

MemberDirect Guide for Active or Deferred Members

**This guide includes instructions on how to enroll in
MemberDirect and will assist members in the use of the site.**

**Mendocino County Employees
Retirement Association**

625B Kings Court Ukiah CA 95482

(707) 463-4328

(707) 467-6473

8/1/2016

Please begin by using the the following link to MemberDirect:

<https://mcera-prod.pensiongoldhosting.com/WMSWebsite/Login.aspx>

All members must first enroll in MemberDirect by clicking “**Enroll Now**” to use the site. See the example below.

Mendocino County Employees' Retirement Association logo and contact information: 625B Kings Court, Ukiah, CA 95482, (707) 463-4328.

MemberDirect | Enroll Now | Contact Information

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
- [Enroll Now](#)

As a Retiree or Recipient

- View your payment history and receipts
- View tax withholding and other deductions
- Update your personal information
- Update your tax withholding and direct deposit information
- [Enroll Now](#)

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Complete all fields on the enrollment screen (please remember your user name and password), click the link to the **Terms and Conditions** in the Disclosure section in order to review, or simply check the box stating you have read the terms and conditions. Then click “**Enroll**”.

Enrollment | Contact Information

Enter the following information to help us identify you

SSN:
Last Name:
Birth Date:
Home Zip Code:
Country: USA

Enter your new account information

Username:
Email:
Confirm Email:
Your password must be at least 8 characters, include both upper and lower case, and be alphanumeric.
Password:
Confirm Password:

Define challenge questions for identity protection

Question #1: In what city did you meet your spouse/significant other?
Answer:
Question #2: In what town was your first job?
Answer:

Disclosure

I read and agree to the Terms And Conditions of service.

Enroll **Cancel**

Once you have completed enrollment the following screen will appear. Click the 'Login to MemberDirect' link.



Re-enter your Username and Password and click Login. If at any time you forget your username or password you may use the *Forgot your password?* or *Forgot your username?*. Both links redirect you to a page wherein you may enter your identifying information. Once submitted you will receive an email which will prompt you to click "[here](#)" to answer your challenge questions and complete your request.

For your protection, any changes made to your password will generate an email notification to the email address on file.



Following login the top right of the blue banner will greet you with "Hi, Your First and Last Name", your full name and last four of your social security number will be visible, and you can review your benefit summary. The menu on the left will allow you to navigate the site.



The 'Account Summary' screen will show your retirement account information including service credit and contribution balance. The 'Personal Information' screen will show current address, email, and phone numbers associated with your account. As an active employee you will not be able to make any changes to the information found here. Please contact your payroll clerk in order to make changes to your personal information.

MENDOCINO COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

625B Kings Court
Ukiah, CA 95482
(707) 469-4328

MemberDirect Hi, JOHN DOE | Profile | Sign Out

PERSONAL INFORMATION

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Estimate a Benefit
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DOE, JOHN A (xxx-xx-2233)

If you need to change your address, phone number, or your email address, please contact your employer.

Address

Address Type: Home
Address Line 1: 112 W MAIN ST
Address Line 2:
City: UKIAH
State: CA
Zip Code: 95482
Country: USA
Mail Stop:

Phone

Phone Type: Home
Area Code: 707
Number: 222-3344
Extension:
Country Code: 1

Email

Email Type: Home
Address: DOEJ@YAHOO.COM

Additional Information

Birth Date: 1/1/1950
Gender: Male
Ethnicity: White (Non-Hispanic)

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The 'Nominated Beneficiaries' screen will contain information pertaining to each of your nominated beneficiaries. This information can be updated by downloading, completing, and submitting the Beneficiary Designation form located in the 'Forms' link on the left.

MENDOCINO COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

625B Kings Court
Ukiah, CA 95482
(707) 469-4328

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DOE, JOHN A (xxx-xx-2233)

Nominated Beneficiaries

BETTY BOOP
Wife born 2/2/1950
Primary Nominated Beneficiary
100% Distribution

DONALD DUCK
Son born 1/1/1970
Alternate Nominated Beneficiary
100% Distribution

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The 'Estimate a Benefit' screen will allow you to create your own future retirement benefit estimate. Select the type from the drop down menu, either retirement or disability retirement. The system will default to the earliest date you are eligible to retire. Select a separation date (usually the day before your first day of retirement) and a 'payments begin date' (retirement date). If you select a date before you are eligible to retire you will receive the following error message:

 - You are not eligible for a benefit using the dates you entered for this estimate.

