

Member Self-Service User Guide

Department of Treasury

Tennessee Consolidated Retirement System

Concord Project



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Member Self-Service

1. Registration and Login

The **Login** screen is the starting point for active members to access the Member Self-Service (MSS) website. Before logging in for the first time, you must register for an MSS account.

1.1. Registering for Member Self-Service

To register for an MSS account, follow the steps below and enter all required information on each screen.

Note: If you input incorrect information five consecutive times, your registration will be locked. If your account is locked, you will need to contact Tennessee Consolidated Retirement System (TCRS) to unlock it.

Step 1 -- Navigate to the **Login** screen of the MSS website and click [Need to register?](#)

[Login to your account](#)

TCRS
Retirement System

Login

Log In To Your Account

User ID

Password

[Need to register?](#)

[Forgot User ID or Password?](#)

Note: The information contained in this site is available via a secure connection.

[Employers log in here](#)

[Medical examiners log in here](#)

Use **Self Service** to:

- View your payment details
- Change your address
- Request an income verification letter
- Check the status of correspondence

Tennessee Consolidated Retirement System
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Step 2 -- Enter your Social Security Number and Birth Date.

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Great care is taken to protect the confidentiality of your account. Before accessing your account, your identity will be confirmed by answering the following questions. After your identity is confirmed, you can create a User ID and Password to be used for future visits to this site.

Registration Step 1 of 3

Social Security Number: * *Must be 9 numeric digits like 987654321*

Birth Date: * *A valid date, entered as MM/DD/YYYY*

* Required field

Next >>

Step 3 -- Click **Next >>.**

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Great care is taken to protect the confidentiality of your account. Before accessing your account, your identity will be confirmed by answering the following questions. After your identity is confirmed, you can create a User ID and Password to be used for future visits to this site.

Registration Step 1 of 3

Social Security Number: * *Must be 9 numeric digits like 987654321*

Birth Date: * *A valid date, entered as MM/DD/YYYY*

* Required field

Next >>

Step 4 -- Enter the **Zip Code** of your current address on file.

Note: Refunded members registering for self-service are prompted to enter their refunded net pay for Retiree Self-Service rather than their Zip Code.

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Confidentiality of member account information is a priority here. Before accessing your account, your identity will be confirmed by answering the following questions. After your identity is confirmed, you can create a User ID and Password to be used for future visits to this site.

Registration Step 2 of 3

Please enter your zip code: * A valid zip code like 37219

* Required field

[Next >>](#)

Note: The zip code is from your address on file

Step 5 -- Click [Next >>](#).

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Confidentiality of member account information is a priority here. Before accessing your account, your identity will be confirmed by answering the following questions. After your identity is confirmed, you can create a User ID and Password to be used for future visits to this site.

Registration Step 2 of 3

Please enter your zip code: * A valid zip code like 37219

* Required field

[Next >>](#)

Note: The zip code is from your address on file

Step 6 -- Enter a **New User ID**, **New Password**, and **Confirm Password**, following the guidelines displayed on the screen.

Tennessee Consolidated Retirement System [Login to your account](#)

Please enter a new User ID and Password below. Your User ID must be unique and your Password must be between 8 to 16 characters using characters A-Z, a-z, 0-9, (@, #, !, %, and \$). The secret question and answer may be used to reset your registration information should you forget your User ID or Password.

Registration Step 3 of 3

New User ID: * Minimum of 5, maximum of 20 characters

New Password: * Minimum of 8, maximum of 16 characters

Confirm Password: *

Secret Question: *

Answer to the secret question: *

Email:

My preferred method of contact is Email.

* Required field

[Next >>](#)

Step 7 -- Select a **Secret Question** from the drop down menu.

Tennessee Consolidated Retirement System [Login to your account](#)

Please enter a new User ID and Password below. Your User ID must be unique and your Password must be between 8 to 16 characters using characters A-Z, a-z, 0-9, (@, #, !, %, and \$). The secret question and answer may be used to reset your registration information should you forget your User ID or Password.

Registration Step 3 of 3

New User ID: * Minimum of 5, maximum of 20 characters

New Password: * Minimum of 8, maximum of 16 characters **Strength: Strong**

Confirm Password: *

Secret Question: *

Answer to the secret question: *

Email:

My preferred method of contact is Email.

* Required field

[Next >>](#)

- Select a Secret Question?
- What was the last name of your favorite teacher?
- What is your favorite color?
- What is the name of your high school mascot?
- What is your favorite sports team?
- Who was your favorite childhood hero?
- Whom did you go to prom with?
- Who is your favorite composer, singer, band?
- What color was your first car?
- What is the last name of your all-time favorite athlete?
- What is the first name of your best friend from high school?
- What is your favorite cartoon character?
- What is your favorite vacation spot?
- What was the last name of your first teacher?
- What was the first phone number that you remember?
- What is your favorite movie?

Step 8 -- Enter your answer in the **Answer to the secret question** field.

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Please enter a new User ID and Password below. Your User ID must be unique and your Password must be between 8 to 16 characters using characters A-Z, a-z, 0-9, (@, #, !, %, and \$). The secret question and answer may be used to reset your registration information should you forget your User ID or Password.

Registration Step 3 of 3

New User ID: * jdoe59 *Minimum of 5, maximum of 20 characters*

New Password: * *Minimum of 8, maximum of 16 characters* **Strength: Strong**

Confirm Password: *

Secret Question: * What is your favorite color? ▾

Answer to the secret question: *

Email:

My preferred method of contact is Email.

* Required field

Next >>

Step 9 -- Enter your **Email** address.

Note: The check box defaults to indicate Email is the preferred method of contact. You may deselect the check box if desired.

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Please enter a new User ID and Password below. Your User ID must be unique and your Password must be between 8 to 16 characters using characters A-Z, a-z, 0-9, (@, #, !, %, and \$). The secret question and answer may be used to reset your registration information should you forget your User ID or Password.

Registration Step 3 of 3

New User ID: * jdoe59 *Minimum of 5, maximum of 20 characters*

New Password: * *Minimum of 8, maximum of 16 characters* **Strength: Strong**

Confirm Password: *

Secret Question: * What is your favorite color? ▾

Answer to the secret question: * blue

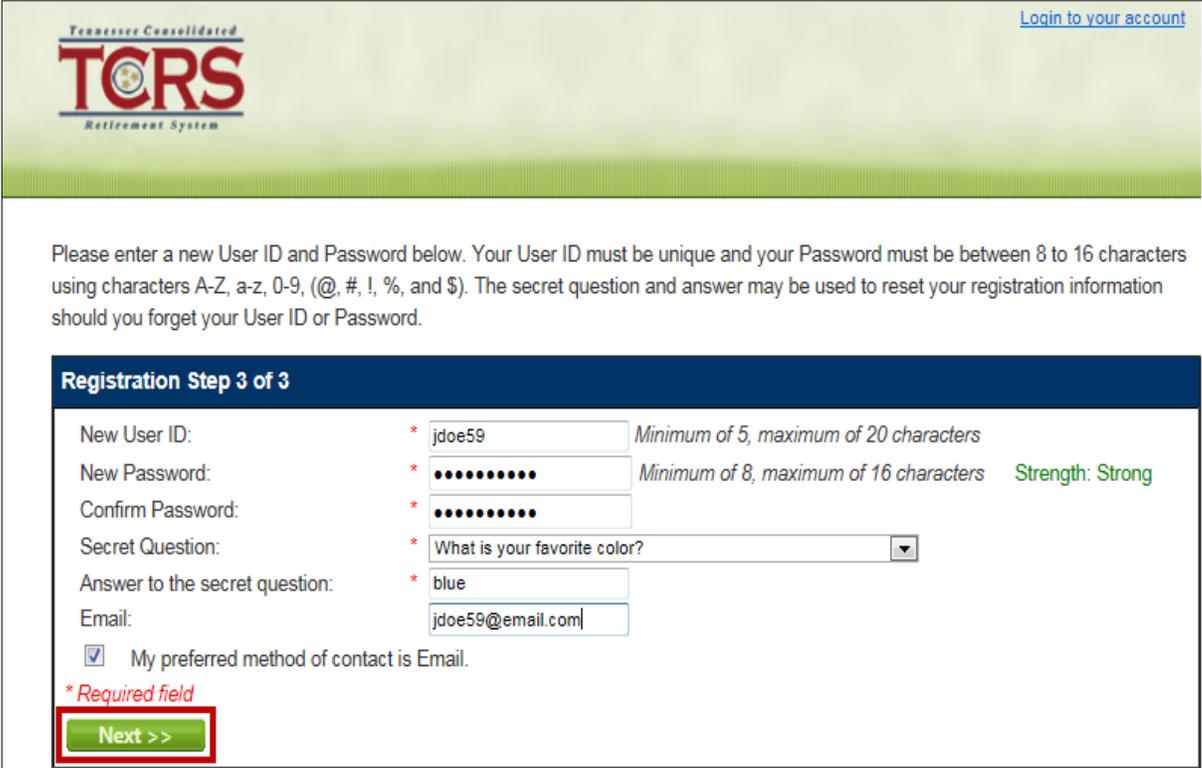
Email:

