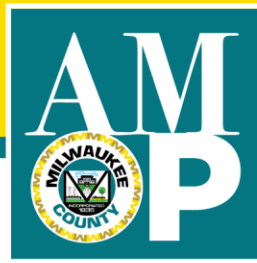




02.06.02 Online Pension Estimate Calculator Process



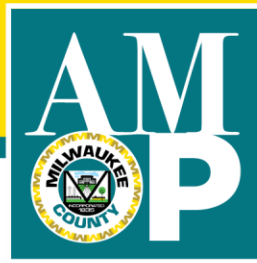
Why This Procedure Is Important

*To provide documentation regarding the Digital Self-Service online estimator tool. This will equip members of the Employees' Retirement System (ERS) of Milwaukee County with the tools to conduct **simulations** of their retirement benefits online. This AMOP is intended for Milwaukee County employees hired before January 1, 2025, who are eligible for membership in the ERS.*



To Whom Does This Procedure Apply?

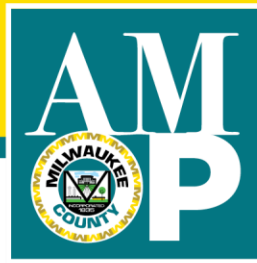
All Milwaukee County pension-eligible employees hired before January 1, 2025, who are eligible for membership in the ERS



Here Is What the Procedure Says:

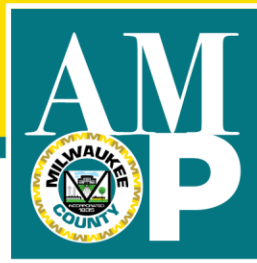
Digital Self-Service Enrollment

- Both active and deferred vested members can access the Pension Estimate Calculator after enrolling on the Milwaukee County ERS Digital Self-Service platform. Members can access the platform by visiting <https://mcersprodms.v3locity.com/> or by visiting the [Retirement Plan Services](#) (RPS) intranet site.
- New users need to click the “Register” button on the Login page. The site will then guide the member through the following registration steps.
 - Milwaukee County pension-eligible employees hired before January 1, 2025, who are eligible for membership in the ERS may register/enroll in the Digital Self-Service platform at anytime.



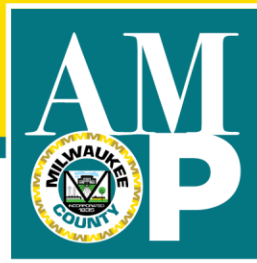
Enter Beneficiary Information for Estimate Purposes

- Before creating an estimate, if a member plans on having a beneficiary for their pension simulation, a beneficiary will need to be added to their account.
- To update beneficiary information, the member can click on the “Dependents” link on the home page. Members can then scroll down to the Beneficiaries subsection and click on “Change” to add beneficiaries to their account. A Beneficiaries screen will appear allowing members to add or make changes to their beneficiaries.
- When adding new beneficiaries, members should make sure to add a date of birth to ensure that estimates generate properly.
- When adding more than one beneficiary, make sure that only one beneficiary is listed as a Primary Beneficiary Type prior to running any estimates to ensure that estimates generate properly.



Pension Estimate Calculator

- From the home page (<https://mcersprodms.v3locity.com/>), click on the “Pension Estimates” link and then the Next button. Members can begin simulations of pension estimates based on the following criteria:
 - Enter Termination Date: This is the estimated last day of work.
 - Enter Retirement Date: This is the first of the month following the last day of work.
 - Enter BackDROP Date (only if eligible): This date should be the member’s Normal Retirement Date or later and must also be one year prior to the Retirement Date.
 - If a member is eligible for the BackDROP but is not sure of their BackDROP eligibility date, they should contact RPS at (414-278-4207) or ERS@milwaukeecountywi.gov.
 - Click “Confirm.” The estimate will then calculate using the dates selected and beneficiary on record.
 - To view the generated estimate, click on the “Documents” link from the home page. All estimates created by the member will be listed in the “RPS Produced Documents” section. Members can open the individual estimates as a PDF to view and/or print them.



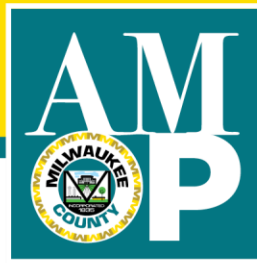
Quiz Questions?

After reviewing the Procedure, you will be asked the following questions to complete the training:



True of False

Members are only allowed to enroll/register on the Digital Self-Service portal at New Employee Orientation?



What information is needed in order to conduct a pension estimate calculation on the Member Self Service portal?

- A. Projected retirement date = First of the month following the last day of work.***
- B. BackDROP date (if eligible)= One year after normal retirement date.***
- C. Termination Date = last day of work***
- D. All the above***