### **Member Direct**

REGISTRATION
GUIDE



# Paper PIN Registration

### **Member Direct**

Ready to enroll in MemberDirect?
Here's what you'll need to register for your account



#### 1. VISIT WWW.COAERS.ORG

Go to www.coaers.org and click on the "Member Log In / Register" link to begin the enrollment process. You'll need a computer, tablet or smart phone device with an internet connection and 15 minutes to complete your MemberDirect account registration.



#### **USERNAMES & PASSWORDS**

Create a username and password that is unique to you. Your username can't contain your social security number nor can it contain the "e" symbol.

Passwords must be a minimum of 10 characters, one lower case, one upper case, and one special character ( $e ! \# \% ^ & + =$ ). Passwords cannot have any spaces in between characters.





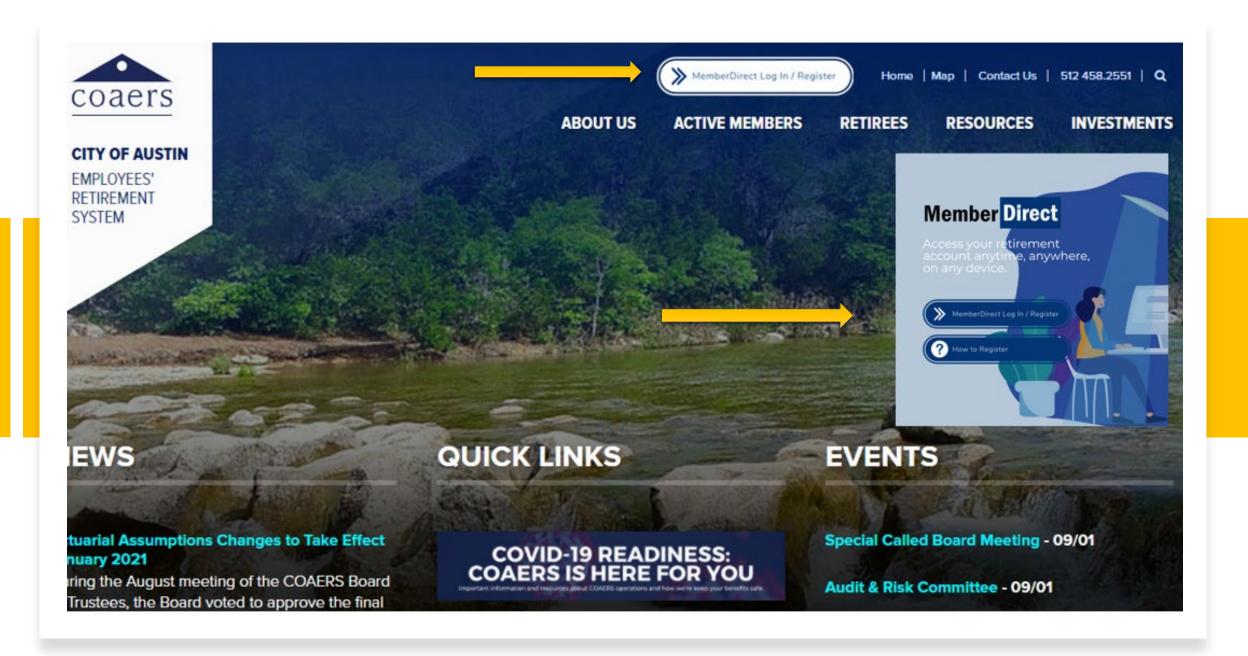
#### 2. IMPORTANT: HAVE THESE ITEMS READY

- 15 minutes of uninterrupted time to register
- Your driver's license
- A cell phone that can receive text messages
- Email address to receive MemberDirect communications and confirmations
- Have your username and password decided ahead of time and ready to go

#### 4. WE'RE HERE TO HELP

If you need immediate assistance to register for your MemberDirect account, please contact us at (512) 458-2551 or email us at member.services@coaers.org







Welcome to MemberDirect

# Sign-in Username Password Login Forgot your password? Forgot your username?

#### Why Register?

#### As a Member

- · View your member information
- · Estimate your benefit
- · Download and complete forms
- View and register for upcoming seminars

#### As a Retiree

- View your payment history and receipts
- View tax withholding and other deductions
- Update your personal information
- Update your tax withholding and direct deposit information
- Obtain your Form 1099-R Tax Document

Click here

**Enroll Now!** 

Enroll Contact Us

<< Back to Logon

#### **Identity Verification Process & Registration**

In order to provide you with access to MemberDirect, COAERS must validate your identity. You can choose one of two methods to validate your identity to continue to use MemberDirect. Click next to your choice below, then scroll down this page to read and accept the Terms and Conditions if you wish to proceed with verifying your identity electronically or with a PIN number.

#### O Electronic Registration

COAERS has contracted with a third party vendor (LexisNexis) to access data sources to authenticate your identity for your online MemberDirect account. As part of this authentication process, you will be required to provide personal information to LexisNexis. You authorize your wireless carrier (AT&T, Sprint, T-Mobile, US Cellular, Verizon, or any other branded wireless operator) to disclose to COAERS and its third-party service providers your mobile number, network status, customer type, billing type, mobile device identifiers (IMSI and IMEI) and other subscriber status and device details, if available, solely to verify your identity and prevent fraud for the duration of the relationship.