My preferred method of contact is Email.

* Required field

Next >>

Step 10 -- Click .



Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Please enter a new User ID and Password below. Your User ID must be unique and your Password must be between 8 to 16 characters using characters A-Z, a-z, 0-9, (@, #, !, %, and \$). The secret question and answer may be used to reset your registration information should you forget your User ID or Password.

Registration Step 3 of 3

New User ID: * Minimum of 5, maximum of 20 characters

New Password: * Minimum of 8, maximum of 16 characters **Strength: Strong**

Confirm Password: *

Secret Question: * ▼

Answer to the secret question: *

Email:

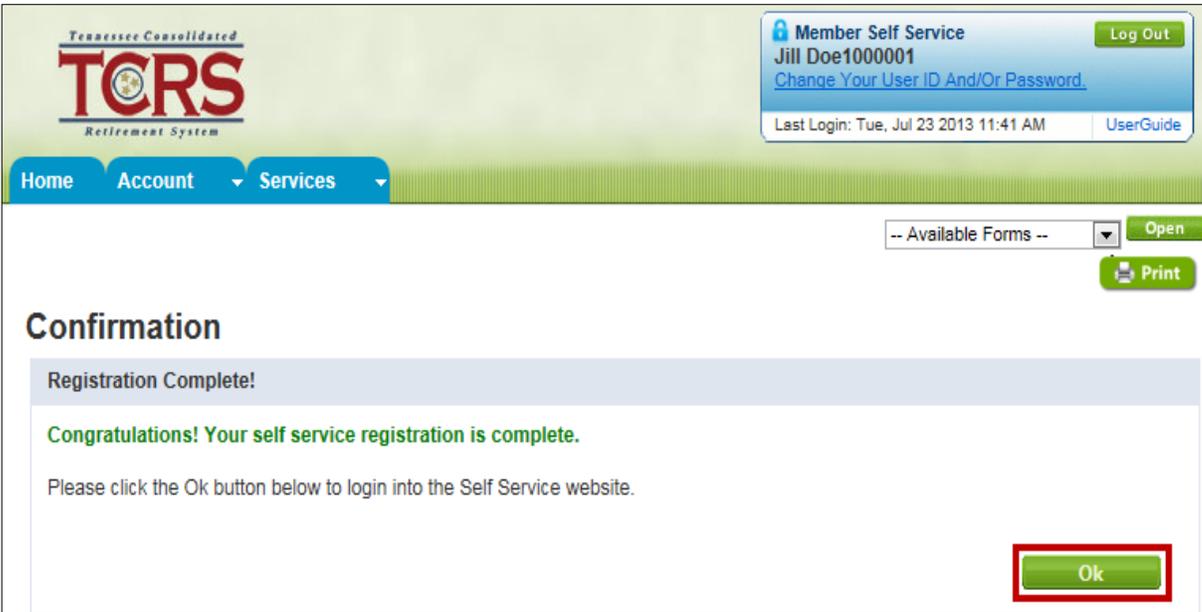
My preferred method of contact is Email.

* Required field



Step 11 -- A message displays on the **Confirmation** screen indicating the registration is complete.
Click .

Note: If you input an email address during registration, MSS automatically sends you an email with the new account information.



Tennessee Consolidated
TCRS
Retirement System

Member Self Service 
Jill Doe1000001
[Change Your User ID And/Or Password.](#)
Last Login: Tue, Jul 23 2013 11:41 AM [UserGuide](#)

Home Account Services

-- Available Forms --  

Confirmation

Registration Complete!

Congratulations! Your self service registration is complete.

Please click the Ok button below to login into the Self Service website.



Step 12 -- The Home screen displays.

Tennessee Consolidated Retirement System (TCRS)

Member Self Service [Log Out](#)
Jill Doe
[Change Your User ID And/Or Password](#)
Last Login: Tue, Sep 03 2013 1:57 PM [UserGuide](#)

Home Account Services

-- Available Forms -- [Open](#)

Dear Jill,

Welcome to Tennessee Consolidated Retirement System (TCRS)' new state-of-the-art technology tool that provides you with full access to your personal retirement account. This tool was designed to improve the service Tennessee Consolidated Retirement System (TCRS) provides by offering secure online access to your account information. You now have access to a modern retirement technology system that is a model for the nation.

It is our privilege to provide you this additional level of service.

David H. Lillard, Jr.
Treasurer

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* You may view detailed information and instructions by clicking on the help link at the top of each screen.

<p>Contact Information</p> <p>This page shows the contact information we have for you. You can change your contact information, including your mailing address, at any time, as well as add phone numbers and e-mail addresses.</p>	<p>Benefit Estimate</p> <p>The benefit estimate screen gives you the ability to use real-time data and calculate your retirement benefit.</p>
<p>Account Summary</p> <p>Your account summary provides a snapshot of your retirement account. From this page you can view your retirement plan, contributions and interest, beneficiary information, service and purchases. You can also reset your self-service User ID and/or password.</p>	<p>Service Purchase Request</p> <p>You are able to submit requests to TCRS to purchase service.</p>
<p>Account History</p> <p>Your account history gives an overview of your contributions, salaries, and service since you began participation.</p>	<p>Service Purchase Status and Payment History</p> <p>You have the ability to track the service purchase costs you have requested and make payments or set up an installment plan. You can also check your history of payments.</p>
<p>Annual Statement</p> <p>The annual statement provides you with a snapshot of retirement account as of the end of the previous fiscal year. You may view or print any annual statement that has been generated in the system.</p>	<p>Maintain IPS Contract</p> <p>You are able to edit your account details, or make supplemental payments towards Installment Purchase of Service IPS.</p>
<p>Account Balance Letter</p> <p>You have the ability to issue an account balance letter to yourself via mail or e-mail, showing your total service, contributions, and interest.</p>	<p>Seminars</p> <p>You can register for upcoming retirement planning seminars.</p>
<p>Member Correspondence</p> <p>If you have submitted a form to have information updated or</p>	<p>Online Retirement Application</p> <p>You can submit a Retirement application online. It also includes</p>

1.2. Logging In to Member Self-Service

After registering for an MSS account, you can use your user ID and password to log in to the MSS website 24 hours a day, seven days a week to access account information. The following steps describe how to log in to the MSS website.

