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Click a link to walk through a specific procedure.

ALL MEMBERS AND PAYEES

ACTIVE AND DEFERRED MEMBERS

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

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All Members and Payees

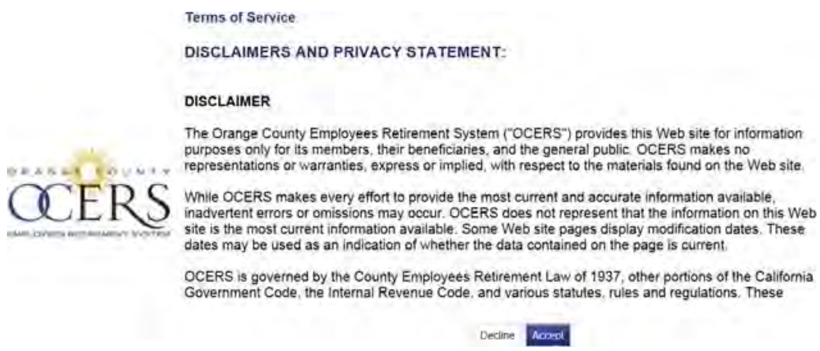
1 Getting Started

HOW DO I REGISTER?

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 (Figure 1):

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
ORANGE COUNTY OCERS EMPLOYEES RETIREMENT SYSTEM
User Name
Password
Log In
Register | Forgot User Name | Forgot Password | Help

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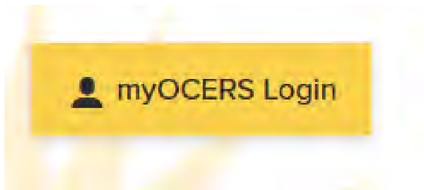
HOW DO I LOG ON?

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 (Figure 2):

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).

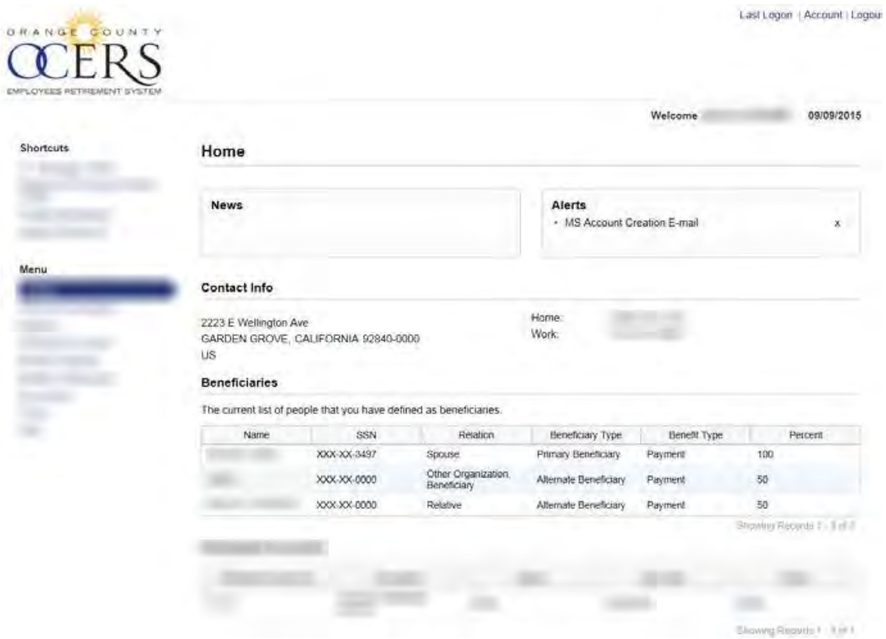


Figure 3 Member Self-Service (MSS) Portal Home page (blurred to only display areas common for all users)

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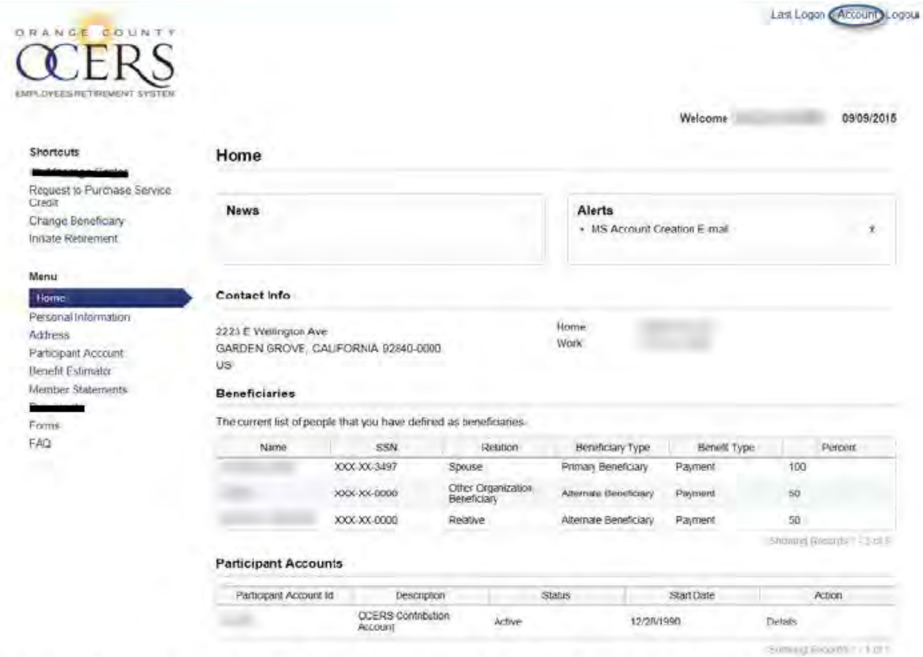
HOW DO I UPDATE SECURITY QUESTIONS?

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.

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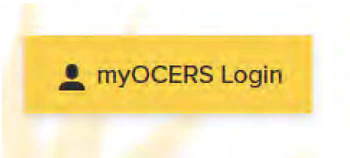
HOW DO I RETRIEVE/RESET MY PASSWORD?

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.



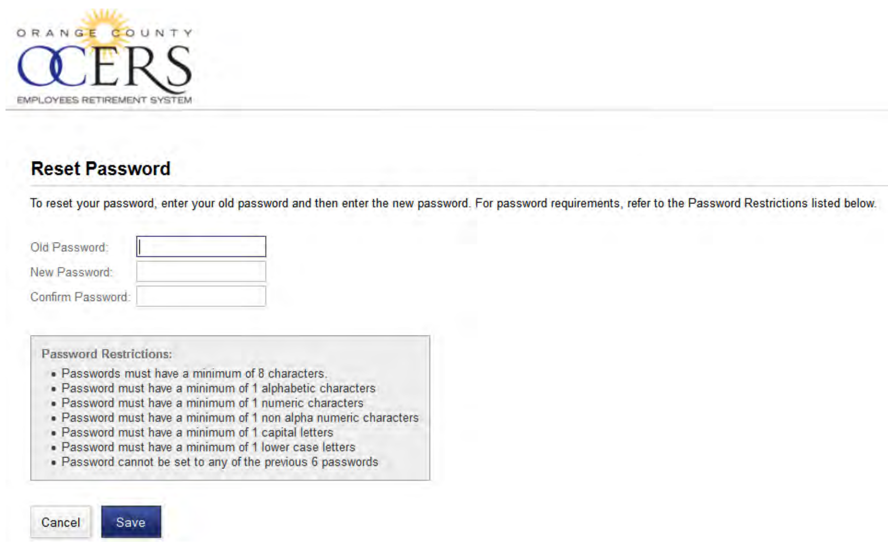
2. The link on this page will take you to the *Member Log In* page.

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.

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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.

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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.

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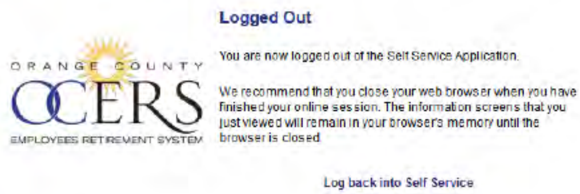
HOW DO I LOG OFF?

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



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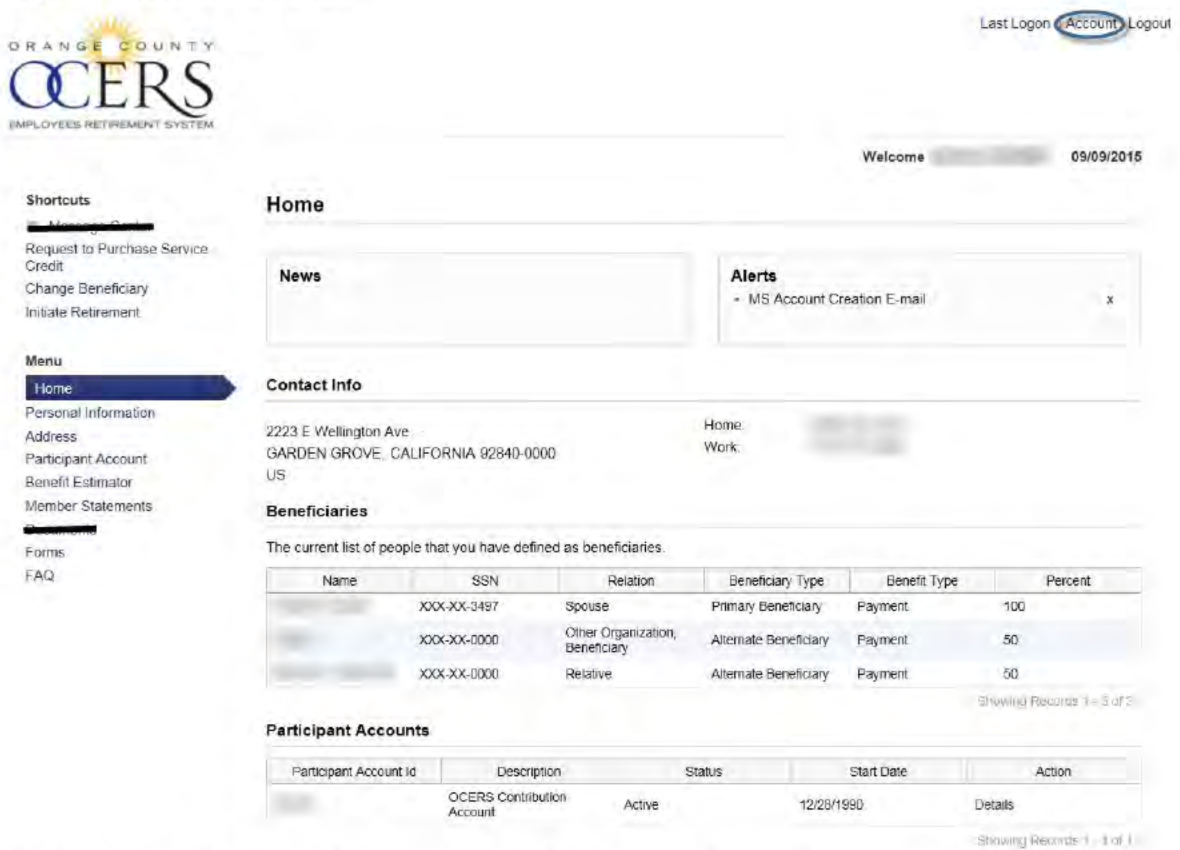
HOW CAN I CHANGE MY EMAIL ADDRESS?

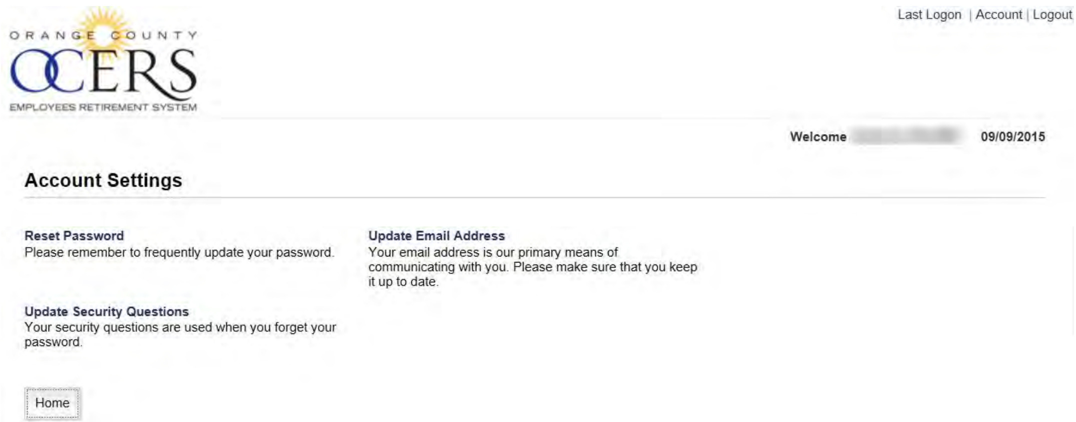
You can change your email address using the Member Self-Service (MSS) Portal application.

