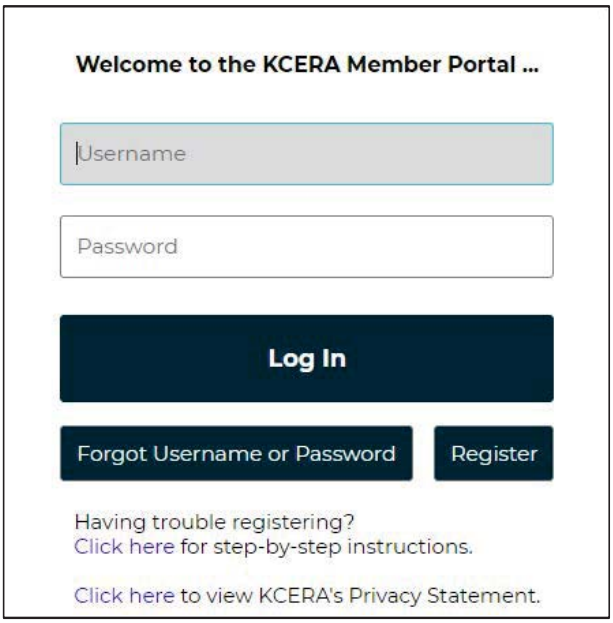
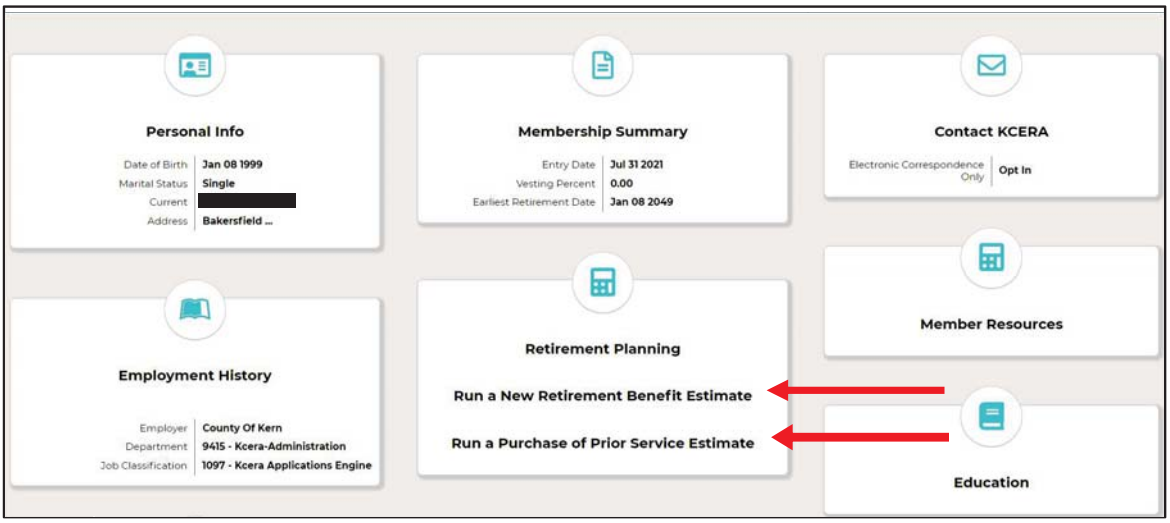
Generating Estimates Within Your KCERA Member Portal