#### **Paper Registration**

O I need a paper PIN mailed to my address on file

Choose this option for COAERS to mail a Personal Identification Number (PIN) to your address on file. Please allow 5-7 days for this letter to arrive. If you have recently moved, call our office at (512) 458-2551. Once you have your PIN, return here to the step below.

#### I have a PIN and need to register

Choose this option if you have received a PIN and you wish to proceed with registration.



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O I have a PIN and need to register

Choose this option if you have received a PIN and you wish to proceed with registration.

Accept the Terms and Conditions to proceed with enrollment.

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#### 24. WIRELESS CARRIER AUTHORIZATION

You authorize your wireless carrier (AT&T, Sprint, T-Mobile, US Cellular, Verizon, or any other branded wireless operator) to disclose to COAERS and its third-party service providers your mobile number, network status, customer type, customers role, billing type, mobile device identifiers (IMSI and IMEI) and other subscriber status and device details, if available, solely to verify your identity and prevent fraud for the duration of the relationship.





October 30, 2020

PAULA PENSIONER 6615 ONE PASS DEL VALLE, TX 78617

Dear Ms. Pensioner,

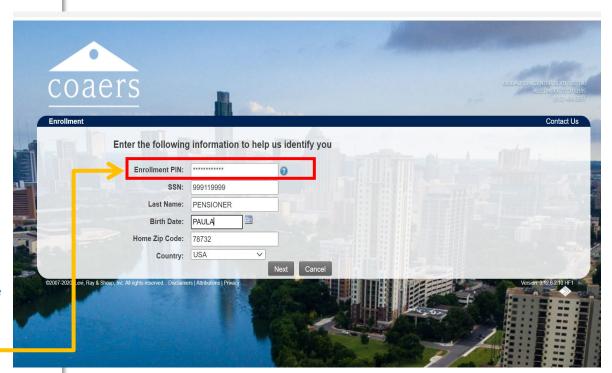
Please find below your MemberDirect Enrollment Personal Identification Number (PIN).

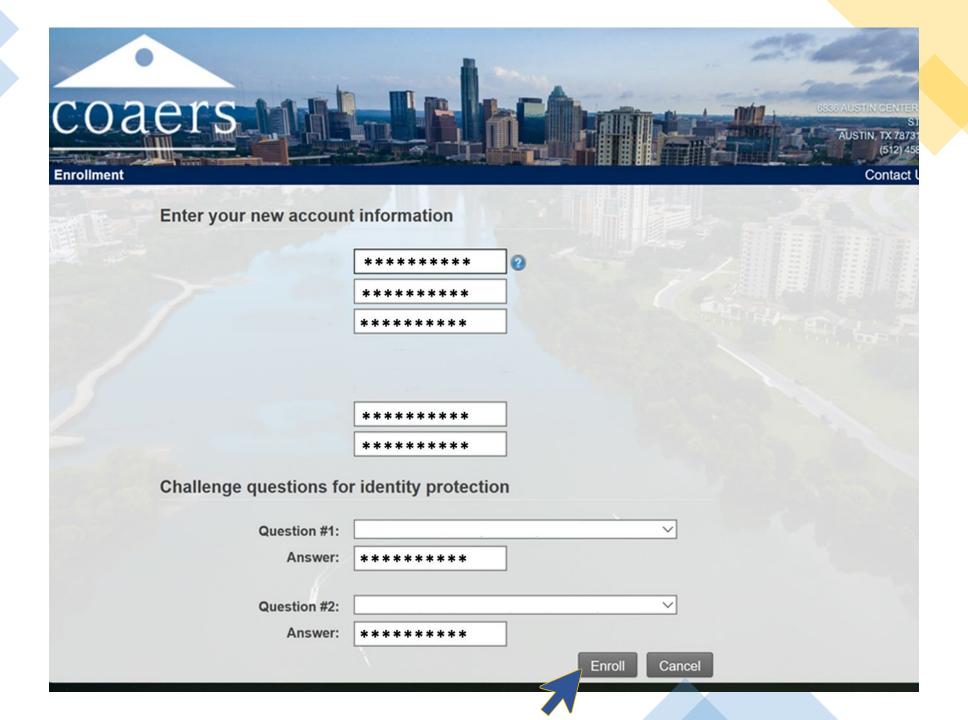
This PIN can be used to enroll on MemberDirect at www.coaers.org.

Please enroll soon as this PIN will expire on January 9, 2021. If your PIN has expired, please contact City of Austin Employees' Retirement System for a new one.

PIN: 9H6M7XXX

Please keep this PIN in a secure location, and do not share it with others. If you have any questions, please contact us at (512) 458-2551.







Welcome to MemberDirect

Sign-in

Username

**Enter Username** 

**Enter Password** 

Login

Forgot your password? Forgot your username?

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- View your payment history and receipts
- View tax withholding and other deductions
- Update your personal information
- Update your tax withholding and direct deposit information
- Obtain your Form 1099-R Tax Document

Enroll Now!



We do not recognize this device, or this device has not been registered as a trusted device to access your account.