To change you email:

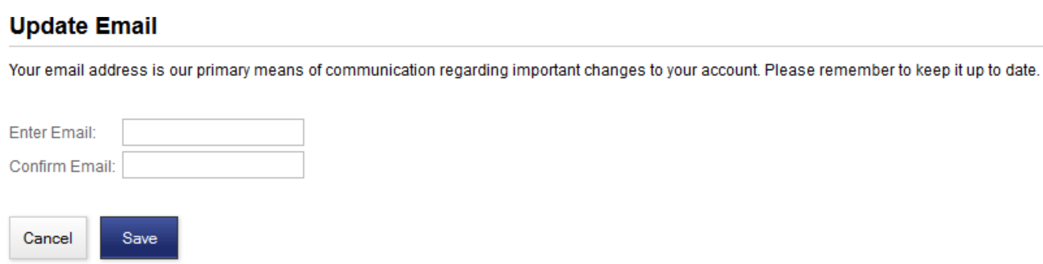
1. Log on to the *Member Portal*.



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.



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**.

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WHAT ARE THE MSS PORTAL SYSTEM REQUIREMENTS?

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

BROWSER NAME	PLATFORM	VERSION
Microsoft Internet Explorer	Windows	10
Mozilla Firefox	Windows and Mac OS X: 10.6 or later	24 and above
Google Chrome	Windows and Mac OS X: 10.6 or later	Latest stable version supported
Safari	Mac OS X: Mountain Lion, Mavericks, Yosemite, El Capitan	Latest stable version supported 6.2.5, 7.1.5, 8.0.5

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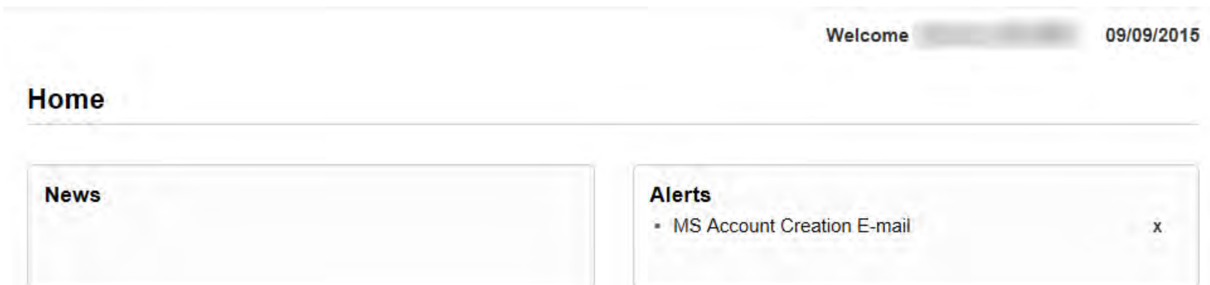
2 Navigating the Member Portal

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.



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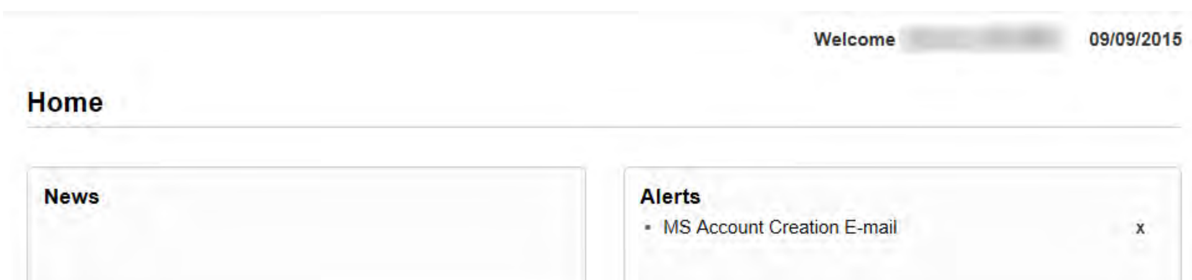
WHAT IS THE ALERTS SECTION FOR?

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).



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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.

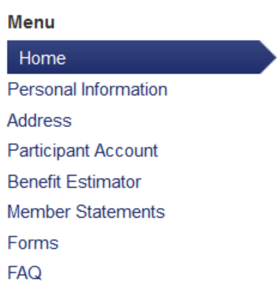

Figure 4 Active and Deferred Member Menu Links

Figure 5 Retiree Member and Payee Menu Bar

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

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

MENU	
Forms	All members and payees can view and print select OCERS forms.
FAQ	All members and payees can view *MSS Portal* Frequently Asked Questions and answers.
Benefits	Retired members and payees can view benefit and COLA information.
Direct Deposit Information	Retired members and payees can view, filter, and export direct deposit information.
Tax Withholding Information	Retired members and payees can view, filter, and export tax withholding information.
Payment History	Retired members and payees can view, filter, and export a list of pension payments.
1099R Information	Retired members and payees can view a list of 1099R tax documents.

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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.

SHORTCUTS
Update Direct Deposit: Retired members and payees can use the Direct Deposit Wizard to update benefit payment direct deposit information.
Update Tax Information: Retired members and payees can use the *Tax Information* Wizard to update benefit payment tax information.
Change Beneficiary: All members can use the Beneficiary Wizard to complete/update the *Beneficiary Change* form and submit it directly to OCERS. **Non-member payees do not have this option.**
Request to Purchase Service Credit: 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.
Initiate Retirement: 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.
View and Print Award Letter: Retired members and payees can view and print an award letter.

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ORANGE COUNTY
OCERS
EMPLOYEES RETIREMENT SYSTEM

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

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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.

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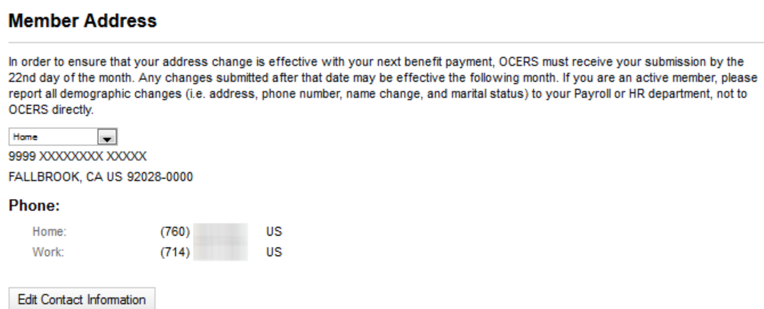
CAN I EDIT MY CONTACT INFORMATION?

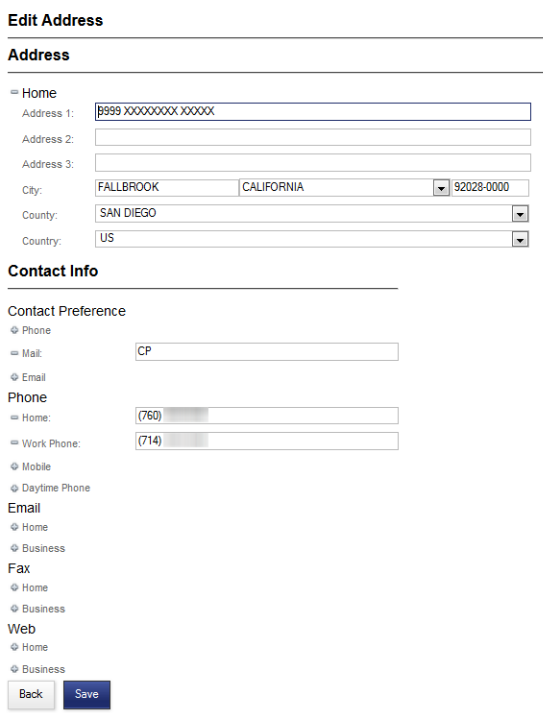
Only retired members and payees can update their address and phone information.

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**.

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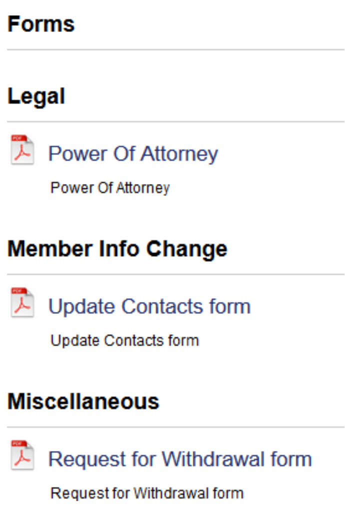
4 Access Select Forms and FAQs

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.

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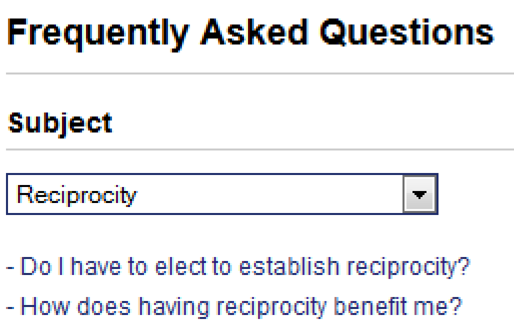
HOW DO I USE THE FAQS?

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.

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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.

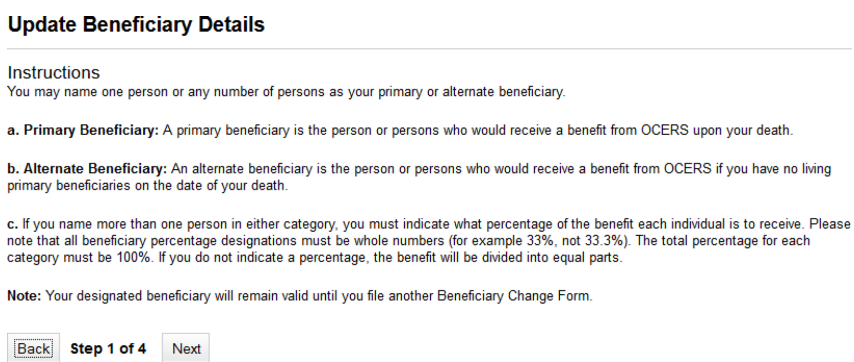
Note: Non-member payees do not have this option.

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 Beneficiary Change Form.

Back **Step 1 of 4** Next

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.