Note: If you attempt to log in five consecutive times with the incorrect user ID, password, or secret question the account will be locked. If your account is locked, you will need to re-register to unlock it.

Step 1 -- Navigate to the **Login** screen of the MSS website. Enter your **User ID** and **Password**.

Tennessee Consolidated Retirement System

[Login to your account](#)

Login

Log In To Your Account

User ID

Password

Next

[Need to register?](#)

[Forgot User ID or Password?](#)

Note: The information contained in this site is available via a secure connection.

[Employers log in here](#)

[Medical Advisors log in here](#)

Use **Self Service** to:

- View your account details
- Update your contact information
- Make requests to TCRS
- Check the status of your requests

Tennessee Consolidated Retirement System

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Complaints are directed to the Human Resources Title VI Coordinator.

Treasury Human Resources
14th Floor, Andrew Jackson Building
502 Deaderick Street
Nashville, TN 37243

Step 2 -- Click .

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Login

Log In To Your Account

User ID

Password

[Need to register?](#)

[Forgot User ID or Password?](#)

Note: The information contained in this site is available via a secure connection.

[Employers log in here](#)

[Medical Advisors log in here](#)

Use **Self Service** to:

- View your account details
- Update your contact information
- Make requests to TCRS
- Check the status of your requests

Step 3 -- Answer the security question.

Note: The security questions display randomly and can be one of the following: **Last four digits of SSN, Date of Birth (MMDD), Year of Birth (YYYY), or ZIP Code on file.**

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Login

Log In To Your Account

Year Of Birth (YYYY)

[Need to register?](#)

[Forgot User ID or Password?](#)

Note: The information contained in this site is available via a secure connection.

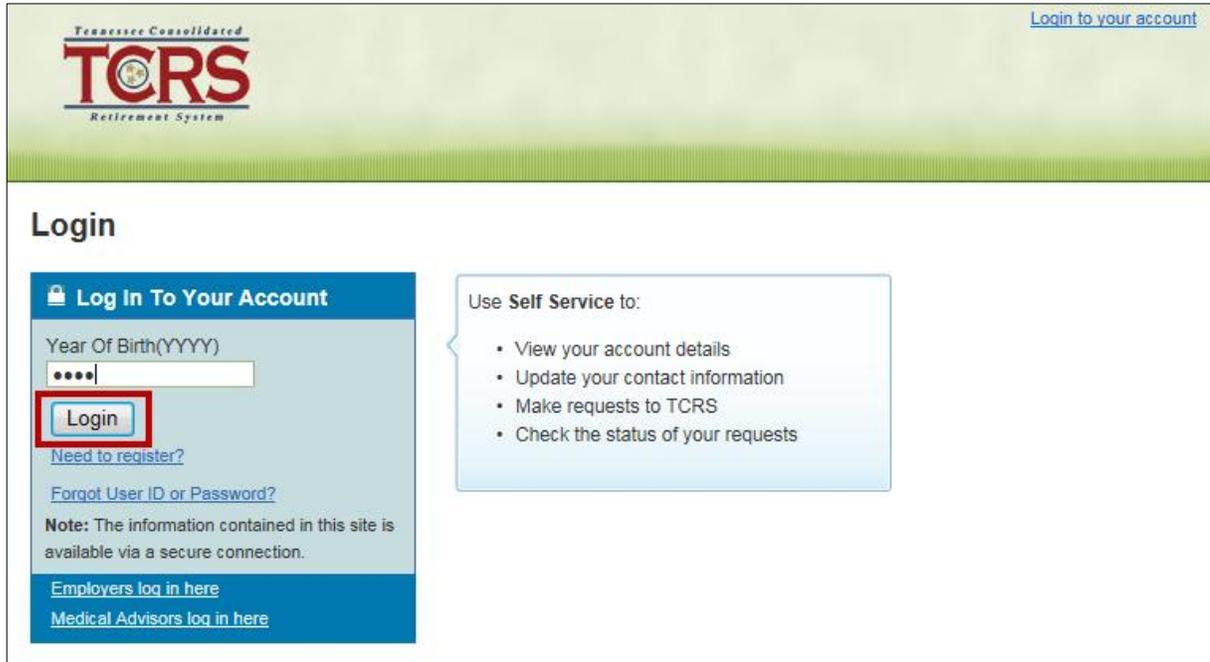
[Employers log in here](#)

[Medical Advisors log in here](#)

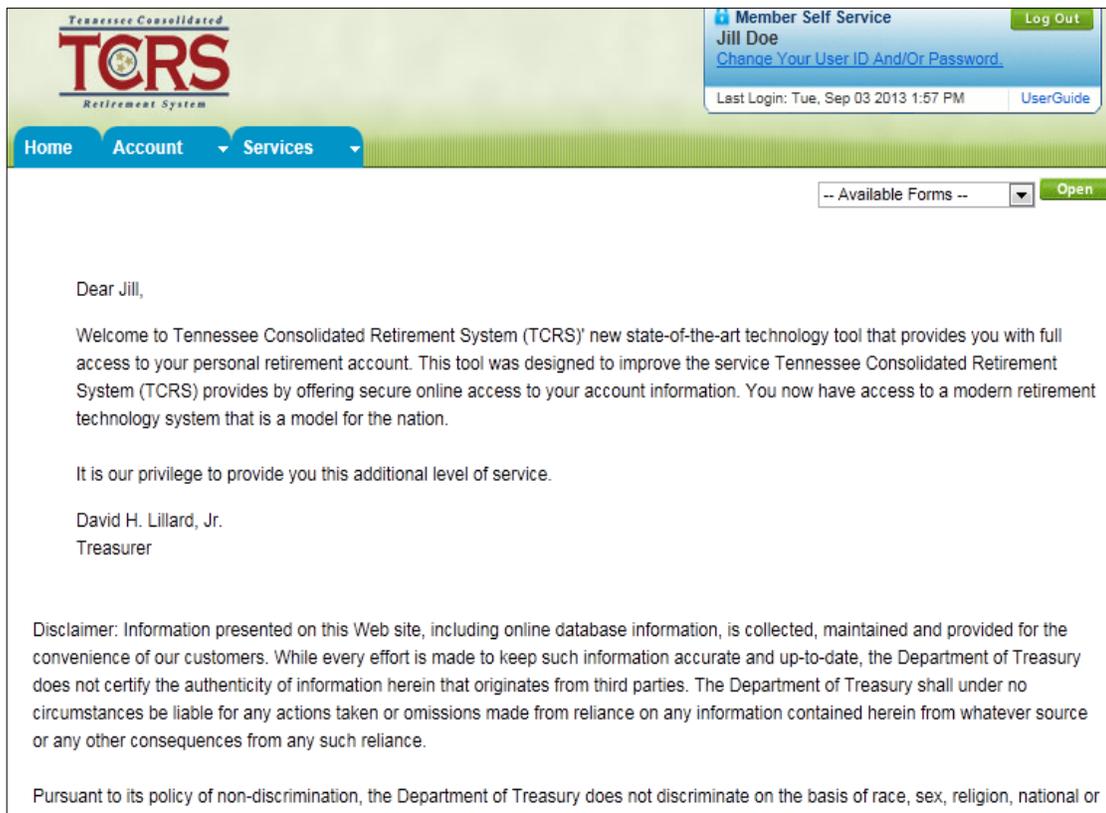
Use **Self Service** to:

- View your account details
- Update your contact information
- Make requests to TCRS
- Check the status of your requests

Step 4 -- Click .



Step 5 -- The Home screen displays.



1.3.Recovering a Forgotten User ID or Password

If you forget your user ID or password, you may create a new one by clicking [Forgot User ID or Password?](#) on the **Login** screen. Follow the steps below to reset your MSS login credentials.

