

Member Self-Service Instructions

Member Self-Service is a feature of the Employees' Retirement System website (www.cmers.com). This secured section of our web-site will allow active, deferred, and retired members of the ERS to see information pertinent to their account and in some cases allow for update requests.

This document is being provided to you so you can see some of the features that are available on the site and to walk you through the initial few set up pages.

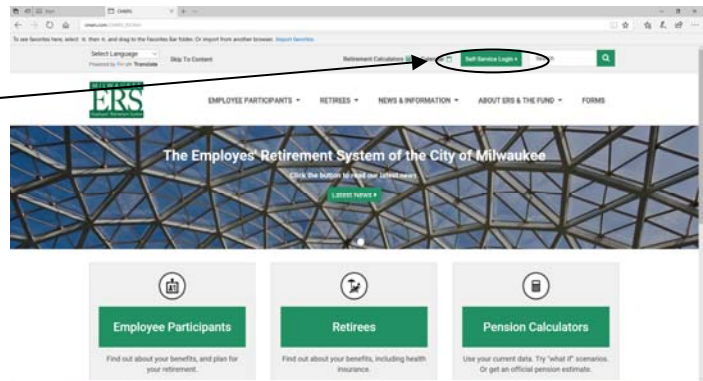
Please call us at 414-286-3557 between 8:00am and 3:45pm Central Time and ask to speak to Member Self-Service Support if you have any questions or issues.

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Self-Service Login

Member Self Service can be accessed by clicking on the green “Self-Service Login” button near the upper right corner of any cmers.com page.



Login

Enter your user name and password and click the green “Sign In” button to access your account.

If you forget either your password or your username, you can reset your password and see your username(s) by following the “Forgot User Name and/or Password” link on the “Login” page.

If you need to “Set Up An Account” we have a link for that as well.

Set Up An Account

Clicking on the “Set Up An Account” link on the “Login” page will take you to a secure page where you will enter your personal information. This information, and any exchange of information between your computer and the ERS, is secured. The information requested is being used to confirm your identity for your protection.

You will only enter the information once during the sign-up process.

After the first time, once you have created a User ID and password, you will only need to remember your user ID and password and use that for future secure interactions on the web-site.

What You Can Do Inside MSS

After you log in with (one of) your username(s) and password, you will see your “Account Home page” that will let you navigate to various pages and see secure information and/or request updates to your data.

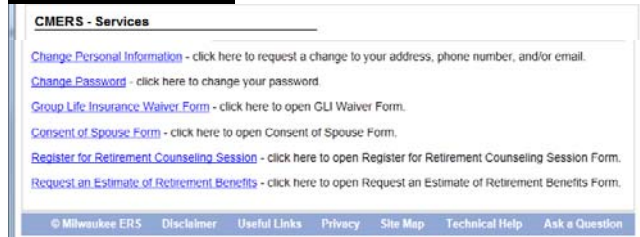
Different groups can do different things...

Retired - Change password, complete forms, view past 1099R information, see past check details, use a tax withholding calculator and change your personal information – including your address and phone number.

Active– Change password, complete forms, register for a retirement counseling session, and request an official retirement benefit estimate.

Deferred - Change password, complete forms, register for a retirement counseling session, request an official retirement benefit estimate and change your personal information – including your address and phone number.

Active/Deferred:

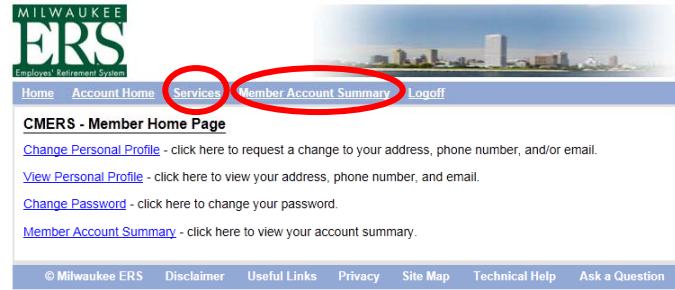


CMERS - Services

- [Change Personal Information](#) - click here to request a change to your address, phone number, and/or email.
- [Change Password](#) - click here to change your password.
- [Group Life Insurance Waiver Form](#) - click here to open GLI Waiver Form.
- [Consent of Spouse Form](#) - click here to open Consent of Spouse Form.
- [Register for Retirement Counseling Session](#) - click here to open Register for Retirement Counseling Session Form.
- [Request an Estimate of Retirement Benefits](#) - click here to open Request an Estimate of Retirement Benefits Form.

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Member Account Summary is available for Active members and allows viewing contributions and service credit, as well as a link to calculate benefit estimates using our system’s real data and the member’s chosen retirement date(s).