Update Beneficiary Details

Member Information

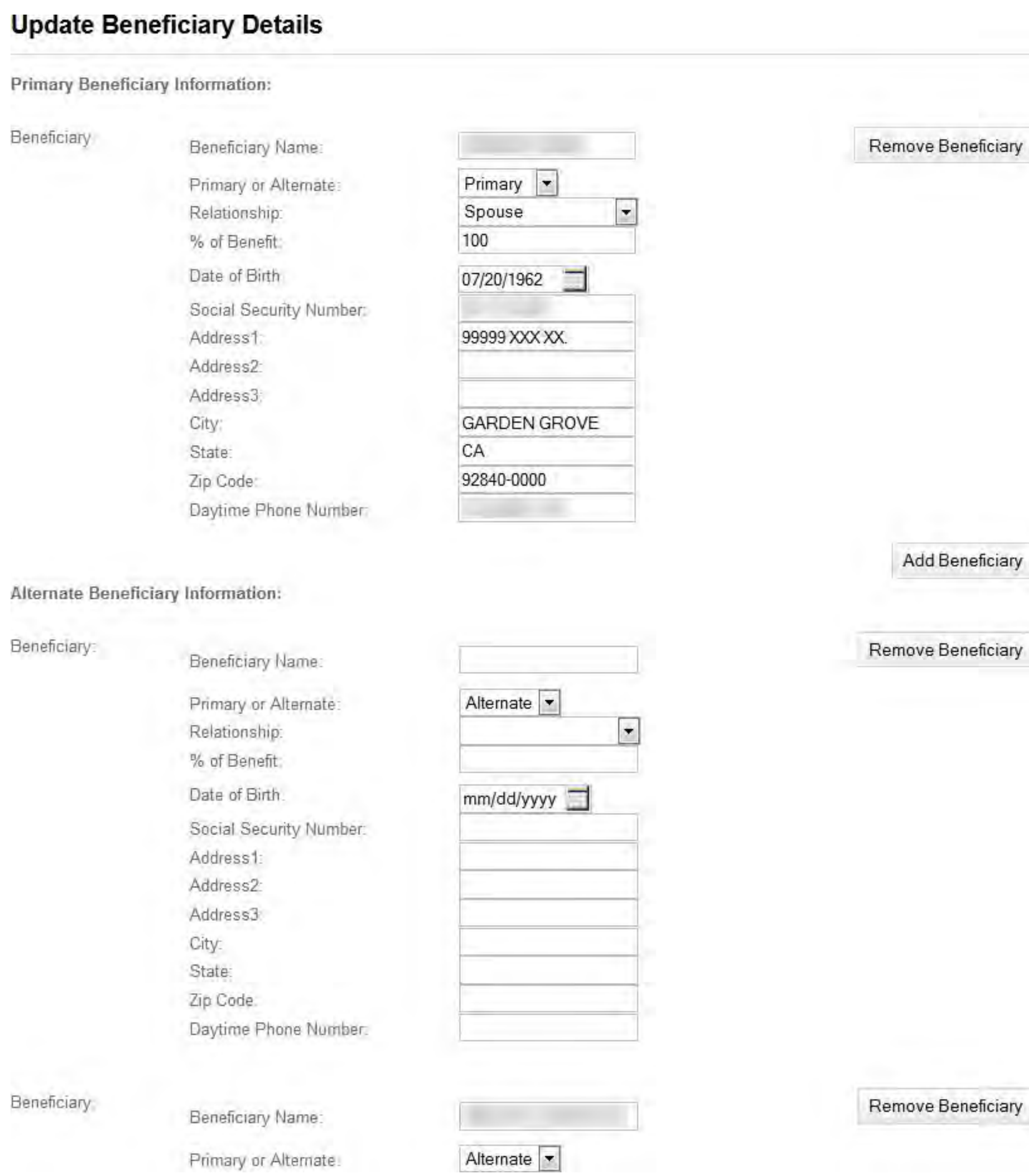
First Name:
Middle Name:
Last Name:
OCERS ID:
Home/Mailing Address: 2223 E Wellington Ave
GARDEN GROVE, CA 92840-0000
Home Phone Number:
Work Phone Number:
Department/Employer: Social Services Agency

Marital Status: Married / Single / Widow(er)
If Married,Date of Marriage: 08/28/1982
Status: Active / Retired / Deferred / DRO

Back **Step 2 of 4** Next

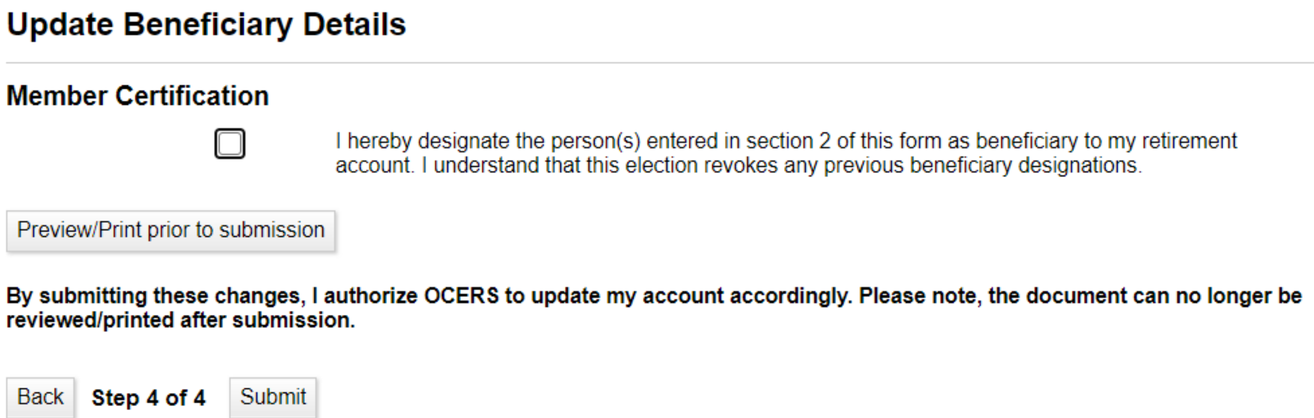
3. Click **Next**.
The *Primary and Alternate Beneficiary Information* page opens to the third page of the wizard, allowing you to review and update beneficiary information. (To add a beneficiary, click **Add Beneficiary** and a set of blank fields appears. To delete a beneficiary, click **Remove Beneficiary**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



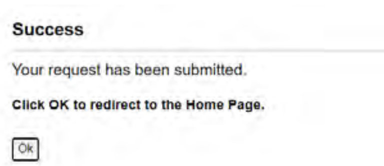
4. Click **Next**.

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.



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.

This page left intentionally blank.

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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.

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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.

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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.

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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.

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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.

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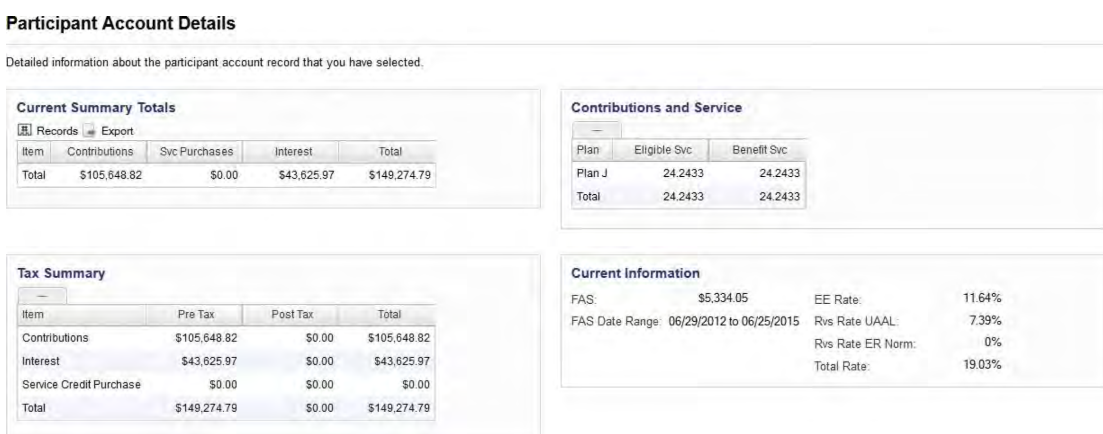
HOW CAN I SAVE (EXPORT) MY CURRENT SUMMARY TOTAL, TAX SUMMARY, AND CONTRIBUTIONS AND SERVICE?

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.

Current Summary Totals

Records Export

Item	Contributions	Svc Purchases	Interest	Total
Total	$105,648.82	$0.00	$43,625.97	$149,274.79

Contributions and Service

Plan	Eligible Svc	Benefit Svc
Plan J	24.2433	24.2433
Total	24.2433	24.2433

Tax Summary

Item	Pre Tax	Post Tax	Total
Contributions	$105,648.82	$0.00	$105,648.82
Interest	$43,625.97	$0.00	$43,625.97
Service Credit Purchase	$0.00	$0.00	$0.00
Total	$149,274.79	$0.00	$149,274.79

Current Information

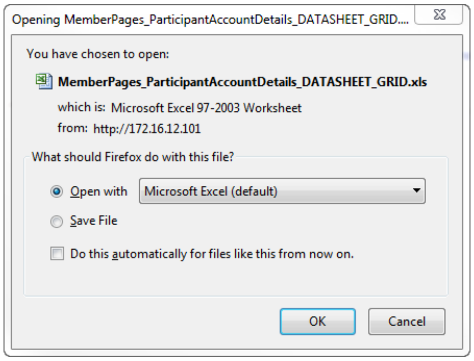
FAS:	$5,334.05	EE Rate:	11.64%
FAS Date Range:	06/29/2012 to 06/25/2015	Rvs Rate UAAL:	7.39%
		Rvs Rate ER Norm:	0%
		Total Rate:	19.03%

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

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

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**.

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ORANGE COUNTY OCERS EMPLOYEES RETIREMENT SYSTEM

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.

Your Member Statement

09/14/2015

2223 E Wellington Ave Suite 100
GARDEN GROVE, CA 92840-0000

OCERS Entry Date:	12/28/1990
Birth Date:	10/14/1963

Years of Service

Benefit Service (Total service includes all completed service purchases):	24.2433
Years of Benefit Service - Plan J:	28.5510
Completed Service Credit Purchases/Redeposits:	0.0000
Reciprocal Service:	0.0000
Current Benefit Plan:	Plan J - Orange County

Contributions

Contributions:	$105,648.82
Interest:	$43,625.97
Total:	$149,274.79

Beneficiaries

Name	SSN	Date of Birth	Relation	Beneficiary Type	Benefit Type	Percent
	XXX-XX-3497	07/20/1962	Spouse	Primary Beneficiary	Payment	100%
				Alternate Beneficiary	Payment	50%
		08/04/1935	Relative	Alternate Beneficiary	Payment	50%

IMPORTANT NOTICE: This is a personalized statement of the retirement benefits you have earned to date. This information has not been audited, and we recommend that you contact OCERS before taking action based on this report.

Print

2. Click **Print** at the bottom of the page to print statement.

Back to top

8 Request to Purchase Service Credit

HOW CAN I SEND A REQUEST TO PURCHASE SERVICE CREDIT?

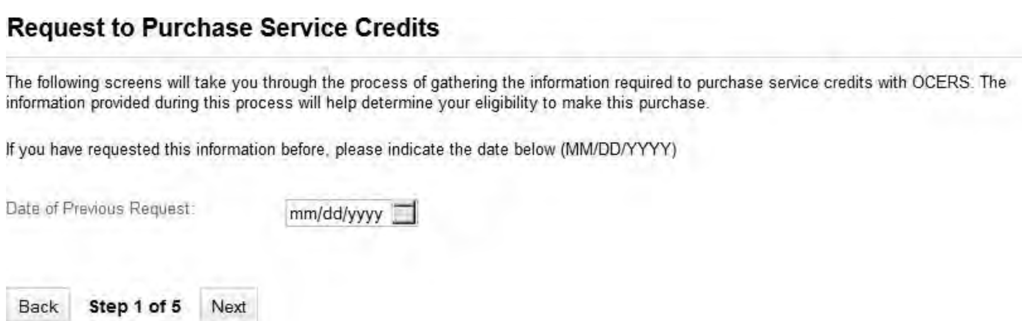
The **Request to Purchase Service Credits** page allows you to walk through the steps to complete the Request to Purchase Service Credit form and submit it directly to OCERS using the Request to Purchase Service Credit Wizard.

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

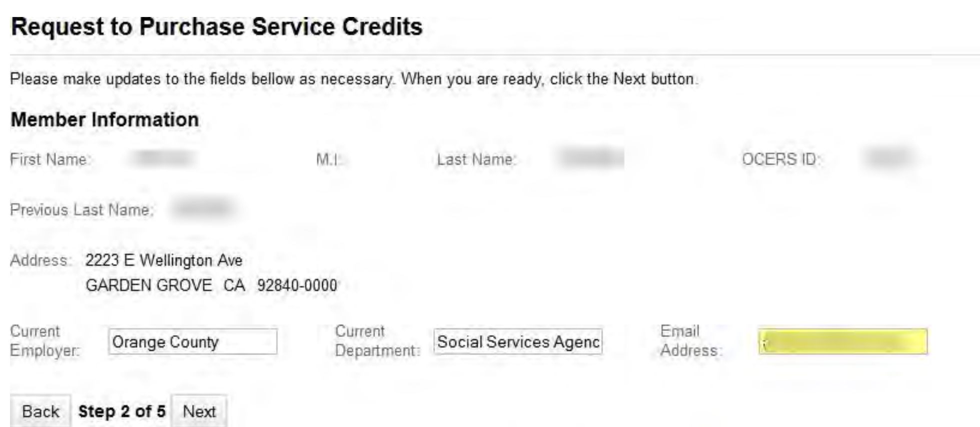
The following screens will take you through the process of gathering the information required to purchase service credits with OCERS. The information provided during this process will help determine your eligibility to make this purchase.

