OKLAHOMA POLICE PENSION AND RETIREMENT SYSTEM

Web Member Services Manual

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Getting Started

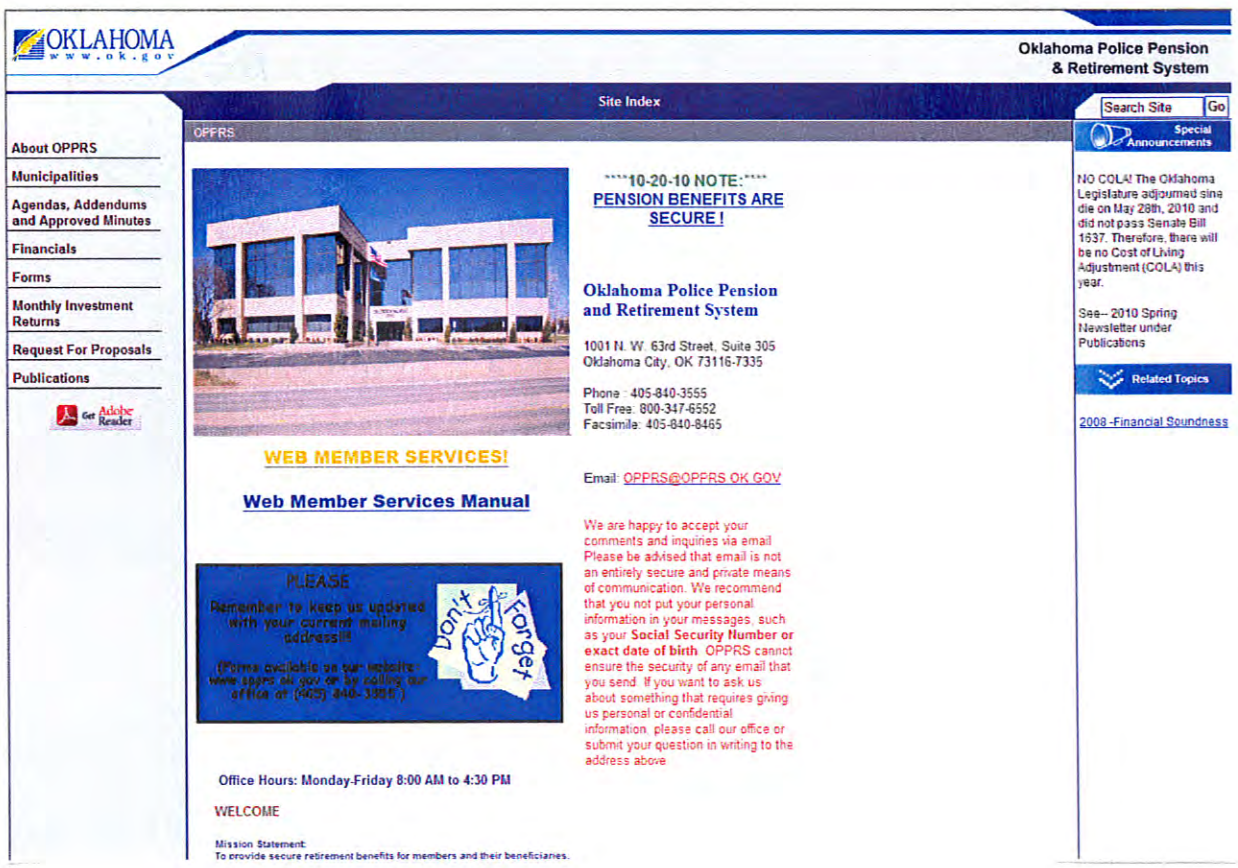
The Oklahoma Police Pension and Retirement System web site, www.ok.gov/opprs is accessible 24 hours a day. This means you will have the ability to access your Web Member Services account at any time. Assistance with your account is available by contacting the Oklahoma Police Pension and Retirement System offices during regular office hours, Monday – Friday 8:00AM to 4:30PM

Located in the upper left corner of the OPPRS Home Page is a picture of the OPPRS building. Just below this picture in yellow are the underlined words, "WEB MEMBER SERVICES". Click on these words and the Logon screen of Web Member Services is displayed.

Each time the user chooses to log into Web Member Services the user has the choice to either return to the OPPRS Home Page and clicking the yellow Web Member Services Words or saving the Logon Screen of Web Member Services as a favorite. If the user chooses to always go to the OPPRS Home Page skip the following instructions and go to page 3 for information about the Logon Screen.

Use the following instructions if you choose to save the Logon Screen in your favorites click on the word "favorites" located across the top of the page. A drop down appears. Click "Add to Favorites". Note the name being saved. The next time you wish to access your account just click "Favorites". A drop down appears displaying all the sites you have saved as favorites. Click the name saved for Web Member Services. The Logon page appears.

The Web Member Services Manual link is located just below the yellow Web Member Services link on the OPPRS web site.

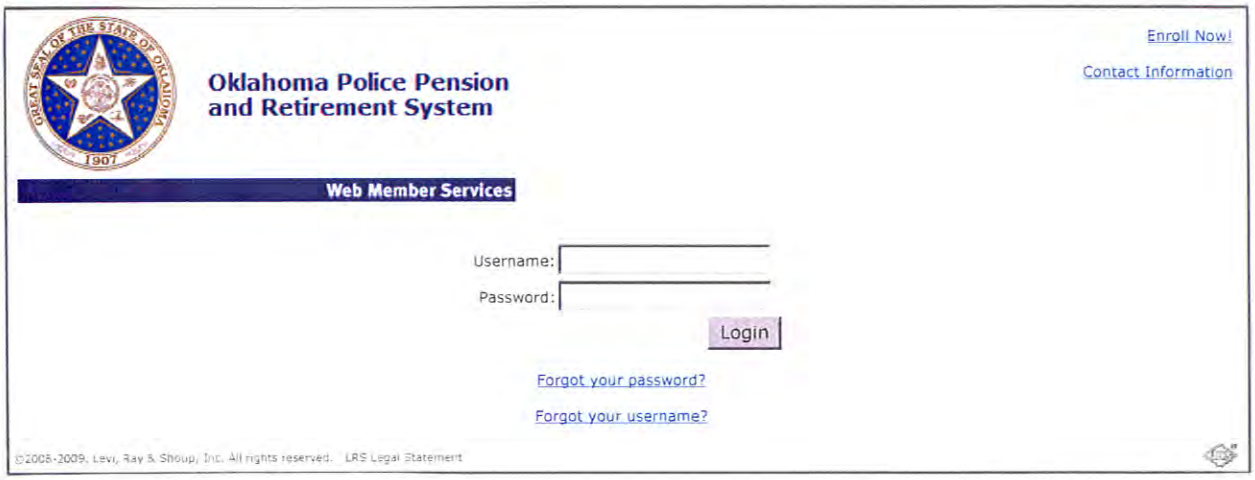


CHAPTER 1

The Logon Screen

About the Logon Screen

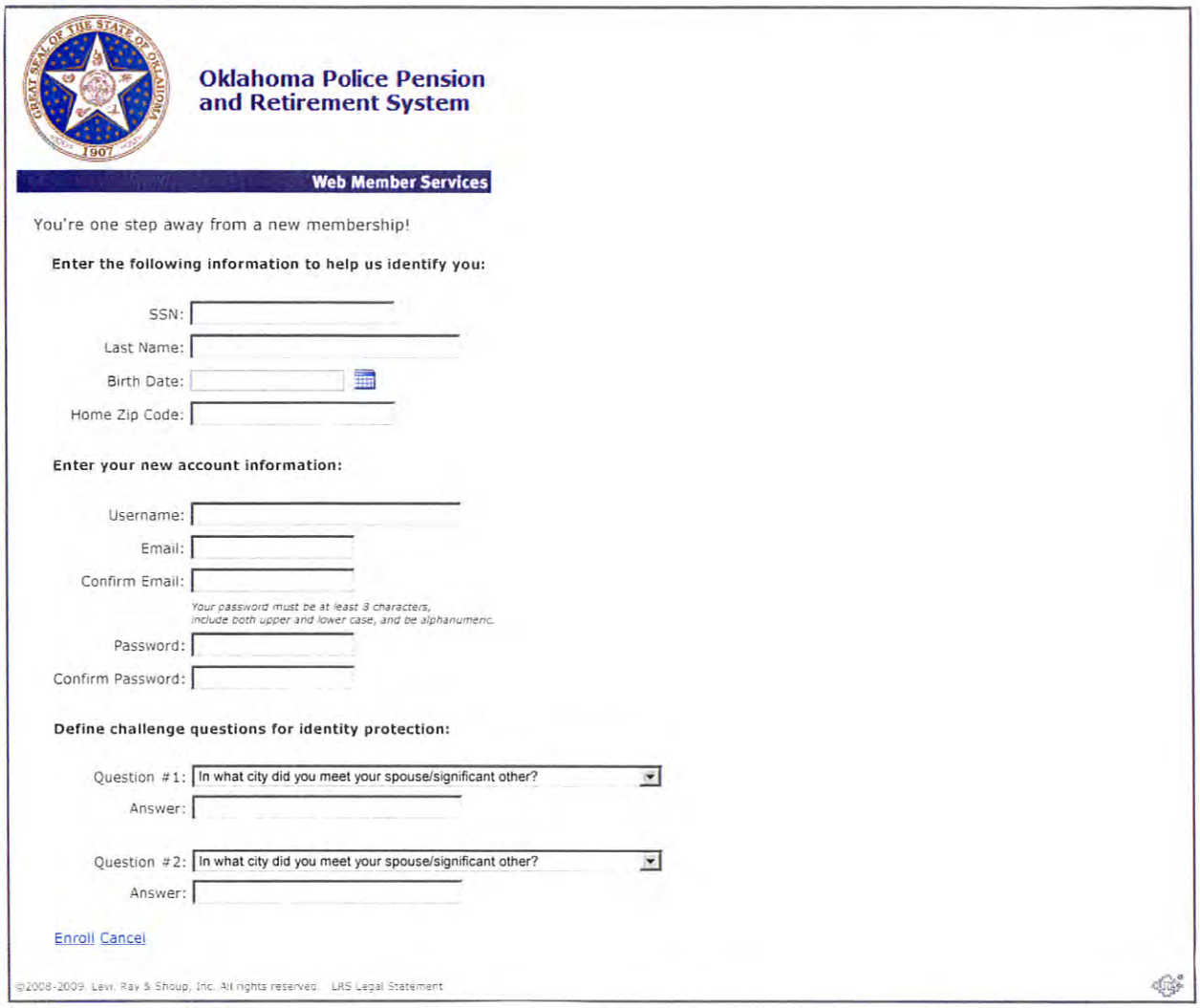
The Logon screen is the first screen you see when you access your online pension account information. Its main purpose is to provide a secure gateway to your pension information. This is the page where you enter your username and password to gain entry to the other pension screens. The Logon screen also provides links to screens that allow you to sign up for access to the online pension information (Enroll Now), get pension fund contact information, and a means by which to retrieve a forgotten username or password.



Enrollment

The Enrollment screen is used to enter information that will allow you to view your pension account information online. You will need to enter some basic information like your name, Social Security number and birth date. You must also enter an email address, create a username and password, and provide answers to some questions used for security purposes. Once you have provided the information on this page, you will be granted access to your pension information account online.

To access the Enrollment screen, click on the Enroll Now link in the upper right corner of the Logon screen. The Enrollment screen appears.



Enter the following information (all fields are required):

SSN - Your Social Security number (dashes are optional).

Last Name

Birth Date - Enter your birth date in using a MMDDYY format or click the calendar icon to locate your birth date.

Home Zip Code - First five numbers only.

Username - Enter the name you want to use to log on with.

Email - Enter the email address you want used to send a username and password information.

Confirm Email - Reenter the email address.

Password - Enter the password you want to use to log on with. The password must be at least 8 characters, include both upper and lower case, and be alphanumeric.

Confirm Password - Reenter the password.

Question #1 - Select a question by clicking on the down arrow and clicking on a question.