Otherwise you will see the following screen as your estimate is generated.

The 'Estimate History' screen will allow you to view every benefit estimate that has been generated for you, most recent to the left. You may click the tile itself or click the down arrow at the top of the tile and select download. (Both perform the same function.) You will be asked if you would like to include final average salary details in the estimate. For comments, questions, or concerns about the results, you may use the 'Contact Us' link shown below.

MENDOCINO COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

MemberDirect Hi, JOHN DOE Profile Sign Out

BENEFIT ESTIMATE HISTORY

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Estimate History

DOE, JOHN A (xxx-xx-2233)

Below you will find the Benefit Estimates you have created on this website. If you have any comments, questions, or concerns about the results, please do not hesitate to [Contact Us](#).

My Estimates view as grid

Service Retirement

General Tier 3
Service Credit: 16.78630 yrs.

Separation Date: 6/23/2016 Benefit Begin Date: 6/24/2016
Created: 6/24/2016 4:01 PM

Adobe Reader is required to view estimates and may be [downloaded](#) for free. Still having problems? View the [PDF Support Page](#).

You will be asked if you want to open the estimate or save the file. Select open and click 'OK.'

MENDOCINO COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

Opening Service

You have chosen to open:

Service
which is: Adobe Acrobat Document
from: https://mcera.pgtest.lrs.com

What should Firefox do with this file?

Open with Adobe Reader (default)

Save File

Do this automatically for files like this from now on.

OK Cancel

Below you will find the Benefit Estimates you have created on this website. If you have any comments, questions, or concerns about the results, please do not hesitate to [Contact Us](#).

My Estimates view as grid

Service Retirement

General Tier 3
Service Credit: 16.78630 yrs.

Separation Date: 6/23/2016 Benefit Begin Date: 6/24/2016
Created: 6/24/2016 4:01 PM

Adobe Reader is required to view estimates and may be [downloaded](#) for free. Still having problems? View the [PDF Support Page](#).

Your document will open in a .pdf format which you can view, print or save. Please see the following example:

Mendocino County Employees' Retirement Association
Retirement Benefit Estimate Worksheet
JOHN A DOE

Retirement Estimate Information

Member Details		Estimate Details	
SSN: *** - ** - 2233	Employee ID: 0000	Separation Date: 08/23/2016 (86.47500)	Benefit Effective Date: 08/24/2016 (86.47800)
Birth Date: 01/01/1950	Hire Date: 01/01/1999	Separation Type (Sub-Type): Retirement	Benefit Type: Service Retirement - Enhanced
Plan Participation Date: 01/15/1999	Current Status: Active	Calculation Date (Run By): 08/24/2016 (JOHN DOE)	Basis Plan: General Tier 3
		Projected Eligibility Service Amount: 18,78630	

Nominated Beneficiary

Name	SSN/TIN	Relationship	Birth Date	Distribution Percent
BETTY BOOP		Wife	02/02/1950	100.00%

Benefit Calculation

Plan	Service	Final Average Salary	FAS Percent	Unadjusted Amount
General Tier 3	18,78630	\$0.00	0.00%	-\$51.28
Total:				-\$51.28

Payment Options

Payment Option	Plan	Factor Type	Factor	Adjusted Amt.
Unmodified 60%	General Tier 3	Form	1.0000000	-\$51.28
Total Benefit Amount: -\$51.28			IRS 415(b) Test Result/Limit: /\$210,000.00	
To Beneficiary: -\$30.77			Annual Benefit: -\$815.36	

Option 1

Plan	Factor Type	Factor	Adjusted Amt.
General Tier 3	Form	0.9478270	\$1.28
Total Benefit Amount: \$1.28			IRS 415(b) Test Result/Limit: /\$210,000.00
To Beneficiary: \$0.00			Annual Benefit: \$15.36

Option 2

Plan	Factor Type	Factor	Adjusted Amt.
General Tier 3	Form	0.8764800	-\$44.95
Total Benefit Amount: -\$44.95			IRS 415(b) Test Result/Limit: /\$210,000.00
To Beneficiary: -\$44.95			Annual Benefit: -\$539.40

Taxability

Account Balance: \$165.00
Post Tax Balance: \$0.00
User ID: JOHN DOE
Run Date: 8/24/2016 4:02:39 PM
Page: 1 of 2

The 'Seminars' screen will list upcoming retirement seminars. These may appear as either a grid or as tiles. Use the 'Details' link to view seminar details if viewing the grid format, or click a tile to view details.

