

# Retiree Information about My Portal services

Once you have done the Self Registration and logged in, you will use the TABS to navigate to the areas you are interested in looking at.

The screenshot shows the 'Demo Retirement System' portal with the 'DATA' tab selected. The page content includes:

The **Demographic Information** we have on file for you is shown in the table below. Note that it is important that this data and all of the data that follows it is accurate, as it influences pension eligibility, retirement estimates and actual amounts available for payment.

SSN	Name	Birth Date	Hire Date	Veteran Svc	Marital Status	Group	Unit
xxxx-xx-8769	Beverly Podlesney	05/01/59	02/15/99	No	Married	1	020 - Town Of Marshfield

Your **Status History** is a record of employment events such as hire, termination, leave of absence, etc. that determine how much creditable service you have.

Status Date	Retirement Board	Status
02/15/99	Mass Demo Retirement System	Enrolled

Your **Service History** is a record of how much creditable service you have accrued during your retirement membership. The more service you have the greater your pension benefit will be. As of today, your total service is 14 years and 4 months.

Begin Date	EndDate	Retirement Board	Service Amt
02/15/99	06/27/13	Mass Demo Retirement System	14.3333

Your **Annuity Savings Balance** is the amount of retirement deductions paid into the retirement system. The current posted accumulated balance is \$20,928.46.

Year	9% Deduction	2% Deduction	Total Deduction	Total Interest	Accumulated Deductions
1999	374.70	0.00	374.70	0.00	374.70
2000	630.61	0.00	630.61	7.87	638.48
2001	1,192.01	0.00	1,192.01	19.25	1,211.26
2002	1,416.32	0.00	1,416.32	31.14	1,447.46
2003	1,477.25	0.00	1,477.25	36.72	1,513.97
2004	1,523.82	0.00	1,523.82	31.12	1,554.94
2005	1,650.38	0.00	1,650.38	40.44	1,690.82
2006	1,643.41	0.00	1,643.41	50.59	1,694.00
2007	1,686.02	0.95	1,686.97	60.75	1,747.72
2008	1,740.54	0.00	1,740.54	71.24	1,811.78
2009	1,815.36	0.00	1,815.36	68.43	1,883.79
2010	1,757.16	0.00	1,757.16	46.71	1,803.87
2011	1,739.38	0.00	1,739.38	34.75	1,774.13
2012	1,762.39	0.00	1,762.39	19.15	1,781.54

## DATA

The screen above shows you what clicking on the **DATA** tab will display.

It shows your **Demographic** information (your SSN, your name, your birthdate, your hire date, veteran status, marital status, group and unit), your **Status History** information (your enrolled date, termination or leave of absence information if applicable, etc), your **Service History** information, your annuity savings balance, and your **Salary History** information.

The bottom part of the screen on the **DATA** tab (shown below) has a box that you could type in corrections if you feel any of the data shown is incorrect. You would type in detail what is wrong, being as specific as possible, and once you are done typing your message be sure to click on the **Record Data Changes** link.

Your Salary History is computed from your contribution rate and your deduction amounts. Your Salary History only reflects pensionable earnings, any additional wages, such as overtime, is excluded.

Year	Earnings
1999	4,163.31
2000	7,006.77
2001	13,244.55
2002	15,736.89
2003	16,413.89
2004	16,931.34
2005	18,337.58
2006	18,260.11
2007	18,733.56
2008	19,339.35
2009	20,170.67
2010	19,523.99
2011	19,326.45
2012	19,582.11

If any of the above data is not correct, please detail below what you believe is wrong. Be sure to be as specific as possible. When you are done, click on the **Record Data Changes** link. Also, be sure that your email address and phone number are correct in the **Contact** section of the site. We will contact you when we have received your message. Any changes you enter through this system will not be posted to your account until after they are reviewed by a Retirement Board staff member.

Data Corrections

[\[Record Data Changes\]](#)

It is important to note when looking at your information on these screens that the Saugus Retirement System did not become fully computerized until 1997, so the data we have on file for you and in the system will only go back to the year 1996.