Note: All required information must be entered on each screen to successfully reset a forgotten user ID or password.

Step 1 -- Navigate to the **Login** screen of the MSS website. Click [Forgot User ID or Password?](#).

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Login

Log In To Your Account

User ID

Password

[Need to register?](#)

[Forgot User ID or Password?](#)

Note: The information contained in this site is available via a secure connection.

[Employers log in here](#)

[Medical examiners log in here](#)

Use Self Service to:

- View your payment details
- Change your address
- Request an income verification letter
- Check the status of correspondence

Step 2 -- Enter your **Social Security Number** and **Birth Date**.

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

You can reset your self service login credentials by answering a few questions. Please enter your social security number, and date of birth, below and then click the Next button.

Lost User ID or Password Step 1 of 4

Social Security Number: * *Must be 9 numeric digits like 987654321*

Birth Date: * *A valid date, entered as MM/DD/YYYY*

* Required field

Step 3 -- Click



[Login to your account](#)

Tennessee Consolidated
TCRS
Retirement System

You can reset your self service login credentials by answering a few questions. Please enter your social security number, and date of birth, below and then click the Next button.

Lost User ID or Password Step 1 of 4

Social Security Number: * *Must be 9 numeric digits like 987654321*

Birth Date: * *A valid date, entered as MM/DD/YYYY*

* Required field

Next >>

Step 4 -- Enter the ZIP Code that is on file with TCRS.

[Login to your account](#)

Tennessee Consolidated
TCRS
Retirement System

You can reset your self service login credentials by answering a few questions. Please enter your Zip Code below and then click the Next button.

Lost User ID or Password Step 2 of 4

Please enter your zip code: * *A valid zip code like 37219*

* Required field

Next >>

Note: The zip code is from your address on file

Step 5 -- Click

[Next >>](#)

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

You can reset your self service login credentials by answering a few questions. Please enter your Zip Code below and then click the Next button.

Lost User ID or Password Step 2 of 4

Please enter your zip code: * *A valid zip code like 37219*

* Required field

[Next >>](#)

Note: The zip code is from your address on file

Step 6 -- Enter the **Secret Answer** to the **Secret Question**.

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Please enter the answer to your secret question below and then click the Next button. The answer to your secret question must be exactly as you entered it when you registered to use self service.

Lost User ID and Password Step 3 of 4

Secret Question: What is your favorite color?

Secret Answer: *

* Required field

[Next >>](#)

Answer must be typed exactly the same as when you registered.

Step 7 -- Click

Next >>

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Please enter the answer to your secret question below and then click the Next button. The answer to your secret question must be exactly as you entered it when you registered to use self service.

Lost User ID and Password Step 3 of 4

Secret Question: What is your favorite color?
Secret Answer: * *Answer must be typed exactly the same as when you registered.*

* Required field

Next >>

Step 8 -- The current user ID displays in the **New User ID** field. Enter a **New Password** and retype it in the **Confirm Password** field.

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Please enter a new Password below. Your Password must be between 8 to 16 characters using characters A-Z, a-z, 0-9, (@, #, !, %, and \$).

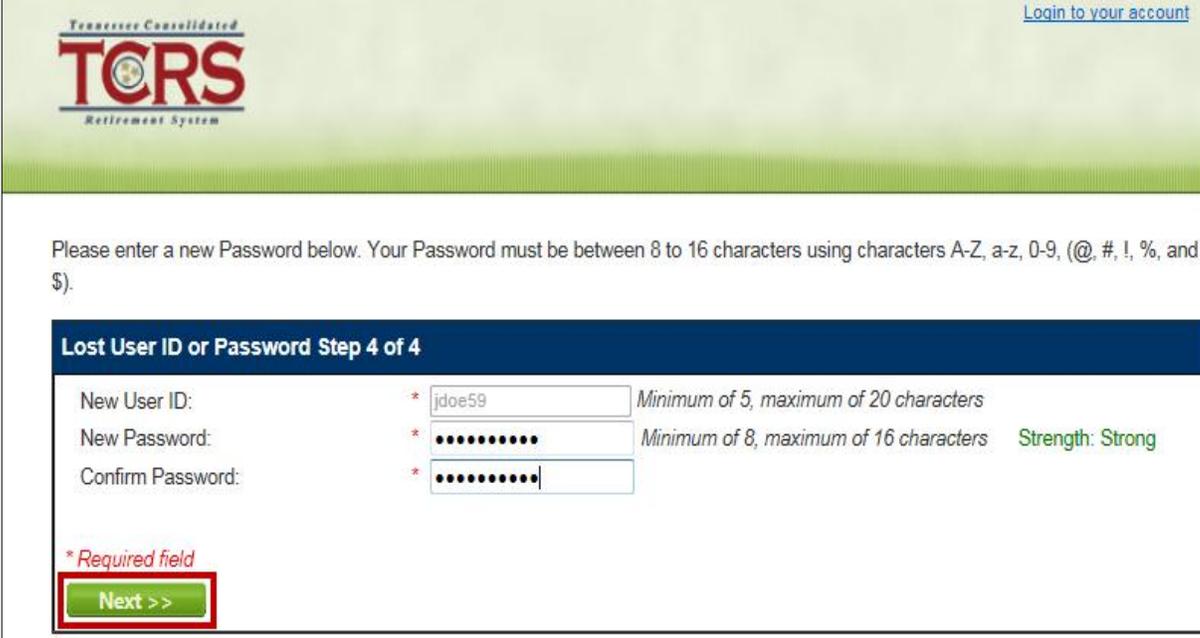
Lost User ID or Password Step 4 of 4

New User ID: * jdoe59 *Minimum of 5, maximum of 20 characters*
New Password: * *Minimum of 8, maximum of 16 characters*
Confirm Password: *

* Required field

Next >>

Step 9 -- Click .



Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Please enter a new Password below. Your Password must be between 8 to 16 characters using characters A-Z, a-z, 0-9, (@, #, !, %, and \$).

Lost User ID or Password Step 4 of 4

New User ID: * Minimum of 5, maximum of 20 characters

New Password: * Minimum of 8, maximum of 16 characters **Strength: Strong**

Confirm Password: *

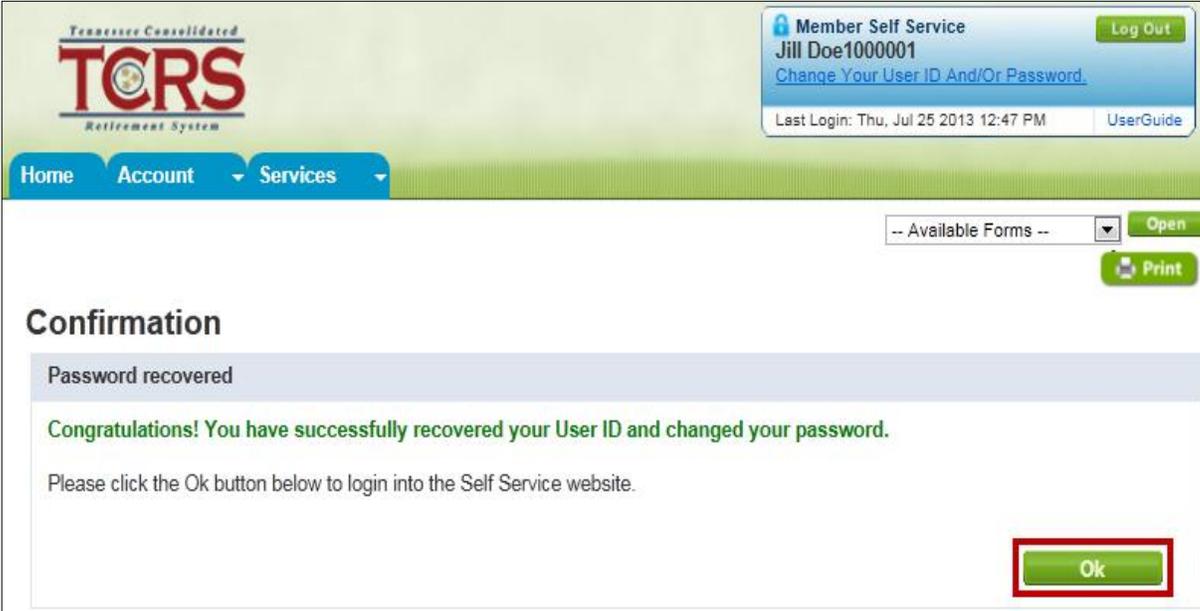
* Required field



Step 10 -- A message displays on the **Confirmation** screen, indicating the update is complete.