1. On the Member Portal login page, enter your username and password. Click "Log In".



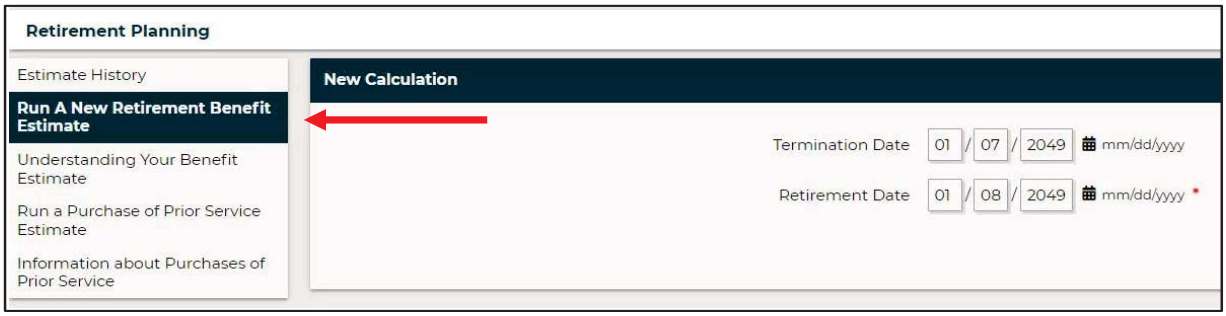
2. Your portal "home page" will be displayed. In the *Retirement Planning* section, make your estimate selection; *Benefit Estimate* or *Prior Service Estimate.*



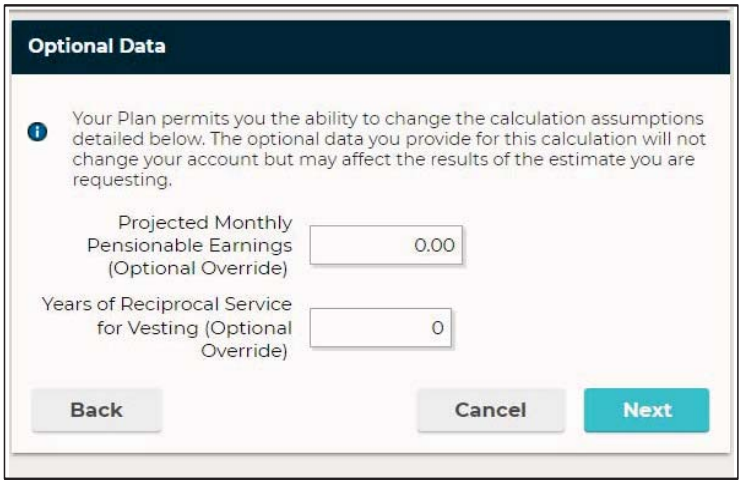
Benefit Estimate

1. New Calculation: The system will default to your first eligible date to retire. You can run an estimate using this date, or you can project it to a date in the future. If you elect a future date, the *Retirement Date* will be the day after your last day on your employer's payroll. Your *Termination Date* and *Retirement Date* **cannot** be the same day.

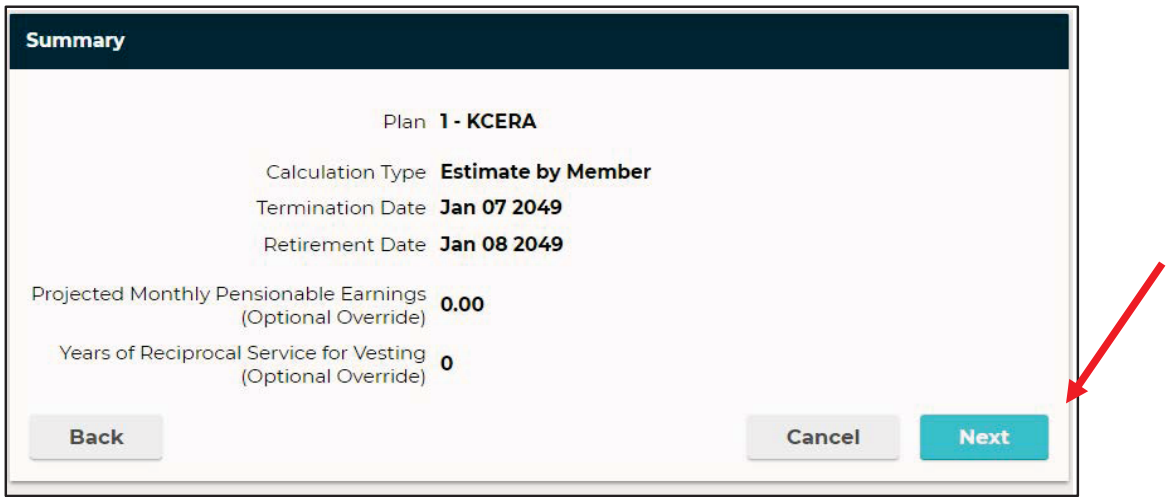
a. Click 'Next'