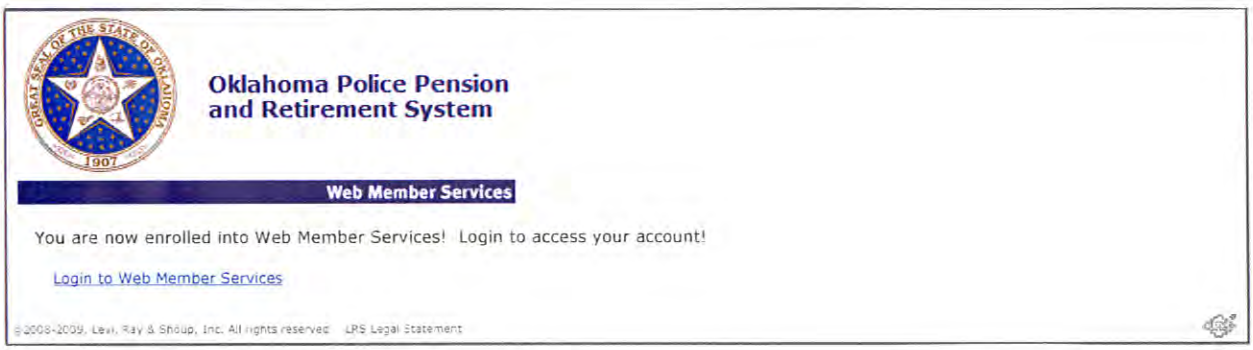
Answer - Type in the answer to the question selected in Question #1.

Question #2 - Select a question by clicking on the down arrow and clicking on a question.

Answer - Type in the answer to the question selected in Question #2.

Click the Enroll link and, if there are no errors, a message will display indicting you are now enrolled into Web Member Services. Below this message will be a link titled Login to Web Member Services. Select this link.

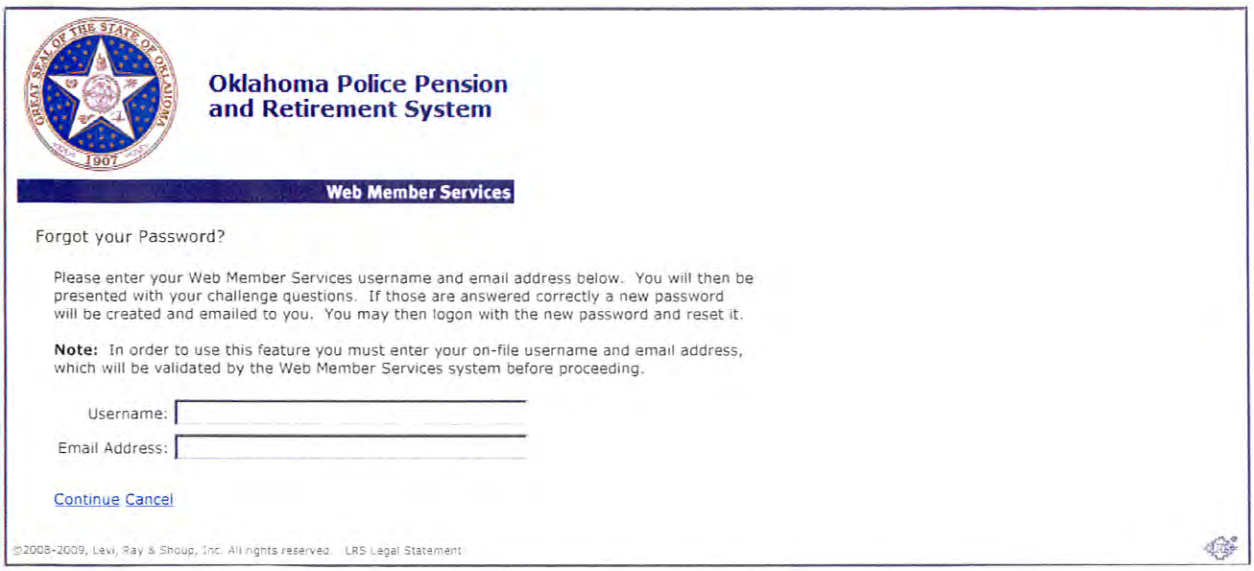
At anytime during the process **before** clicking Update, you can stop the process by clicking Cancel. This cancels the enroll process and takes you back to the Logon screen.



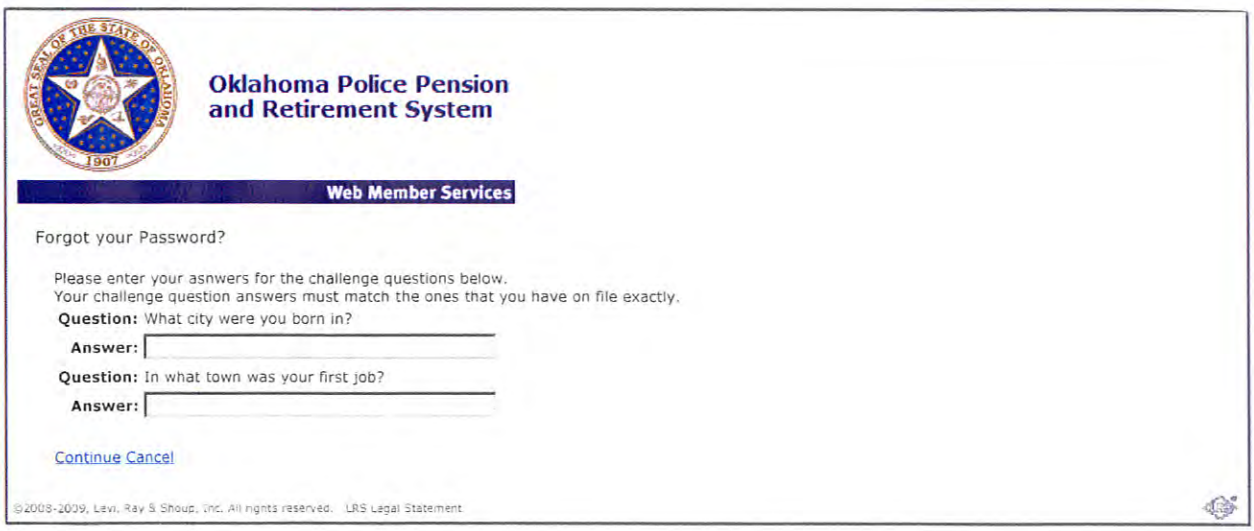
Forgot Your Password

The Forgot Your Password screen allows you to request a password be sent to you in the event you forget yours. Note that a new password will be sent to the email address you entered during the enrollment process, not your password entered during the enrollment process. If you wish to change the new password, you can do so on the Change Password screen, after you have logged on with the new password that has been emailed to you.

To access the Forgot Your Password screen, click on the Forgot Your Password link at the bottom of the Logon screen. The Forgot Your Password screen appears.



Enter the username you normally use to log in and the email address on file for communicating your forgotten password. This is the email address you entered when enrolling for access to your pension information online. Click the Continue link and the next screen in the process appears.



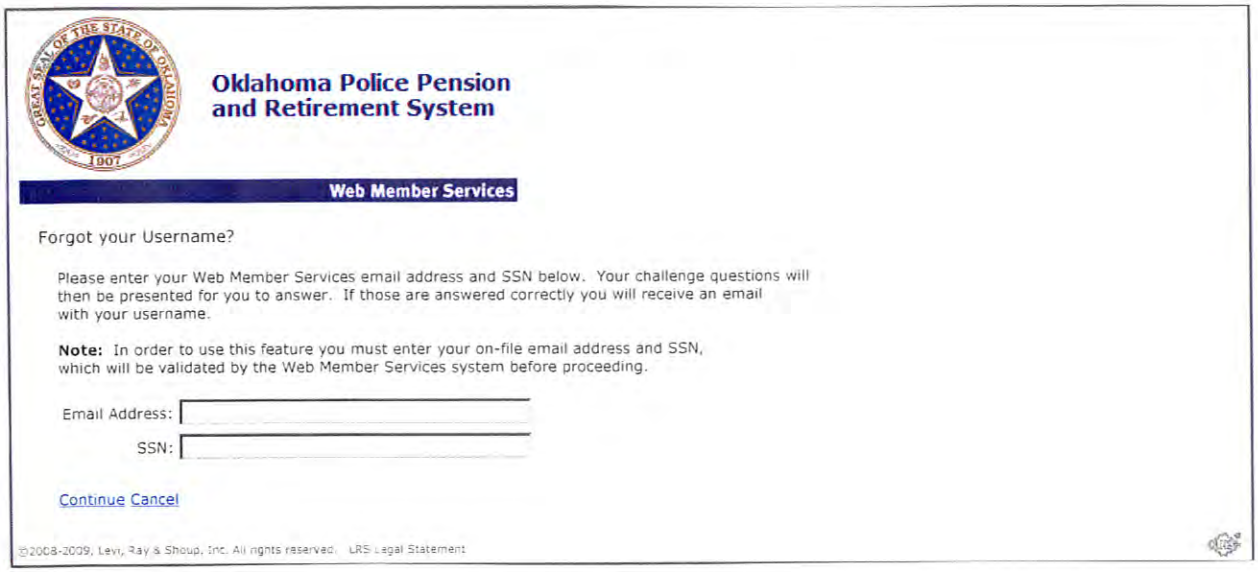
Enter the answers to the two questions that appear on the screen. These should be the same answers you entered when enrolling for access to your pension information online. Click the Continue link. The final screen of the process appears with a message indicating the new password has been sent to your email address. Click the Back to Logon link to get back to the Logon screen.

At any time during the process **before** clicking the last Continue link, you can stop the process by clicking Cancel. This cancels the forgot your password process and takes you back to the Logon screen

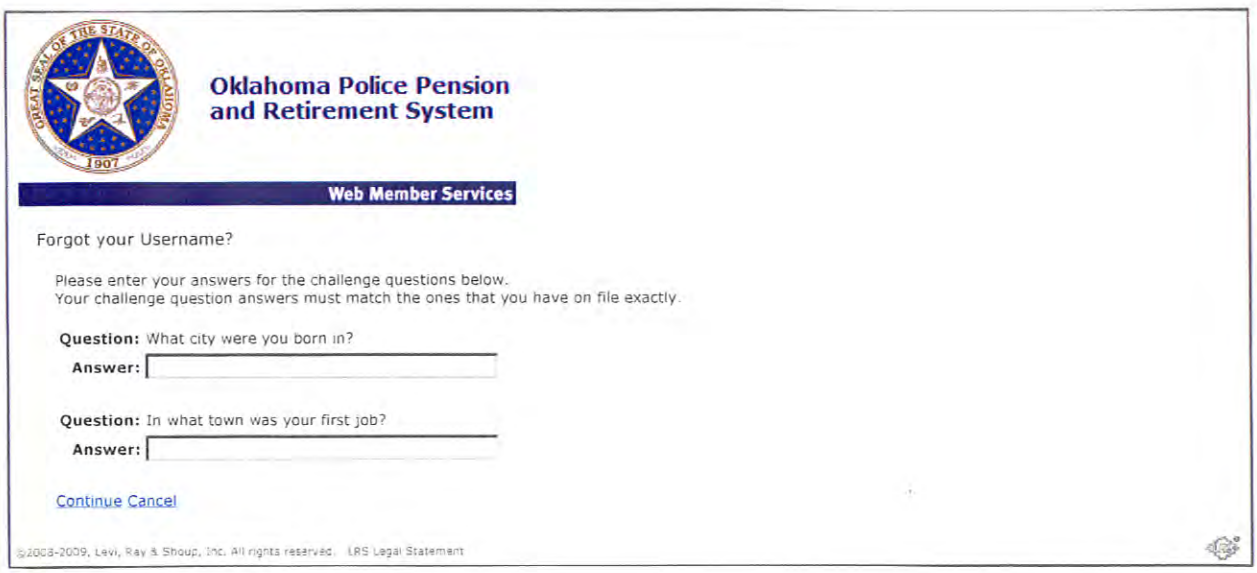
Forgot Your Username

The Forgot Your Username screen allows you to request your username be sent to you in the event you forget it. Note that your username will be emailed to the email address you entered during the enrollment process.

To access the Forgot Your Username screen, click on the Forgot Your Username link at the bottom of the Logon screen. The Forgot Your Username screen appears.



Enter the email address on file for communicating your forgotten username. This is the email address you entered when enrolling for access to your pension information online. Also enter your Social Security number. Click the Continue link and the next screen in the process appears.



Enter the answers to the two questions that appear on the screen. These should be the same answers you entered when enrolling for access to your pension information online. Click the Continue link. The final screen of the process appears with a message indicating your username has been sent to your email address. Click the Back to Logon link to get back to the Logon screen.