Click .

Note: If you input an email address during registration, MSS automatically sends you an email with the new account information.



Tennessee Consolidated
TCRS
Retirement System

Member Self Service
Jill Doe1000001
[Change Your User ID And/Or Password](#)
Last Login: Thu, Jul 25 2013 12:47 PM [UserGuide](#) [Log Out](#)

Home Account Services

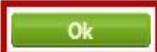
-- Available Forms -- [Open](#) [Print](#)

Confirmation

Password recovered

Congratulations! You have successfully recovered your User ID and changed your password.

Please click the Ok button below to login into the Self Service website.



Step 11 -- The **Home** screen displays.

Tennessee Consolidated
TCRS
Retirement System

Member Self Service [Log Out](#)
Jill Doe
[Change Your User ID And/Or Password.](#)
Last Login: Tue, Sep 03 2013 1:57 PM [UserGuide](#)

Home Account Services

-- Available Forms -- [Open](#)

Dear Jill,

Welcome to Tennessee Consolidated Retirement System (TCRS)' new state-of-the-art technology tool that provides you with full access to your personal retirement account. This tool was designed to improve the service Tennessee Consolidated Retirement System (TCRS) provides by offering secure online access to your account information. You now have access to a modern retirement technology system that is a model for the nation.

It is our privilege to provide you this additional level of service.

David H. Lillard, Jr.
Treasurer

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* You may view detailed information and instructions by clicking on the help link at the top of each screen.

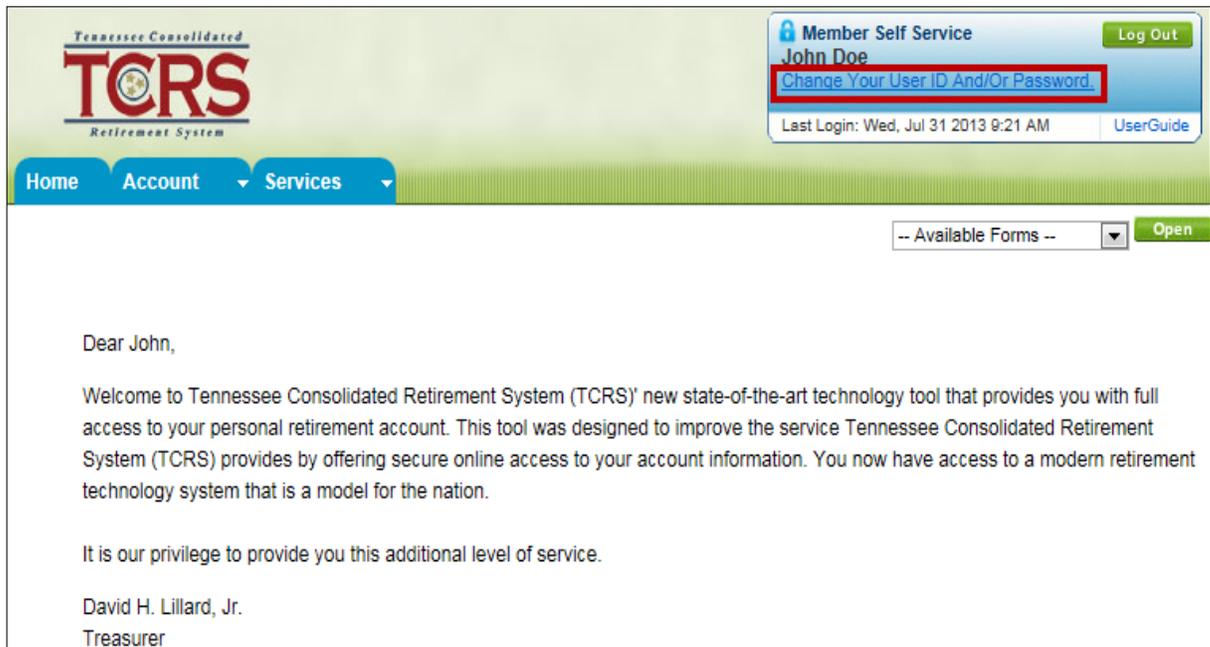
<p>Contact Information</p> <p>This page shows the contact information we have for you. You can change your contact information, including your mailing address, at any time, as well as add phone numbers and e-mail addresses.</p>	<p>Benefit Estimate</p> <p>The benefit estimate screen gives you the ability to use real-time data and calculate your retirement benefit.</p>
<p>Account Summary</p> <p>Your account summary provides a snapshot of your retirement account. From this page you can view your retirement plan, contributions and interest, beneficiary information, service and purchases. You can also reset your self-service User ID and/or password.</p>	<p>Service Purchase Request</p> <p>You are able to submit requests to TCRS to purchase service.</p>

1.4. Changing a User ID or Password

A user can change his / her ID and password from the **Home** screen. Users must enter all required information on each screen to successfully change a user ID and / or password.

Step 1 -- Follow the steps from Section 1.2, Logging In to Member Self-Service.

Step 2 -- Click [Change Your User ID And/Or Password](#) on the **Home** screen.



Tennessee Consolidated
TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Wed, Jul 31 2013 9:21 AM UserGuide

Home Account Services

-- Available Forms -- Open

Dear John,

Welcome to Tennessee Consolidated Retirement System (TCRS)' new state-of-the-art technology tool that provides you with full access to your personal retirement account. This tool was designed to improve the service Tennessee Consolidated Retirement System (TCRS) provides by offering secure online access to your account information. You now have access to a modern retirement technology system that is a model for the nation.

It is our privilege to provide you this additional level of service.

David H. Lillard, Jr.
Treasurer

Step 3 -- The **Change User ID and / or Password** screen displays.



Tennessee Consolidated
TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Wed, Jul 31 2013 9:21 AM UserGuide

Home Account Services

-- Available Forms -- Open

Change User ID and/or Password

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

Change User ID and/or Password

Select one or more checkboxes depending on the items you want to change. For each item you select, additional fields will appear below to allow you to enter the necessary information. Please enter the required information to change your user id, password, and/or secret question. You may re-use your existing user id. Your password must be at least eight characters and contain at least one capital letter, at least one number, and at least one special character (@, #, !, % or \$). The secret question and answer may be used to reset your registration information should you forget your user id and/or password.

Items to Change: * User ID Password Secret Question

Step 4 -- Select the check box(es) for the item(s) you wish to change. You may select multiple items.

Member Self Service
John Doe
[Change Your User ID And/Or Password.](#)
Last Login: Wed, Jul 31 2013 9:21 AM [UserGuide](#)

Home Account Services

-- Available Forms -- Open

Change User ID and/or Password

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

Change User ID and/or Password

Select one or more checkboxes depending on the items you want to change. For each item you select, additional fields will appear below to allow you to enter the necessary information. Please enter the required information to change your user id, password, and/or secret question. You may re-use your existing user id. Your password must be at least eight characters and contain at least one capital letter, at least one number, and at least one special character (@, #, !, % or \$). The secret question and answer may be used to reset your registration information should you forget your user id and/or password.