Enter the answers to your challenge questions:

Question 1:

Answer: Enter Answer

Question 2:

Answer:

**Enter Answer** 

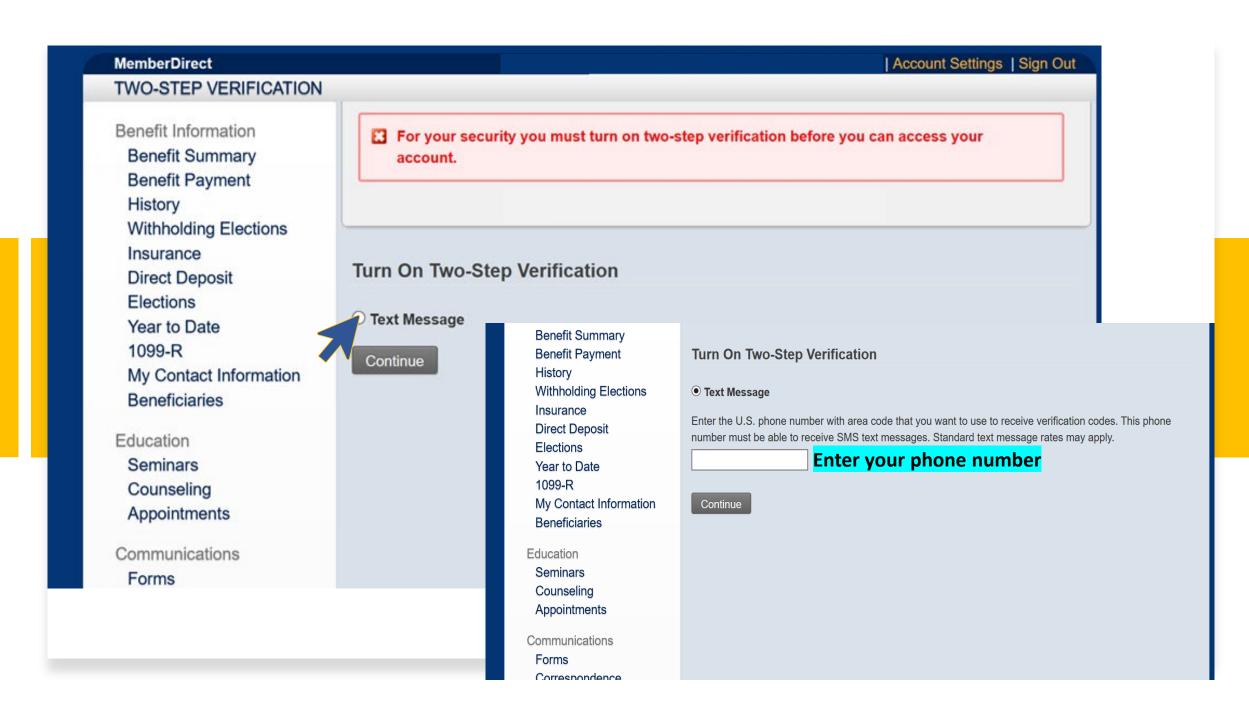
Continue

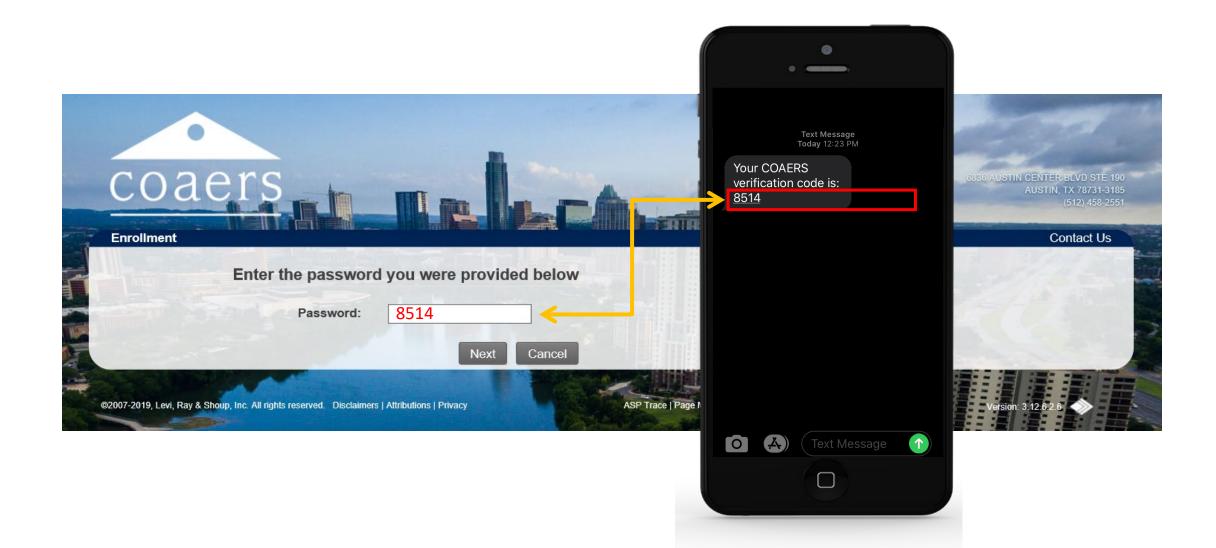
Cancel

632007-2020

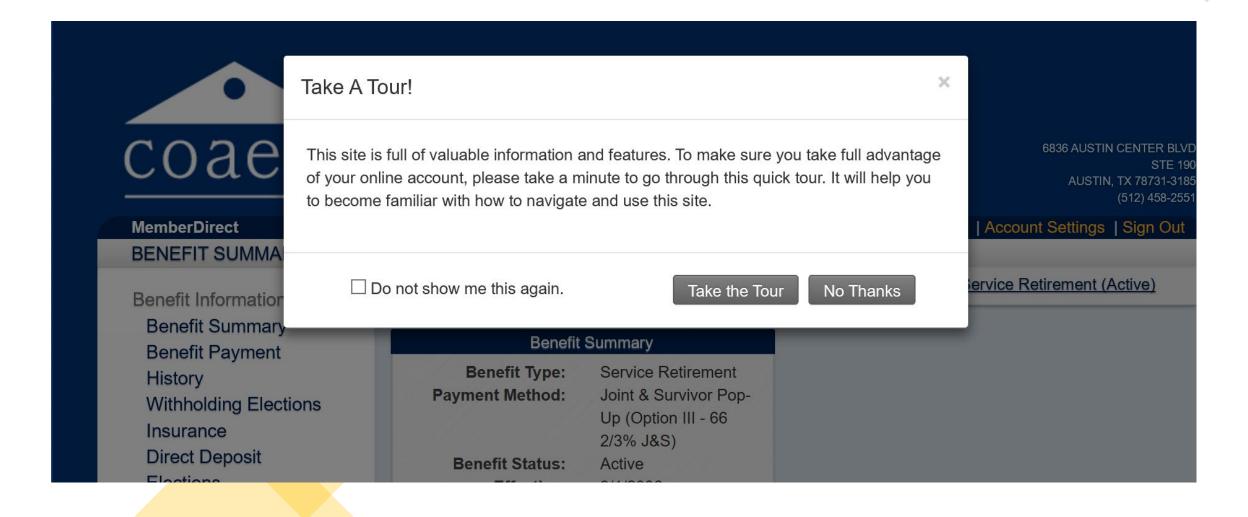
Ray & Shoup, Inc. All rights reserved. Disclaimers | Altributions | Privac