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

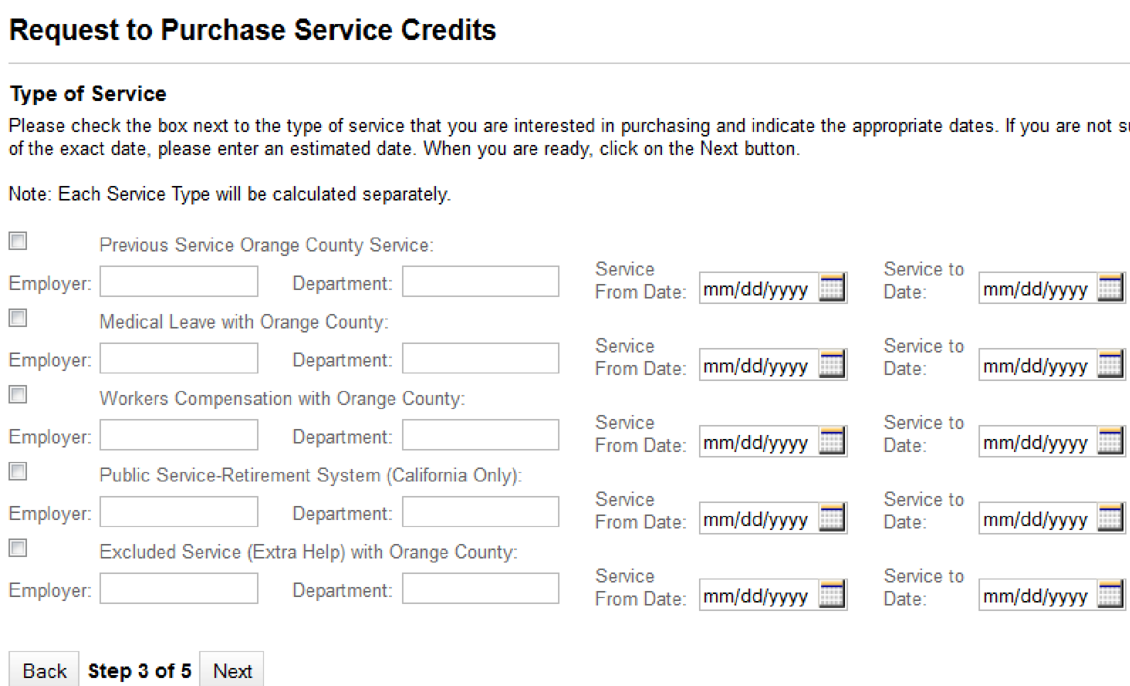
Date of Previous Request: mm/dd/yyyy

Back **Step 1 of 5** Next

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.



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.

Request to Purchase Service Credits

Confirmation Screen

Please select the Next button to submit the information to OCERS

Previous Request:			
Service Type:	Medical Leave with Orange County	Member Name:	[redacted]
Service From Date:	Aug 11, 2014	Member OCERS ID:	107547
Service To Date:	Aug 29, 2014	Member Phone:	(949) 555-1212
Employer/System:	Orange County	Member Email:	[redacted]
Department:	Social Services		

Back **Step 4 of 5** Next

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.

Request to Purchase Service Credits

Member Certification

☐ I hereby affirm that the statements I have made on this form are true and correct to the best of my knowledge and belief.

Preview/Print prior to submission

By submitting these changes, I authorize OCERS to update my account accordingly. Please note, the document can no longer be reviewed/printed after submission.

Back **Step 5 of 5** Submit

6. Click **Submit**.

The application submitted dialog box opens.

Success

Your request has been submitted.

Click OK to redirect to the Home Page.

Ok

7. Click **OK**.

   A confirmation email message is sent to the email address you submitted, confirming the submission was successful.

Some documents and updates will still be sent through USPS mail.

Back to top

9 Initiate Retirement

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

To estimate your retirement allowance, enter information as indicated below and click on CALCULATE.

Member Information

Name:		Age At Effective Date:	51.75
Birth Date:	10/14/1963	Earliest Retirement Date:	10/14/2013
OCERS Entry Date:	12/28/1990	OCERS Classification:	General
Status:	Active		
Years of Benefit Service - Plan J:	24.2433		
Total:	24.2433		

Benefit Estimator

Retirement Effective Date	09/14/2015	This is your earliest retirement date. You may also enter a future date in this field and your age at effective date above will automatically update. If you are an Active member the system will project your service up to the date entered based on 80 hours per pay period. If you are a Deferred member no service will be projected.
Monthly Final Average Salary at Retirement Effective Date	$5,352.19	This is your current FAS based on payroll data posted in our system as of today's date. You may also enter another value in this field and your benefit will be calculated based on that amount.
Years of Service at Retirement Effective Date	24.2433	
Service Purchase (Not yet completed)		If you have a purchase service that is planned or in progress, enter the years of service you are purchasing here. Do not enter a value for any previously paid in full service purchase contracts or Public Service purchases that are in process, as those amounts are reflected in the total above. The years of service entered here will be calculated based on your current or most recent plan formula. If you are purchasing service that will not be credited to your current or most recent plan formula, please contact OCERS.
Total Service	24.2433	Total the YOS at retirement effective date and Service Purchase (not yet completed)

CALCULATE

Click Calculate when all information has been entered.

Estimated Unmodified Monthly Benefit Amount

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.

Benefit Estimator

To estimate your retirement allowance, enter information as indicated below and click on CALCULATE.

Member Information

Name:		Age At Effective Date:	56
Birth Date:	10/14/1963	Earliest Retirement Date:	10/14/2013
OCERS Entry Date:	12/28/1990	OCERS Classification:	General
Status:	Active		

Years of Benefit Service - Plan J: 28.5510
Total: 28.5510

Benefit Estimator

Retirement Effective Date	12/25/2019	This is your earliest retirement date. You may also enter a future date in this field and your age at effective date above will automatically update. If you are an Active member the system will project your service up to the date entered based on 80 hours per pay period. If you are a Deferred member no service will be projected.
Monthly Final Average Salary at Retirement Effective Date	$5,441.69	This is your current FAS based on payroll data posted in our system as of today's date. You may also enter another value in this field and your benefit will be calculated based on that amount.
Years of Service at Retirement Effective Date	28.5510	
Service Purchase (Not yet completed)		If you have a purchase service that is planned or in progress, enter the years of service you are purchasing here. Do not enter a value for any previously paid in full service purchase contracts or Public Service purchases that are in process, as those amounts are reflected in the total above. The years of service entered here will be calculated based on your current or most recent plan formula. If you are purchasing service that will not be credited to your current or most recent plan formula, please contact OCERS.
Total Service	28.5510	Total the YOS at retirement effective date and Service Purchase (not yet completed).

CALCULATE

Click Calculate when all information has been entered.

Estimated Unmodified Monthly Benefit Amount $4,194.87

[Back to top](#)

HOW CAN I COMPLETE A SERVICE RETIREMENT APPLICATION?

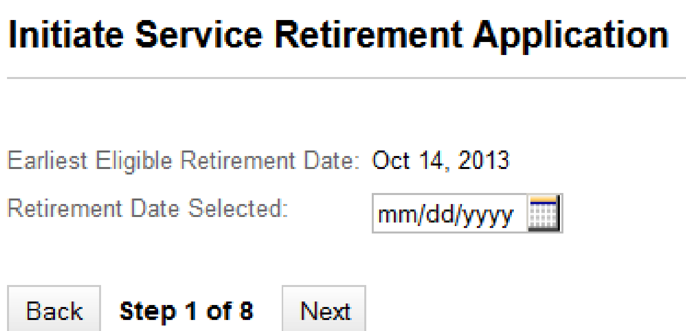
You can start a service retirement application using the Service Retirement Wizard.

Before you begin you will need the following:

- Retirement date, retirement option, marital status and marriage date
- One or more beneficiary names, date of birth, social security number, address, and phone number for each named beneficiary
- Federal and state tax withholding information: filing status and number of exemptions
- 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.



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.


Initiate Service Retirement Application

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

Home/Mailing Address: 2223 E Wellington Ave
GARDEN GROVE CA 92840-0000

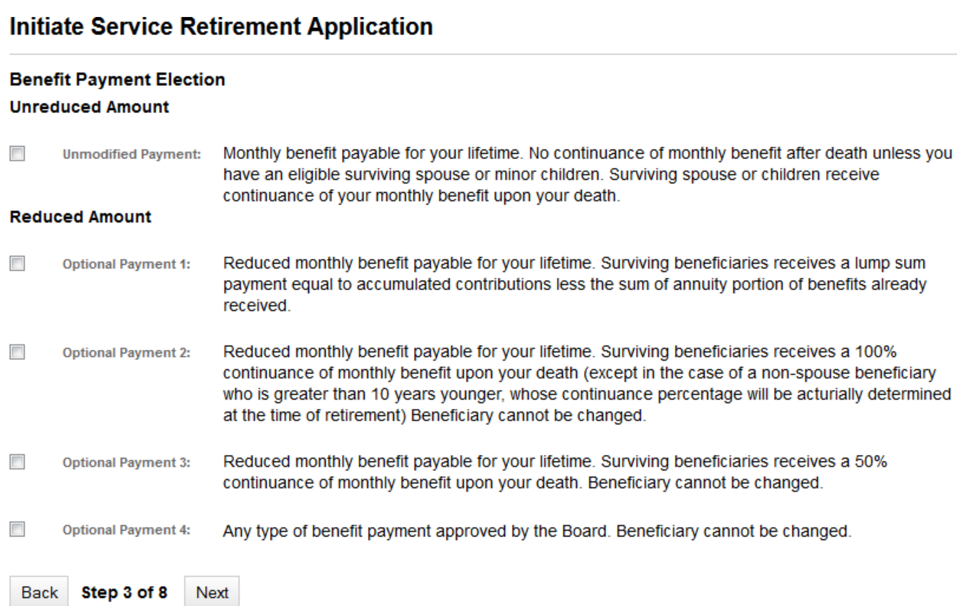
Birth Date: 10/14/1963 Current Marital Status: Married Date of Marriage: 08/28/1982

Department: Social Services Agency Daytime Phone Number:

Total years of Service: 24.2433 Effective Date of Retirement: 10/30/2015

Back **Step 2 of 8** Next

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 continuance 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 receives 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 acturially 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.

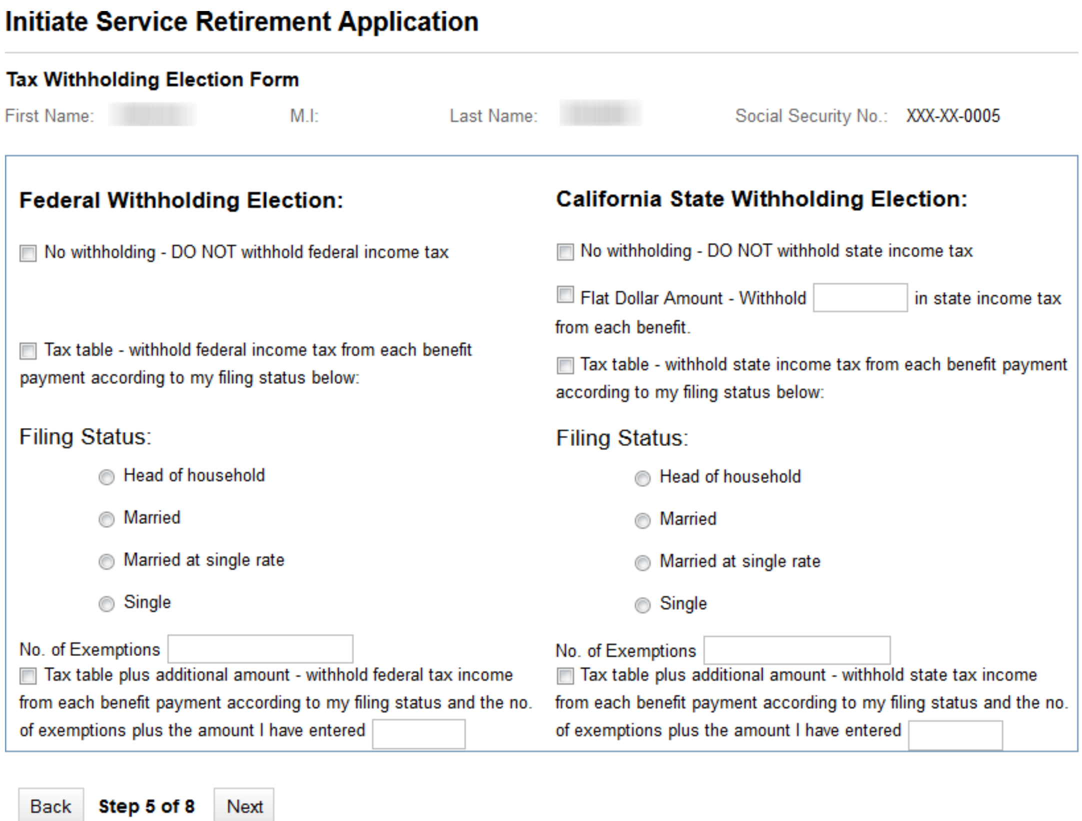
Back **Step 3 of 8** Next

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.)