Items to Change: * User ID Password Secret Question

* Required field

Next >>

Step 5 -- Enter the required information. The required information is determined by the selection(s) from the previous screen.

- If **User ID** check box is selected, enter a **New User ID**
- If **Password** check box is selected, enter the **Old Password**, **New Password**, and **Confirm New Password**
- If **Secret Question** check box is selected, select a question from the **Secret Question** drop down menu and enter the **Answer to the secret question**

Change User ID and/or Password

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

Change User ID and/or Password

Select one or more checkboxes depending on the items you want to change. For each item you select, additional fields will appear below to allow you to enter the necessary information. Please enter the required information to change your user id, password, and/or secret question. You may re-use your existing user id. Your password must be at least eight characters and contain at least one capital letter, at least one number, and at least one special character (@, #, !, % or \$). The secret question and answer may be used to reset your registration information should you forget your user id and/or password.

Items to Change: * User ID Password Secret Question

New User ID:	*	<input type="text"/>	
Old Password:	*	<input type="text"/>	
New Password:	*	<input type="text"/>	Password must be at least 8 and no more than 16 characters.
Confirm Password:	*	<input type="text"/>	
Secret Question:	*	<input type="text" value="Select a Secret Question?"/>	
Answer to the secret question:	*	<input type="text"/>	

* Required field

[Next >>](#)

Step 6 -- Click

Next >>

The screenshot shows the TCRS Member Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right, a user profile for "John Doe" is displayed, including a "Log Out" button, a link to "Change Your User ID And/Or Password", and the last login time: "Wed, Jul 31 2013 9:21 AM". Below the header is a navigation menu with "Home", "Account", and "Services". A dropdown menu for "Available Forms" is set to "Open".

Change User ID and/or Password

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

Change User ID and/or Password

Select one or more checkboxes depending on the items you want to change. For each item you select, additional fields will appear below to allow you to enter the necessary information. Please enter the required information to change your user id, password, and/or secret question. You may re-use your existing user id. Your password must be at least eight characters and contain at least one capital letter, at least one number, and at least one special character (@, #, !, % or \$). The secret question and answer may be used to reset your registration information should you forget your user id and/or password.

Items to Change: * User ID Password Secret Question

New User ID: * johndoe1

Old Password: * [masked]

New Password: * [masked] *Password must be at least 8 and no more than 16 characters.*

Confirm Password: * [masked]

Secret Question: * What color was your first car? [dropdown menu]

Answer to the secret question: * blue

* Required field

Next >>

Step 7 -- A message displays on the **Confirmation** screen, indicating the change is complete. Click



A screenshot of the TCRS Member Self Service web application. The page features a header with the TCRS logo and navigation tabs for Home, Account, and Services. A user profile box in the top right identifies the user as John Doe and provides a Log Out button and a link to change user ID or password. Below the navigation, there is a dropdown menu for "Available Forms" with an "Open" button and a "Print" button. The main content area is titled "Confirmation" and contains a message: "User ID/Password Changed" followed by "Congratulations, you have successfully changed your User ID and/or password information." A green "Ok" button is located at the bottom right of the message box and is highlighted with a red rectangular border.

2. Home Screen

After logging in to the MSS website, the **Home** screen displays. You can navigate to each section of the MSS website using either of the following options:

1. Using the drop down menus at the top of the **Home** screen
2. Using the links located on the lower portion of the **Home** screen

Tennessee Consolidated Retirement System (TCRS)

Member Self Service
Jill Doe
Change Your User ID And/Or Password
Last Login: Tue, Sep 03 2013 1:57 PM
UserGuide

Home Account Services

Dear Jill,

Welcome to Tennessee Consolidated Retirement System (TCRS) new state-of-art technology tool that provides you with full access to your personal retirement account. This tool was designed to improve the service Tennessee Consolidated Retirement System (TCRS) provides by offering secure online access to your account information. You now have access to a modern retirement technology system that is a model for the nation.

It is our privilege to provide you this additional level of service.

David H. Lillard, Jr.
Treasurer

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* You may view detailed information and instructions by clicking on the help link at the top of each screen.

Contact Information This page shows the contact information we have for you. You can change your contact information, including your mailing address, at any time, as well as add phone numbers and e-mail addresses.	Benefit Estimate The benefit estimate screen gives you the ability to use real-time data and calculate your retirement benefit.
Account Summary Your account summary provides a snapshot of your retirement account. From this page you can view your retirement plan, contributions and interest, beneficiary information, service and purchases. You can also reset your self-service User ID and/or password.	Service Purchase Request You are able to submit requests to TCRS to purchase service.
Account History Your account history gives an overview of your contributions, salaries, and service since you began participation.	Service Purchase Status and Payment History You have the ability to track the service purchase costs you have requested and make payments or set up an installment plan. You can also check your history of payments.
Annual Statement The annual statement provides you with a snapshot of retirement account as of the end of the previous fiscal year. You may view or print any annual statement that has been generated in the system.	Maintain IPS Contract You are able to edit your account details, or make supplemental payments towards Installment Purchase of Service IPS.
Account Balance Letter You have the ability to issue an account balance letter to yourself via mail or e-mail, showing your total service, contributions, and interest.	Seminars You can register for upcoming retirement planning seminars.
Member Correspondence If you have submitted a form to have information updated or request for a calculation, you can check on the status of your request, or check to see if a particular document has been submitted to your account.	Online Retirement Application You can submit a Retirement application online. It also includes the online Disability Retirement application.
View/Change Beneficiary You are able to designate your beneficiary (ies) and update their information on file.	Request Refund You can request your account to be refunded.

3. View and Maintain Contact Information

The **Contact Information** screen displays the contact information that is on record with TCRS, such as address, phone number, or email address.

3.1. Navigating to the Contact Information Screen

The following steps describe how to navigate to the **Contact Information** screen. You will first log in to the MSS website and follow the steps in the sections that follow.

Step 1 -- Navigate to the **Contact Information** screen by clicking either [Contact Information](#) or the following menu options from the **Home** screen:

Account > Contact Information

The screenshot displays the TCRS Member Self Service interface. At the top right, a user is logged in as John Doe, with a 'Log Out' button and a link to 'Change Your User ID And/Or Password'. The last login is noted as Wednesday, July 31, 2013, at 8:59 AM. A 'UserGuide' link is also present. The main navigation bar includes 'Home', 'Account', and 'Services'. The 'Account' menu is expanded, showing options like 'Contact Information', 'Account Summary', 'Account History', 'Annual Statement', 'Account Balance Letter', 'Member Correspondence', and 'View/Change Beneficiary'. The 'Contact Information' option is highlighted with a red box. Below the navigation, there is a section for 'Available Forms' with an 'Open' button. The main content area contains a disclaimer and a note about detailed information. At the bottom, there are two links: 'Contact Information' (highlighted with a red box) and 'Benefit Estimate'. The 'Contact Information' link is accompanied by a brief description: 'This page shows the contact information we have for you. You can change your contact information, including your mailing address, at any time, as well as add phone numbers and e-mail addresses.'

Step 2 -- The **Contact Information** screen displays.