At anytime during the process **before** clicking the last Continue link, you can stop the process by clicking Cancel. This cancels the Forgot Your Username process and takes you back to the Logon screen.

Contact Information

The "Contact Your Retirement Fund" screen lists the mailing address, phone number, fax number and the Oklahoma Police Pension and Retirement System Website used to contact the Oklahoma Police Pension and Retirement System.

To access the "Contact Your Retirement Fund" screen, click on the Contact Information link in the upper right part of the Logon screen). The Contact Your Retirement Fund screen appears.

CHAPTER 2

Member Information

About Member Information

The member information screens provide basic information regarding your pension account including an account summary, and your demographic information (address, phone numbers, etc.). There is also a screen available from which you can generate an estimate of benefits.

Account Summary Information

The "Account Summary" screen allows you to view general information about your retirement account. In the upper part of the screen, information about your current plan membership and employment situation is displayed. In the center of the screen, information about your service credit is shown. In the lower portion of the screen, your retirement account contributions are broken down into the various elements that make up your account total. The lower portion of the screen displays your employment history.

To access the Account Summary Screen, click on the "Account Summary" option in the left menu (under Member Information). The Account summary screen appears. For active members, this is also the page that appears when you first log in.

Beneath your name at the top of the screen, the first section contains the details of your membership in the retirement plan. Some of this information only appears if you are an active (not retired) member of the pension fund.

Current Status - Your membership status in the retirement plan. A status of "active" indicates that you are actively employed and are earning service credit. A status of "Retired" indicates that you are a retired officer receiving a monthly pension benefit. A status of "Active Payee" indicates that you are participating in the Forward DOP plan and your monthly pension benefit is deposited into your Forward DOP account.

Date of Birth - Your date of birth.

Participation Date - An Active member's participation date will be the date you became a member in the retirement plan. An Active Payee's participation date represents the start date of the Forward DOP Plan.

Current Plan - Retirement plan in which you are currently enrolled, Oklahoma Police Pension and Retirement System (OPPRS).

Current Employer - Name of the employer for whom you currently work.

Employment Date - Date that you began employment under the retirement plan.

The section in the center of the screen contains information about your service credit, which is the amount of time that you have worked toward retirement. Service credit, along with your final average salary, is used to calculate your retirement benefits.

Employment Service - Amount of time, in years, that is used to calculate your **eligibility** for benefits.

Benefit Service - Amount of time, in years, that is used to calculate your retirement benefit **amount**.

The Member Contributions section in the lower portion of the screen displays the contributions you have made to your retirement account. The amounts are broken down by contribution type, as well as pre tax, post tax and interest amounts. There are grand totals at the bottom.

Contribution Type - Source of contribution. Active member's contribution type will be "Employee Current" and represents the total member contributions. Active Payees participating in the Forward DOP will have displayed a line for "Employer DOP Contributions" which represents the employer contributions deposit into the DOP account. Also, a line for your monthly "Pension Benefits Deposits" into the Forward DOP account will be displayed.

Total Pre Tax - Amount in your account for which no taxes have been paid. Otherwise known as taxable contributions, these contributions are made prior to the calculation of federal income tax. Because no federal income tax has been paid on these contributions, taxes may be assessed on this money when paid out.

Total Post Tax - Amount in your account for this contribution type on which federal taxes already have been paid.

Total Interest - Interest amount in your DOP account for this contribution type.

Total - Total of the Pre Tax, Post Tax and Interest amounts for this contribution type.

The Employment History section will display the Hire Date, Participation Date, Termination Date and Contributions Basis Date (Date contributions are to begin, same date as Participation Date) for each of your employments.

Member Account Information

The "Member Account" screen allows you to view general information about your account. In the upper part of the screen, there is an option to filter the account information according to employer and plan. In the middle area of the screen, Life to Date Balances are showing for this particular account. Finally, in the lower portion of the screen, there is your member account transactions displayed in the Account Transactions grid.

To access the Member Account screen, click on the Member Account option in the left menu (under Member Information). The Member Account screen appears.

Above the Life to Date Balances are the filter options for this page. Choose a Plan (OPPRS, Forward DOP, Back DOP, Pay Out DOP) and/or Employer to filter the information in the Life to Date Balances or Account Transactions grid. Click Apply to view updated information.

Below the Life to Date Balances area is the **Account Transactions** table. Each account transaction is listed in this area. The information displayed includes:

Pay Period End Date - The final date of the pay period

Deposit Received Date - Date the amount was deposited

Description - Name and/or description of transaction

Amount - Amount of account transaction

To view more account transactions, click a number at the bottom of the page. You can also move to the previous or next page by clicking the left or right arrows at the bottom of the page. Click the column headings to the sort the information based on the heading types.

Demographic Information

The Demographic Information screen allows you to view personal information on file. This information includes things like addresses, phone numbers and email addresses. Changes to this information can be made by clicking Downloadable Forms in the Left Menu. Select and print Form 115 Address. Complete and return this form to the Oklahoma Police Pension and Retirement System. Your Web Member Services account will display your correct information once the form is received and the information is entered.

To access the Demographic Information screen, click on the Demographics option in the left menu. The Demographic Information screen appears.

At the top of the page is your birth date, marital status, marriage date (if applicable), spouse's name (if applicable) and spouse's birth date (if applicable). If any of these items are blank, it is because this information is not on file with your pension fund. If you would like any missing information added or incorrect information corrected, contact your pension fund.

The **Address** section of the screen contains your address information on file with your pension fund. By selecting an Address Type (click the down arrow and select an address type), you can view the addresses your fund has on file for you.

The Phone section of the screen contains your telephone number information on file with your pension fund. By selecting a Phone Type (click the down arrow and select a telephone type), you can view the phone numbers your fund has on file for you.

The **Email** section of the screen contains your email address information on file with your pension fund. By selecting an Email Type (click the down arrow and select an email address type), you can view the email addresses your fund has on file for you. **Note: The e-mail address associated with your Login Account is not displayed in this screen. To view or change the login account e-mail address, use the Change Email option on the Settings menu**

The **Correspondence Distribution Preference**s section displays what your pension fund has on file as your preferred means of sending you correspondence.

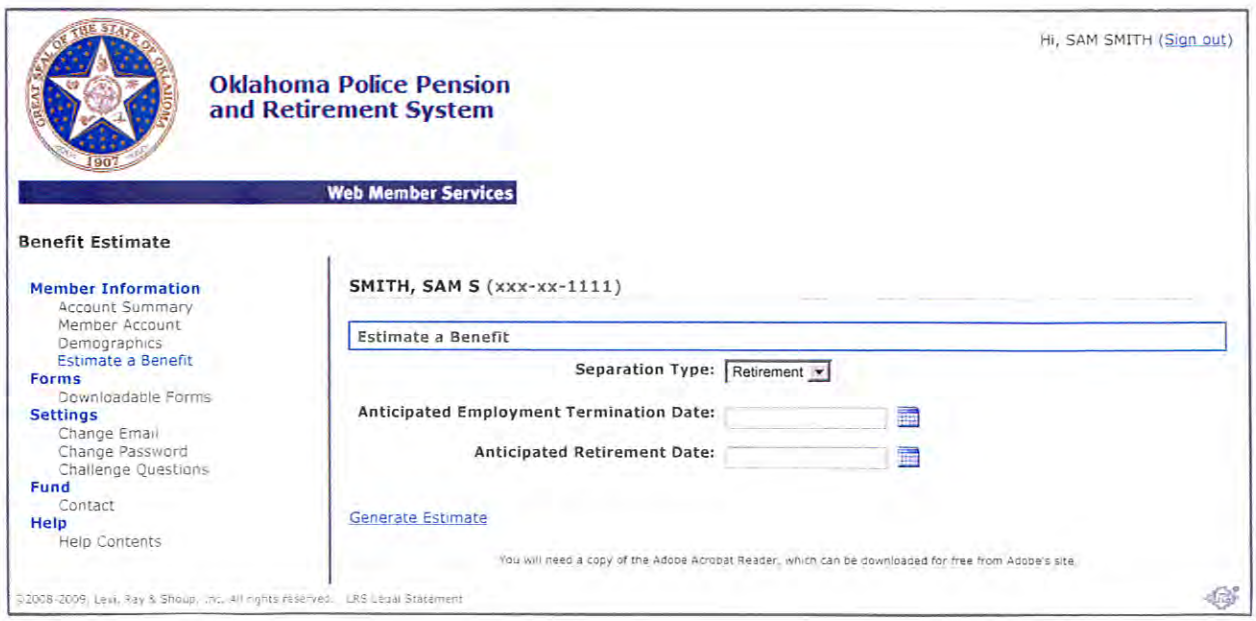
To change any of the information on this screen, OPPRS will need in writing the correct information, signed and dated by you.

Estimate a Benefit

The Benefit Estimate screen allows you to estimate the benefit you will be eligible to receive upon retirement or disability or the benefit your beneficiary receives in the event of death. You can also estimate a Back DOP benefit and account balance with a termination from employment with the last day of the current month.

Benefit estimates can be calculated based on projected dates of separation in addition to type of retirement. Benefit estimates are generated into .pdf files and can be viewed or printed. The Benefit estimates you generate using this tool are also accessible by your pension fund personnel so that you can later discuss the estimates with them.

To access the Benefit Estimator, click on the Estimate a Benefit option from the left menu (under Member Information). The Benefit Estimate screen opens.



Enter the following information:

Separation Type – Retirement is preselected.

Anticipated Employment Termination Date - Enter the date when you expect to leave your job. You can type the date in manually using a month/day/year (mm/dd/yyyy) format or you can click on the calendar icon to the right of the field and use the calendar feature to select a date.

Anticipated Retirement Date - Enter the date when you want to have your benefit payments begin. You can type the date in manually using a month/day/year (mm/dd/yyyy) format or you can click on the calendar icon to the right of the field and use the calendar feature to select a date.

After you have completed entering the requested information, click the Generate Estimate link. If there are any errors, they will be displayed and you can make the necessary corrections to your entered information. If the request to generate the estimate is successful, a .pdf file will open in a separate window. You can view its contents and print it.

The benefit estimate report is divided into several sections:

Basis Information - This section includes basic information on file about your pension account (Social Security number, birth date, age at retirement, total contributions) and some of the data you entered on the Benefit Estimate screen (separation date, benefit effective date).

Service - This section lists your accumulated service credit by Service Type (Benefit, Vesting, Eligibility).

Earnings History - This section displays a history of your earnings by pay period.

Average Earnings - This section displays an average of your earnings that can be used in calculating your benefit.

Benefit Formula and Calculation - This section displays the calculation used in calculating your benefit.

Optional Form Adjustments - This section displays the benefit you would be eligible for. The Final Benefit Amount is the monthly amount you would be eligible to receive.

Mailing Instructions - This section displays the address on file with your pension fund where your payment is to be sent.

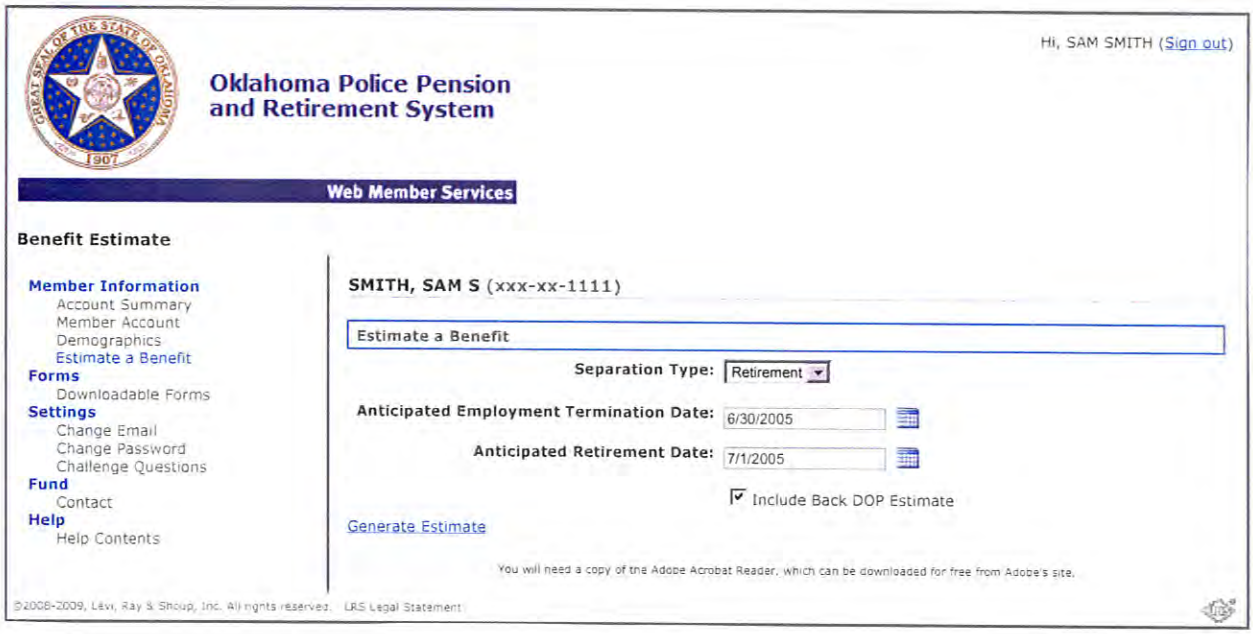
There a few other sections but they are for use by OPPRS when a benefit estimate is generated at the pension fund office

Back DOP Estimate

To access the Benefit Estimator, click on the Estimate a Benefit option from the left menu (under Member Information). The Benefit Estimate screen opens.