ORANGE COUNTY
OCERS
EMPLOYEES RETIREMENT SYSTEM


Initiate Service Retirement Application

Tax Withholding Election Form

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

Federal Withholding Election:

☐ No withholding - DO NOT withhold federal income tax

☐ Tax table - withhold federal income tax from each benefit payment according to my filing status below:

Filing Status:

- Head of household
- Married
- Married at single rate
- Single

No. of Exemptions

☐ Tax table plus additional amount - withhold federal tax income from each benefit payment according to my filing status and the no. of exemptions plus the amount I have entered

California State Withholding Election:

☐ No withholding - DO NOT withhold state income tax

☐ Flat Dollar Amount - Withhold in state income tax from each benefit.

☐ Tax table - withhold state income tax from each benefit payment according to my filing status below:

Filing Status:

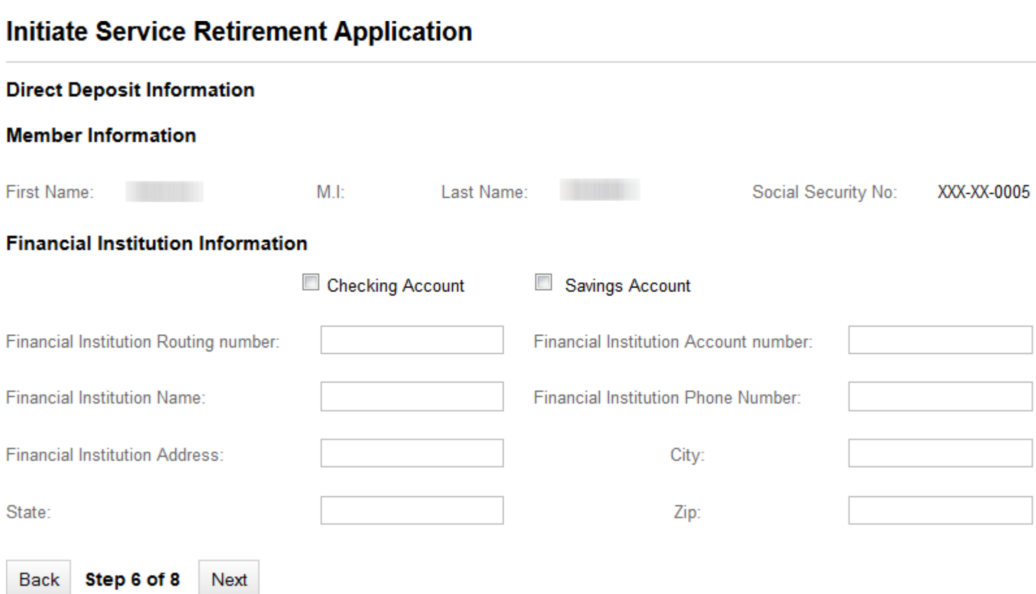
- Head of household
- Married
- Married at single rate
- Single

No. of Exemptions

☐ Tax table plus additional amount - withhold state tax income from each benefit payment according to my filing status and the no. of exemptions plus the amount I have entered

Back **Step 5 of 8** Next

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 Account number:

Financial Institution Name: 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

Summary

First Name:	[redacted]	Last Name:	[redacted]	M.I.:	
Social Security No.:	XXX-XX-0005	Birth Date:	10/14/1963	Marital Status:	M
Date of Marriage:	Aug 28, 1982	Effective Date:			
Home/Mailing Address:	2223 E Wellington Ave GARDEN GROVE, CA, 92840-0000				
Phone No.:	[redacted]				
Department:	Social Services Agency	Option Selected:	Unmodified		

Primary Beneficiary Information

Beneficiary Name:	[redacted]	Beneficiary Type:	Primary	Relationship:	Spouse
% of Benefit :	100	Birth Date :	07/20/1962	Social Security No.:	[redacted]
Home/Mailing Address :	99999 XXX XX.				
City :	GARDEN GROVE CA 92840-0000				
Telephone Number :	[redacted]				

Alternate Beneficiary Information

Beneficiary Name :	[redacted]	Beneficiary Type :	Alternate	Relationship:	
% of Benefit :	50	Birth Date :		Social Security No.:	
Address:					
City :					
Telephone Number :					

Beneficiary Name :	[redacted]	Beneficiary Type :	Alternate	Relationship:	Relative
% of Benefit :	50	Birth Date :	08/04/1935	Social Security No.:	000-00-0000
Address:	9999 X. XXXX XXX.				
City :	SANTA ANA CA 92705-0000				
Telephone Number :	[redacted]				

Back **Step 7 of 8** Next

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.
- ☐ I hereby acknowledge that there are rules governing a retiree who wishes to return to work for an OCERS-covered Employer in any capacity (including extra help, contractor, full or part time). Failure to follow proper procedures may result in my retirement allowance being suspended. Contact OCERS for more information regarding a retiree returning to work
- ☐ **I UNDERSTAND BENEFIT PAYMENT OPTIONS ARE IRREVOCABLE AFTER RECEIPT OF MY FIRST RETIREMENT PAYMENT.**

By submitting these changes, I authorize OCERS to update my account accordingly. Please note, the document can no longer be reviewed/printed after submission.

Back **Step 8 of 8** Submit

10. Click **Submit**.

    A dialog box opens confirming the application submission.

Success

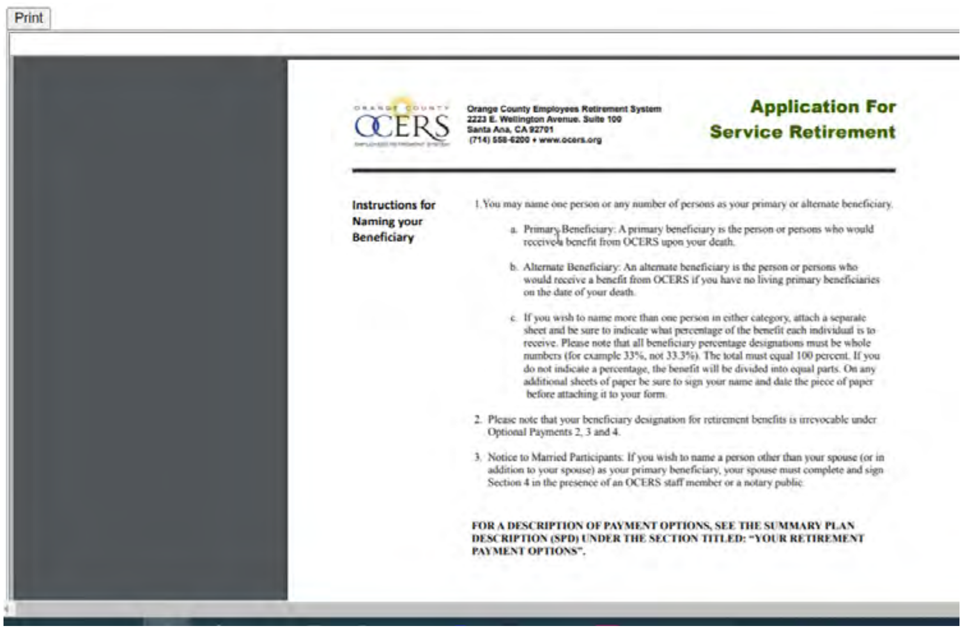
Your request has been submitted.

Click OK to redirect to the Home Page.

Ok

11. Click **OK**.

You are also given the option of printing out your completed Application For Service Retirement.



Print

Orange County Employees Retirement System
2223 E. Wellington Avenue, Suite 100
Santa Ana, CA 92701
(714) 558-6200 • www.ocers.org

Application For Service Retirement

Instructions for Naming your Beneficiary

1. 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 wish to name more than one person in either category, attach a separate sheet and be sure to 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 must equal 100 percent. If you do not indicate a percentage, the benefit will be divided into equal parts. On any additional sheets of paper be sure to sign your name and date the piece of paper before attaching it to your form.
2. Please note that your beneficiary designation for retirement benefits is irrevocable under Optional Payments 2, 3 and 4.
3. Notice to Married Participants: If you wish to name a person other than your spouse (or in addition to your spouse) as your primary beneficiary, your spouse must complete and sign Section 4 in the presence of an OCERS staff member or a notary public.

FOR A DESCRIPTION OF PAYMENT OPTIONS, SEE THE SUMMARY PLAN DESCRIPTION (SPD) UNDER THE SECTION TITLED: "YOUR RETIREMENT PAYMENT OPTIONS".

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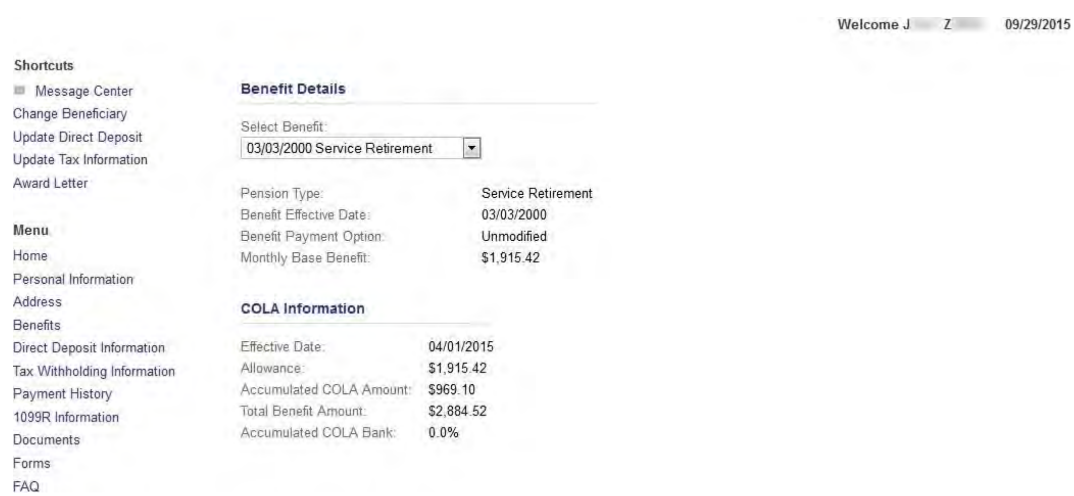
Retired Members and Payees

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.



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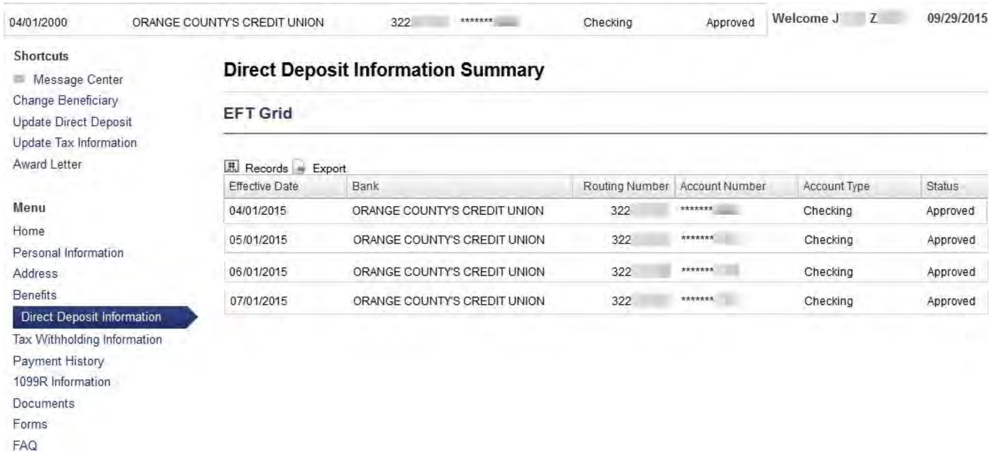
WHERE CAN I VIEW MY DIRECT DEPOSIT INFORMATION?