MENDOCINO COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

MemberDirect | Hi, JOHN DOE | Profile | Sign Out

MY SEMINARS

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Seminars ←

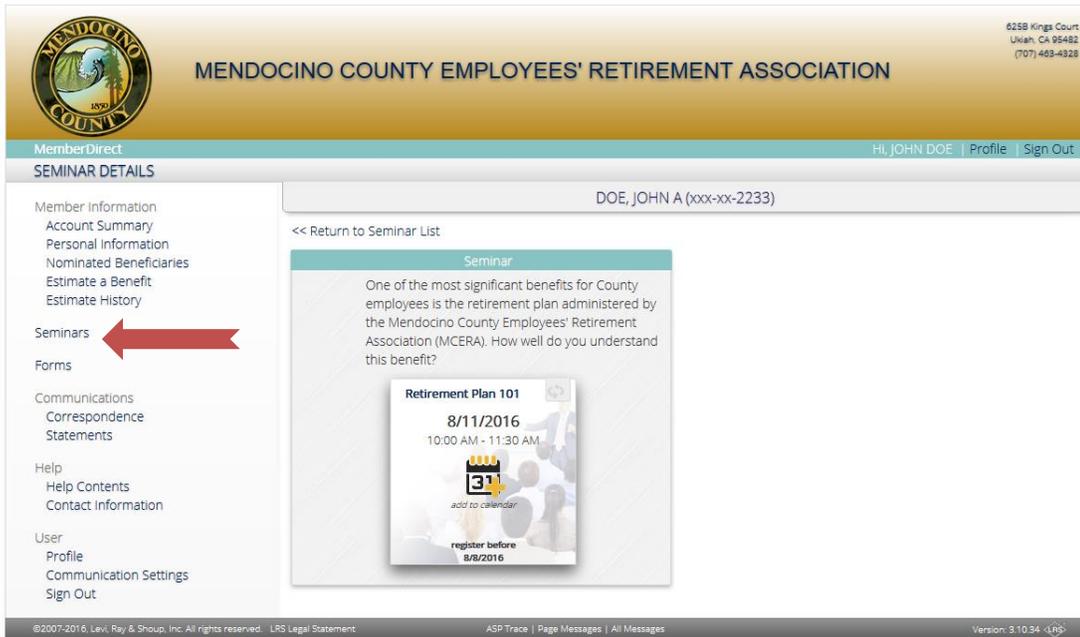
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DOE, JOHN A (xxx-xx-2233)

Available Seminars				
	Seminar Title	Status	Begins	Register By
Details	Retirement Plan 101	Open	08/11/2016 10:00 AM	8/8/2016
Details	Retirement Plan 101	Open	11/03/2016 10:00 AM	10/31/2016