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# Welcome to Member Direct

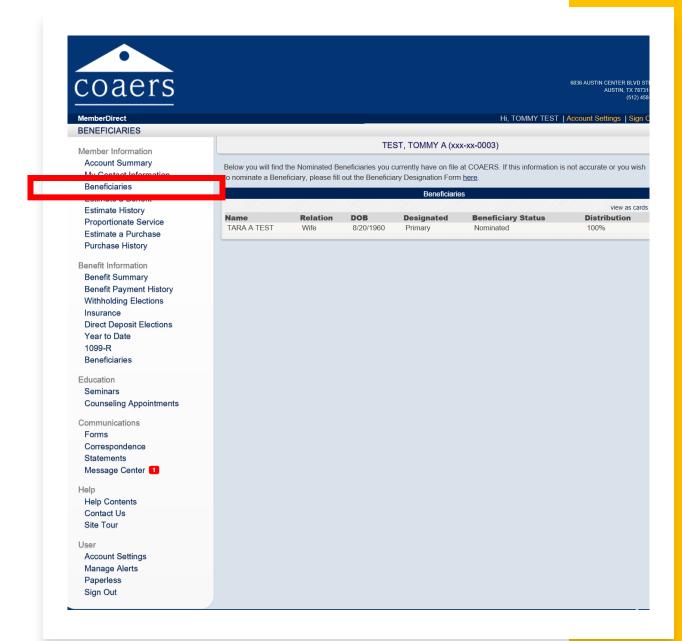


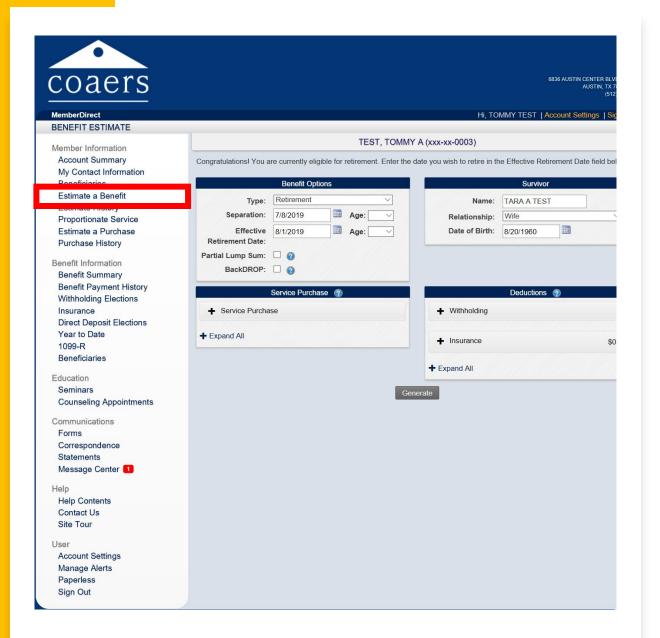
### Active Member Features



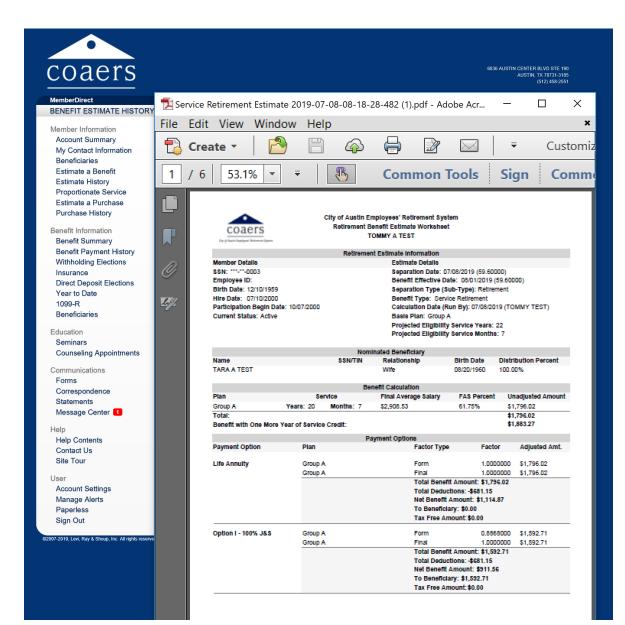
### **Contribution Balance**

### **Review Beneficiaries**





### **Estimate a Benefit**



# Estimates at your fingertips



6836 AUSTIN CENTER BLVD AUSTIN, TX 78731-3185 (512) 458-2551

MemberDirect

Hi, TOMMY TEST | Account Settings | Sign Out

#### SERVICE PURCHASE ESTIMATE

#### Member Information

**Account Summary** 

My Contact Information

Beneficiaries

Estimate a Benefit

**Estimate History** 

Proportionate Service

Estimate a Purchase

Purchase History

#### Benefit Information

**Benefit Summary** 

Benefit Payment

History

Withholding Elections

Insurance

**Direct Deposit** 

**Elections** 

Year to Date

1099-R

Beneficiaries

#### TEST, TOMMY A (xxx-xx-0003)

Select the Service Purchase Contract (SPC) type you wish to run a Service Purchase Estimate for and enter information into the corresponding fields.

DISCLAIMER: This estimate is not final and may not be available for purchase.

#### Service Purchase Estimate

SPC Type: Supplementary

Members may purchase up to 5 years of creditable service. Only members with 5 or more years of contributing Membership Service with COAERS are eligible to purchase Supplementary Time. Age, salary, earliest retirement date, and a combination of actuarial data determine the cost. There may be federal limitations on certain purchases.

Hourly Rate: 17.45

**Prior Purchased Supplementary Service:** 

0.00000 0.00000

**Proportionate Service:** 

Prior Purchased Other Service:

2.00000

Generate

### **Service Purchase Estimate**



July 8, 2019