The screenshot shows the TCRS Member Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right, it says "Member Self Service John Doe" with a "Log Out" button and a link to "Change Your User ID And/Or Password". Below this, it shows "Last Login: Tue, Aug 20 2013 10:43 AM" and a "UserGuide" link. A navigation bar contains "Home", "Account", and "Services" tabs. Below the navigation bar is a dropdown menu for "Available Forms" and an "Open" button. The main content area is titled "Contact Information" and is divided into several sections:

- Plan Selection:** A text block stating, "The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan."
- Membership Information:** A table with the following data:

Member ID:	1800494
Social Security Number:	XXX-XX-0493
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System
- Mailing Address Information:** A text block stating, "All correspondence will be sent to your mailing address unless you have selected email as your preferred method of contact." Below this is the mailing address:

Mailing Address: John Doe
400 MAIN ST
NASHVILLE, TN 37206-4215

Below the address are three links: "Change your address information click here.", "Change your alternate address information click here.", and "View address changes click here."
- Contact Information:** A table with the following data:

Your current home phone number on file is:	(555) 555-5555
Your current work phone number on file is:	
Your current cell phone number on file is:	
Your current fax number on file is:	
Your current email address on file is:	 johndoe@email.com

At the bottom, under "If you want to:", there are two links: "Change your current contact information click here." and "View your previous contact information changes click here."

3.2. Changing Address Information

The following steps describe how to change address information. You must input the required information on each screen to successfully change address contact information.

Step 1 -- Follow the steps from Section 3.1, Navigating to the Contact Information Screen.

Step 2 -- Click [Change your address information click here.](#)

The screenshot displays the TCRS Member Self-Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right, a blue box shows the user's name "John Doe", a "Log Out" button, and a link to "Change Your User ID And/Or Password". Below this, it shows the last login time and a "UserGuide" link. A navigation bar contains "Home", "Account", and "Services" tabs. A dropdown menu for "Available Forms" is set to "Open". The main content area is titled "Contact Information" and is divided into three sections: "Plan Selection", "Membership Information", and "Mailing Address Information". The "Membership Information" section lists: Member ID: 1800458, Social Security Number: XXX-XX-0457, Name: John Doe, Birth Date: 1/10/1983, and Retirement System: TCRS - Tennessee Consolidated Retirement System. The "Mailing Address Information" section states that correspondence will be sent to the mailing address unless email is preferred, and lists the address: John Doe, 400 MAIN ST, NASHVILLE, TN 37206-4215. At the bottom of the page, there are three links: "Change your address information click here." (highlighted with a red box), "Change your alternate address information click here.", and "View address changes click here."

Step 3 -- The **Edit Address** screen displays. Enter your new address in the *Mailing Address Information* section.

Tennessee Consolidated TCRS Retirement System

Member Self Service
John Doe
Change Your User ID And/Or Password
Last Login: Wed, Jul 31 2013 10:24 AM
Log Out
UserGuide

Home Account Services

-- Available Forms -- Open

Edit Address

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

[Change your alternate address information click here.](#)

Mailing Address Information

Your mailing address is shown below. If you do not want to make any changes to your existing information, please click the Cancel button.

Mailing Address Information

Foreign:	<input type="checkbox"/>
Mail To:	John Doe
Effective Date: *	<input type="text" value="8/1/2013"/>
Care Of:	<input type="text"/>
Address Line 1: *	<input type="text" value="400 Main St"/>
Address Line 2:	<input type="text"/>
City: *	<input type="text" value="Nashville"/>
County: *	<input type="text" value="Davidson"/>
<i>Only required for Tennessee.</i>	
State: *	<input type="text" value="Tennessee"/>
Zip Code: *	<input type="text" value="37206-4215"/>

Click here to add an alternate mailing address.

* Required field

Save Cancel

Step 4 -- Click





Member Self Service [Log Out](#)
John Doe
[Change Your User ID And/Or Password.](#)
Last Login: Wed, Jul 31 2013 10:24 AM [UserGuide](#)

[Home](#) [Account](#) [Services](#)

-- Available Forms -- [Open](#)

Edit Address

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

[Change your alternate address information click here.](#)

Mailing Address Information

Your mailing address is shown below. If you do not want to make any changes to your existing information, please click the Cancel button.

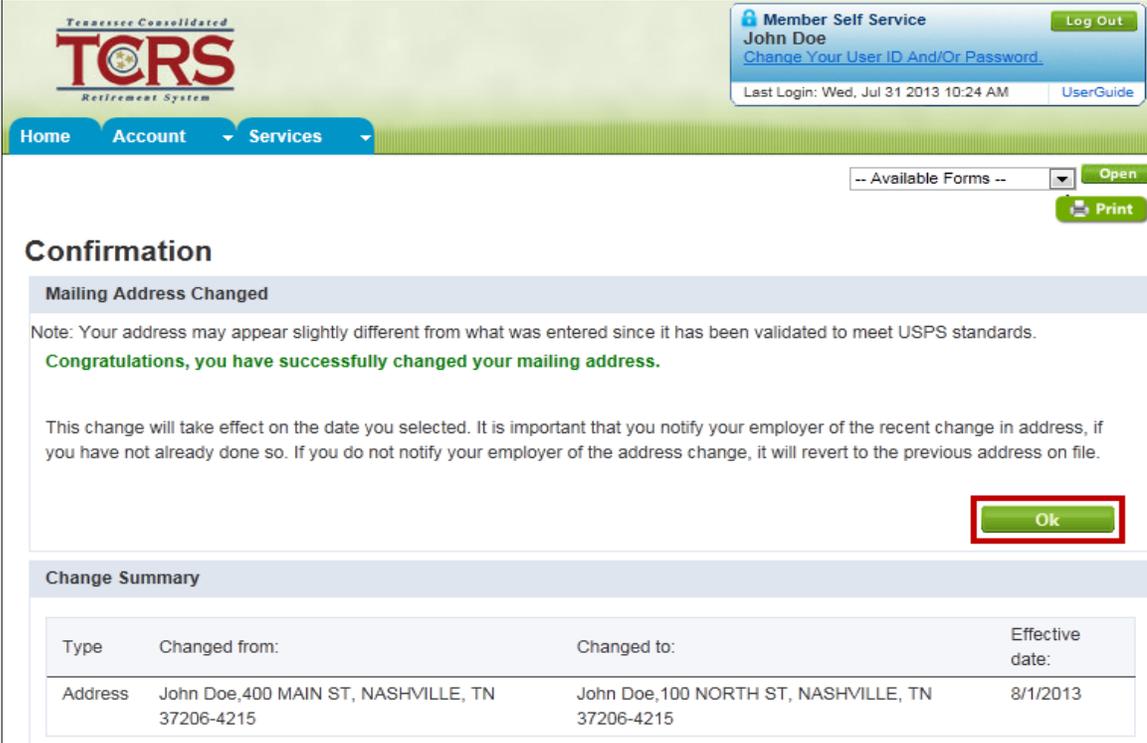
Mailing Address Information

Foreign:	<input type="checkbox"/>
Mail To:	John Doe
Effective Date: *	<input type="text" value="8/1/2013"/>
Care Of:	<input type="text"/>
Address Line 1: *	<input type="text" value="100 North St"/>
Address Line 2:	<input type="text"/>
City: *	<input type="text" value="Nashville"/>
County: *	<input type="text" value="Davidson"/>
<i>Only required for Tennessee.</i>	
State: *	<input type="text" value="Tennessee"/>
Zip Code: *	<input type="text" value="37206-4215"/>

Click here to add an alternate mailing address.

* Required field

Step 5 -- The **Confirmation** screen displays. Click  to view the pending change.



Confirmation

Mailing Address Changed

Note: Your address may appear slightly different from what was entered since it has been validated to meet USPS standards.
Congratulations, you have successfully changed your mailing address.