Back DOP is when a member elects to stop working, but for the sake of the benefit calculation, decides to set their retirement date to a retroactive date, not to exceed 5 years prior. The member must have had at least 20 years of service as of the retroactive retirement date chosen. The value of the DOP account is then calculated to include all monthly benefits due from the retirement date forward, all employee-paid contributions from the retirement date forward, 50% of the employer-paid contributions from the retirement date forward, interest due from the retirement date forward and all due Legislative Increases from the retirement date forward.

For Back DOP Estimates, the user will be required to create a back-dated service retirement estimate with the Anticipated Retirement Date equal to the first day of the Back DOP period.



Enter the following information:

Separation Type - Retirement is preselected.

Anticipated Employment Termination Date - Enter the day before the Back DOP is to begin. This date should be the last day of the month with the first day of Back DOP is the first day of the following month.

Anticipated Retirement Date - Enter the first day of the Back DOP period.

After you have completed entering the requested information, a check box titled Include Back DOP Estimate is displayed. Check the box and click the Generate Estimate link. If there are any errors, they will be displayed and you can make the necessary corrections to your entered information. If the request to generate the estimate is successful, a pdf file will open in a separate window. You can view its contents and print it.

The Back DOP benefit estimate report is divided into several sections:

Basis Information - This section includes basic information on file about your pension account (Social Security number, birth date, age at retirement, total contributions) and some of the data you entered on the Benefit Estimate screen (separation date, benefit effective date).

Service - This section lists your accumulated service credit by Service Type (Benefit, Vesting, Eligibility).

Earnings History - This section displays a history of your earnings by pay period.

Average Earnings - This section displays an average of your earnings that can be used in calculating your benefit.

Benefit Formula and Calculation - This section displays the calculation used in calculating your benefit.

Optional Form Adjustments - This section displays the benefit you would be eligible for. The Final Benefit Amount is the monthly amount you would be eligible to receive.

Back DOP Account Estimate – Lists by deposit date all employee contributions, all employer DOP contributions (1/2 of employer contribution for the pay period), all pension benefits and all interest transaction which fall within the Back DOP participation dates. Also displayed is the Back DOP Account Balance Total.

Mailing Instructions - This section displays the address on file with your pension fund where your payment is to be sent.
There a few other sections but they are for use by OPPRS when a benefit estimate is generated at the pension fund office

CHAPTER 3

Benefit Information

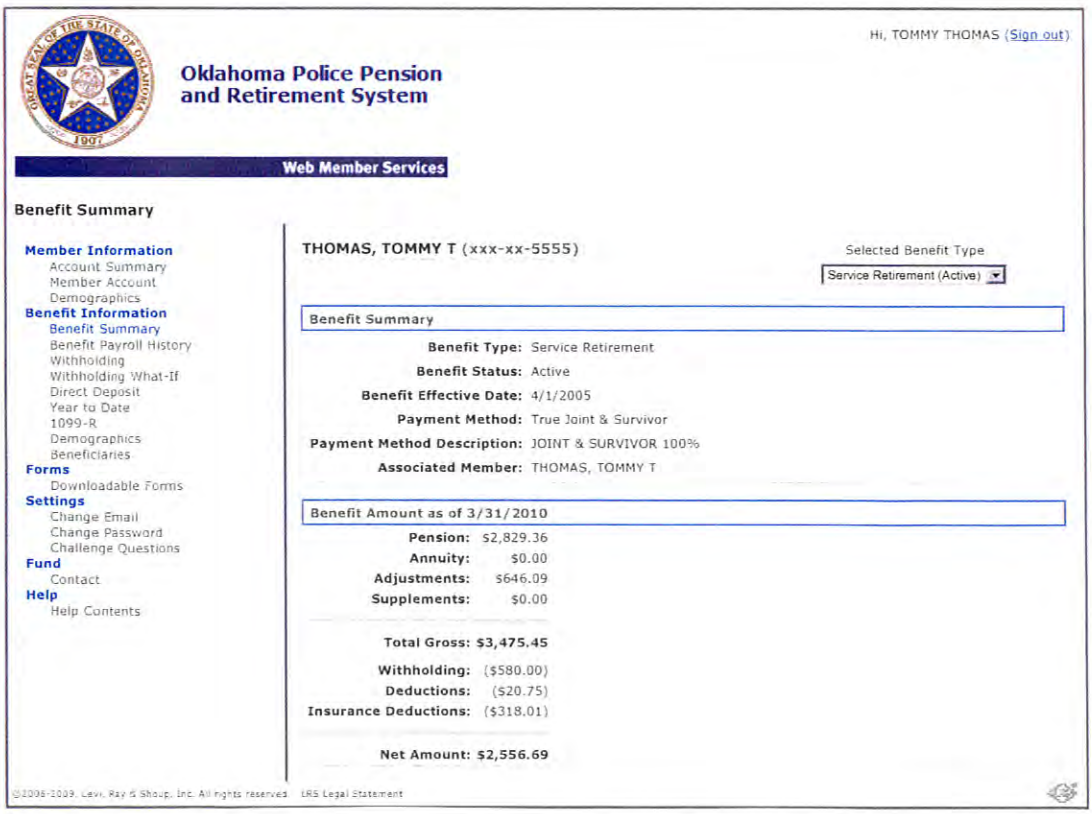
About Benefit Information

The benefit, information screens provide information on the pension benefits you are receiving. These screens allow you to see benefit summaries, your payment history, tax withholding information, any payment adjustments, direct deposit information and a list of beneficiaries. Only payees have access to payee information screens.

Benefit Summary

The Benefit Summary screen allows you to view general information about your retirement benefit. The rest of the screen contains the specific information about the benefit you selected.

To access the Benefit Summary screen, click on the Benefit Summary option in the left menu (under Benefit Information). The Benefit Summary screen appears. For everyone other than active members, this is also the page that appears when you first log in



The screen automatically displays the current payment you are receiving, your monthly pension benefit. You may view any refund of member contributions or DOP account by clicking the down arrow in the Select Benefit Type field and select the refund you wish to view. The selected refund will then be displayed on the screen.

Displayed information includes:

Benefit Type - Type of benefit selected at the top of the screen.

Benefit Effective Date - Date on which this benefit became effective.

Payment Method - Your benefit payment method.

Payment Method Description - Further description of your benefit payment method. For more specific information on your benefit, contact your pension fund.

Associated Member - The pension fund member with which the selected benefit originated.

Pension - This is your initial benefit amount before any amounts such as raises are added or subtracted. See Adjustments.

Annuity – Always zero.

Adjustments - Additional amounts added or subtracted from your Pension amount. Adjustments can be permanent, such as cost-of-living adjustments (COLAs) or they can be one-time only, such as prorating partial month payments or correcting an overpayment or underpayment.

Supplements – Always zero.

Total Gross - Your benefit amount after factoring in any annuity, adjustment and supplement amounts.

Withholding - Amount deducted from your benefit to cover taxes.

Deductions - Total amount of additional deductions (other than Insurance) withheld from your benefit.

Insurance Deductions - Amount deducted from your benefit to cover insurance payments.

Net Amount - Benefit amount you actually receive after all adjustments, deductions and supplements.

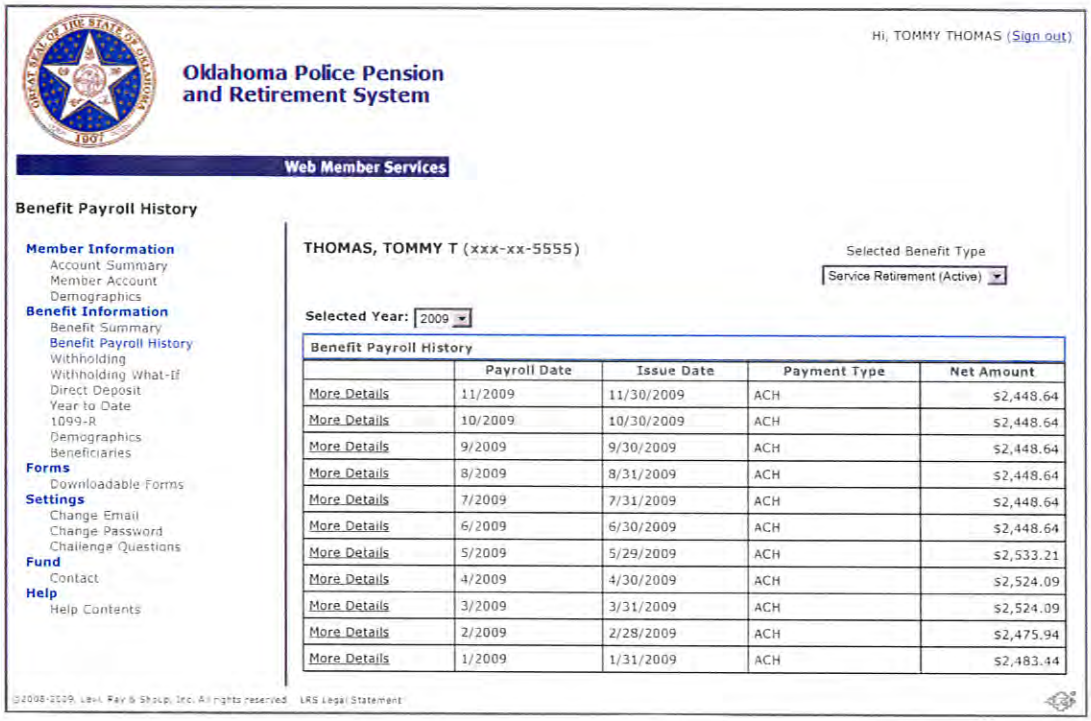
Note that any amounts displayed in parenthesis are negative amounts that are deducted.

Benefit Payroll History

The Benefit Payroll History screen allows you to view a list of payments that you have received. You can do this for specific benefits. You can also select the year for which you want to view payroll information.

Details of each payment are viewed on the Benefit Payroll History Details screen which can be accessed from the Benefit Payroll History screen.

To access the Benefit Payroll History screen, click on the Benefit Payroll History option in the left menu (under Benefit Information). The Benefit Payroll History screen appears.



The Selected Year field automatically displays the current year, but you can click on the down-arrow and select a different year.