TOMMY A. TEST

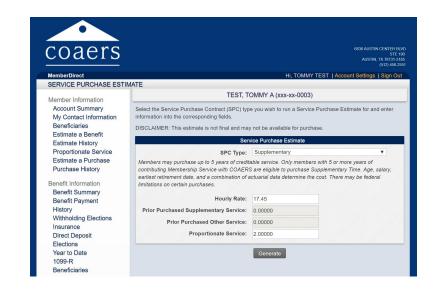
Re: Supplementary Service Purchase Estimate

You recently requested the cost to purchase and receive retirement service credit for Supplementary service. The supplementary purchase provision allows a member with five or more years of membership service with COAERS to purchase up to 60 months of supplementary service.

Your cost(s) to purchase Supplementary service are:

Service Credit month(s)	7/31/2019	8/31/2019	9/30/2019
1	\$951.80	\$953.08	\$954.37
2	\$1,903.61	\$1,906.38	\$1,908.95
3	\$2,855.53	\$2,859.46	\$2,863.42
4	\$3,807.45	\$3,812.66	\$3,817.90
5	\$4,759.25	\$4,765.85	\$4,772.37
6	\$5,711.17	\$5,719.04	\$5,726.85
7	\$6,662.98	\$6,672.12	\$6,681.32
8	\$7,614.90	\$7,625.43	\$7,635.91
9	\$8,566.81	\$8,578.51	\$8,590.27
10	\$9,518.62	\$9,531.70	\$9,544.75
11	\$10,470.43	\$10,484.89	\$10,499.33
12	\$11,422.46	\$11,438.09	\$11,453.80
13	\$12,374.26	\$12,391.17	\$12,408.17
14	\$13,326.07	\$13,344.47	\$13,362.75
15	\$14,277.99	\$14,297.55	\$14,317.23
16	\$15,229.91	\$15,250.75	\$15,271.70
17	\$16,181.72	\$16,203.94	\$16,226.18
18	\$17,133.63	\$17,157.13	\$17,180.65
19	\$18,085.44	\$18,110.21	\$18,135.13
20	\$19,037.36	\$19,063.51	\$19,089.71
21	\$19,989.27	\$20,016.60	\$20,044.08
22	\$20,941.08	\$20,969.79	\$20,998.55
23	\$21,892.89	\$21,922.98	\$21,953.14
24	\$22,844.92	\$22,876.17	\$22,907.50
25	\$23,796.73	\$23,829.26	\$23,861.98
26	\$24,748.53	\$24,782.56	\$24,816.56
27	\$25,700.45	\$25,735.64	\$25,771.03
28	\$26,652.37	\$26,688.83	\$26,725.40
29	\$27,604.18	\$27,642.03	\$27,679.98
30	\$28,556.09	\$28,595.22	\$28,634.46
31	\$29,507.90	\$29,548.30	\$29,588.93
32	\$30,459.82	\$30,501.60	\$30,543.41
33	\$31,411.74	\$31,454.69	\$31,497.88
34	\$32,363.54	\$32,407.88	\$32,452.36