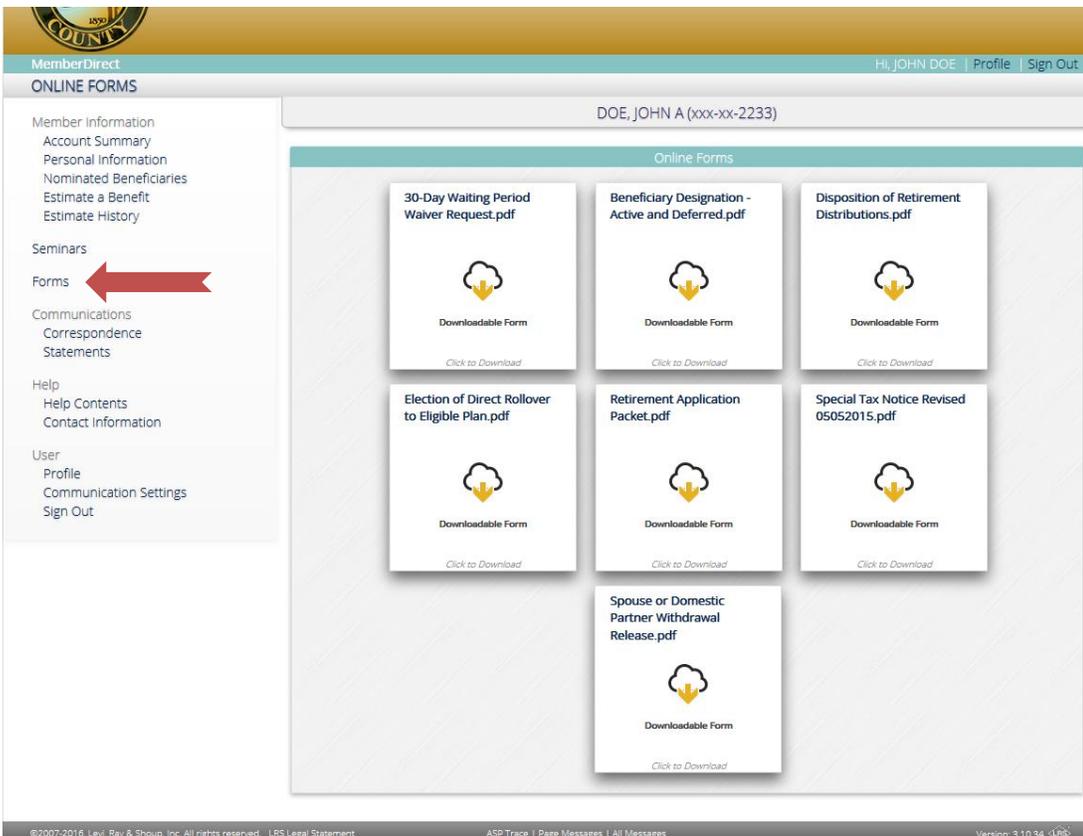
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Clicking  at the top right corner of the tile will reveal the details of the seminar. You may register for a seminar and add it to your calendar or cancel a prior seminar registration here.



The screenshot shows the MemberDirect interface for the Mendocino County Employees' Retirement Association. The header includes the logo, the association name, and contact information (625B Kings Court, Ukiah, CA 95482, (707) 463-4328). The user is logged in as JOHN DOE. The left sidebar contains navigation links: Member Information, Account Summary, Personal Information, Nominated Beneficiaries, Estimate a Benefit, Estimate History, Seminars (highlighted with a red arrow), Forms, Communications, Correspondence, Statements, Help, Help Contents, Contact Information, and User Profile/Settings. The main content area shows a seminar titled "Retirement Plan 101" on 8/11/2016 from 10:00 AM to 11:30 AM. A calendar icon with "add to calendar" and a "register before 8/8/2016" notice are visible. A red arrow points to the "add to calendar" text.

The 'Forms' screen will list member forms that are available for download. The ability to allow our members to complete forms from within the site is not available at this time. Instead, please select the form you wish to download and print. Completed forms must be returned to the retirement office in order to make the requested changes.



The screenshot shows the MemberDirect interface for the Mendocino County Employees' Retirement Association, specifically the "ONLINE FORMS" section. The user is logged in as JOHN DOE. The left sidebar is identical to the previous screenshot, with the "Forms" link highlighted by a red arrow. The main content area displays a grid of seven downloadable forms, each with a cloud icon and a "Click to Download" link: "30-Day Waiting Period Waiver Request.pdf", "Beneficiary Designation - Active and Deferred.pdf", "Disposition of Retirement Distributions.pdf", "Election of Direct Rollover to Eligible Plan.pdf", "Retirement Application Packet.pdf", "Special Tax Notice Revised 05052015.pdf", and "Spouse or Domestic Partner Withdrawal Release.pdf".