The Benefit Payroll History section displays all of the payments made for the selected benefit during the selected year. Information displayed for each payment includes:

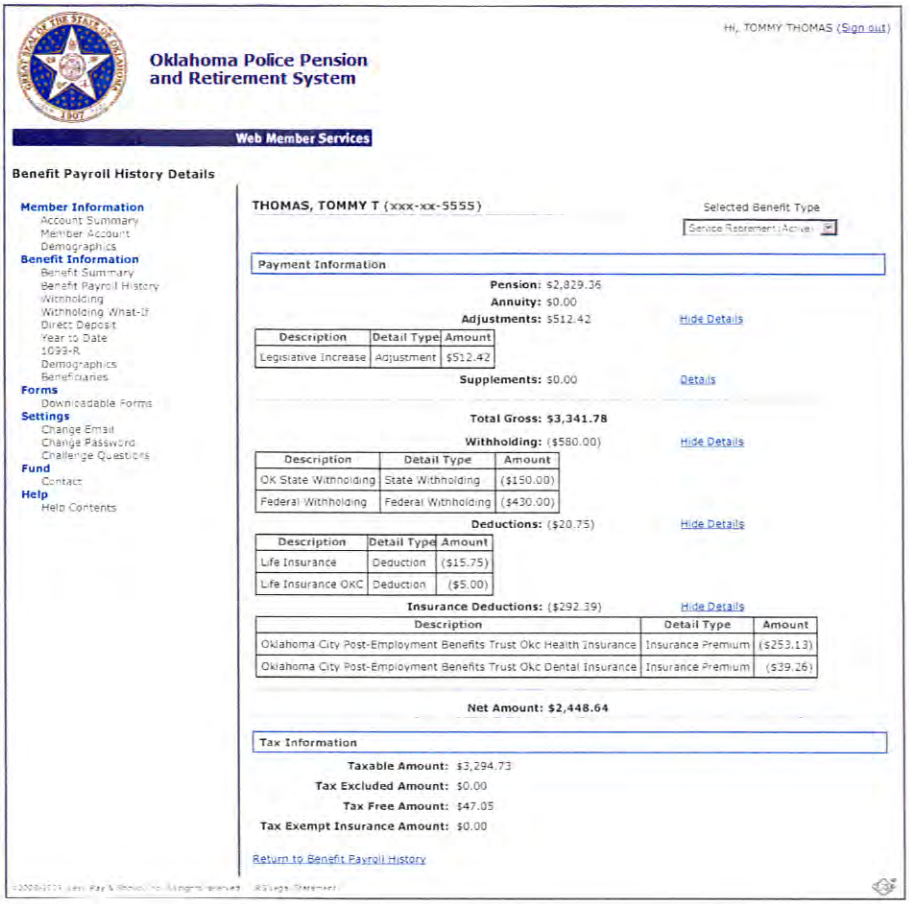
Payroll Date - Date the payroll was posted by your pension fund.

Issue Date - Date payment was issued (date printed on the check or direct deposit sheet).

Payment Type - Method by which your benefit payment was made such as check or ACH (direct deposit).

Net Amount -Actual amount of payment after any deductions, supplements, etc.

To view detail of a specific payment, click the More Details link associated with the payment. The Benefit Payroll History Details screen appears



The following payment detail information appears on this screen:

Pension - This was your base benefit amount before any amounts were added or subtracted

Annuity – Always zero.

Adjustments - Additional amounts added or subtracted from your Pension amount. Adjustments can be permanent, such as cost-of-living adjustments (COLAs) or they can be one-time only, such as prorating partial month payments or correcting an overpayment or underpayment.

Supplements –Always zero.

Total Gross - Your benefit amount after factoring any adjustments amounts.

Withholding - Amount deducted from your benefit to cover taxes.

Deductions - Total amount of additional deductions (other than Insurance) withheld from your benefit

Insurance Deductions - Amount deducted from your benefit to cover insurance payments.

Net Amount - Benefit amount you actually received after all adjustments and deductions.

Taxable Amount - Amount of the payment which was subject to taxation.

Tax Free Amount - Taxable benefit that was not taxed due to the recovery of pre taxed contributions.

Tax Exempt Insurance Amount - Amount of insurance that is tax exempt

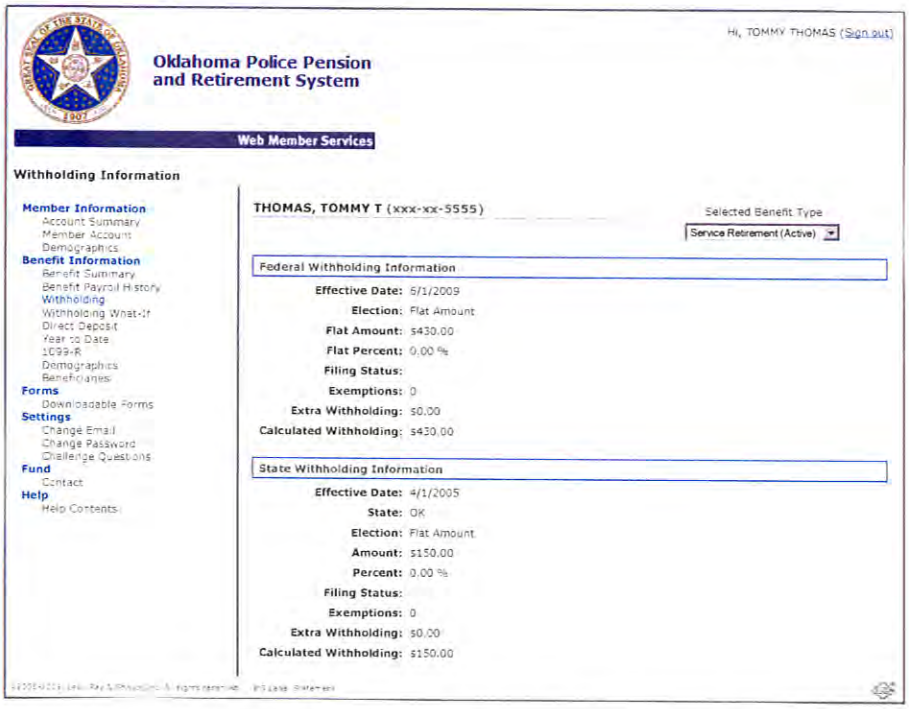
Adjustments, Withholding, Deductions and Insurance Deductions all have Details links next to them. By clicking on Details, a table appears displaying the breakdown of all items comprising that item. The details tables can be hidden again by clicking the Hide Details link.

Note that any amounts displayed in parenthesis are negative amounts that are deducted.

Withholding Information

The Withholding Information screen displays all of the current tax withholding deductions being applied to your pension benefit. Both federal and state tax withholding data is available.

To access the Withholding Information screen, click on the Withholding option in the left menu (under Benefit Information). The Tax Withholding Information screen appears.



There is a Federal Withholding Information section and a State Withholding Information section on this screen. Information displayed in each section includes:

Effective Date - Date the withholding type (election) became effective and applied to the benefit

State (this appears for state withholding only) –OK for Oklahoma Tax Withholding.

Election - Method of withholding.

Flat Amount - Dollar amount withheld from each benefit payment.

Percent - Percent of benefit withheld from each benefit payment.

Filing Status - Marital status used to determine the tax table for calculating withholding

Exemptions - Number of exemptions used in determining the withholding allowance.

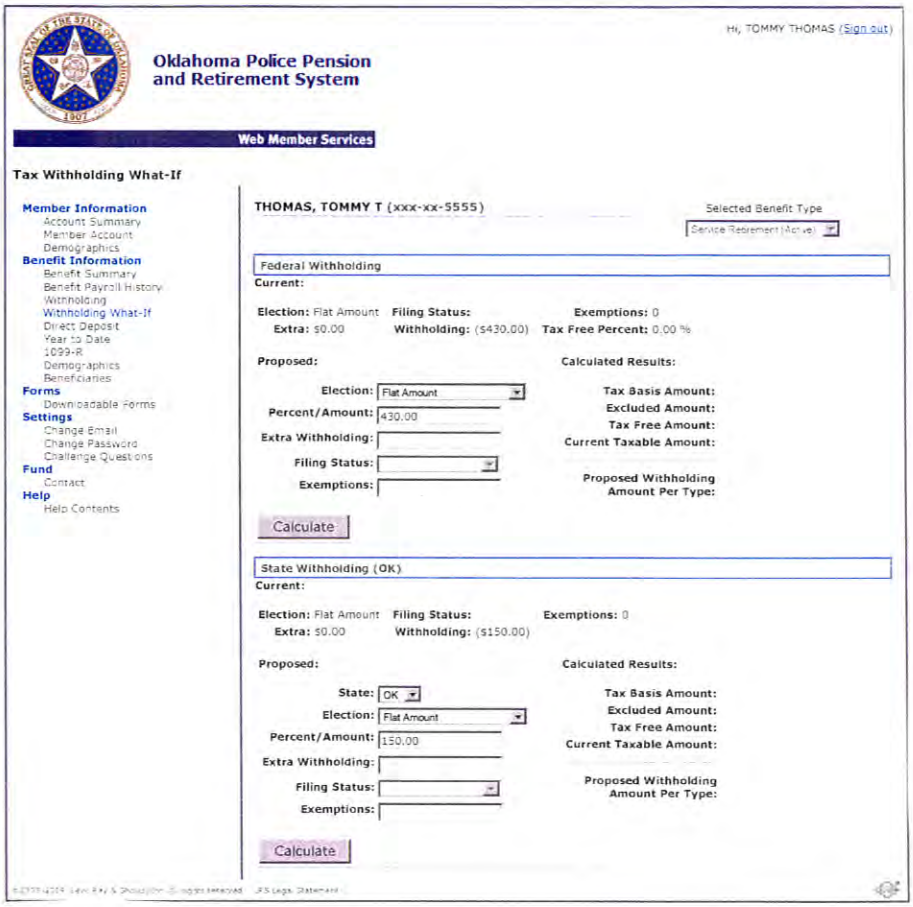
Extra Withholding - Additional dollar amount withheld from each benefit payment.

Calculated Withholding - Total dollar amount withheld from each benefit payment for this type (Federal or State) of withholding.

Tax Withholding What-If Information

The Tax Withholding What-If provides you with the ability to experiment with your elections for Federal and State Withholdings.

To access the Tax Withholding What If screen, click on the Withholding What If option in the left menu (under Benefit Information). The Tax Withholding What-If screen appears.



Current tax withholding deductions appear at the top of the Federal/State Withholding areas.

In the Proposed area, you are able to enter tax withholding for various scenarios. Enter the following information:

State – OK for Oklahoma

Election - Select a type of withholding or election.

Percent/Amount - Enter a percentage or dollar amount withheld from each benefit payment.

Extra Withholding - Enter Additional dollar amount withheld from each benefit payment when the withholding election is Tax Table + Extra Amount

Filing Status - Select a marital status used to determine the tax table for calculating withholding

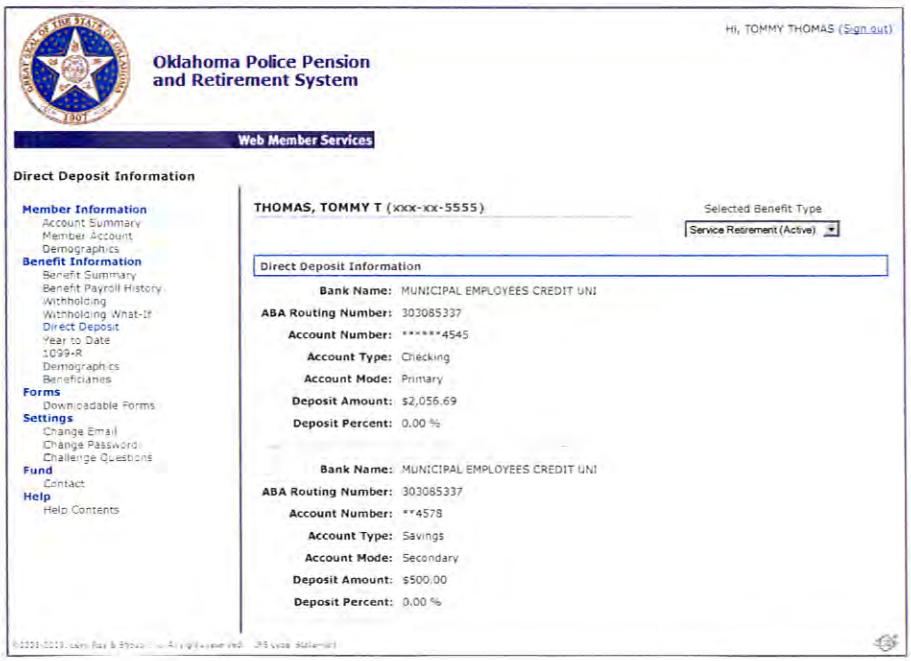
Exemptions - Enter the number of exemptions used in determining the withholding allowance.

After you have completed entering the requested information, click the Calculate button. If there are any errors, they will be displayed and you can make the necessary corrections to your entered information. The results appear in the Calculated Results section Located to the right of the proposed information you entered.

Direct Deposit Information

The Direct Deposit Information screen allows you to view any direct deposit information related to your pension benefit. If you have portions of your pension benefit deposited in multiple accounts, information is displayed for each account.

