www.ocers.org) web address to navigate to the OCERS website. The Member Portal Log in is on the left hand side of the screen.

2. The link on this page will take you to the *Member Log In* page (Figure 2):

   ![Member Self-Service (MSS) Portal Log In page](image)

   *Figure 2 Member Self-Service (MSS) Portal Log In page*

3. Type your user name in the **User Name** field.
4. Type your password in the **Password** field.
5. Click **Log In**.
   
   The *Member Portal* home page opens, displaying member information (Figure 3).
**HOW DO I UPDATE SECURITY QUESTIONS?**

You can update your security questions.

**Reminder:** The *Forgot Password* link on the *Portal Log In* page will not work unless security questions are set.

To update security questions:

1. Log on to the *Member Portal.*
2. On the Home page, click the Account link at the top right of the page. The Account Settings page opens.

3. Click the Update Security Question link. The Security Questions page opens, displaying the current security question.
4. Select a security question from the Select Security Question 1 drop-down list.

5. Type an answer to the security question in the Answer to Security Question 1 field.

6. Click Save.
   The Account Settings page displays a message confirming your security question has been updated and you will receive a confirmation email that confirms the update was successful.

7. Click Home to return to the Home page.

Back to top

**HOW DO I RETRIEVE/RESET MY PASSWORD?**

You can reset your password using the Forgot Password link on the Member Log In page.
To reset password:

1. Open a web browser and type the https://www.ocers.org web address to navigate to the OCERS website. The Member Portal log in is on the left hand side of the screen.

2. The link on this page will take you to the Member Log In page.

3. Click the Forgot Password link.
   The Account Lookup page opens.

4. Type your user name in the Username field and click Submit.
   The Password Sent page opens.

5. Acquire the temporary password sent to the e-mail address we have on file and type it in the Password field of the Member Log In screen and click Log In. Temporary Password expires in 2 hours.
   You will automatically be directed to the Reset Password screen.
6. Enter the temporary password in the Old Password field and type a new password in Enter New Password and Confirm Password field, using the following password requirements:

7. Click Save.
The system returns to the Home page and you will receive a confirmation email that confirms the password update was successful.

HOW DO I RETRIEVE MY FORGOTTEN USER NAME?
You can retrieve your forgotten user name using the Forgot User Name link on the Member Log In page.
To recover a forgotten user name:

1. Open a web browser and type the https://www.ocers.org web address to navigate to the OCERS website.
2. An MSS link on this page will take you to the Member Log In page:

3. Click the Forgot User Name link. The Forgot Login page opens.

4. Type the email address you used when you registered for Member Portal access and click Submit. The Forgot Login page displays a message that your user name was sent to your email address.

5. Locate the email from OCERS that contains the forgotten user name.

6. Click Login to log onto the application.

**HOW DO I UNLOCK MY USER ACCOUNT?**

User accounts will lock after three invalid attempts to log on.

To unlock a user account:

- Contact an OCERS representative at (714) 558-6200 or info@ocers.org during OCERS business hours to unlock your account. Requests must be submitted from the email address you used to register for Member Portal access.
**HOW DO I LOG OFF?**

Click the **Logout** link at the top right of the page to exit the *Member Portal* application.

Logged Out
You are now logged out of the Self Service Application.

We recommend that you close your web browser when you have finished your online session. The information screens that you just viewed will remain in your browser's memory until the browser is closed.

Log back into Self Service

**HOW CAN I CHANGE MY EMAIL ADDRESS?**

You can change your email address using the Member Self-Service (MSS) Portal application.

To change your email:

1. Log on to the *Member Portal*.

2. On the *Home* page, click the **Account** link at the top right of the page. The *Account Settings* page opens.
3. Click the **Update Email Address** link.
   The Update Email page opens.

### Update Email

**Your email address is our primary means of communication regarding important changes to your account. Please remember to keep it up-to-date.**

- **Enter Email:**
- **Confirm Email:**

4. Type your new email address in the **Enter Email** field.
5. Retype your new email address in the **Confirm Email** field.
6. Click **Save**.

**WHAT ARE THE MSS PORTAL SYSTEM REQUIREMENTS?**

The following lists the browser requirements for the *Member Portal* application:

<table>
<thead>
<tr>
<th><strong>BROWSER NAME</strong></th>
<th><strong>PLATFORM</strong></th>
<th><strong>VERSION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Internet Explorer</td>
<td>Windows</td>
<td>10</td>
</tr>
<tr>
<td>Mozilla Firefox</td>
<td>Windows and Mac OS X: 10.6 or later</td>
<td>24 and above</td>
</tr>
<tr>
<td>Google Chrome</td>
<td>Windows and Mac OS X: 10.6 or later</td>
<td>Latest stable version supported</td>
</tr>
<tr>
<td>Safari</td>
<td>Mac OS X: Mountain Lion, Mavericks, Yosemite, El Capitan</td>
<td>Latest stable version supported 6.2.5, 7.1.5, 8.0.5</td>
</tr>
</tbody>
</table>
2 Navigating the Member Portal

**WHAT IS THE NEWS SECTION FOR?**

The News section of the Home page is viewable by all users who log on to their member or payee account. News messages are generated by OCERS and broadcast communications relating to all members and payees, which can include submission reminders and upcoming application upgrades.

**WHAT IS THE ALERTS SECTION FOR?**

The Alerts section of the Home page is viewable by all users who log on to their member or payee account. The Alerts section of the Home page is viewable only by those who log on to their member account. Alerts inform member of specific tasks to be completed or system events to be aware of, or the action the member has taken (i.e., a password change).
WHERE ARE THE MENU LINKS AND WHAT ARE THEY?

Depending upon your status, you will see one of these (Figure 4) (Figure 5) two Menu bar options on the left side of your page.

---

### Figure 4 Active and Deferred Member Menu Links

```
Menu
Home
Personal Information
Address
Participant Account
Benefit Estimator
Member Statements
Forms
FAQ
```

### Figure 5 Retiree Member and Payee Menu Bar

```
Menu
Home
Personal Information
Address
Benefits
Direct Deposit Information
Tax Withholding Information
Payment History
1099R Information
Forms
FAQ
```

---

The table below describes all the Menu Bar options and identifies which user has access.