2. **Optional Data:** You can leave the defaulted information on this screen (zero) if you want the system to use your current highest monthly average. If you would like to project your earnings, you can override the figure in *Projected Monthly Pensionable Earnings.* As for the *Years of Reciprocal Service for Vesting,* disregard this section unless you have reciprocity coming in or out of KCERA and want the years of service to go towards your vesting and eligibility for retirement.
   For further information on reciprocity, please refer to the KCERA website.
   a. Click 'Next'

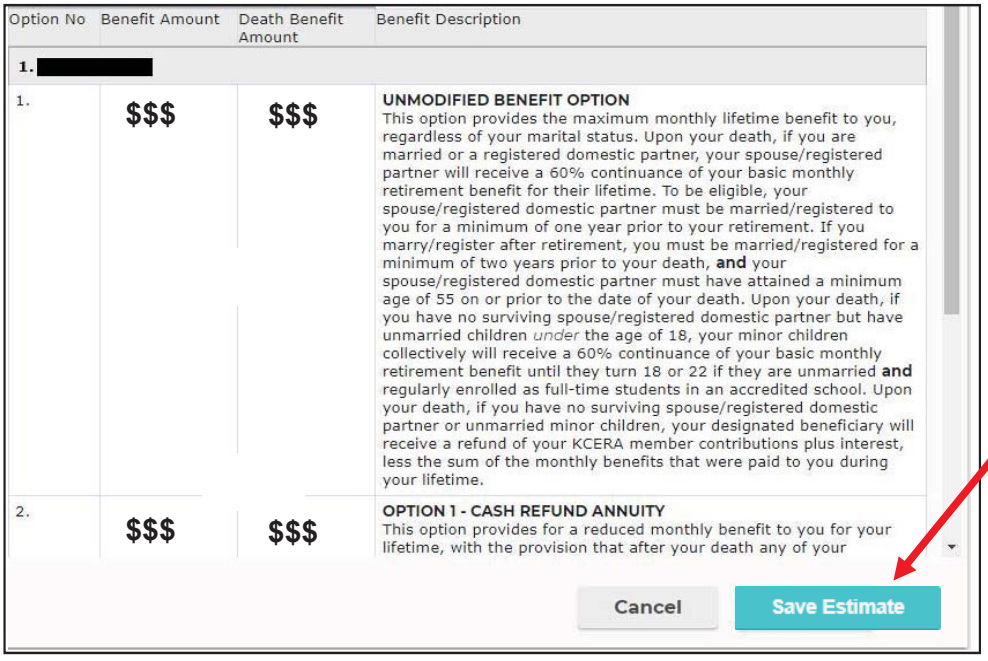


3. **Summary:** This screen will provide you with a summary of the information you entered for your calculation. If everything is correct, click 'Next'.



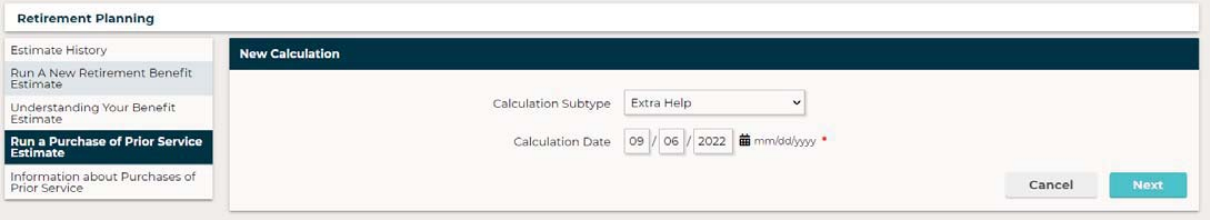
4. Calculation Results: Your benefit estimate will be reflected on this screen. The *Unmodified Benefit Option* will be reflected for all members. The benefit amounts reflected are strictly an estimate of what your gross (before taxes) monthly pension benefit would be based on the factors to date or what was entered. For more information on retirement eligibility, beneficiary designation, retirement options, death benefits, etc., please refer to the KCERA website.