To access the Direct Deposit Information screen, click on the Direct Deposit option in the left menu (under Benefit Information). The Direct Deposit Information screen appears



Information displayed for each direct deposit account includes:

Bank Name - Name of financial institution.

ABA Routing Number - This number identifies your bank for transaction purposes.

Account Number - Your account number at the financial institution.

Account Type - This indicates whether the direct deposit account type is checking or savings.

Account Mode - This indicates whether the direct deposit account is a primary or a secondary account. Only one direct deposit account can be the primary account for each benefit. All others are secondary accounts.

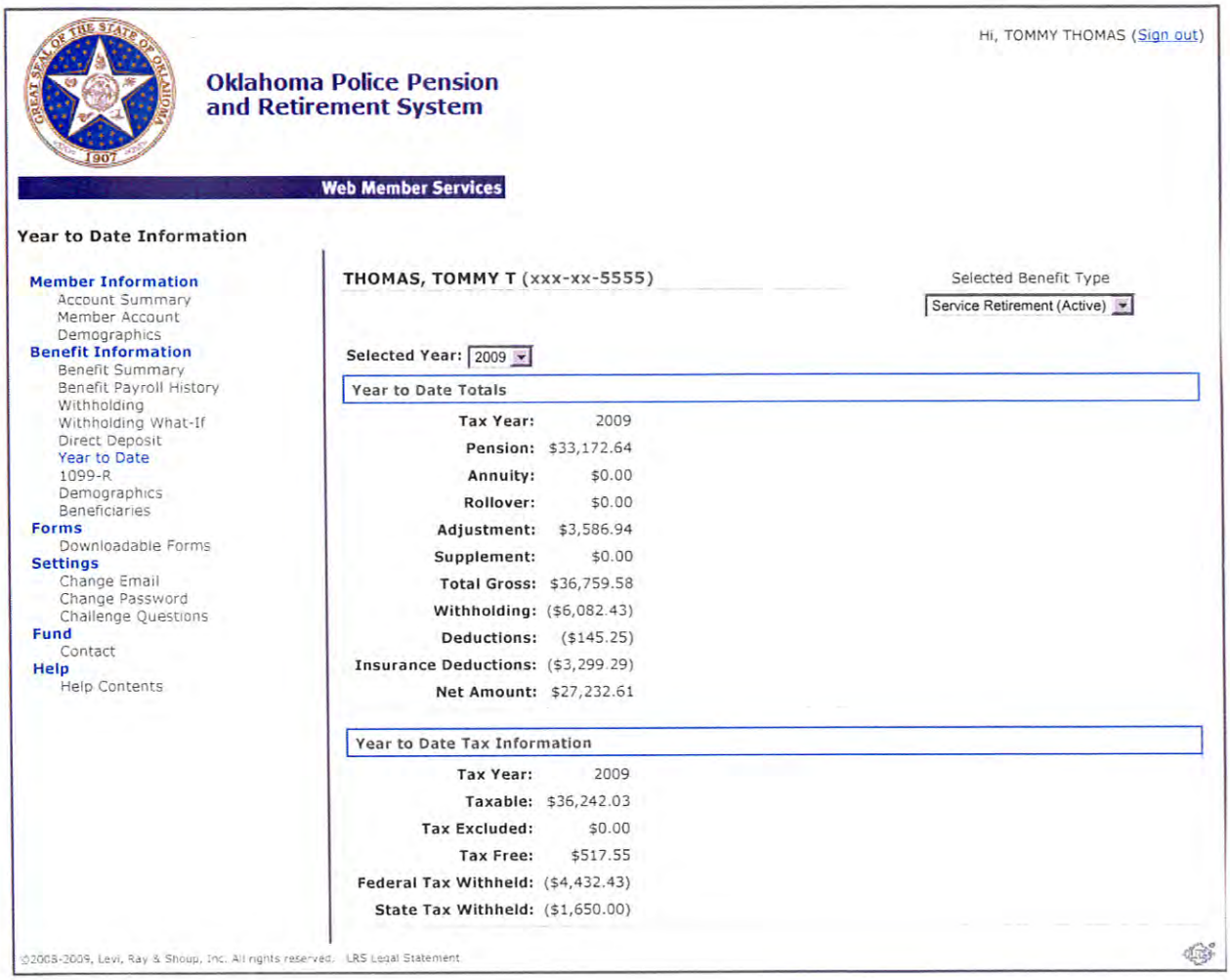
Deposit Amount - Dollar amount that is deposited into this account. This will be $0.00 if the benefit payment is being distributed to multiple accounts on a percentage basis (see Deposit Percent below).

Deposit Percent - Percent of benefit payment that is deposited into this account. This will be 0.00% if the benefit payment is being distributed to multiple accounts on a flat dollar amount basis (see Deposit Amount above).

Year to Date Information

The Year to Date Information screen allows you to view the year to date totals for your pension benefit.

To access the Year to Date Information screen, click on the Year to Date option in the left menu (under Benefit Information). The Year to Date Information screen appears



The Selected Year field automatically displays the current year, but you can click on the down-arrow and select a different year.

The Year to Date Totals section displays the following for the selected year:

Tax Year - Year associated with the year to date amount totals.

Pension - Total amount of pension paid.

Annuity – Always zero.

Rollover - Total amount rolled over if you have selected refund from the Selected Benefit Type drop down.

Adjustment- Total amount of adjustments made to benefit payments.

Supplement – Always zero

Total Gross - Sum of pension and adjustments.

Withholding - Total amount of tax withholdings (federal and state).

Deductions - Sum of all deductions (other than insurance deductions, tax withholdings and adjustments).

Insurance Deductions - Total insurance premium deductions

Net Amount - Total Gross amount less tax withholdings, deductions and insurance deductions.

The Year to Date Tax Information section displays the following for the selected year:

Tax Year - Year associated with the year to date amount totals.

Taxable - Amount of benefit payments subject to taxation.

Tax Excluded - Amount of benefit payments excluded from the taxable amount calculation.

Tax Free - Amount of taxable benefits not taxed because they originated from pre-taxed contributions.

Federal Withholding - Total amount of Federal tax withheld.

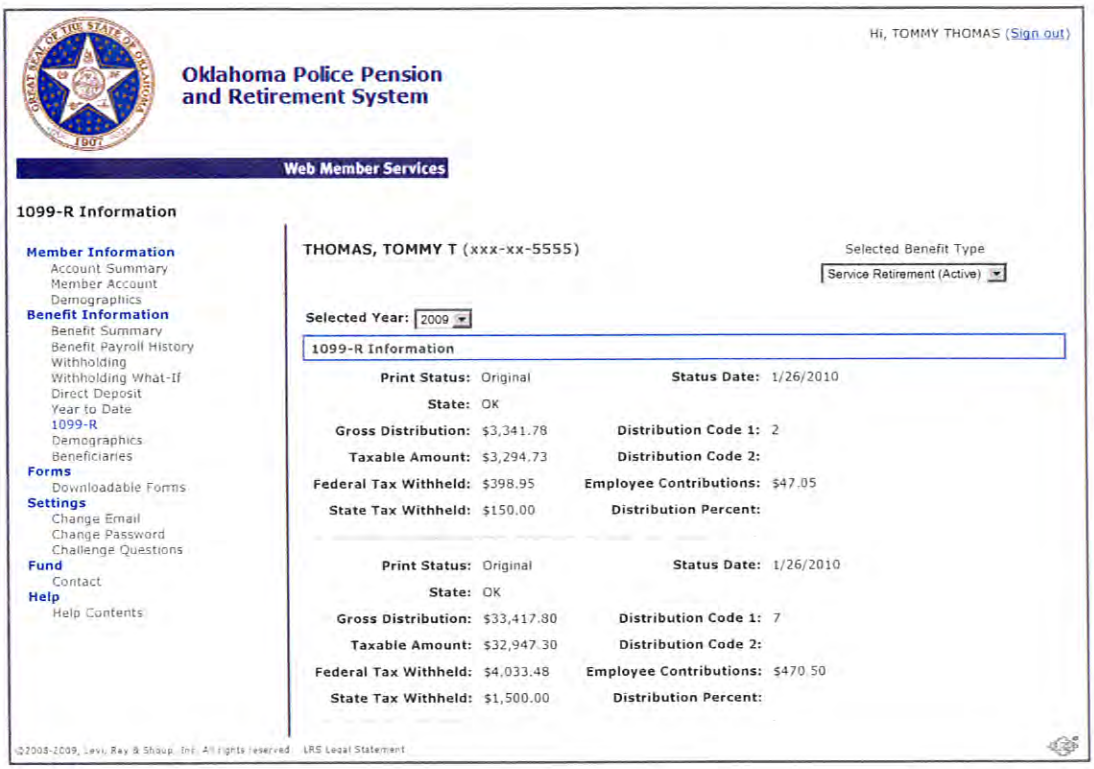
State Withholding - Total amount of State tax withheld.

Note: that any amounts displayed in parenthesis are negative amounts that are deducted.

1099-R Information

The 1099-R Information screen allows you to view information about your 1099-R tax forms. 1099R forms are the end of year tax forms you receive from your pension fund to file with your income taxes.

To access the 1099-R Information screen, click on the 1099-R option in the left menu (under Benefit Information). The 1099-R Information screen appears



If you have more than one type of benefit, click on the down-arrow in the Select Benefit Type (Benefit, DOP, Refund) field and select the benefit for which you are interested in viewing 1099-R information.

The Selected Year field automatically displays the current year, but you can click on the down-arrow and select a different year.

1099-R Information section displays the following:

Print Status - This will appear as either Original or Corrected. An original 1099-R is the first one issued to you for the tax year. A corrected 1099 is one that was modified in some way making it different from the original.

Status Date - Date on which the most recent 1099-R for this tax year was issued to you.

State – OK if Oklahoma State taxes were withheld.

Gross Distribution - Total amount of retirement benefit payments before any tax withholdings.

Taxable Amount - Amount of the Gross Distribution that is taxable.

Federal Tax Withheld - Amount withheld for federal taxes.

State Tax Withheld - Amount withheld for state taxes.

Distribution Code 1 - This is a code that describes how your benefits are being paid.

Distribution Code 2 - If needed, this field displays a code that further describes how your benefits are being paid.

Employee Contributions - Total amount on which no taxes need to be calculated (your contributions on which you have already paid taxes).

Distribution Percent - Percentage of any survivors benefit you received. This field is empty if you received no survivor benefits during the tax year.

Demographic Information

The Demographic Information screen allows you to view personal information on file. This information includes things like addresses, phone numbers and email addresses. Changes to this information can be made by clicking Downloadable Forms in the Left Menu. Select and print Form 115 Address. Complete and return this form to the Oklahoma Police Pension and Retirement System. Your Web Member Services account will display your correct information once the form is received and the information is entered.

To access the Demographic Information screen, click on the Demographics option in the left menu. The Demographic Information screen appears.

At the top of the page is your birth date, marital status, marriage date (if applicable), spouse's name (if applicable) and spouse's birth date (if applicable). If any of these items are blank, it is because this information is not on file with your pension fund. If you would like any missing information added or incorrect information corrected, contact your pension fund.

The **Address** section of the screen contains your address information on file with your pension fund. By selecting an Address Type (click the down arrow and select an address type), you can view the addresses your fund has on file for you.

The Phone section of the screen contains your telephone number information on file with your pension fund. By selecting a Phone Type (click the down arrow and select a telephone type), you can view the phone numbers your fund has on file for you.

The **Email** section of the screen contains your email address information on file with your pension fund. By selecting an Email Type (click the down arrow and select an email address type), you can view the email addresses your fund has on file for you. **Note: The e-mail address associated with your Login Account is not displayed in this screen. To view or change the login account e-mail address, use the Change Email option on the Settings menu**

The **Correspondence Distribution Preference**s section displays what your pension fund has on file as your preferred means of sending you correspondence.