<table>
<thead>
<tr>
<th>MENU</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>The Member Portal Home page displays the latest news, alerts, beneficiary,</td>
</tr>
<tr>
<td></td>
<td>and account or pension information.</td>
</tr>
<tr>
<td>Personal Information</td>
<td>All members and payees can view personal information. Contact OCERS if</td>
</tr>
<tr>
<td></td>
<td>any information is incorrect.</td>
</tr>
<tr>
<td>Address</td>
<td>All members and payees can view personal address and telephone contact</td>
</tr>
<tr>
<td></td>
<td>information. Only retired members and payees can update their address and</td>
</tr>
<tr>
<td></td>
<td>contact information. Contact OCERS if any information is incorrect.</td>
</tr>
<tr>
<td>Participant Account</td>
<td>Active and deferred members can view and export account details.</td>
</tr>
<tr>
<td>Benefit Estimator</td>
<td>Active and deferred members can calculate your retirement allowance benefit</td>
</tr>
<tr>
<td></td>
<td>estimate.</td>
</tr>
<tr>
<td>Member Statements</td>
<td>Active and deferred members and view and print member statement details that</td>
</tr>
<tr>
<td></td>
<td>include years of service, contributions, and beneficiaries.</td>
</tr>
</tbody>
</table>
### MENU

<table>
<thead>
<tr>
<th><strong>Forms</strong></th>
<th>All members and payees can view and print select OCERS forms.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FAQ</strong></td>
<td>All members and payees can view MSS Portal Frequently Asked Questions and answers.</td>
</tr>
<tr>
<td><strong>Benefits</strong></td>
<td>Retired members and payees can view benefit and COLA information.</td>
</tr>
<tr>
<td><strong>Direct Deposit Information</strong></td>
<td>Retired members and payees can view, filter, and export direct deposit information.</td>
</tr>
<tr>
<td><strong>Tax Withholding Information</strong></td>
<td>Retired members and payees can view, filter, and export tax withholding information.</td>
</tr>
<tr>
<td><strong>Payment History</strong></td>
<td>Retired members and payees can view, filter, and export a list of pension payments.</td>
</tr>
<tr>
<td><strong>1099R Information</strong></td>
<td>Retired members and payees can view a list of 1099R tax documents.</td>
</tr>
</tbody>
</table>
**WHERE ARE THE SHORTCUT LINKS AND WHAT ARE THEY?**

Depending upon your status, you will see one of these two (Figure 6) (Figure 7) Shortcut options on the left side of your page.

**Shortcuts**
- Request to Purchase Service Credit
- Change Beneficiary
- Initiate Retirement

*Figure 6 Active and Deferred Member Shortcuts*

**Shortcuts**
- Change Beneficiary
- Update Direct Deposit
- Update Tax Information
- Award Letter

*Figure 7 Retired Member and Payee Shortcuts*

The table below describes all the Shortcut options and identifies which user has access.

<table>
<thead>
<tr>
<th>SHORTCUTS</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Update Direct Deposit</strong>: Retired members and payees can use the Direct Deposit Wizard to update benefit payment direct deposit information.</td>
<td></td>
</tr>
<tr>
<td><strong>Update Tax Information</strong>: Retired members and payees can use the Tax Information Wizard to update benefit payment tax information.</td>
<td></td>
</tr>
<tr>
<td><strong>Change Beneficiary</strong>: All members can use the Beneficiary Wizard to complete/update the Beneficiary Change form and submit it directly to OCERS. <em>Non-member payees do not have this option.</em></td>
<td></td>
</tr>
<tr>
<td><strong>Request to Purchase Service Credit</strong>: Active and deferred members can use the Request to Purchase Service Credit Wizard to complete the Request to Purchase Service Credit form and submit it directly to OCERS.</td>
<td></td>
</tr>
<tr>
<td><strong>Initiate Retirement</strong>: Active and deferred members can use Service Retirement Wizard to complete the Service Retirement Application form and submit it directly to OCERS to initiate the retirement process.</td>
<td></td>
</tr>
<tr>
<td><strong>View and Print Award Letter</strong>: Retired members and payees can view and print an award letter.</td>
<td></td>
</tr>
</tbody>
</table>

[Back to top](#)
3 Personal Information and Address Pages

WHERE CAN I VIEW MY CONTRIBUTION INFORMATION?
From the Menu bar, click Personal Information to view the following contact information:

- Name, date of birth, age, gender
- Age at entry
- Contribution basis date
- Entry date
- Employment separation date
- OCERS ID
- Marital status
- Marriage date

WHERE CAN I VIEW MY ADDRESS/PHONE INFORMATION?
All members and payees can view personal address and telephone contact information. From the Menu bar, click Address to view the addresses and phone numbers on file with OCERS.

Back to top
CAN I EDIT MY CONTACT INFORMATION?

Only retired members and payees can update their address and phone information.

To edit address information:

1. From the **Menu** bar, click **Address** to view the addresses and phone numbers on file with OCERS. The *Member Address* page opens.

2. Click **Edit Contact Information**. The *Edit Address* page opens.

3. Update information. If applicable, click the plus sign next to an item to open the field and add additional contact information.

4. Click **Save**.
4 Access Select Forms and FAQs

**HOW CAN I FIND A FEW OCERS FORMS?**

The Forms page allows you to view, save and print PDF documents.

1. From the Menu bar, click Forms.
   The Forms page opens.

2. Click a document link.
   A dialog box opens, asking if you would like to open or save the file.

3. Select the **Open with** option and click **OK**.
   The PDF form opens.

4. Click the Windows close icon to return to the Forms page.
HOW DO I USE THE FAQS?

The Frequently Asked Questions (FAQs) page provides a list of common questions and answers about the Member Portal.

1. From the Menu bar, click FAQ. The Frequently Asked Questions page opens.
2. Select a topic from the drop-down list to focus only on a specific subject.
3. Click on a question. A response displays below the question.
4. To hide the response, click the question.

Frequently Asked Questions

<table>
<thead>
<tr>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reciprocity</td>
</tr>
</tbody>
</table>

- Do I have to elect to establish reciprocity?
- How does having reciprocity benefit me?
5 Change Beneficiary

**HOW CAN I UPDATE ONE OR MORE OF MY BENEFICIARIES?**

You can update one or more beneficiaries and the percentage each individual is to receive using the Beneficiary Wizard.

**Note:** Non-member payees do not have this option.

Before you begin you will need the following:

- Marriage date if need to enter a new marriage
- One or more beneficiary names, date of birth, social security number, address, and phone number

To update beneficiary details:

1. From the **Shortcuts** bar, click the **Change Beneficiary** link.
   The **Update Beneficiary Details** page opens to the first page of the wizard, defining the types of beneficiaries.