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.



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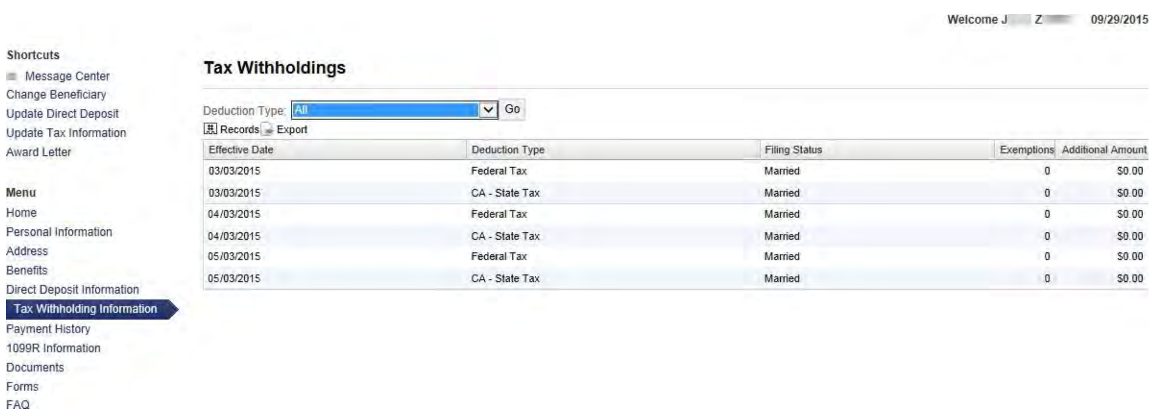
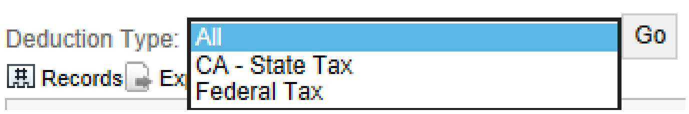
WHERE CAN I VIEW MY TAX WITHHOLDING INFORMATION?

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.



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HOW CAN I UPDATE MY TAX INFORMATION?

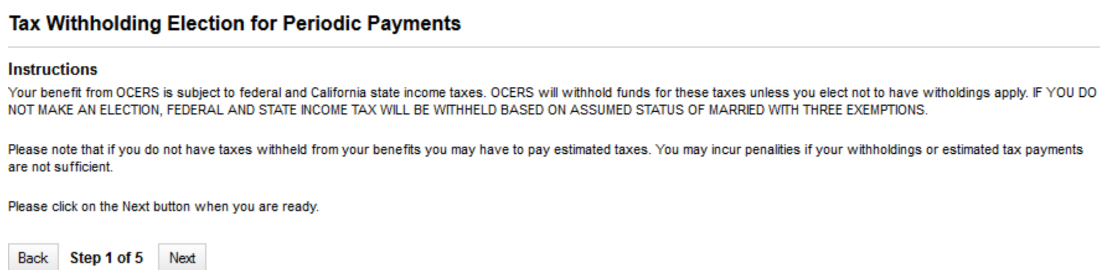
You can update tax withholding information using the *Tax Information* Wizard.

Before you begin you will need the following:

- Federal and state tax withholding information.

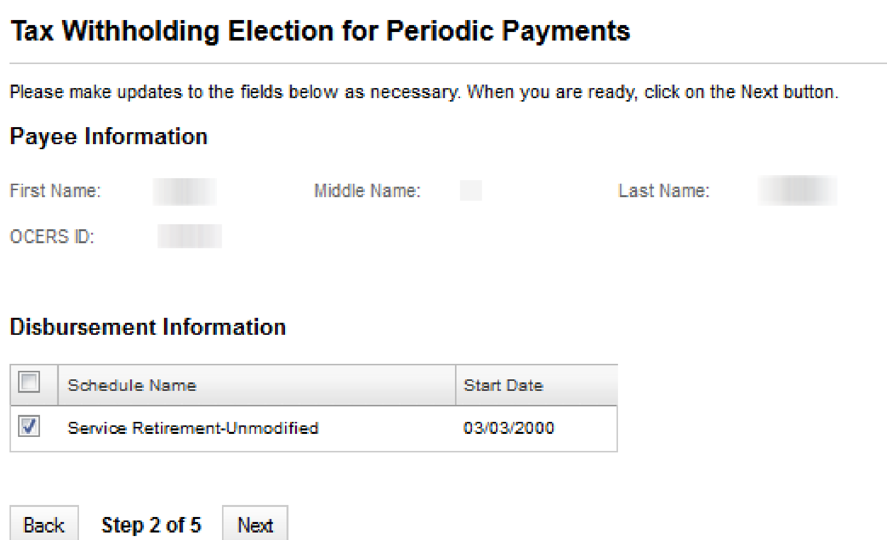
To update tax information:

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.



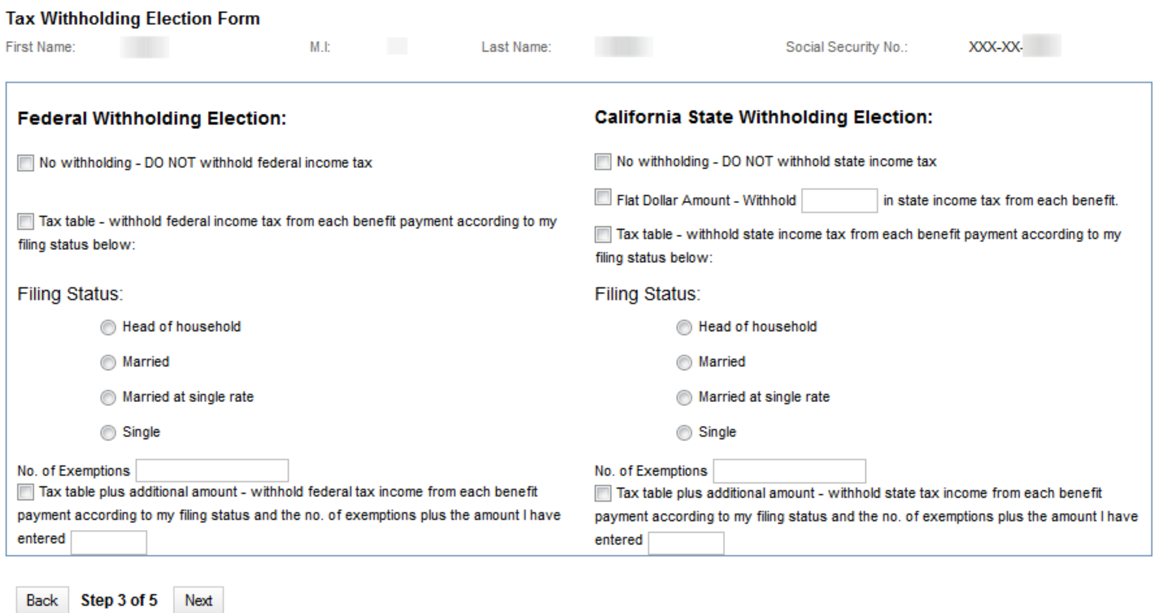
2. Click **Next**.
   The *Payee Information* page opens to the second page of the wizard, displaying a disbursement schedule. If there are multiple schedules, select the appropriate schedule.

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



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.)


Tax Withholding Election Form

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

Federal Withholding Election:

No withholding - DO NOT withhold federal income tax

Tax table - withhold federal income tax from each benefit payment according to my filing status below:

Filing Status:

Head of household

Married

Married at single rate

Single

No. of Exemptions

Tax table plus additional amount - withhold federal tax income from each benefit payment according to my filing status and the no. of exemptions plus the amount I have entered

California State Withholding Election:

No withholding - DO NOT withhold state income tax

Flat Dollar Amount - Withhold in state income tax from each benefit.

Tax table - withhold state income tax from each benefit payment according to my filing status below:

Filing Status:

Head of household

Married

Married at single rate

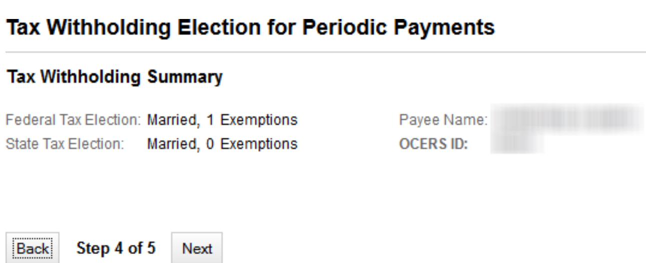
Single

No. of Exemptions

Tax table plus additional amount - withhold state tax income from each benefit payment according to my filing status and the no. of exemptions plus the amount I have entered

Back Step 3 of 5 Next

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.


Tax Withholding Election for Periodic Payments

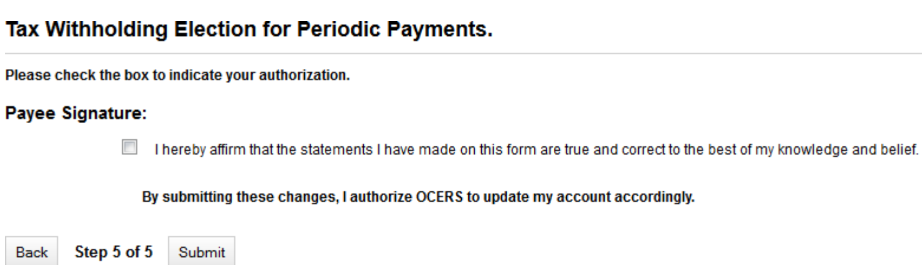
Tax Withholding Summary

Federal Tax Election: Married, 1 Exemptions Payee Name:

State Tax Election: Married, 0 Exemptions OCERS ID:

Back Step 4 of 5 Next

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.


Tax Withholding Election for Periodic Payments.

Please check the box to indicate your authorization.

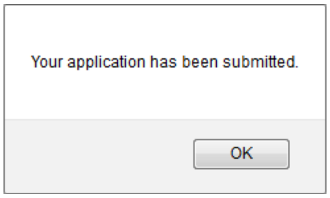
Payee Signature:

I hereby affirm that the statements I have made on this form are true and correct to the best of my knowledge and belief.

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

Back Step 5 of 5 Submit

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.

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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:

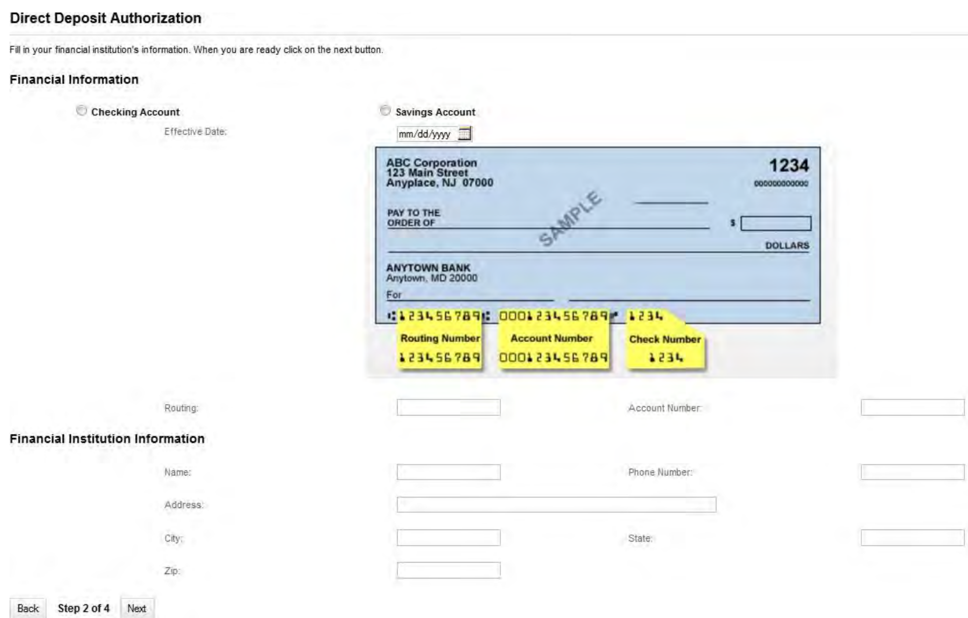
- Effective date
- Direct deposit routing number, account number, institution name, address, and phone number

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.