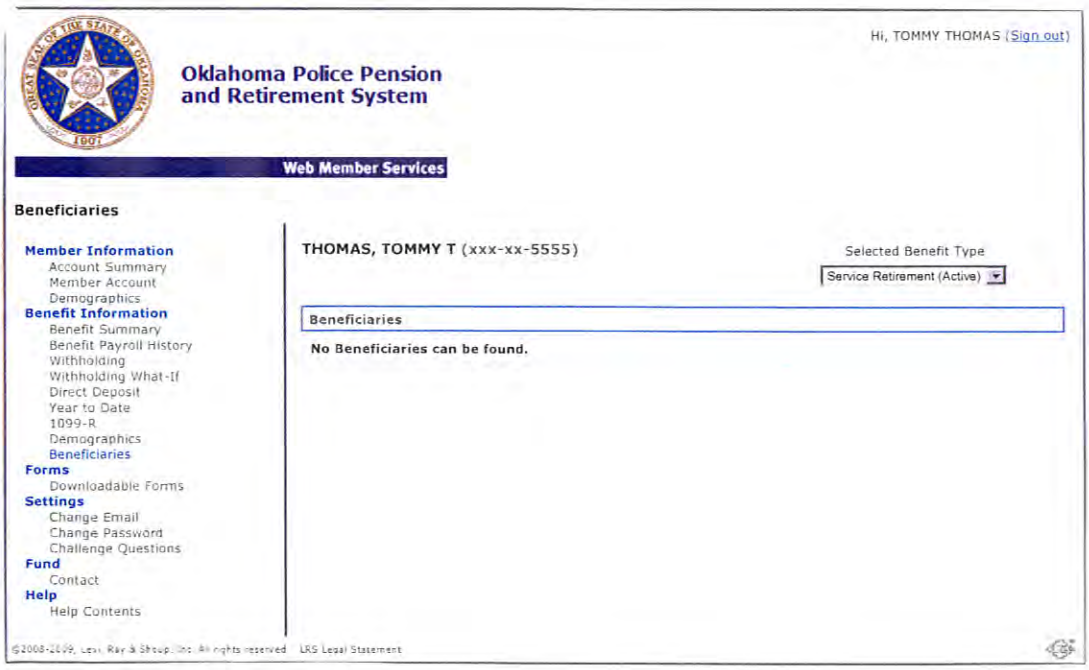
To change any of the information on this screen, OPPRS will need for you to reply in writing the correct information, sign and date the document. Notice of Change of Address, Form 115, may be used by clicking "Downloadable Forms" in the left Menu. The Form 115 will display and can be printed for completion and mailing.

Beneficiaries

Title 11 Section 50-101(13) defines "Beneficiary" as a member's surviving spouse or any surviving children, including biological and adopted children, at the time of the member's death. The surviving spouse must have been married to the member for the thirty (30) continuous months immediately preceding the member's death, provided a surviving spouse of a member who died while in, and as a consequence of, the performance of the member's duty for a participating municipality, shall not be subject to the thirty-month marriage requirement for survivor benefits. A surviving child of a member shall be a beneficiary until reaching eighteen (18) years of age or twenty-two (22) years of age if the child is enrolled full time and regularly attending a public or private school or any institution of higher education. Any child adopted by a member after the member's retirement shall be a beneficiary only if the child is adopted by the member for thirty (30) continuous months preceding the member's death. Any child who is adopted by a member after the member's retirement and such member dies accidentally or as a consequence of the performance of the member's duty as a police officer shall not be subject to the thirty-month adoption requirement.

To access the Beneficiaries screen, click on the Beneficiaries option in the left menu (below Benefit Information). The Beneficiaries screen appears.

Please be advised that the beneficiary for members will not be determined until the death of the related member. Therefore, this screen shall not display information until that time.



CHAPTER 4

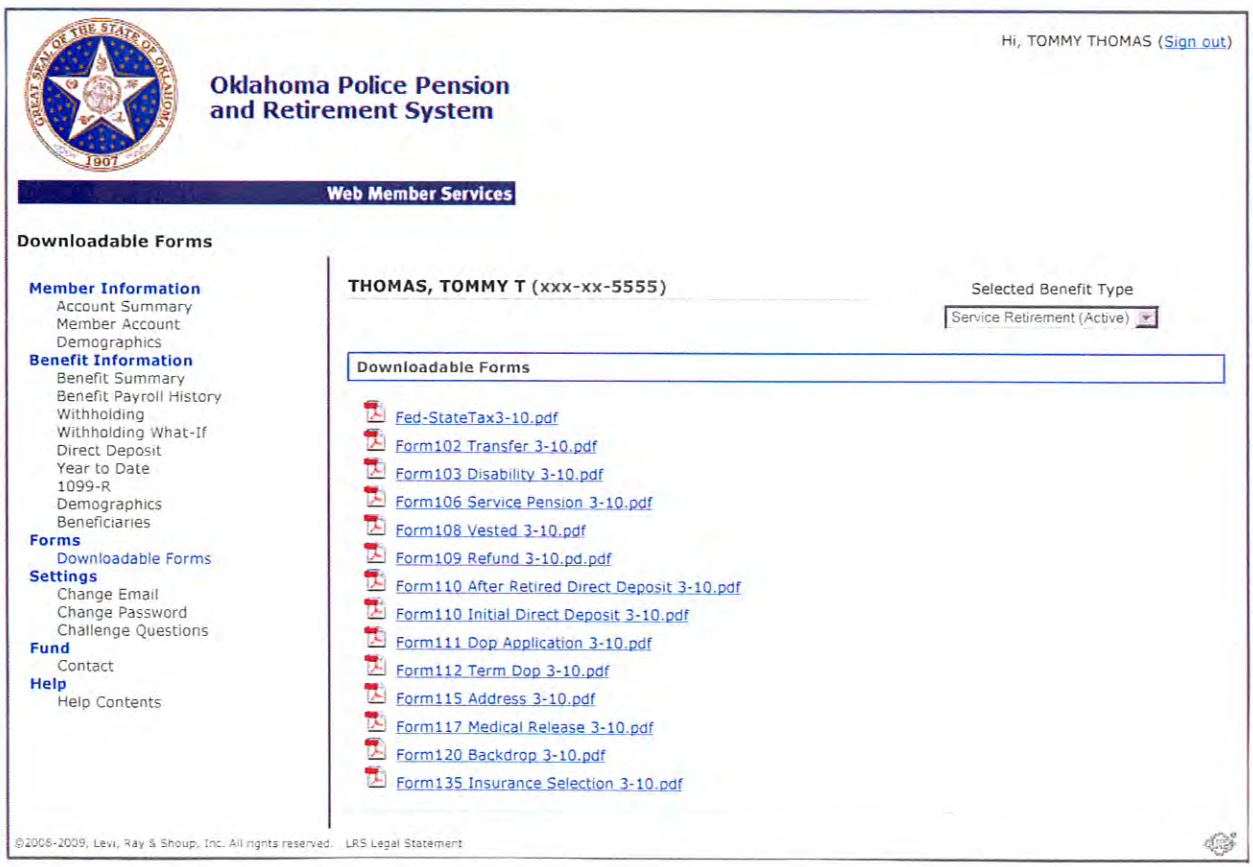
FORMS

Downloadable Forms

The Downloadable Forms screen allows you to view, save and/or print forms your pension fund has made available to you.

To access the Downloadable Forms screen, click on the Downloadable Forms option in the left menu. The Downloadable Forms screen appears.

Clicking on the form opens the document assuming you have the standard software to do so. This screen supports and Adobe Acrobat (.pdf). Once the form is open, you can then save it locally or print it.



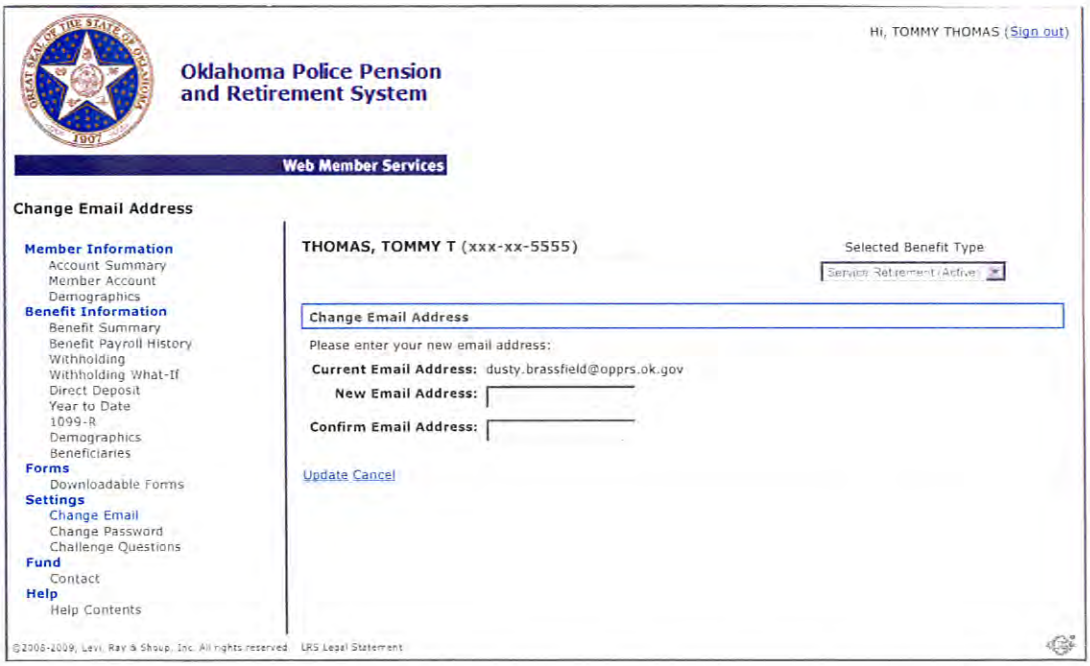
CHAPTER 5

SETTINGS

Change of Email Address

The Change Email Address screen allows you to change the email address you need to enter when your use the Forgot Your Password and Forgot Your Username screens accessed from the Login screen. This email address is the one you entered when you registered for online access to your pension account information. Changing your email address here only changes the address where your password or username is sent in the event you forget them. Changing your email address on this screen **DOES NOT** change the email addresses on file for you with OPPRS and **WILL NOT** BE used for sending normal email communications. To change those email addresses, you must contact OPPRS.

To access the Change Email Address screen, click on the Change Email Address option in the left menu (under Settings). The Change Email Address screen appears.



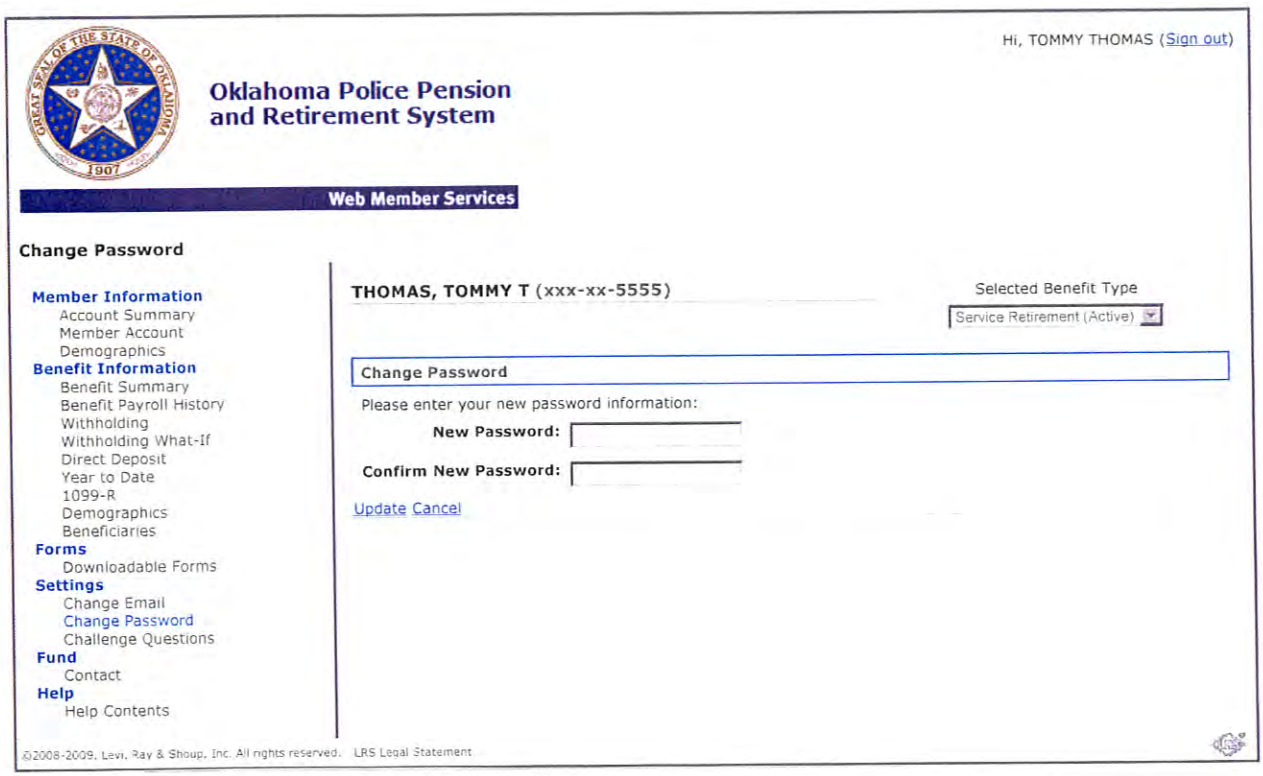
Your current email address is displayed. Enter the new email address in the New Email Address field and enter it again in the Confirm Email Address field. Click the Update link and the new email address is saved

At anytime during the process **before** clicking Update, you can stop the process by clicking Cancel. This cancels the email change process and takes you to your summary page.