   **Update Beneficiary Details**

   **Instructions**
   You may name one person or any number of persons as your primary or alternate beneficiary.
   a. **Primary Beneficiary:** A primary beneficiary is the person or persons who would receive a benefit from OCERS upon your death.
   b. **Alternate Beneficiary:** An alternate beneficiary is the person or persons who would receive a benefit from OCERS if you have no living primary beneficiaries on the date of your death.
   c. If you name more than one person in either category, you must indicate what percentage of the benefit each individual is to receive. Please note that all beneficiary percentage designations must be whole numbers (for example 33%, not 33.3%). The total percentage for each category must be 100%. If you do not indicate a percentage, the benefit will be divided into equal parts.

   **Note:** Your designated beneficiary will remain valid until you file another Benefit Change Form.

2. Click **Next**.
   The **Member Information** page opens, to the second page of the wizard, displaying the member’s current contact information and allowing you to change your marital status.

   **Member Information**

   **First Name:**
   **Middle Name:**
   **Last Name:**
   **OCERS ID:**
   **Home/Mailing Address:**
   **Home Phone Number:**
   **Work Phone Number:**
   **Department/Employer:**
   **Social Security Agency:**
   **Marital Status:**
   - Married
   - Single
   - Widow(er)
   **Status:**
   - Active
   - Retired
   - Deferred
   - DRO

   2223 E Wellington Ave
   GARDEN GROVE, CA 92840-9000

   **Date of Marriage:**
   **Status:**
   **Date of Death:**
   **March 01, 1982**

   **Step 2 of 4**
3. Click Next.  
   The Primary and Alternate Beneficiary Information page opens to the third page of the wizard, allowing you to review and update beneficiary information. (To add a beneficiary, click Add Beneficiary and a set of blank fields appears. To delete a beneficiary, click Remove Beneficiary next to the beneficiary name and the name will delete.)

**Reminder:** Make sure to update the benefit percentage since all beneficiaries together must equal 100 percent.

### Update Beneficiary Details

<table>
<thead>
<tr>
<th>Primary Beneficiary Information:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Beneficiary:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Beneficiary Name:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Primary or Alternate:</strong></td>
<td>Primary</td>
</tr>
<tr>
<td><strong>Relationship:</strong></td>
<td>Spouse</td>
</tr>
<tr>
<td><strong>% of Benefit:</strong></td>
<td>100</td>
</tr>
<tr>
<td><strong>Data of Birth:</strong></td>
<td>07/20/1962</td>
</tr>
<tr>
<td><strong>Social Security Number:</strong></td>
<td>99999-XXX-XX</td>
</tr>
<tr>
<td><strong>Address1:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Address2:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Address3:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>City:</strong></td>
<td>GARDEN GROVE</td>
</tr>
<tr>
<td><strong>State:</strong></td>
<td>CA</td>
</tr>
<tr>
<td><strong>Zip Code:</strong></td>
<td>92840-0000</td>
</tr>
<tr>
<td><strong>Daytime Phone Number:</strong></td>
<td></td>
</tr>
</tbody>
</table>

| **Remove Beneficiary**           |  |

<table>
<thead>
<tr>
<th>Alternate Beneficiary Information:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Beneficiary:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Beneficiary Name:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Primary or Alternate:</strong></td>
<td>Alternate</td>
</tr>
<tr>
<td><strong>Relationship:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>% of Benefit:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Data of Birth:</strong></td>
<td>mm/dd/yyyy</td>
</tr>
<tr>
<td><strong>Social Security Number:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Address1:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Address2:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Address3:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>City:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>State:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Zip Code:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Daytime Phone Number:</strong></td>
<td></td>
</tr>
</tbody>
</table>

| **Add Beneficiary**               |  |

| **Beneficiary:**                  |  |
| **Beneficiary Name:**             |  |
| **Primary or Alternate:**         | Alternate |

| **Remove Beneficiary**           |  |
4. Click Next. The Member Certification page opens to the fourth page of the wizard, allowing you to select the Member Certification check box, affirming the statements are true and correct to the best of your knowledge.

**Update Beneficiary Details**

**Member Certification**

- [ ] I hereby designate the person(s) entered in section 2 of this form as beneficiary to my retirement account. I understand that this election revokes any previous beneficiary designations.

*By submitting these changes, I authorize OCERS to update my account accordingly.*

5. Click Submit.
   The application submitted dialog box opens.

6. Click OK.
   A confirmation email message is sent to the email address you submitted, confirming the beneficiary change and the application opens to the Documents page.

**Documents**

You now have the ability to select a paperless delivery option for communications. If you select this option you will receive a notification by email. The email will direct you to this page where you can view your document on-line. If you check the box “Yes, email documents to me” you will no longer receive mail for most documents.

- [ ] Yes, email documents to me

<table>
<thead>
<tr>
<th>Date</th>
<th>Document</th>
<th>Status</th>
<th>Recipient</th>
<th>SSN</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/14/2015</td>
<td>Beneficiary Change</td>
<td>Queue</td>
<td></td>
<td>XXX-XX-0005</td>
<td>Details</td>
</tr>
<tr>
<td>09/14/2015</td>
<td>Request to Purchase Service</td>
<td>Queue</td>
<td>XXX-XX-0005</td>
<td>SSN</td>
<td>Details</td>
</tr>
</tbody>
</table>

7. Select the Yes, email documents to me check box (if this option was not already selected) to receive documents and the updates you make via the Member Self-Service Portal and email. (Note that some documents and updates will still be sent through USPS mail.)
   A dialog box opens confirming the Member Self-Service Portal document delivery method.
8. Click **OK**.
   A confirmation email message is sent to the email address you submitted, confirming the submission.

9. To print a document, in the *Documents* page, click the **Details** link to open the *Document Details* page where you can click the **Download** button and then print the application.
Active and Deferred Members

6 View Participant Account Details

HOW CAN I VIEW MY CONTRIBUTION ACCOUNT DETAILS?