6836 AUSTIN CENTER BLVD STE 190 AUSTIN, TX 78731 Phone: (512) 458-2551 Fax: (512) 458-5650 www.coaers.org



## Instant Access to Estimates

# Retiree Features



6836 AUSTIN CENTER BLVD STE 190 AUSTIN, TX 78731-3185 (512) 458-2551

#### MemberDirect

Hi, PAMELA PENSIONER | Account Settings | Sign Out

#### BENEFIT SUMMARY

#### Benefit Information

Benefit Summary

Benefit Payment History
Withholding Elections

Insurance

**Direct Deposit Elections** 

Year to Date 1099-R

My Contact Information

Beneficiaries

#### Education

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Appointments

#### Communications

Forms

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Statements

Message Center 1

#### Help

Help Contents Contact Us

Site Tour

#### Benefit Summary

PENSIONER, PAMELA R (xxx-xx-0600)

Viewing: Service Retirement (Active)

Benefit Type: Service Retirement

Payment Method: Joint & Survivor Pop-Up (Option I

- 100% J&S)

Benefit Status: Active
Effective: 1/1/2004

#### Benefit Amount as of 7/3/2019

	\$4,566.75 \$0.00	Pension Annuity	
	\$0.00	Adjustments	
+	\$0.00	Supplements	
	\$4,566.75	Total Gross	
	(\$309.25)	Withholding	
	\$0.00	Deductions	
-	(\$558.57)	Insurance Deductions	
	\$3,698.93	Net Amount	

#### Retiree Return to Work

Total Hours for Rolling Period: 1284.00

If you are rehired with the City of Austin and have an employment status other than a regular full-time employee, you can work up to 1,508 hours in any rolling 12-month period. If the hours you work exceed 1,508 hours in any rolling 12 month period, your benefit payment will be supposed.

# View Benefit Summary

# Benefit Payment History



6836 AUSTIN CENTER BLVD STE 190 AUSTIN, TX 78731-3185 (512) 458-2551

#### MemberDirect

Hi, PAMELA PENSIONER | Account Settings | Sign Out

#### BENEFIT PAYMENT HISTORY

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Selected Year: 2019 ▼

PENSIONER, PAMELA R (xxx-xx-0600)

Viewing: Service Retirement (Active)

		beneiit	Payment n	listory	
					view as cards
	Payroll	Issue	Payment	Gross	Net Amount
	Date	Date	Type	Amount	Net Amount
Details	5/2019	5/31/2019	ACH	\$4,566.75	\$3,698.93
Details	4/2019	4/30/2019	ACH	\$4,566.75	\$3,698.93
Details	3/2019	3/29/2019	ACH	\$4,566.75	\$3,698.93
Details	2/2019	2/28/2019	ACH	\$4,566.75	\$3,551.86
Details	1/2019	1/31/2019	ACH	\$4,566.75	\$3,551.86



6836 AUSTIN CENTER BLVD STE 190 AUSTIN, TX 78731-3185 (512) 458-2551

#### MemberDirect

Hi, PAMELA PENSIONER | Account Settings | Sign Out

#### 1099-R INFORMATION

#### **Benefit Information**

**Benefit Summary** 

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### PENSIONER, PAMELA R (xxx-xx-0600) Viewing: Service Retirement (Active)

		1099-	R Informatio	on	
					view as cards
Tax	Status	Cross	Taxable	Federal	State
Year	Status	GIOSS	laxable	Withheld	Withheld
View 2017	Original	\$54,801.00	\$54,355.32	\$4,708.08	\$0.00
View 2018	Original	\$54,801.00	\$54,355.32	\$3,838.20	\$0.00

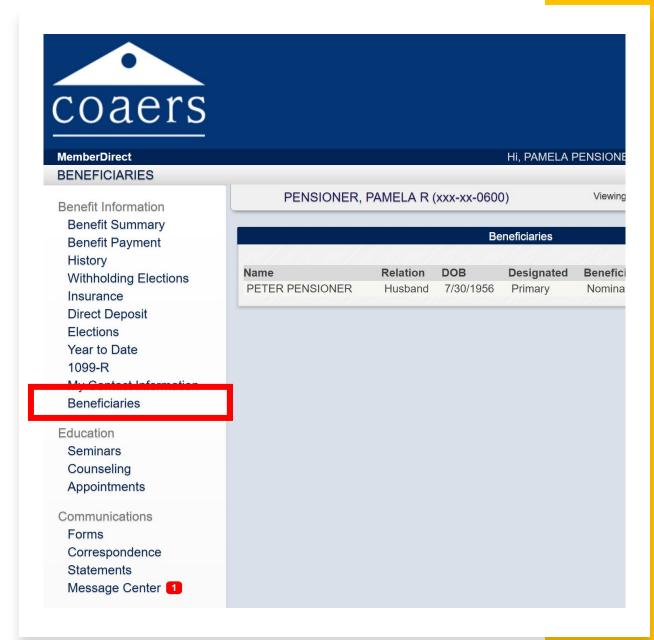
Depending on your browser's settings, documents opened from MemberDirect could be saved locally as temporary internet files.