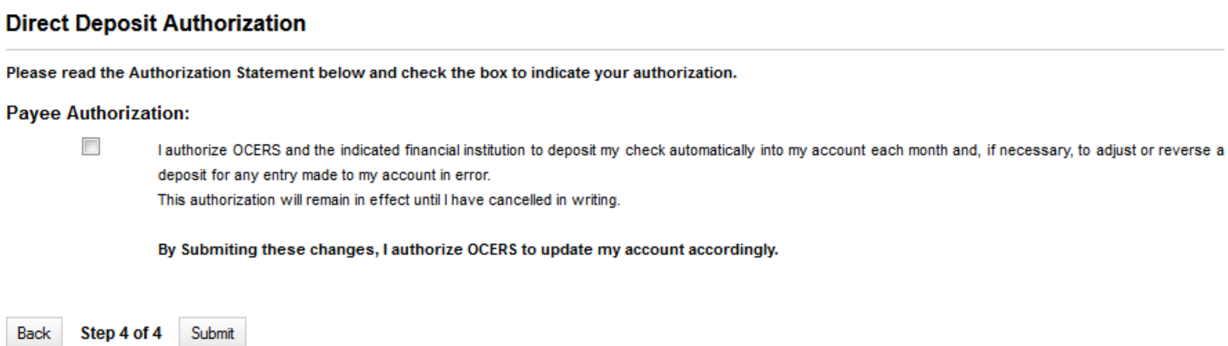
   Note: One or more disbursement payments can occur if a retired member is also getting a survivor benefit, for example.

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.

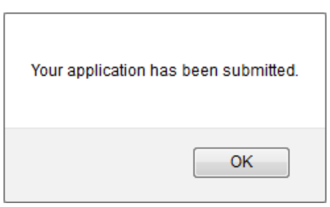


3. Click **Next**.
   The *EFT Summary* page opens to the third page of the wizard, allowing you to perform a final review of the date you've included.

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.

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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.

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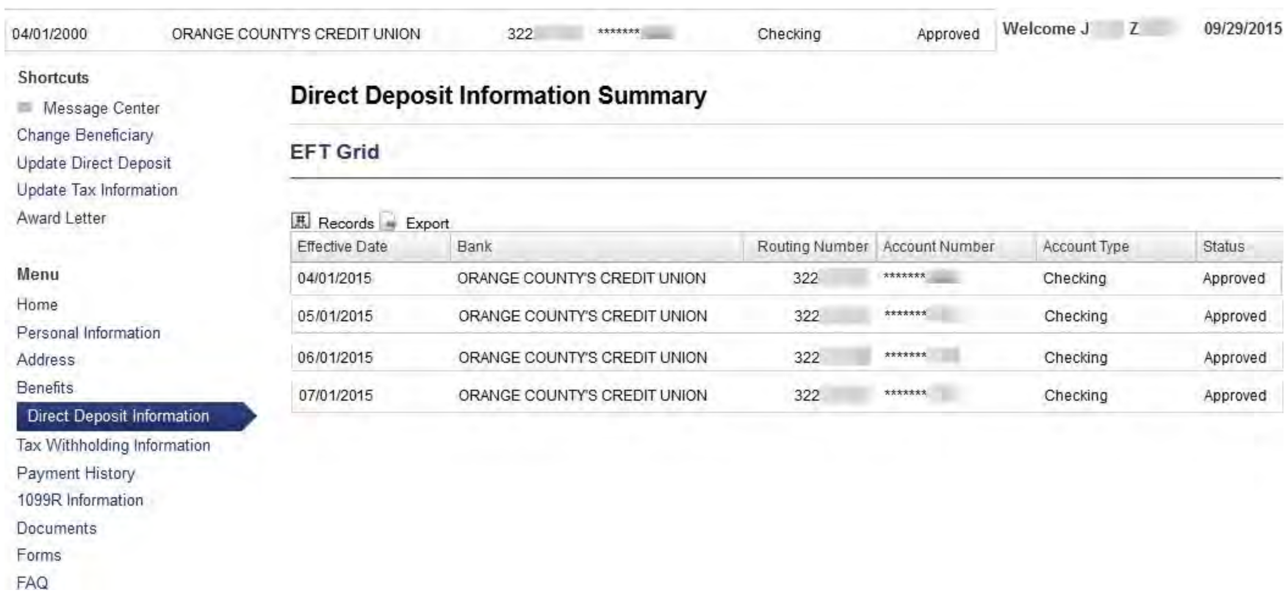
HOW CAN I SAVE (EXPORT) MY DIRECT DEPOSIT INFORMATION IN ANOTHER FORMAT?

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

To export direct deposit details:

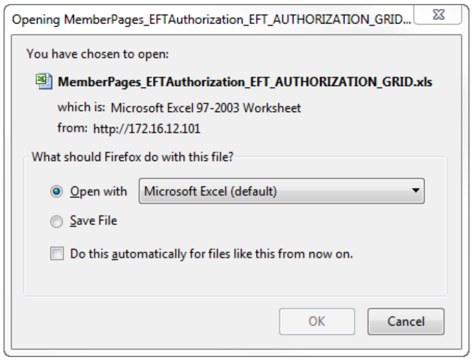
1. From the **Menu** bar, click **Direct Deposit Information**.
   The *Direct Deposit Information Summary* page opens.



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.



4. Click **OK**.

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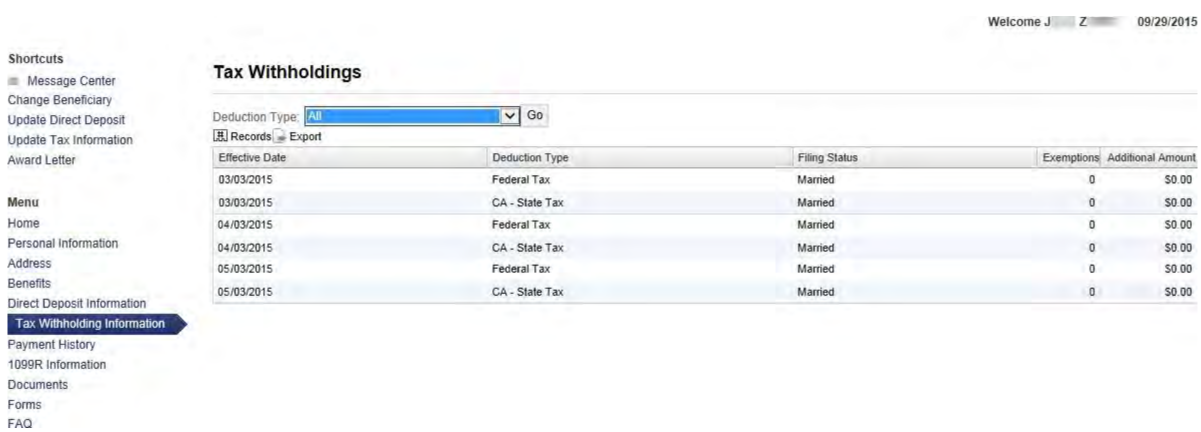
HOW CAN I SAVE (EXPORT) MY TAX WITHHOLDING INFORMATION IN ANOTHER FORMAT?

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

To export tax withholding details:

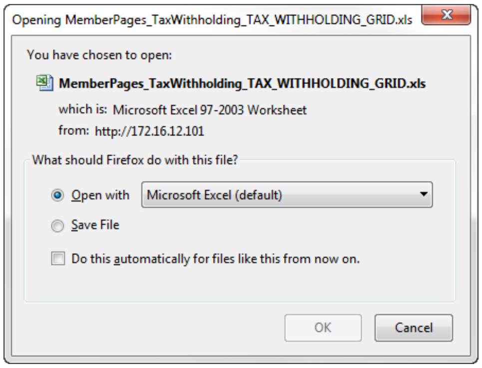
1. From the **Menu** bar, click **Tax Withholding Information**.
   The *Tax Withholdings* page opens.



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**.

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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 historical record of your payments

Benefit Account: All   Year: All

Records Export

Date	Benefit Account	Type	Bank Name	Gross Amount	Total Deductions	Net Amount	View Details
07/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,884.52	$470.75	$2,413.77	
06/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,884.52	$470.75	$2,413.77	
05/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,884.52	$470.75	$2,413.77	
04/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$463.41	$2,378.48	
03/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$463.41	$2,378.48	
02/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$463.41	$2,378.48	
01/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$463.41	$2,378.48	
12/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$394.05	$2,447.84	
11/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
10/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
09/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
08/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
07/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
06/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
05/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
04/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,813.75	$388.53	$2,425.22	
03/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,813.75	$388.53	$2,425.22	
02/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,813.75	$388.53	$2,425.22	
01/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,813.75	$388.53	$2,425.22	
12/01/2013	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,813.75	$309.20	$2,504.55	

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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.

ORANGE COUNTY OCERS EMPLOYEES RETIREMENT SYSTEM

Payment History

Below is historical record of your payments

Benefit Account: All   Year: All

Records Export

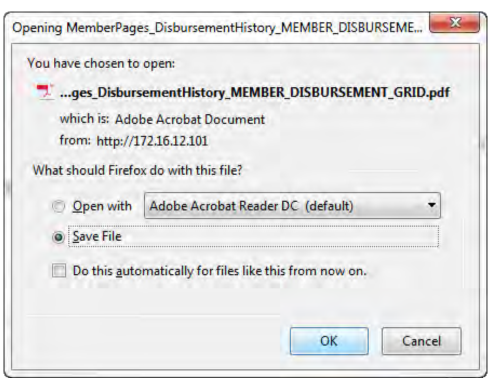
Date	Benefit Account	Type	Bank Name	Gross Amount	Total Deductions	Net Amount	View Details
07/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,884.52	$470.75	$2,413.77	
06/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,884.52	$470.75	$2,413.77	
05/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,884.52	$470.75	$2,413.77	
04/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$463.41	$2,378.48	
03/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$463.41	$2,378.48	
02/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$463.41	$2,378.48	
01/01/2015	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$463.41	$2,378.48	
12/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$394.05	$2,447.84	
11/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
10/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
09/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
08/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
07/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
06/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
05/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,841.89	$393.37	$2,448.52	
04/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,813.75	$388.53	$2,425.22	
03/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,813.75	$388.53	$2,425.22	
02/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,813.75	$388.53	$2,425.22	
01/01/2014	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,813.75	$388.53	$2,425.22	
12/01/2013	Pension Monthly	EFT	ORANGE COUNTY'S CREDIT UNION	$2,813.75	$309.20	$2,504.55	

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.



4. Click **OK**.

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ORANGE COUNTY OCERS EMPLOYEES RETIREMENT SYSTEM

WHERE CAN I VIEW MY 1099R?

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

1099R Tax Report

Records Export

Print Flag	Tax Id	Recipient Name	Tax Year	Gross Distribution	Taxable Amount	Federal Tax	Return Type
Print	XXX-XX-	J ZABEL	2014	$33,990.12	$33,734.04	$2,885.08	1099-R
Print	XXX-XX-	J ZABEL	2013	$33,544.32	$33,288.24	$2,859.80	1099-R
Print	XXX-XX-	J ZABEL	2012	$32,833.84	$32,577.76	$2,801.60	1099-R
Print	XXX-XX-	J ZABEL	2011	$32,084.52	$31,828.44	$2,739.64	1099-R

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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.

1099R Tax Report

Records Export

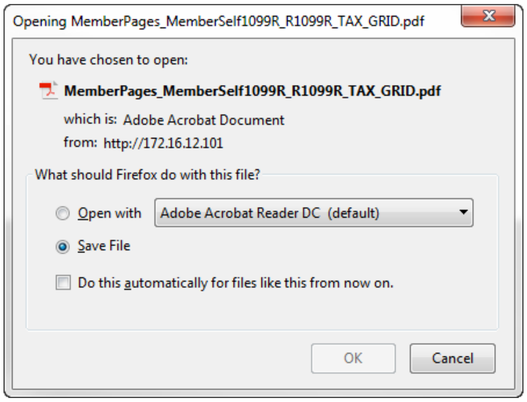
Print Flag	Tax Id	Recipient Name	Tax Year	Gross Distribution	Taxable Amount	Federal Tax	Return Type
Print	XXX-XX-	J ZABEL	2014	$33,990.12	$33,734.04	$2,885.08	1099-R
Print	XXX-XX-	J ZABEL	2013	$33,544.32	$33,288.24	$2,859.80	1099-R
Print	XXX-XX-	J ZABEL	2012	$32,833.84	$32,577.76	$2,801.60	1099-R
Print	XXX-XX-	J ZABEL	2011	$32,084.52	$31,828.44	$2,739.64	1099-R

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.