You can do this two ways:

1. From the Menu bar, click Participant Account to view the following four sections:
   - **Current Summary Totals** – lists a total pre-tax contributions, service credit purchases, and interest.
   - **Contributions and Service** – lists the contribution rate plan and number of years of service.
   - **Tax Summary** – displays an itemized list of pre-tax and post-tax totals for contributions, service credit purchases, and interest.
   - **Current Information** – lists the most recent final average salary calculation, along with current employee and employer contribution rates and, if applicable, any employee reverse pick-up of an employer’s Normal Cost or UAAL.

2. From the Menu bar, click Member Statements to view total contributions and interest, along with years of service.

HOW CAN I VIEW MY SERVICE CREDIT PURCHASE TOTALS?

From the Menu bar, click Participant Account to view the Tax Summary, which displays an itemized list of pre-tax and post-tax totals for contributions, service credit purchases, and interest.

HOW CAN I VIEW MY CURRENT CONTRIBUTIONS?

From the Menu bar, click Participant Account to view the Current Information, which lists the most recent final average salary calculation, along with current employee and employer contribution rates and, if applicable, any employee reverse pick-up of an employer’s Normal Cost or UAAL.

HOW CAN I VIEW MY TOTAL CONTRIBUTIONS?

From the Menu bar, click Participant Account to view the Current Summary Totals, which lists a total pre-tax contributions, service credit purchases, and interest.
**HOW CAN I VIEW MY CONTRIBUTIONS TAX SUMMARY?**

From the Menu bar, click Participant Account to view the Tax Summary, which displays an itemized list of pre-tax and post-tax totals for contributions, service credit purchases, and interest.

[Back to top](#)

**HOW CAN I SAVE (EXPORT) MY CURRENT SUMMARY TOTAL, TAX SUMMARY, AND CONTRIBUTIONS AND SERVICE?**

You can individually export the records in the Current Summary Total, Tax Summary, and Contributions and Service sections to an Excel, PDF or .csv file.

To export participant account details:

1. From the Menu bar, click Participant Account. The Participant Account Details page opens.

   **Participant Account Details**

   Detailed information about the participant account record that you have selected.

   ![Table 1: Current Summary Totals](#)
   ![Table 2: Contributions and Service](#)
   ![Current Information](#)

2. Click the horizontal grid icon to display grid. The grid displays.

   ![Records Export](#)

3. Click the Export icon and a list of file format icons appear.

   ![XLS PDF CSV](#)

4. Click a file format. Example: Excel .XLS format

   After the account information exports, the Opening dialog box opens, requesting you open or save the file.

   **Note:** Other browsers may automatically download or open a different Open file dialog box.
5. Click **OK**.
**7 Access Member Statements**

**HOW CAN I GET MY MOST RECENT MEMBER/BENEFICIARY STATEMENT?**

You can view and print your statement.

To view and print a member statement:

1. From the Menu bar, click **Member Statements**. The **Member Statement** page opens.

2. Click **Print** at the bottom of the page to print statement.
8 Request to Purchase Service Credit

**HOW CAN I SEND A REQUEST TO PURCHASE SERVICE CREDIT?**

The Request to Purchase Service Credits page allows you to walk through the steps to complete the Request to Purchase Service Credit form and submit it directly to OCERS using the Request to Purchase Service Credit Wizard.

Before you begin you will need the following:

- If you already submitted a Service Credit Request to Purchase application, the date submitted.
- Service dates from and to dates for one or more types of submitted service

To complete the form:

1. From the Shortcuts bar, click the Request to Purchase Service Credit link.
   The Request to Purchase Service Credits page opens to the first page of the wizard, requesting the date you are completing the application.
   - If no previous request has been submitted, leave the date blank.
   - If you completed this OCERS application previously, type the previous request date in the MM/DD/YYYY format in the Date of Previous Request field or click the calendar icon to select the month, date and year.

   **Request to Purchase Service Credits**

   The following screens will take you through the process of gathering the information required to purchase service credits with OCERS. The information provided during this process will help determine your eligibility to make this purchase.

   If you have requested this information before, please indicate the date below (MM/DD/YYYY)

   Date of Previous Request:  
   ![Calendar Icon]

   2. Click Next.
   The Member Information page opens to the second page of the wizard, displaying the member’s current contact information. Update the Current Employer, Current Department, and Email Address fields as needed.
3. **Click Next.**

The *Type of Service* page opens to the third page of the wizard, allowing you to select one or more of the service type check boxes, complete **Employer**, **Department**, **Service From Date**, and **Service to Date** fields for each selected row.

**Request to Purchase Service Credits**

**Type of Service**

Please check the box next to the type of service that you are interested in purchasing and indicate the appropriate dates. If you are not at the exact date, please enter an estimated date. When you are ready, click on the Next button.

**Note:** Each Service Type will be calculated separately.

- [ ] Previous Service Orange County Service: Employer: [ ] Department: [ ] Service From Date: [ ] Service to Date: [ ]
- [ ] Medical Leave with Orange County: Employer: [ ] Department: [ ] Service From Date: [ ] Service to Date: [ ]
- [ ] Workers Compensation with Orange County: Employer: [ ] Department: [ ] Service From Date: [ ] Service to Date: [ ]
- [ ] Public Service-Retirement System (California Only): Employer: [ ] Department: [ ] Service From Date: [ ] Service to Date: [ ]
- [ ] Excluded Service (Extra Help) with Orange County: Employer: [ ] Department: [ ] Service From Date: [ ] Service to Date: [ ]

4. **Click Next.**

The *Confirmation Screen* page opens to the fourth page of the wizard, allowing you to perform a final review of the data you’ve included.
5. Click Next.
The Member Certification page opens to the fifth page of the wizard, allowing you to select the Member Certification check box, affirming the statements are true and correct to the best of your knowledge.

6. Click Submit.
The application submitted dialog box opens.

7. Click OK.
A confirmation email message is sent to the email address you submitted, confirming the submission was successful and the application opens to the Documents page.

8. Select the Yes, email documents to me check box (if this option was not already selected) to receive documents and the updates you make via the Member Self-Service Portal and email.
that some documents and updates will still be sent through USPS mail.)
A dialog box opens confirming the Member Self-Service Portal document delivery method.

9. Click OK.
   A confirmation email message is sent to the email address you submitted, confirming the submission.

10. To print a document, in the Documents page, click the Details link to open the Document Details page where you can click the Download button and then print the application.
HOW CAN I ESTIMATE MY RETIREMENT?

You can calculate an estimated retirement benefit.

To estimate a retirement benefit:

1. From the Menu bar, click Benefit Estimator.
   The Benefit Estimator page opens, displaying member name and contribution information.