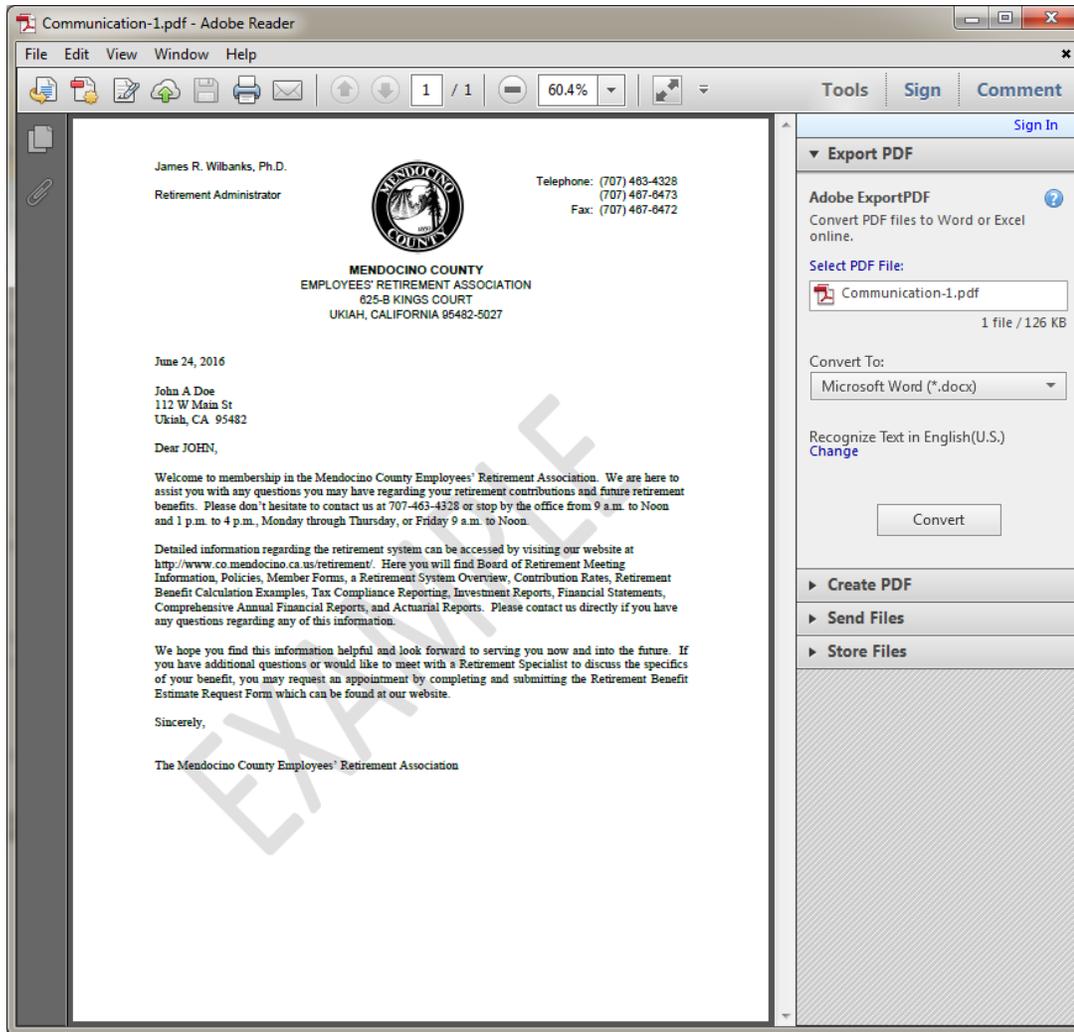
The 'Correspondence' screen will list any correspondence created specifically for you.

The screenshot shows the Mendocino County Employees' Retirement Association MemberDirect interface. The header includes the Mendocino County logo, the association name, and contact information (625B Kings Court, Ukiah, CA 95482, (707) 463-4328). The user is logged in as JOHN DOE. The main content area displays a communication titled "Welcome New Member" received on 6/24/2016. A red arrow points to the "Correspondence" link in the left navigation menu. Below the communication, there is a note: "Adobe Reader is required to view correspondence communications and may be downloaded for free. Still having problems? View the PDF Support Page."