4. Click **OK**.

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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:

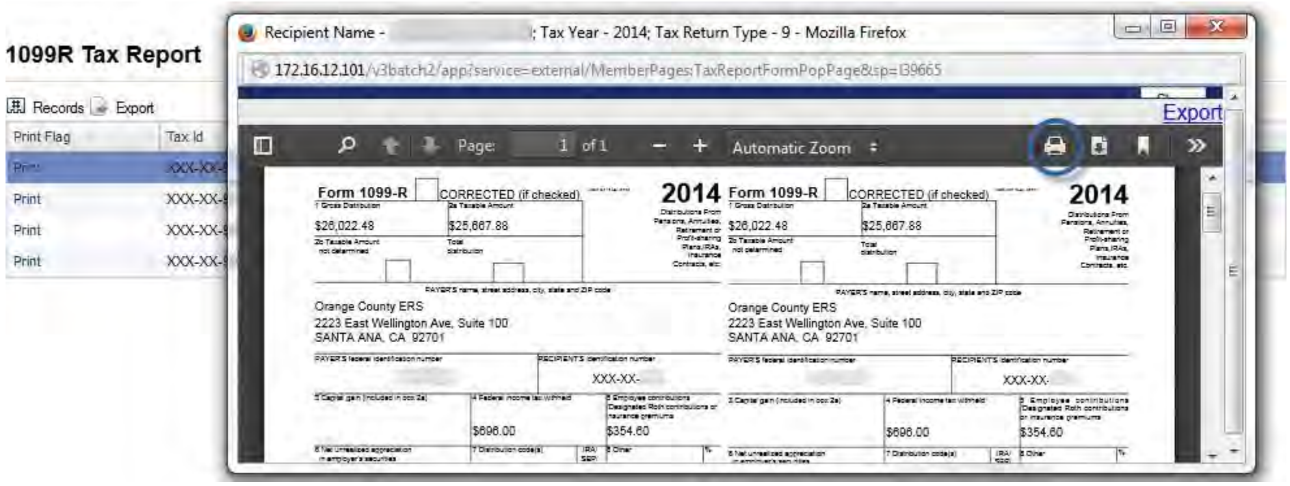
1. From the **Menu** bar, click **1099R Information** to view a list of 1099R records.
   The *1099R Tax Report* page opens.

1099R Tax Report

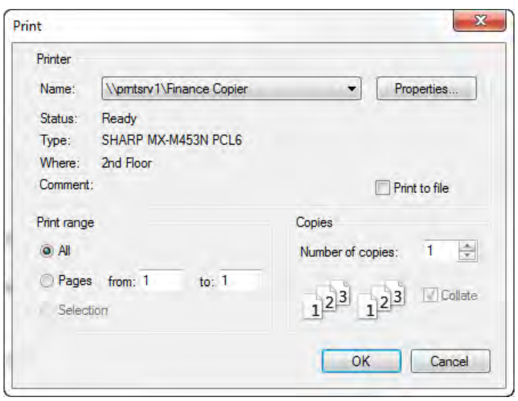
Records Export

Print Flag	Tax Id	Recipient Name	Tax Year	Gross Distribution	Taxable Amount	Federal Tax	Return Type
Print	XXX-XX-	J ZABEL	2014	$33,990.12	$33,734.04	$2,885.08	1099-R
Print	XXX-XX-	J ZABEL	2013	$33,544.32	$33,288.24	$2,859.80	1099-R
Print	XXX-XX-	J ZABEL	2012	$32,833.84	$32,577.76	$2,801.60	1099-R
Print	XXX-XX-	J ZABEL	2011	$32,084.52	$31,828.44	$2,739.64	1099-R

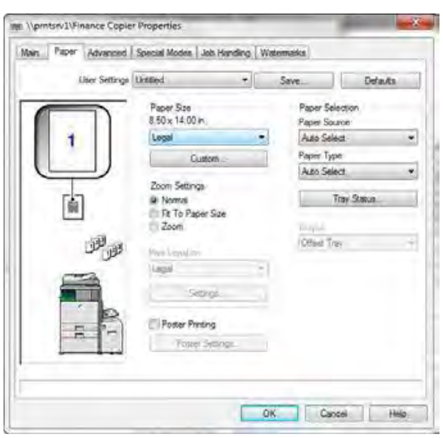
2. Click the **Print** link.
   The 1099R document opens.



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.

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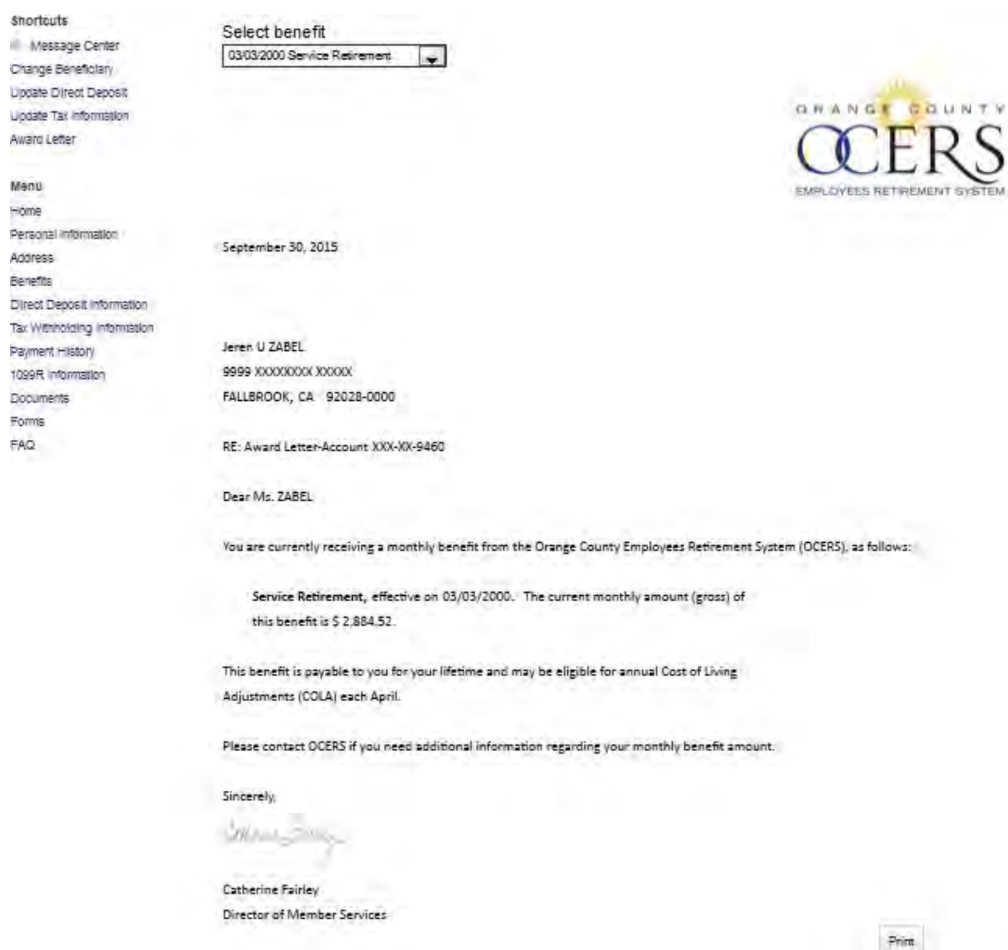
12 View and Print Award Letter

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.



Shortcuts
Message Center
Change Beneficiary
Update Direct Deposit
Update Tax Information
Award Letter

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

Select benefit
03/03/2000 Service Retirement

ORANGE COUNTY OCERS EMPLOYEES RETIREMENT SYSTEM

September 30, 2015

Jeren U ZABEL
9999 XXXXXXXX XXXXX
FALLBROOK, CA 92028-0000

RE: Award Letter-Account XXX-XX-9460

Dear Ms. ZABEL

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

Service Retirement, effective on 03/03/2000. The current monthly amount (gross) of this benefit is $ 2,884.52.

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 Fairley
Director of Member Services

Print

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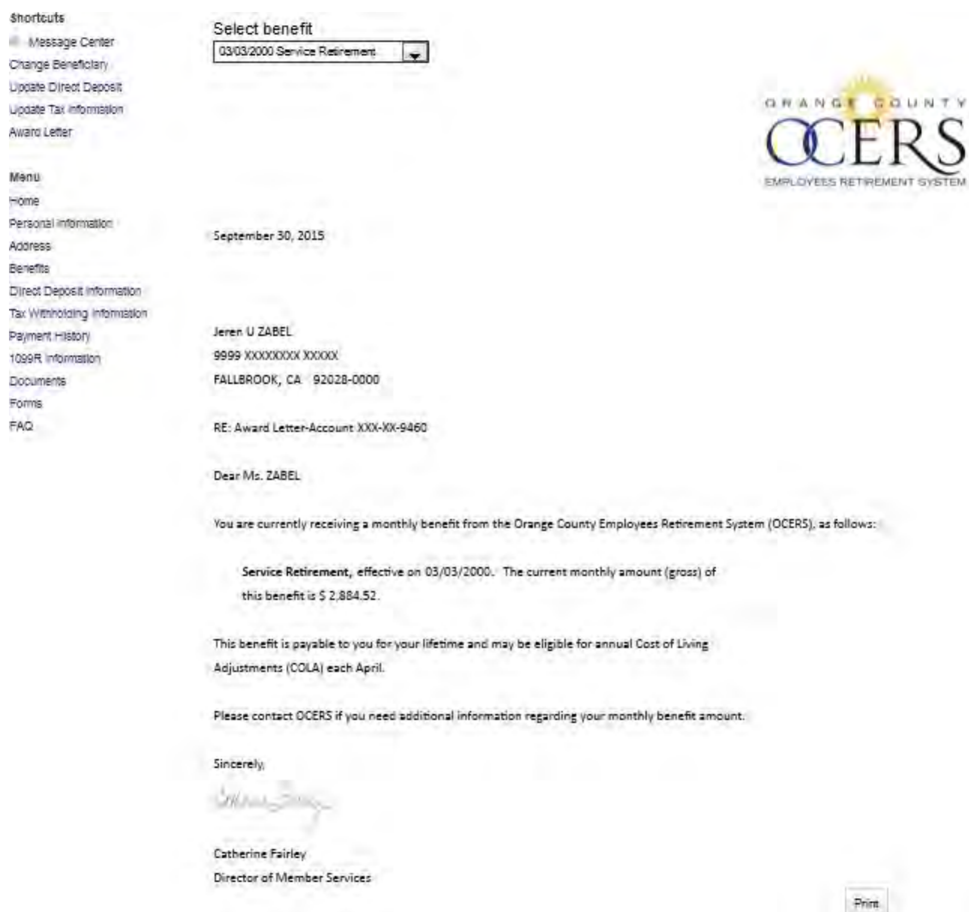
ORANGE COUNTY OCERS EMPLOYEES RETIREMENT SYSTEM

HOW CAN I PRINT MY AWARD LETTER?

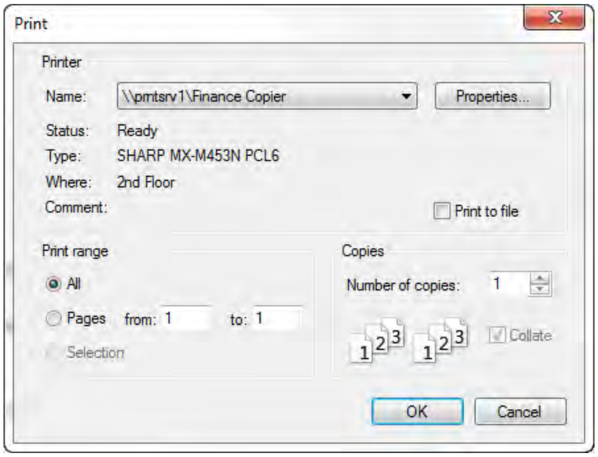
Retired members and payees can view and print an award letter.

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**.

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