   ![Benefit Estimator](image)

   - **Retirement Effective Date**: [Date]
   - **Monthly Final Average Salary at Retirement Effective Date**: [FAS]
   - **Years of Service at Retirement Effective Date**: [Years]
   - **Service Purchase (not yet completed)**: [Amount]
   - **Total Service**: [Years]
   - **Estimated Unmodified Monthly Benefit Amount**: [Amount]

   **Warning**: Do not include Public Service purchases in progress or any previously paid in full service purchase contract in the value because those amounts are already included.

2. In the **Retirement Effective Date** field, type a future retirement date using the MM/DD/YYYY format or leave the auto-populated date, which is the earliest retirement date.

3. In the **Monthly Final Average Salary at Retirement Effective Date** field, type a final average salary (FAS) value or leave the auto-populated value, which is the current FAS.

4. In the **Years of Service at Retirement Effective Date** field, the current years of service reflect the auto-populated date in the **Retirement Effective Date** field. (If you changed the date in the **Retirement Effective Date** field, once you click **Calculate**, the years of service will update and factor in the calculation.)

   **Warning**: Do not include Public Service purchases in progress or any previously paid in full service purchase contract in the value because those amounts are already included.
5. In the **Service Purchase (Not yet completed)** field, enter the years of service that is currently planned or in progress to purchase and once you click **Calculate**, the years of service entered here will factor into the calculation.

**Warning:** Do not include Public Service purchases in progress or any previously paid in full service purchase contract in the value because those amounts are already included.

6. Click **Calculate**.
   The estimator calculates and populates the **Estimated Unmodified Monthly Benefit Amount** field.
HOW CAN I COMPLETE A SERVICE RETIREMENT APPLICATION?

You can start a service retirement application using the Service Retirement Wizard.

Before you begin you will need the following:

- Marriage date if need to enter a new marriage
- Type of service retirement election
- One or more beneficiary names, date of birth, social security number, address, and phone number
- Federal and state tax withholding information
- Direct deposit routing number, account number, institution name, address, and phone number

To start the application:

1. From the Shortcuts bar, click the Initiate Retirement link.
   The Initiate Service Retirement Application page opens to the first page of the wizard, displaying your earliest eligible retirement date and allowing you to type the proposed retirement date in the Retirement Date Selected field.

2. **Reminder**: Your application cannot be submitted greater than 60 days in advance of the retirement date selected.

   **Initiate Service Retirement Application**

   **Earliest Eligible Retirement Date**: Oct 14, 2013
   **Retirement Date Selected**: mm/dd/yyyy

   Back   Step 1 of 8   Next

3. Click Next.
   The Member Information page opens to the second page of the wizard, displaying the member’s current contact information and allowing you to correct inaccuracies in the Current Marital Status and Date of Marriage fields.
4. **Click Next.**

The *Benefit Payment Election* page opens to the third page of the wizard, allowing you to select a benefit payment election.

**Initiate Service Retirement Application**

**Benefit Payment Election**

*Unreduced Amount*

- **Unmodified Payment:** Monthly benefit payable for your lifetime. No continuation of monthly benefit after death unless you have an eligible surviving spouse or minor children. Surviving spouse or children receive continuance of your monthly benefit upon your death.

*Reduced Amount*

- **Optional Payment 1:** Reduced monthly benefit payable for your lifetime. Surviving beneficiaries receive a lump sum payment equal to accumulated contributions less the sum of annuity portion of benefits already received.

- **Optional Payment 2:** Reduced monthly benefit payable for your lifetime. Surviving beneficiaries receives a 100% continuance of monthly benefit upon your death (except in the case of a non-spouse beneficiary who is greater than 10 years younger, whose continuance percentage will be actuarially determined at the time of retirement). Beneficiary cannot be changed.

- **Optional Payment 3:** Reduced monthly benefit payable for your lifetime. Surviving beneficiaries receives a 50% continuance of monthly benefit upon your death. Beneficiary cannot be changed.

- **Optional Payment 4:** Any type of benefit payment approved by the Board. Beneficiary cannot be changed.

5. **Click Next.**

The *Primary and Alternate Beneficiary Information* page opens to the fourth page of the wizard, allowing you to review and update beneficiary information. (To add a beneficiary, click Add Beneficiary and a set of blank fields appears. To delete a beneficiary, click Remove Beneficiary next to the beneficiary name and the name will delete.)

**Reminder:** Make sure to update the benefit percentage since all beneficiaries together must equal 100 percent.
6. Click Next. The Tax Withholding Election Form page opens to the fifth page of the wizard to select at least one required federal and one required state tax withholding election. Example: Tax table and Married filing status. (If applicable, when a filing status is selected, the No. of Exemptions field must also be completed.)
7. Click **Next**. The *Direct Deposit Information* page opens to the sixth page of the wizard to complete direct deposit information.

**Initiate Service Retirement Application**

**Direct Deposit Information**

**Member Information**

First Name: [ ] M.I: [ ] Last Name: [ ] Social Security No: XXX-XX-0005

**Financial Institution Information**

- Checking Account
- Savings Account

Financial Institution Routing number: [ ]

Financial Institution Name: [ ]

Financial Institution Account number: [ ]

Financial Institution Phone Number: [ ]

Financial Institution Address: [ ]

City: [ ]

State: [ ]

Zip: [ ]

Back  Step 6 of 8  Next
8. **Click Next.**
   The *Summary* page opens to the seventh page of the wizard, allowing you to perform a final review of the data you’ve included.