MILWAUKEE ERS Employee Retirement System

Home Account Home **Services** **Member Account Summary** Logoff

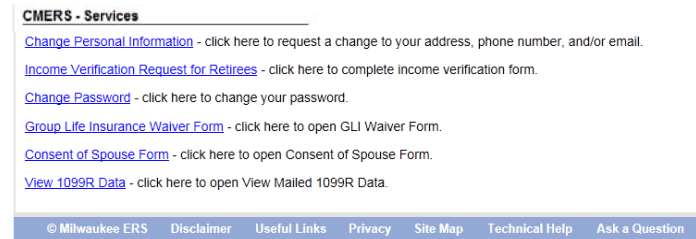
CMERS - Member Home Page

- [Change Personal Profile](#) - click here to request a change to your address, phone number, and/or email.
- [View Personal Profile](#) - click here to view your address, phone number, and email.
- [Change Password](#) - click here to change your password.
- [Member Account Summary](#) - click here to view your account summary.

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Retired:

Some of what you can do is on the “Services” tab...

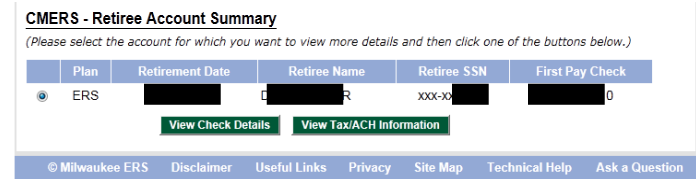


CMERS - Services

- [Change Personal Information](#) - click here to request a change to your address, phone number, and/or email.
- [Income Verification Request for Retirees](#) - click here to complete income verification form.
- [Change Password](#) - click here to change your password.
- [Group Life Insurance Waiver Form](#) - click here to open GLI Waiver Form.
- [Consent of Spouse Form](#) - click here to open Consent of Spouse Form.
- [View 1099R Data](#) - click here to open View Mailed 1099R Data.

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Some of what you can do is on the “Retiree Account Summary” tab...



CMERS - Retiree Account Summary

(Please select the account for which you want to view more details and then click one of the buttons below.)

Plan	Retirement Date	Retiree Name	Retiree SSN	First Pay Check
ERS		R	xxx-xx	0

[View Check Details](#) [View Tax/ACH Information](#)

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Retiree Account Summary allows viewing of Check Details and Tax/ACH Information, the latter includes a tax withholding calculator that allows you to see your new Federal and State deduction amounts given changes in your marital status and number of exemptions.

Changing Your Address and Other Information

By clicking on the “Change Personal Profile” link on the Account Home page members can change their phone number, e-mail and other information by clicking on the “Change Personal Profile” link and submitting their changes. Active members **cannot** change their address on the website. (Their address changes come into our system through the payroll process.) But retired members can change their address on this page.

Information submitted to the ERS will be processed in the next ten to fifteen business days.

Any special instructions, such as time limitations for the changes, etc. should be provided in the “Message” section.

CMERS - Change Personal Information

Hello [redacted] - You are viewing your retiree account with retirement date of [redacted]

The information we currently have for your profile is displayed in the boxes below. To change your information, simply re-type it in the corresponding box. Once you have completed all desired changes, click the "Submit Request" button.

Street: [text box]

City: MILWAUKEE *

State: WI

Zip: 532 *

Email: [text box]

Confirm Email: [text box]

Home Phone: 414- [text box] (ex. 414-123-4567)

Business Phone: [text box] (ex. 414-123-4567)

Marital Status: [dropdown menu]

Marital Status Effective Date: [text box]

Spouse First Name: [text box]

Spouse Last Name: [text box]

Spouse Date of Birth: [text box]

Message: [text area]

Please enter any special instructions (such as delayed effective dates, address types (permanent/temporary) etc.) in the "Message" section.

* Required

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Please note the following:

1. For your security, if there is no activity on the site for 10 minutes, you will automatically be logged off, and you will have to log in again.
2. On the Check Details page, you will see the dates that the funds were (or will be) made available to you. Towards the end of the month, you will notice that the pay stub information will be present, however, the funds will only be transferred (directly deposited) to your account on the date indicated. If you are still receiving checks, the date indicated will be the date that the check will be payable.

What If I Need Help?

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Notice that, since logging in, at the bottom of ALL the pages are two links meant to assist you in your use of our website. The first, “Technical Help,” opens a page that provides answers to our frequently asked questions. The second, “Ask a Question,” enables you to send a question about our site to an ERS staff member. The expected turn-around time for a submitted question is 2-3 business days.

Of course you can always call our main office line 414-286-3557 or 800-815-8418 on business days between 8:00am and 4:45pm, and let them know you are having a problem with the website.

We are Changing Along With the On-line World

When our site was created, it was created to be viewed with Microsoft’s Internet Explorer. And while “IE” is still a very popular web browser, other browsers have gained popularity in recent years. The latest version of our website (both the public side and the Member Self-Service side) has been designed to be viewed with IE, Firefox, Chrome and Safari. As of this writing, these four browsers are used for 92% of visits to our website.

We hope you enjoy this new site, and find the new features that have been provided useful. Please let us know if you have any suggestions, by e-mailing us at norm@cmers.com.