# CONTACT

Welcome to the Contact Maintenance page. The contact information we have on file for you is detailed below. You may only update or provide your telephone number, cell phone number and email address online by modifying it appropriately and clicking the [Update Contact Data](#) link.

Address 1	One Smeton Pl #014
Address 2	
City	Towson
State	Maryland
Zip Code	21204-0000
Telephone	
Cell Phone	
E-Mail Address	

[Update Contact Data]

If your address information is not correct or is missing, please download the attached Address Change [form](#). Fill in this form completely and submit it to the Retirement Office.

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The **CONTACT** tab, shown above, displays the address, telephone, cell phone, and email address information the Retirement System currently has in your file. If any of this information needs to be corrected, the best way to do so is to click on the link that says **Address Change form**. It would be great if you send us a message about the change as well, in case the link isn't working properly.

# BENE

The **BENE** tab, shown below, displays the beneficiary information the Retirement System currently has in your file. The State requires a specific form to change your beneficiary so please click on the link to **Correct Beneficiary**.

The beneficiary information we have on file for you is shown below. **Note that Secondary Percentage should add up to 100.**

All members need a Return of Accumulated Deductions beneficiary on file. If a member dies before retirement, the Return of Accumulated Deductions beneficiary will receive a lump sum payment of the accumulated retirement deductions.

Name	SSN	Birth Date	Type	Primary	Marital Status	Percent	Telephone	Cell Phone	Address 1	Address 2	City	State	Zip	E-Mail
David W Podlesney	xxxx-xx-1077	02/05/63	Spouse	Yes	Married	100			815 Nettie Circle		Salem	VA	24153	

Members with at least 2 years of creditable service may select an Option D beneficiary. At the time of selection, the Option D beneficiary must be either the member's spouse, child, sibling, parent or former unmarried spouse. If the member dies before retirement, the Option D beneficiary will receive a lifetime monthly retirement allowance.

Option D is an optional beneficiary selection and will trump the Return of Accumulated Deductions beneficiary. If the same beneficiary is named for both Return of Accumulated Deductions and Option D, the beneficiary can choose either a lump sum or monthly payment.

A spouse of a member married for at least 1 year is automatically the Option D beneficiary, provided they are living together, or apart for justifiable cause, on the member's date of death.

Name	SSN	Birth Date	Type	Primary	Marital Status	Percent	Telephone	Cell Phone	Address 1	Address 2	City	State	Zip	E-Mail
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Information about your beneficiary can be updated or provided by selecting the beneficiary from the drop down box below and clicking on the **Correct Beneficiary** link. A page will load where you can make corrections.

Select Beneficiary: [Dropdown Menu]

[Correct Beneficiary]

To update or correct your beneficiary elections, download a blank beneficiary form [here](#). Fill in this form completely and submit it to the Retirement Office.

More information regarding survivor benefits may be found on the PERAC web site. Click [here](#) to access this information.

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# PYMNT



**Demo Retirement System**

Home Data Contact Bene **Pymnt** 1099 Acct Logout

The information displayed below details the last 18 months of pension payments that have been made on your behalf.

Payee	Gross Amt	Net Amt	Pymnt Date	Payment Option
Ahern, William	3,533.63	2,927.95	02/28/13	SuperAnn Opt B
Ahern, William	3,533.63	2,927.95	01/31/13	SuperAnn Opt B
Ahern, William	3,533.63	2,927.95	12/31/12	SuperAnn Opt B
Ahern, William	3,533.63	2,927.95	11/30/12	SuperAnn Opt B
Ahern, William	3,533.63	2,927.95	10/31/12	SuperAnn Opt B
Ahern, William	3,533.63	2,927.95	09/28/12	SuperAnn Opt B
Ahern, William	3,533.63	2,927.95	08/31/12	SuperAnn Opt B
Ahern, William	3,533.63	2,927.95	07/31/12	SuperAnn Opt B
Ahern, William	3,501.13	2,895.45	06/29/12	SuperAnn Opt B
Ahern, William	3,501.13	2,895.45	05/31/12	SuperAnn Opt B
Ahern, William	3,501.13	2,895.45	04/30/12	SuperAnn Opt B
Ahern, William	3,501.13	2,895.45	03/30/12	SuperAnn Opt B
Ahern, William	3,501.13	2,895.45	02/29/12	SuperAnn Opt B
Ahern, William	3,501.13	2,895.45	01/31/12	SuperAnn Opt B
Ahern, William	3,501.13	2,895.45	12/30/11	SuperAnn Opt B
Ahern, William	3,501.13	2,895.45	11/30/11	SuperAnn Opt B
Ahern, William	3,501.13	2,895.45	10/31/11	SuperAnn Opt B
Ahern, William	3,501.13	2,895.45	09/30/11	SuperAnn Opt B