   **Initiate Service Retirement Application**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>XXX</td>
</tr>
<tr>
<td>Last Name</td>
<td>XXX</td>
</tr>
<tr>
<td>Social Security No.</td>
<td>XXX-XX-XXXXXX</td>
</tr>
<tr>
<td>Birth Date</td>
<td>10/14/1963</td>
</tr>
<tr>
<td>Marital Status</td>
<td>M</td>
</tr>
<tr>
<td>Date of Marriage</td>
<td>Aug 26, 1982</td>
</tr>
<tr>
<td>Effective Date</td>
<td></td>
</tr>
<tr>
<td>Home/Mailing Address</td>
<td>2223 E Wellington Ave GARDEN GROVE, CA, 92640-8000</td>
</tr>
<tr>
<td>Phone No.</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>Social Services Agency</td>
</tr>
<tr>
<td>Option Selected</td>
<td>Unmodified</td>
</tr>
</tbody>
</table>

   **Primary Beneficiary Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beneficiary Name</td>
<td>XXX</td>
</tr>
<tr>
<td>Beneficiary Type</td>
<td>Primary</td>
</tr>
<tr>
<td>Relationship</td>
<td>Spouse</td>
</tr>
<tr>
<td>% of Benefit</td>
<td>100</td>
</tr>
<tr>
<td>Birth Date</td>
<td>07/20/1962</td>
</tr>
<tr>
<td>Social Security No.</td>
<td>XXX-XX-XXXXXX</td>
</tr>
<tr>
<td>Home/Mailing Address</td>
<td>XXX-XX-XXXXXX</td>
</tr>
<tr>
<td>City</td>
<td>GARDEN GROVE, CA 92640-0000</td>
</tr>
<tr>
<td>Telephone Number</td>
<td></td>
</tr>
</tbody>
</table>

   **Alternate Beneficiary Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beneficiary Name</td>
<td>XXX</td>
</tr>
<tr>
<td>Beneficiary Type</td>
<td>Alternate</td>
</tr>
<tr>
<td>Relationship</td>
<td></td>
</tr>
<tr>
<td>% of Benefit</td>
<td>50</td>
</tr>
<tr>
<td>Birth Date</td>
<td></td>
</tr>
<tr>
<td>Social Security No.</td>
<td>XXX-XX-XXXXXX</td>
</tr>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>Telephone Number</td>
<td></td>
</tr>
<tr>
<td>Beneficiary Name</td>
<td>XXX</td>
</tr>
<tr>
<td>Beneficiary Type</td>
<td>Alternate</td>
</tr>
<tr>
<td>Relationship</td>
<td>Relative</td>
</tr>
<tr>
<td>% of Benefit</td>
<td>50</td>
</tr>
<tr>
<td>Birth Date</td>
<td>03/04/1935</td>
</tr>
<tr>
<td>Social Security No.</td>
<td>XXX-XX-XXXXXX</td>
</tr>
<tr>
<td>Address</td>
<td>9999 X XXXX XXXX</td>
</tr>
<tr>
<td>City</td>
<td>SANTA ANA, CA 92706-0000</td>
</tr>
<tr>
<td>Telephone Number</td>
<td></td>
</tr>
</tbody>
</table>

9. **Click Next.**
   The *Disclaimer* page opens to the eighth page of the wizard to select the *Disclaimer* check box.

   **Initiate Service Retirement Application**

   **Disclaimer**

   I wish to receive my retirement benefit from OCERS in the payment form elected in section 2. I wish benefits to be paid to my beneficiary(ies) in accordance with the payment option elected. I understand that by clicking on the submit button, I am placing my electronic signature on this application for Service Retirement. I further understand that my signature will not be witnessed and that the elections made on this application will become effective as of the date submitted and my retirement will take place on the date contained in this application unless I notify the Orange County Employees Retirement System of changes prior to the effective date of the retirement above.

10. **Click Submit.**
    A dialog box opens confirming the application submission.
11. Click OK.
A confirmation email message is sent to the email address you submitted, confirming the submission was successful and the application opens to the Documents page.

12. Select the Yes, email documents to me check box (if this option was not already selected) to receive documents and the updates you make via the Member Self-Service Portal and email. (Note that some documents and updates will still be sent through USPS mail.)
A dialog box opens confirming the Member Self-Service Portal document delivery method.

13. Click OK.
A confirmation email message is sent to the email address you submitted, confirming the submission.

14. To print a document, in the Documents page, click the Details link to open the Document Details page where you can click the Download button and then print the application.
Retired Members and Payees

10 View Benefits and View and Update Direct Deposit and Tax Withholding

WHERE CAN I VIEW MY BENEFIT AND COLA INFORMATION?

From the Menu bar, click Benefits to view:

- **Benefit information**: Pension type, benefit effective date, benefit payment option, and monthly base benefit.
- **COLA information**: Effective date, allowance, accumulated COLA amount, total benefit amount, and accumulated COLA bank.

WHERE CAN I VIEW MY DIRECT DEPOSIT INFORMATION?

From the Menu bar, click Direct Deposit Information to view a list of direct deposit records.

**Note**: Prior to 1/1/16, a Details button will not display under the View Details column to view additional direct deposit details.
WHERE CAN I VIEW MY TAX WITHHOLDING INFORMATION?

From the **Menu** bar, click **Tax Withholding Information** to view a list of tax withholding records.

In the **Deduction Type** drop-down list, click the **All, CA – State Tax, or Federal Tax** and then click **Go** to update the records you want to display.
HOW CAN I UPDATE MY TAX INFORMATION?

You can update tax withholding information using the *Tax Information Wizard*. Before you begin you will need the following:

- Federal and state tax withholding information.

To update tax information:

1. From the **Shortcuts** bar, click the **Update Tax Information** link.
   
   The *Tax Withholding Election for Periodic Payments* page opens to the first page of the wizard, describing OCERS withholding if no elections are made.

   **Tax Withholding Election for Periodic Payments**

   Instructions
   
   Your benefit from OCERS is subject to federal and California state income taxes. OCERS will withhold funds for those taxes unless you elect not to have withholdings apply. **IF YOU DO NOT MAKE AN ELECTION, FEDERAL AND STATE INCOME TAX WILL BE WITHHELD BASED ON ASSUMED STATUS OF MARRIED WITH THREE EXEMPTIONS.**

   Please note that if you do not have taxes withheld from your benefit you may have to pay estimated taxes. You may incur penalties if your withholdings or estimated tax payments are not sufficient.

   Please click on the *Next* button when you are ready.

2. Click **Next**.
   
   The *Payee Information* page opens to the second page of the wizard, displaying a disbursement schedule. If there are multiple schedules, select the appropriate schedule.

   **Note:** One or more disbursement payments can occur if a retired member is also getting a survivor benefit, for example.

   **Tax Withholding Election for Periodic Payments**

   *Please make updates to the fields below as necessary. When you are ready, click on the Next button.*

   **Payee Information**

   First Name:  
   Middle Name:  
   Last Name:  

   OCERS ID:  

   **Disbursement Information**

<table>
<thead>
<tr>
<th>Schedule Name</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Retirement Unmodified</td>
<td>03/03/2000</td>
</tr>
</tbody>
</table>

3. Click **Next**.
   
   The *Tax Withholding Election Form* page opens to the third page of the wizard to set at least one required federal and one required state tax withholding election. Example: Tax **table** and **Married**
filing status. (If applicable, when a filing status is selected, the No. of Exemptions field must also be completed.)