Change Password

The Change Password screen allows you to change the passwords you use to log on with on the Logon screen.

To access the Change Password screen, click on the Change Password option in the left menu (under Settings). The Change Password screen appears.



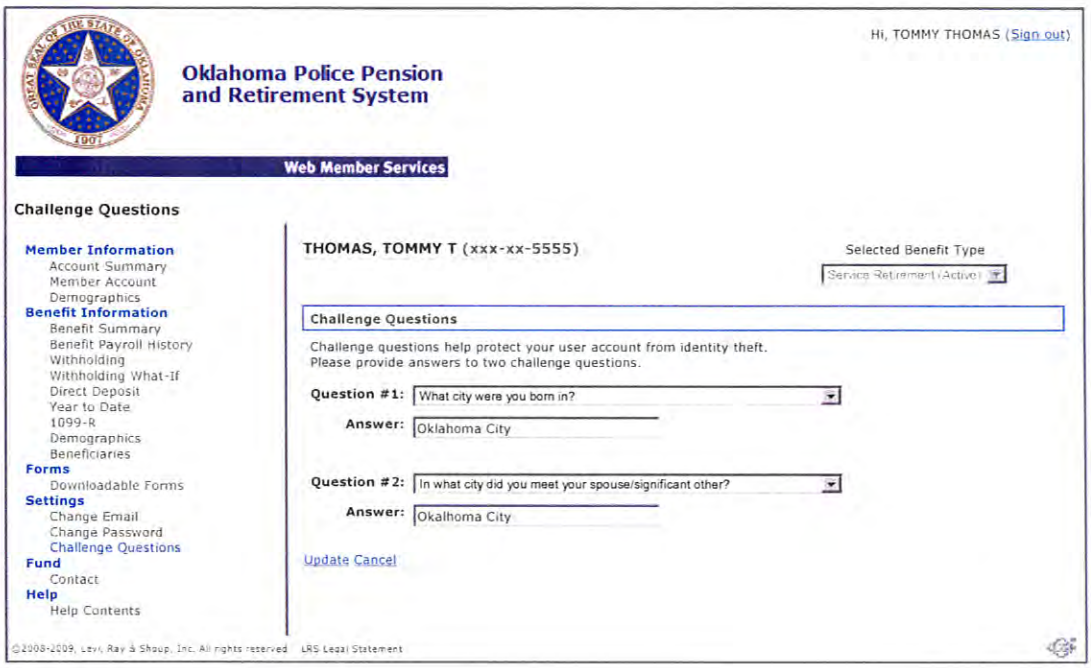
Enter your new password in the New Password field and enter it again in the Confirm Password field. Click the Update link and the new password address is saved.

At anytime during the process **before** clicking Update, you can stop the process by clicking Cancel. This cancels the change password process and takes you to your summary page.

Challenge Questions

The Challenge Questions screen allows you to change the challenge questions you need to enter when you use the Forgot Your Password and Forgot Your Username screens accessed from the Logon screen. These challenge questions are the ones you entered when you registered for online access to your pension account information. There are two challenge questions and you can change both or just one. Each new question also needs a corresponding answer to be entered.

To access the Challenge Questions screen, click on the Challenge Questions option in the left menu (under Settings). The Challenge Questions screen appears.



Select a new Question #1 and/or Question #2 by clicking on the down arrow and clicking on a question. Type in the answer for any question you changed. Alternately, you can leave the questions the same and enter new answers.

Click the Update link and the new challenge questions and answers are saved.

At anytime during the process **before** clicking Update, you can stop the process by clicking Cancel. This cancels the change challenge question process and takes you to your summary page.

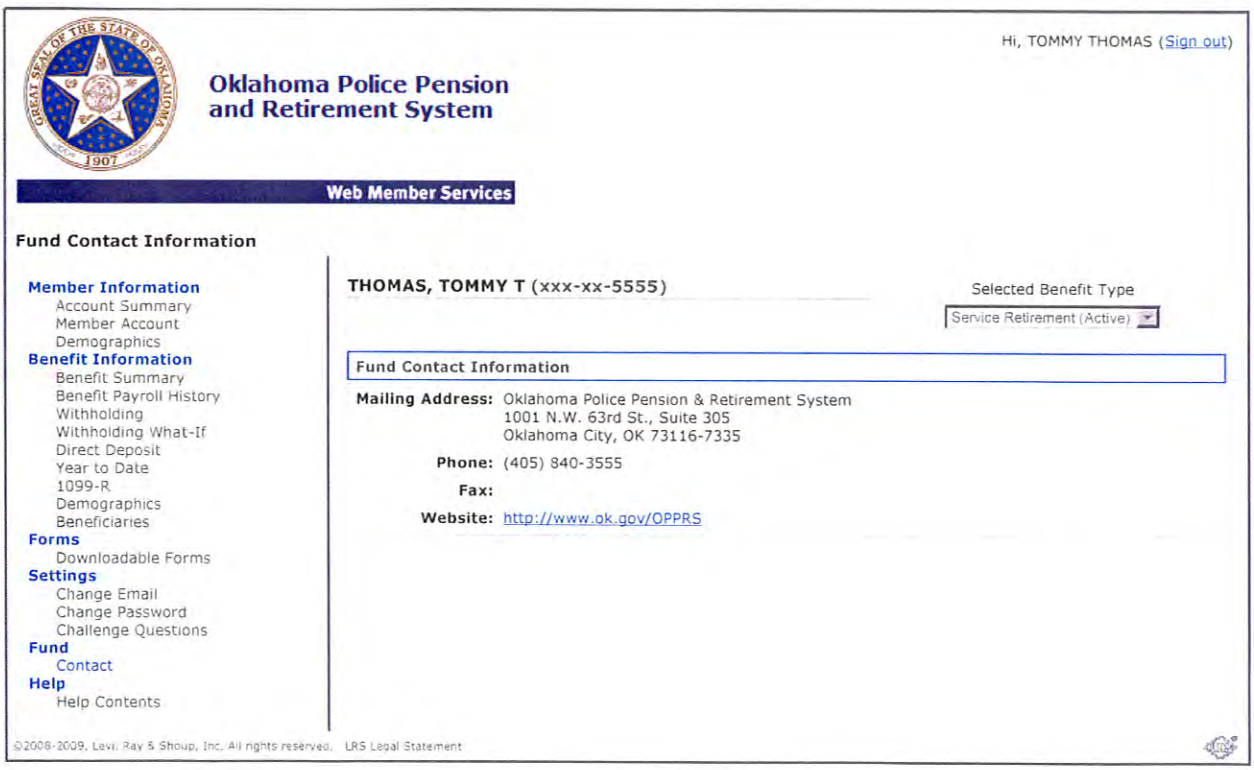
CHAPTER 6

Fund

Contact Fund

The Fund Contact Information screen lists the mailing address and phone numbers used to contact the Oklahoma Police Pension and Retirement System.

To access the Fund Contact Information screen, click on the Contact option in the left menu (under Fund). The Fund Contact Information screen appears.



CHAPTER 7

HELP

User Help

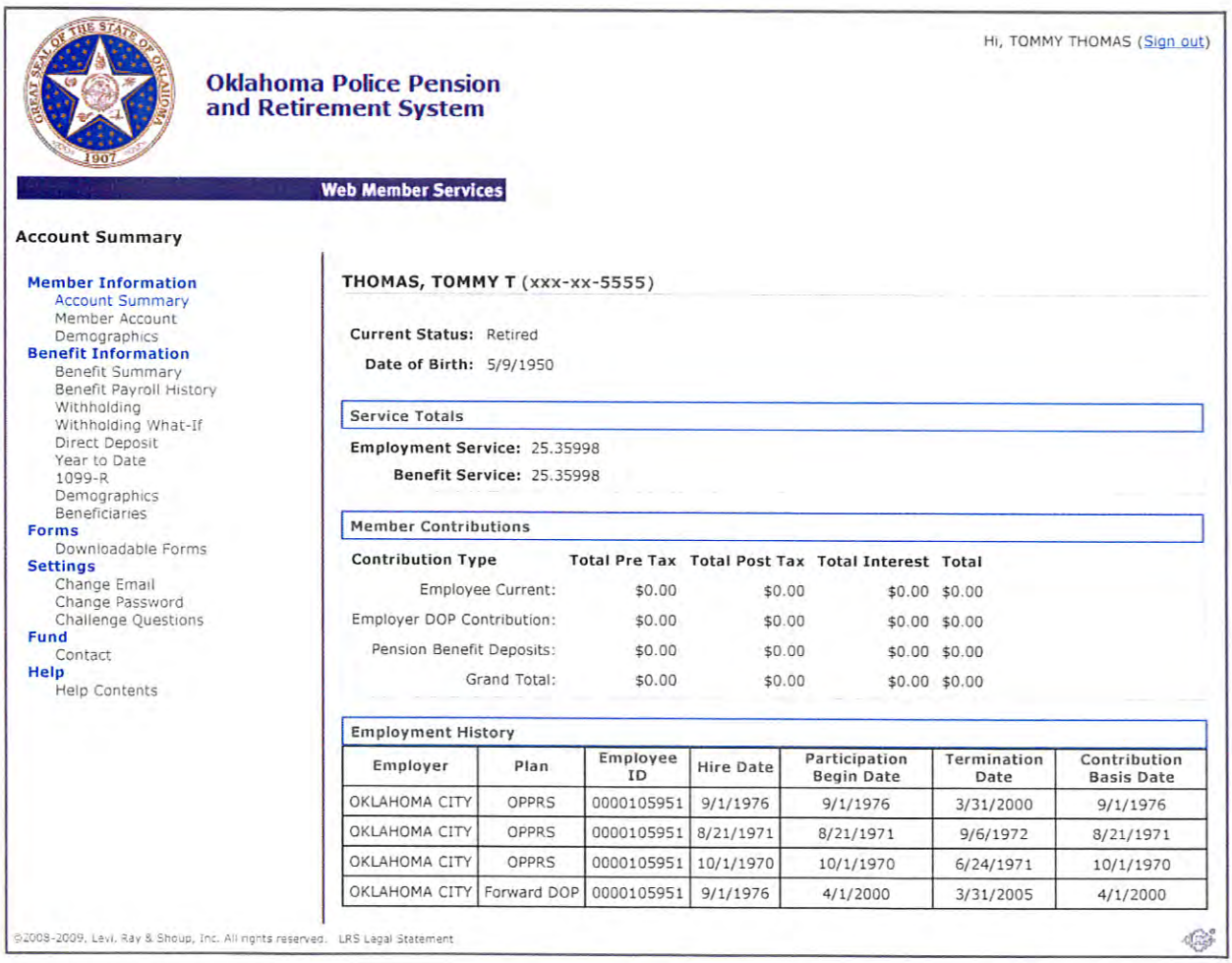
The Help screens provide information and step-by-step instructions on how to use the various screens containing your pension fund information. The Help can be accessed from any screen once you have logged on.

To access the user Help, click on the Help Contents option in the left menu (under Help). The Help menu screen appears. The Help menu screen provides links to the available topics. Topics are grouped in sections for members, payees and other topics that may be useful for any user.

To access a specific topic, click on the topic you wish to view. The Help screen associated with that topic appears.

CHAPTER 8

EXIT/SIGN OFF

Exit Online Account Information (Sign Out)

When you are finished with your online pension account information, you can exit by clicking the **Sign out** link located in the upper right corner of any screen. This takes you back to the Logon screen.