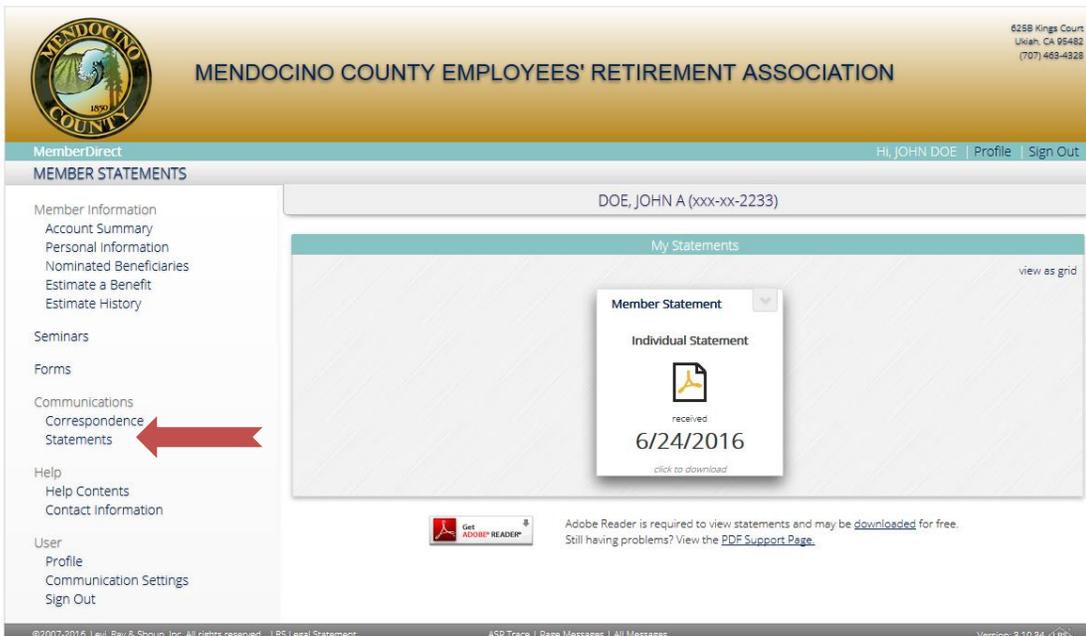
You will have the option to delete the correspondence or download in order to view, print or save.

The screenshot shows the Mendocino County Employees' Retirement Association MemberDirect interface. The header includes the Mendocino County logo, the association name, and contact information (625B Kings Court, Ukiah, CA 95482, (707) 463-4328). The user is logged in as JOHN DOE. The main content area displays a communication titled "Welcome New Member" received on 6/24/2016. A context menu is open over the communication, showing options for "Delete" and "Download...". A red arrow points to these options. Below the communication, there is a note: "Adobe Reader is required to view correspondence communications and may be downloaded for free. Still having problems? View the PDF Support Page."

Please see the following example:



The 'Statements' screen will show any statements of account that have been generated for you. The statements will be available for download, viewing, and printing here.



Please see the following example:

Mendocino County Employees' Retirement Association
625-B Kings Ct. Ukiah, CA 95482 . (707) 463-4328 . Fax (707) 467-6472

Statement Period Begin Date: 01/01/2015
Statement Period End Date: 12/31/2015
As of Date: 06/24/2016

JOHN A DOE
112 W MAIN ST
UKIAH, CA 95482

MEMBER AND DEMOGRAPHIC INFORMATION

Date of Birth: 01/01/1960 Social Security Number: ###-##-2233
Birth Certificate on File: Yes Current Member Status: Active
Gender: Male Non Member: No
Marital Status: Married Average Salary: \$0.00
Date of Marriage: Reciprocity Claimed: No
Spouse's Name: E-mail Address: DOEJ@YAHOO.COM
Spouse's Date of Birth: Spouse's SSN:

EMPLOYMENT INFORMATION

Plan: General Tier 3 Hire Date: 01/01/1999 Date Last Reported: \$0.00
Employer: County of Mendocino Participation Begin Date: 01/15/1999 Last Salary Reported: \$0.00
Termination Date:

CONTRIBUTIONS

Contribution Type	Total as of 12/31/2014	Pre Tax Contributions	Post Tax Contributions	Interest	Total as of 12/31/2016
Employee COLA	\$0.00	\$15.00	\$0.00	\$0.00	\$15.00
Employee Regular	\$0.00	\$150.00	\$0.00	\$0.00	\$150.00
Account Balance:	\$0.00	\$165.00	\$0.00	\$0.00	\$165.00

SERVICE CREDIT

Plan	Service Type	Service Earned as of 12/31/2014	Service Earned This Period	Service Total as of 12/31/2016
General Tier 3	Regular	0.00000	16.78630	16.78630
Total		0.00000	16.78630	16.78630

NOMINATED BENEFICIARY INFORMATION

Name	SSN/TIN	Birth Date	Relationship	Benefit/Designation/Distribution
BETTY BOOP	###-##-2222	02/02/1950	Wife	All Available/Primary/100.00 %
DONALD DUCK	###-##-0000	01/01/1970	Son	All Available/Alternate/100.00 %

Sign In

Export PDF

Adobe ExportPDF
Convert PDF files to Word or Excel online.