4. Click **Next**.
The *Tax Withholding Summary* page opens to the fourth page of the wizard, allowing you to perform a final review of the data you’ve included.

5. Click **Next**.
The *Payee Signature* page opens to the fifth page with the statement affirming the statements on the form are true and correct.

6. Click **Submit**.
The application submitted dialog box opens.
7. Click **OK**.
   A confirmation email message is sent to the email address you submitted, confirming the tax withholding change and the application opens to the **Documents** page.

8. Select the **Yes, email documents to me** check box (if this option was not already selected) to receive documents and the updates you make via the **Member Self-Service Portal** and email. (Note that some documents and updates will still be sent through USPS mail.)
   A dialog box opens confirming the **Member Self-Service Portal** document delivery method.

9. Click **OK**.
   A confirmation email message is sent to the email address you submitted, confirming the submission.

10. To print a document, in the **Documents** page, click the **Details** link to open the **Document Details** page where you can click the **Download** button and then print the application.
**HOW CAN I UPDATE MY DIRECT DEPOSIT INFORMATION?**

You can update benefit payment direct deposit information using the Direct Deposit Wizard.

Before you begin you will need the following:

- Effective date
- Direct deposit routing number, account number, institution name, address, and phone number

To update direct deposit:

1. From the **Shortcuts** bar, click the **Update Direct Deposit** link.
   
   The **Direct Deposit Authorization** page opens to the first page of the wizard, displaying a disbursement schedule. If there are multiple schedules, select the appropriate schedule.

   **Note:** One or more disbursement payments can occur if a retired member is also getting a survivor benefit, for example.
2. Click Next.  
The Financial Information page opens to the second page of the wizard to complete the direct deposit information and the effective date, which must be the first of the month.

3. Click Next.  
The EFT Summary page opens to the third page of the wizard, allowing you to perform a final review of the date you’ve included.
4. Click Next.
The Payee Authorization page opens to the fourth page of the wizard, allowing you to select the Payee Authorization check box, affirming the statements are true and correct to the best of your knowledge.

5. Click Submit.
The application submitted dialog box opens.

6. Click OK.
A confirmation email message is sent to the email address you submitted, confirming the EFT change and the application opens to the Documents page.
7. Select the **Yes, email documents to me** check box (if this option was not already selected) to receive documents and the updates you make via the **Member Self-Service Portal** and email. (Note that some documents and updates will still be sent through USPS mail.) A dialog box opens confirming the **Member Self-Service Portal** document delivery method.

8. Click **OK**.
   A confirmation email message is sent to the email address you submitted, confirming the submission.

9. To print a document, in the **Documents** page, click the **Details** link to open the **Document Details** page where you can click the **Download** button and then print the application.

---

**HOW CAN I LIMIT THE NUMBER OF RESULTS FOR MY DIRECT DEPOSIT OR TAX WITHHOLDING RECORDS?**

You can use the records number icon to specify the number of records to display.

To set a number of records to display:

1. From the Menu bar, click Direct Deposit Information or Tax Withholding Information.

2. Click the records number icon.
   A search field opens with a default of 10 records to display.
3. Type the number of fields you want to display and click the checkmark icon to execute the filter. The specified number of records appears.

**HOW CAN I SAVE (EXPORT) MY DIRECT DEPOSIT INFORMATION IN ANOTHER FORMAT?**

You can export the list of direct deposit records to an Excel, PDF, or .csv file.

To export direct deposit details:

1. From the **Menu** bar, click **Direct Deposit Information**. The **Direct Deposit Information Summary** page opens.

2. Click the **Export** icon and a list of file format icons appear.

3. Click a file format. Example: Excel .XLS format
   After the account information exports, the **Opening** dialog box opens, requesting you open or save the file.

   **Note:** Other browsers may automatically download or open a different Open file dialog box.
HOW CAN I SAVE (EXPORT) MY TAX WITHHOLDING INFORMATION IN ANOTHER FORMAT?

You can export the list of tax withholding records to an Excel, PDF, or .csv file.

To export tax withholding details:

1. From the Menu bar, click Tax Withholding Information. The Tax Withholdings page opens.

2. Click the Export icon and a list of file format icons appear.

3. Click a file format. Example: Excel .XLS format

   After the account information exports, the Opening dialog box opens, requesting you open or save the file.

   Note: Other browsers may automatically download or open a different Open file dialog box.
4. Click OK.
## 11 Payment History and 1099R Information

**WHERE CAN I VIEW MY PAYMENT HISTORY?**

From the Menu bar, click Payment History to view a list of direct deposit records.

**Note:** Prior to 1/1/16, a View Details link will not display under the View Details column to view additional payment history details.

### Payment History

Below is a historical record of your payments.

<table>
<thead>
<tr>
<th>Date</th>
<th>Benefit Account</th>
<th>Type</th>
<th>Bank Name</th>
<th>Gross Amount</th>
<th>Total Deductions</th>
<th>Net Amount</th>
<th>View Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/01/2015</td>
<td>Pension Monthly</td>
<td>EFT</td>
<td>ORANGE COUNTY'S CREDIT UNION</td>
<td>$2,084.52</td>
<td>$479.75</td>
<td>$2,443.77</td>
<td></td>
</tr>
<tr>
<td>08/01/2015</td>
<td>Pension Monthly</td>
<td>EFT</td>
<td>ORANGE COUNTY'S CREDIT UNION</td>
<td>$2,084.52</td>
<td>$479.75</td>
<td>$2,443.77</td>
<td></td>
</tr>
<tr>
<td>09/01/2015</td>
<td>Pension Monthly</td>
<td>EFT</td>
<td>ORANGE COUNTY'S CREDIT UNION</td>
<td>$2,084.52</td>
<td>$479.75</td>
<td>$2,443.77</td>
<td></td>
</tr>
<tr>
<td>10/01/2015</td>
<td>Pension Monthly</td>
<td>EFT</td>
<td>ORANGE COUNTY'S CREDIT UNION</td>
<td>$2,084.52</td>
<td>$479.75</td>
<td>$2,443.77</td>
<td></td>
</tr>
<tr>
<td>11/01/2015</td>
<td>Pension Monthly</td>
<td>EFT</td>
<td>ORANGE COUNTY'S CREDIT UNION</td>
<td>$2,084.52</td>
<td>$479.75</td>
<td>$2,443.77</td>
<td></td>
</tr>
<tr>
<td>12/01/2015</td>
<td>Pension Monthly</td>
<td>EFT</td>
<td>ORANGE COUNTY'S CREDIT UNION</td>
<td>$2,084.52</td>
<td>$479.75</td>
<td>$2,443.77</td>
<td></td>
</tr>
</tbody>
</table>

**HOW CAN I SAVE (EXPORT) A LIST OF PAYMENTS?**

You can export the list of payment records to an Excel, PDF, or .csv file.