To download a PDF document with all of the pension payments and deductions for the last 18 months, click on the following link: [Recent Pension Payments](#)

To return to the home page, click on the following link: [\[Return To Home Page\]](#)

To view all payments, click on the following link: [\[View All Payments\]](#)



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The **PYMNT** tab, shown above, displays the last 12 months of retirement payments made to you. You can also print a document that will show all pension payments and deductions for the last **18 months** in this section.

# 1099



**Demo Retirement System**

Home Data Contact Bene Pymnt **1099** Acct Logout

The information displayed below details all of the 1099's that have been made on your behalf.

Year	F Name	L Name	Street Address	Gross Dist	Taxable Amt	Fed Tax	EE Contribs	State Tax	Dist Code
2008	William	Ahern	834 Park Place Ct	40,753.56	40,084.55	4,608.00	669.01	0.00	7 - Normal distribution
2009	William	Ahern	834 Park Place Ct	41,113.56	40,444.55	4,608.00	669.01	0.00	7 - Normal distribution
2010	William	Ahern	834 Park Place Ct	41,473.56	40,804.55	4,608.00	669.01	0.00	7 - Normal distribution
2011	William	Ahern	834 Park Place Ct	41,833.56	41,164.55	4,608.00	669.01	0.00	7 - Normal distribution
2012	William	Ahern	834 Park Place Ct	42,208.56	41,539.55	4,608.00	669.01	0.00	7 - Normal distribution

To return to the home page, click on the following link: [\[Return To Home Page\]](#)

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The **1099** tab will bring you to the screen shown above. This screen shows you the 1099R's issued to you (this area only goes back to the year 2006).

## MSG

**Demo Retirement System**

Home Data Contact Bene Est **Msgs** Acct Logout

The following messages have been sent to our staff from you:

[Date Received](#) [Time Received](#) [Message](#)

The following messages have been sent to you from our staff:

[Date Sent](#) [Time Sent](#) [Message](#)

[\[Back to the Home page\]](#)

If you would like to send us a new message, please enter it below and click on the [Send Message](#) link. We would be pleased to hear any thoughts you might have about how we can better serve you!

New Message

[\[Send Message\]](#)

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The **MSG** tab will bring you to the screen shown above. This is where you would go to send or receive a message to the Retirement Office directly from My Portal.

Once you type your message in the box, remember to click on [\[Send Message\]](#) before leaving this page or your message will not be sent to the Retirement Office.

## ACCT

**Demo Retirement System**

Home **Account Setup** Logout

- Account Setup -

Welcome to the **Account Setup** page. Here you can set your Username and Password as well as setup the information needed by the system's "I forgot my password" functionality.

Usernames must be unique (i.e. you and someone else can not share the same username). We recommend using your e-mail address. *Passwords must be at least six characters in length and must contain at least one lower case letter, one upper case letter as well as one number.*

Username

Password

Confirm Password

Special Question

Special Question Answer

E-Mail Address

[\[Save Account Information\]](#)

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If you want to change your Username or Password or update your Account Information, go to the **Acct** tab. The screen above will appear. This is where you would update or change your username, password, security question/answer or email address. Make sure to click on [\[Save Account Information\]](#) before leaving this page or your new information will not be saved or updated!