Select PDF File:
Member-1.pdf
1 file / 169 KB

Convert To:
Microsoft Word (*.docx)

Recognize Text in English(U.S.)
Change

Convert

Create PDF

Send Files

Store Files

The 'Help Contents' provides additional instructions for all functions of MemberDirect. 'Contact Information' provides contact information for the retirement association including our email address retirementassociation@co.mendocino.ca.us and link to our website <https://www.co.mendocino.ca.us/retirement/>. The map can provide directions to the retirement office by clicking on "click here to enter a starting location". Once you enter your starting location you should get appropriate directions from your location to the retirement office.

MENDOCINO COUNTY EMPLOYEES' RETIREMENT ASSOCIATION
625B Kings Court
Ukiah, CA 95482
(707) 463-4328

MemberDirect Hi JOHN DOE | Profile | Sign Out

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DOE, JOHN A (xxx-xx-2233)

Contact Information

Mailing Address: Mendocino County Employees' Retirement Association
625B Kings Court
Ukiah, CA 95482

Phone: (707) 463-4328
Email: retirementassociation@co.mendocino.ca.us
Website: <https://www.co.mendocino.ca.us/retirement/>

Select 'Get Directions' to view directions based on your current location.
If you do not wish to share your current location, [click here to enter a starting location](#).

Get Directions

User 'Profile' will allow you to view your current account login settings after confirming your password.

The screenshot shows the Mendocino County Employees' Retirement Association MemberDirect interface. The user is identified as SYLVIA MCGEE. A 'Verify Identity' dialog box is displayed, prompting the user to confirm their password. A red arrow points to the 'Confirm Password' input field. Another red arrow points to the 'User' section in the left-hand navigation menu, specifically to the 'Profile' link.

MemberDirect | Hi, SYLVIA MCGEE | Profile | Sign Out

VERIFY IDENTITY

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Ukiah, CA 95482
(707) 463-4328

MENDOCINO COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

MCGEE, SYLVIA A (xxx-xx-8570)

Verify Identity

Please verify your identity by entering your current password before making changes to your account.

Confirm Password:

Continue Cancel

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Once your identity is confirmed you will be allowed to update your email address, change your password, and change your challenge questions and answers here.

'Communication Settings' will show your preferred communication settings.

The screenshot shows the Mendocino County Employees' Retirement Association MemberDirect interface. The user is identified as JOHN A DOE. The 'Communication Settings' page is displayed, showing a table with communication types and delivery methods. A red arrow points to the 'Add Communication Setting' link below the table. Another red arrow points to the 'Communication Settings' link in the left-hand navigation menu.

MemberDirect | Hi, JOHN DOE | Profile | Sign Out

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MENDOCINO COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

DOE, JOHN A (xxx-xx-2233)

Communication Settings	
Communication Type	Delivery Method
Default	Mail JOHN A DOE 112 W MAIN ST UKIAH, CA 95482

Add Communication Setting

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'Add Communication Settings' will allow you to add additional communication settings for different communication types from the drop down menu. You may also choose the Delivery Method for communication types by using the corresponding drop down menu.

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625B Kings Court
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(707) 469-4928

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Communication Setting

Communication Type: Member Statements

Delivery Method: Email

Insert Cancel

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You will see the following screen as changes are made.

MENDOCINO COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

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(707) 469-4928

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A communication setting has been set up for Member Statements.

DOE, JOHN A (xxx-xx-2233)

Communication Settings	
Communication Type	Delivery Method
Default	Mail JOHN A DOE 112 W MAIN ST UKIAH, CA 95482
Member Statements	Email MemberDirect - DOEJ@YAHOO.COM

Add Communication Setting

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For your protection, any changes you make to your profile will generate an email notification to the email address on file.

'Sign Out' on the left or upper right will allow you to sign out and exit MemberDirect.

Thank you for using the new MemberDirect self-service website. We hope that your overall experience has been a pleasant one. It is our goal to offer our members enhanced services and convenience through MemberDirect. If you ever experience difficulty please contact the retirement office for assistance.