Use caution when opening or saving documents from MemberDirect on public computers to protect your personal information.

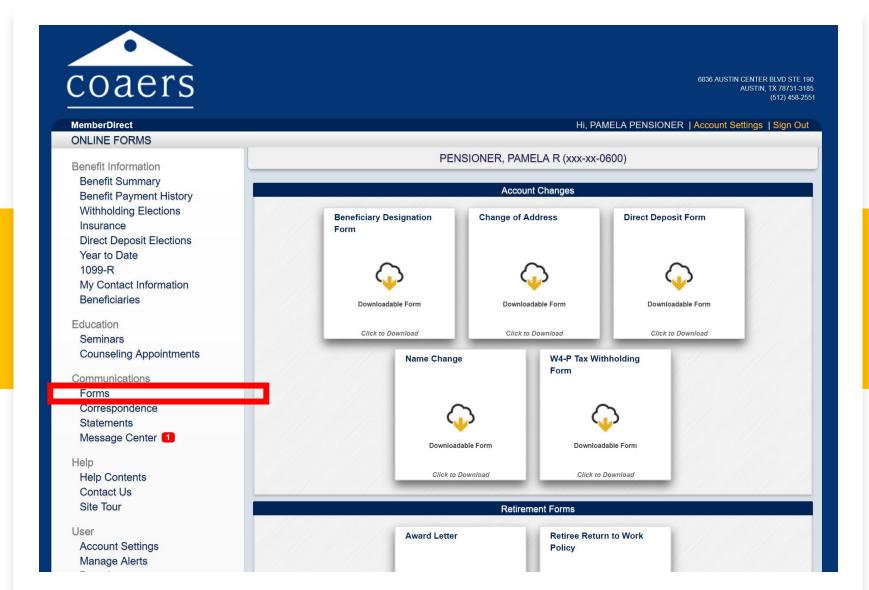
### 1099-R

Form 1099-R		COLLIE	TED (if checked)	Department of the Treasury - sions, Annuities, Retirem	
PAYER'S name, address, ZIP/postal cod	le & country			As, Insurance Contracts	etc. 2017
City of Austin Employees' F 6836 AUSTIN CENTER BL		ı		on your fed. tax return. If this hheld in box 4, attach this cop	·
			1 Gross distribution	2a Taxable amount	2b Taxable amount not determined
AUSTIN, TX 78731-3185			\$ 54801.00	\$ 54355.32	Total distribution
			3 Capital gain (included in box 2a)	4 Federal income tax withheld	5 Employee contribs./Des Roth contribs./ins. prem
PAYER'S federal identification number	RECIPIENT'S identification	on number	\$	\$ 4708.08	\$ 445.6
74-2609047	***-**-0600		6 Net unrealized appreciation in employer's securities	7 Distrib. IRA/SEP/ code(s) SIMPLE 8	Other
RECIPIENT'S name, address, ZIP/posta	l code & country		\$	7 \$	
PAMELA R PENSIONER			9a Percentage total distrib. 9b Total employee		
6850 AUSTIN CENTER BL	VD		% \$	\$	
AUSTIN, TX 78731		12 State tax withheld	13 State/Payer's state no.	14 State distribution	
•			\$		\$
			\$ 0.00		\$
			15 Local tax withheld	16 Name of locality	17 Local distribution
Account number (see instructions)	FATCA filing	requirement	\$		\$
1			\$		s

### **Beneficiaries**



## **Communication Features**



### **Access Forms**



### City of Austin Employees' Retirement System Beneficiary Designation Form

Unloss othorwise provided by law honefits po				
	be distributed as indica gnation applies to Lump-S ou read the instruction	ted on this form. ium Death Benefits payable b is on page 2 of this form be	fore completing.	
		aries under the age of 21.	in (Sections Land 1 Page 2) ii	iiay
	SECTION A: MEMBER I	NFORMATION		
Name (Last, First, Middle Initial) Pensioner, Pamela R.		ecurity Number *-0600	Narital Status ☐ Single ☐ Married	
Street Address 6850 AUSTIN CENTER BLVD	·	City, State, Zip Code AUSTIN, TX 78731	-	
Email				
Pay benefits to the named beneficiary(ies) as figer sure to designate the percentage of benefi		oficiany. The total nercentage		
	each named beneficiary.  Relationship	Social Security Number	Percentage	age
Name (Last, First, Middle Initial)				age
Name (Last, First, Middle Initial) Address (Street, City, State, Zip Code)		Social Security Number		
Name (Last, First, Middle Initial)  Address (Street, City, State, Zip Code)  Name (Last, First, Middle Initial)	Relationship	Social Security Number  Date of Birth	Percentage	%
Address (Street, City, State, Zip Code)  Name (Last, First, Middle Initial)  Address (Street, City, State, Zip Code)  Name (Last, First, Middle Initial)  Address (Street, City, State, Zip Code)  Name (Last, First, Middle Initial)	Relationship	Social Security Number  Date of Birth  Social Security Number	Percentage	