To export payment record details:

1. From the Menu bar, click Payment History. The Payment History page opens.
2. Click the **Export** icon and a list of file format icons appear.

![XLS PDF CSV]

3. Click a file format. Example: PDF format

After the account information exports, the *Opening* dialog box opens, requesting you open or save the file.

**Note:** Other browsers may automatically download or open a different Open file dialog box.

![Opening MemberPages_DisbursementHistory_MEMBER_DISBURSEMENT_Grid.pdf]

4. Click **OK**.
**WHERE CAN I VIEW MY 1099R?**

From the **Menu** bar, click **1099R Information** to view a list of 1099R records.

**1099R Tax Report**

<table>
<thead>
<tr>
<th>Print Flag</th>
<th>Tax Id</th>
<th>Recipient Name</th>
<th>Tax Year</th>
<th>Gross Distribution</th>
<th>Taxable Amount</th>
<th>Federal Tax</th>
<th>Return Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>XXX-XX</td>
<td>J. ZABEL</td>
<td>2014</td>
<td>$33,960.12</td>
<td>$33,960.12</td>
<td>$33,960.12</td>
<td>1099-R</td>
</tr>
<tr>
<td>Print</td>
<td>XXX-XX</td>
<td>J. ZABEL</td>
<td>2013</td>
<td>$33,960.12</td>
<td>$33,960.12</td>
<td>$33,960.12</td>
<td>1099-R</td>
</tr>
<tr>
<td>Print</td>
<td>XXX-XX</td>
<td>J. ZABEL</td>
<td>2012</td>
<td>$33,960.12</td>
<td>$33,960.12</td>
<td>$33,960.12</td>
<td>1099-R</td>
</tr>
<tr>
<td>Print</td>
<td>XXX-XX</td>
<td>J. ZABEL</td>
<td>2011</td>
<td>$33,960.12</td>
<td>$33,960.12</td>
<td>$33,960.12</td>
<td>1099-R</td>
</tr>
</tbody>
</table>

**HOW CAN I SAVE (EXPORT) A LIST OF 1099R RECORDS?**

You can export the list of 1099R records to an Excel, PDF, or .csv file.

To export 1099R record details:

1. From the **Menu** bar, click **1099 Information**. The **1099R Tax Report** page opens.

2. Click the **Export** icon and a list of file format icons appear.

   ![Export Formats]

3. Click a file format. Example: PDF format
   After the account information exports, the **Opening** dialog box opens, requesting you open or save the file.

   **Note:** Other browsers may automatically download or open a different Open file dialog box.
HOW DO I PRINT MY 1099R?

The print 1099R statement function automatically defaults to print on 8½ x 14 paper; this size meets the IRS printing requirements for submission to the IRS.

To print the 1099R:

1. From the Menu bar, click 1099R Information to view a list of 1099R records. The 1099R Tax Report page opens.

   **1099R Tax Report**

<table>
<thead>
<tr>
<th>Print Flag</th>
<th>Tax ID</th>
<th>Recipient Name</th>
<th>Tax Year</th>
<th>Gross Distribution</th>
<th>Taxable Amount</th>
<th>Federal Tax</th>
<th>Return Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>XXX-XXXX</td>
<td>ZABEL</td>
<td>2014</td>
<td>$33,960.12</td>
<td>$33,734.84</td>
<td>$2,865.08</td>
<td>1099-R</td>
</tr>
<tr>
<td>Print</td>
<td>XXX-XXXX</td>
<td>ZABEL</td>
<td>2013</td>
<td>$33,544.32</td>
<td>$33,259.24</td>
<td>$2,850.80</td>
<td>1099-R</td>
</tr>
<tr>
<td>Print</td>
<td>XXX-XXXX</td>
<td>ZABEL</td>
<td>2012</td>
<td>$32,833.04</td>
<td>$22,577.76</td>
<td>$2,601.69</td>
<td>1099-R</td>
</tr>
<tr>
<td>Print</td>
<td>XXX-XXXX</td>
<td>ZABEL</td>
<td>2011</td>
<td>$31,864.52</td>
<td>$21,828.44</td>
<td>$2,275.64</td>
<td>1099-R</td>
</tr>
</tbody>
</table>

2. Click the Print link.
The 1099R document opens.
3. Click the printer icon.  
The *Print* dialog box opens.

4. *Optional*: Click *Properties* to open the *Copier Properties* dialog box and then click the *Paper* tab to view the 8½ x 14 paper size automatically selected; click *OK* to exit the *Copier Properties* dialog box.

5. Click *OK* to print the document.
12 View and Print Award Letter

WHERE IS MY AWARD LETTER?

Retired members and payees can view and print an award letter, which may be used as proof of monthly income.

To view letter:

1. From the Shortcuts bar, click the Award Letter link.
   The Award Letter page opens.

2. If applicable, select the type of benefit from the Select benefit drop-down list.

---

Dear Mr. ZABOIL

You are currently receiving a monthly benefit from the Orange County Employees Retirement System (OCERS), as follows:

Service Retirement, effective on 05/01/2000. The current monthly amount (gross) of this benefit is $2,834.32.

This benefit is payable to you for your lifetime and may be eligible for annual Cost of Living Adjustments (COLA) each April.

Please contact OCERS if you need additional information regarding your monthly benefit amount.

Sincerely,

Catherine Pailey
Director of Member Services
**HOW CAN I PRINT MY AWARD LETTER?**

Retired members and payees can view and print an award letter.

To view letter:

1. From the **Shortcuts** bar, click the **Award Letter** link. The **Award Letter** page opens.
2. If applicable, select the type of benefit from the **Select benefit** drop-down list.
3. Click the **Print** button at the bottom right of the page. The **Print** dialog box opens.
4. Click Print.