If you would like to keep your estimate in your portal for future reference (highly recommended), click "Save Estimate". To print the estimate, right-click on the screen and select "Print."

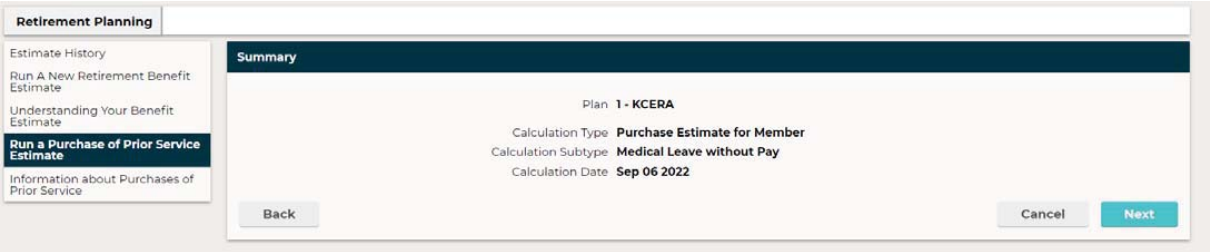


Purchase of Prior Service Estimate:

1. **New Calculation:** After *selecting the Prior Service option under Retirement Planning,* the system will default to *Run A Purchase of Prior Service Estimate.*
    a. Click the drop down box in the *Calculation Subtype* to select the type of service you wish to estimate.
    b. Leave the *Calculation Date* as is with the current default date.
    c. Click "Next".

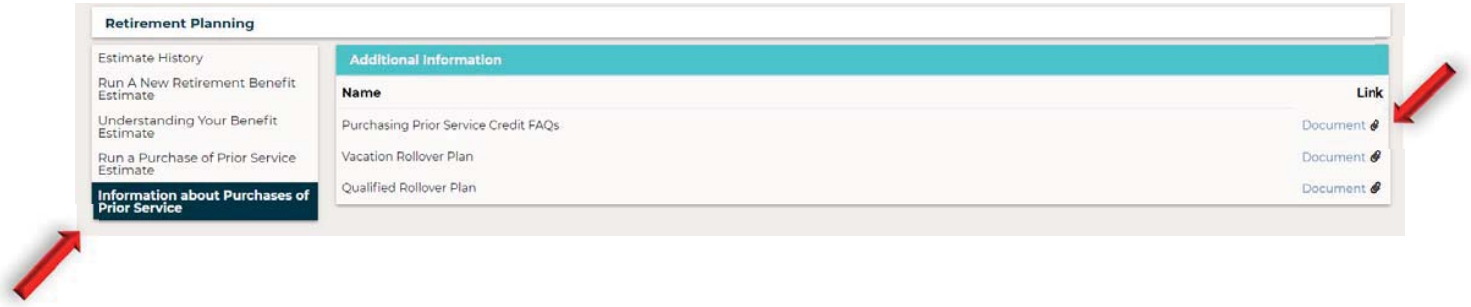


2. **Summary:** This screen will provide you with a summary of the information you entered for your calculation. If everything is correct, click "Next"



3. **Calculation Results:** Your purchase estimate will be reflected on this screen. It will display the estimated total amount due as well as payroll deduction options (if applicable). Selecting the *Summary (Member)* option along the top of the estimate will take you to a separate page of the estimate that will reflect the estimated service available to you with this purchase request. The purchase and service amounts reflected are strictly an estimate based on the factors to date or what was entered.
    *In order to request an official purchase of prior service request, you **must** save your purchase estimate in your portal *prior* to completing and submitting the Purchase request to KCERA.

For more information on purchases of service, eligibility, payment options etc., please refer to KCERA's *Purchasing Prior Service Credit FAQ*. The FAQ can be found on our website or within the portal.



Need Additional Help?

For additional help setting up your Member Portal Account you can call us at **661-381-7700** or email Member Services at memberservices@kcera.org