# Sign Up for Events



6836 AUSTIN CENTER BLVD AUSTIN, TX 78731-3185 (512) 458-2551

#### **MemberDirect**

Hi, TOMMY TEST | Account Settings | Sign Out

#### MY SEMINARS

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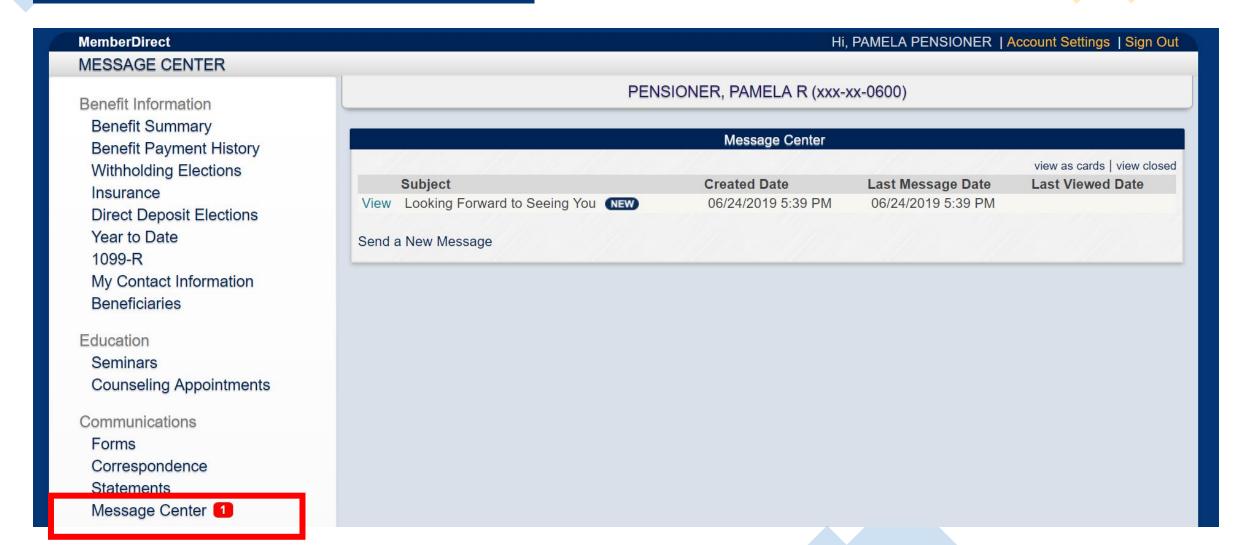
TEST, TOMMY A (xxx-xx-0003)

My Seminars

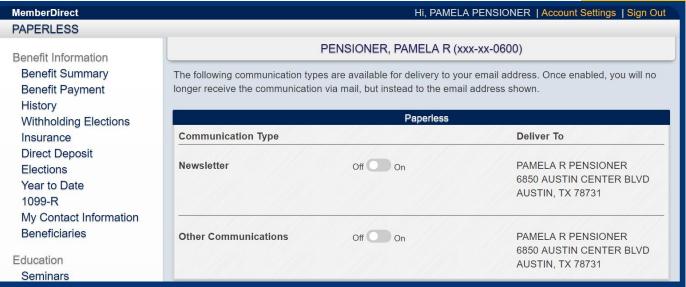
view as cards

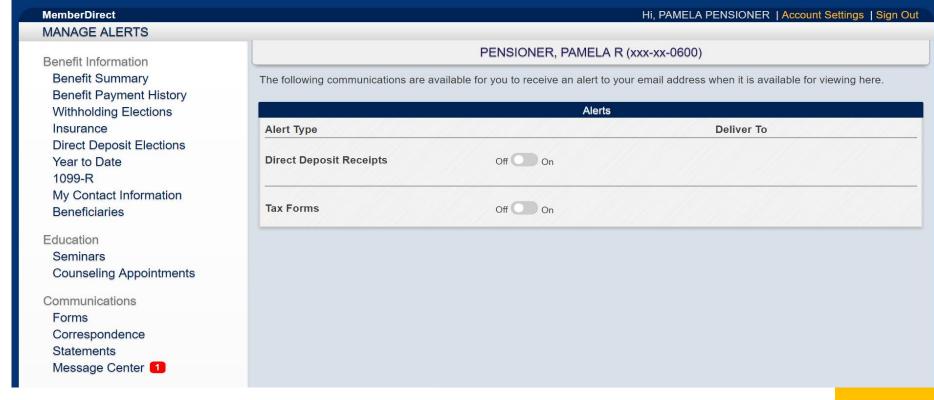
**Seminar Title** Status **Begins** Pre-Retirement Seminar Registered 08/22/2019 1:00 PM

### **Receive and Send Messages**



# Go Paperless & Receive COAERS News





# Thank You

www.coaers.org member.services@coaers.org (512) 458-2551