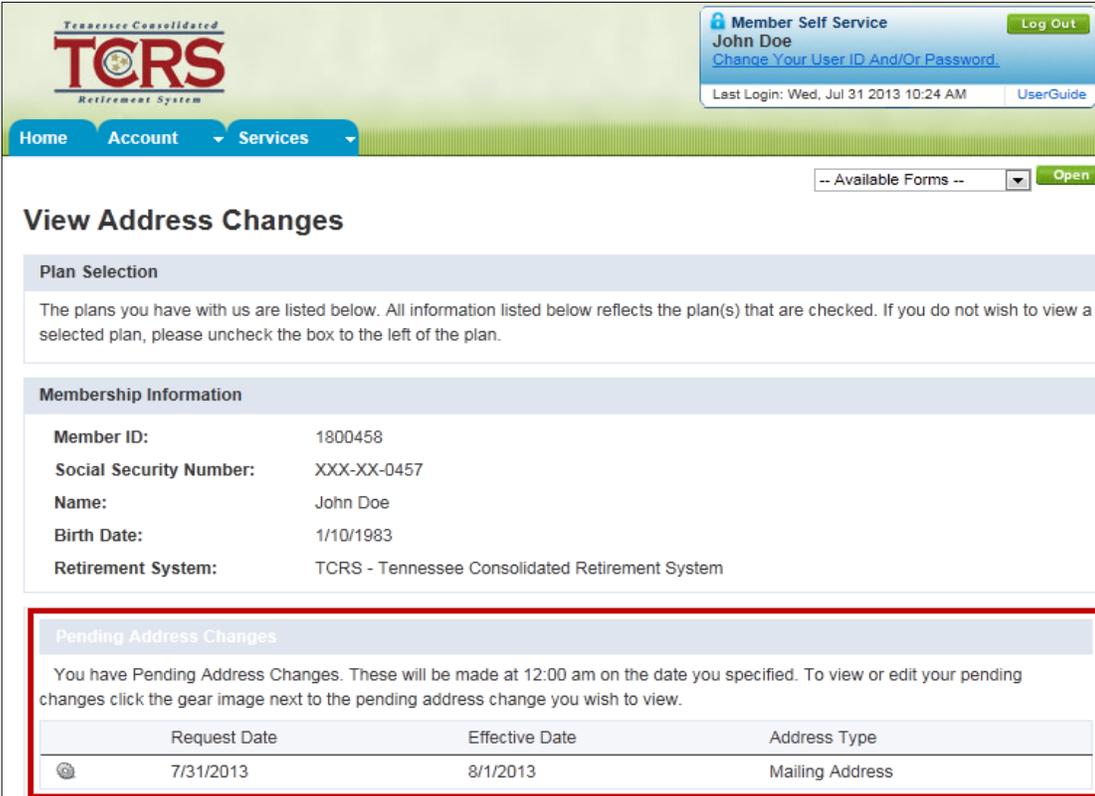
This change will take effect on the date you selected. It is important that you notify your employer of the recent change in address, if you have not already done so. If you do not notify your employer of the address change, it will revert to the previous address on file.

Ok

Change Summary

Type	Changed from:	Changed to:	Effective date:
Address	John Doe, 400 MAIN ST, NASHVILLE, TN 37206-4215	John Doe, 100 NORTH ST, NASHVILLE, TN 37206-4215	8/1/2013

Step 6 -- The **View Address Changes** screen displays. The pending change displays in the *Pending Address Changes* section.



View Address Changes

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID: 1800458
 Social Security Number: XXX-XX-0457
 Name: John Doe
 Birth Date: 1/10/1983
 Retirement System: TCRS - Tennessee Consolidated Retirement System

Pending Address Changes

You have Pending Address Changes. These will be made at 12:00 am on the date you specified. To view or edit your pending changes click the gear image next to the pending address change you wish to view.

Request Date	Effective Date	Address Type
 7/31/2013	8/1/2013	Mailing Address

3.3. Adding an Alternate Address

An alternate address is a secondary mailing address that you can use temporarily or for recurring periods of time. For example, if you live at a different residence for several months, an alternate address should be on record with TCRS. The following steps describe how to add an alternate address. You must input the required information on each screen to successfully add alternate address information.

Step 1 -- Follow the steps from Section 3.1, Navigating to the Contact Information Screen.

Step 2 -- Click [Change your address information click here.](#)

The screenshot displays the TCRS Member Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". To the right, a user profile box shows "Member Self Service" for "John Doe", with a "Log Out" button and a link to "Change Your User ID And/Or Password". Below the profile, it shows the last login time as "Wed, Jul 31 2013 10:24 AM" and a "UserGuide" link. A navigation bar contains "Home", "Account", and "Services" tabs. Below this is a dropdown menu for "Available Forms" with an "Open" button. The main content area is titled "Contact Information" and is divided into three sections: "Plan Selection", "Membership Information", and "Mailing Address Information". The "Membership Information" section lists: Member ID: 1800458, Social Security Number: XXX-XX-0457, Name: John Doe, Birth Date: 1/10/1983, and Retirement System: TCRS - Tennessee Consolidated Retirement System. The "Mailing Address Information" section includes a note: "All correspondence will be sent to your mailing address unless you have selected email as your preferred method of contact." and lists the mailing address: John Doe, 400 MAIN ST, NASHVILLE, TN 37206-4215. At the bottom of the page, there are three links: "Change your address information click here." (highlighted with a red box), "Change your alternate address information click here.", and "View address changes click here."

Step 3 -- Select the **Click here to add an alternate mailing address** check box.

Tennessee Consolidated TCRS Retirement System

Member Self Service
John Doe
Change Your User ID And/Or Password.
Last Login: Wed, Jul 31 2013 10:24 AM UserGuide

Home Account Services

-- Available Forms -- Open

Edit Address

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

[Change your alternate address information click here.](#)

Mailing Address Information

Your mailing address is shown below. If you do not want to make any changes to your existing information, please click the Cancel button.

Mailing Address Information

Foreign:	<input type="checkbox"/>
Mail To:	John Doe
Effective Date: *	8/1/2013
Care Of:	
Address Line 1: *	100 North St
Address Line 2:	
City: *	Nashville
County: *	Davidson
<i>Only required for Tennessee.</i>	
State: *	Tennessee
Zip Code: *	37206-4215

Click here to add an alternate mailing address.

* Required field

Save Cancel

Step 4 -- Enter the alternate address information into the *Alternate Mailing Address Information* section of the screen. Select the date range the **Alternate Mailing Address** is effective.



Member Self Service
John Doe
[Change Your User ID And/Or Password](#)

Last Login: Wed, Jul 31 2013 11:06 AM [UserGuide](#)

[Log Out](#)

Home
Account
Services

-- Available Forms -- Open

Edit Address

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

[Change your address information click here.](#)

Mailing Address Information

Your mailing address is shown below. If you do not want to make any changes to your existing information, please click the Cancel button.

Mailing Address Information

Foreign:

Mail To: John Doe

Effective Date: * 7/31/2013

Care Of:

Address Line 1: * 400 Main St

Address Line 2:

City: * Nashville

County: * Davidson

Only required for Tennessee.

State: * Tennessee

Zip Code: * 37206-4215

Alternate Mailing Address Information

From: *

To: *

Foreign:

Mail To:

Care Of:

Address Line 1: *

Address Line 2:

City: *

County: *

Only required for Tennessee.

State: * Tennessee

Zip Code: *

[Click here to add an alternate mailing address.](#)

* Required field

Step 5 -- Click



Tennessee Consolidated
TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password.](#)
Last Login: Wed, Jul 31 2013 11:06 AM | [UserGuide](#) | [Log Out](#)

Home Account Services

-- Available Forms -- Open

Edit Address

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

[Change your address information click here.](#)

Mailing Address Information

Your mailing address is shown below. If you do not want to make any changes to your existing information, please click the Cancel button.

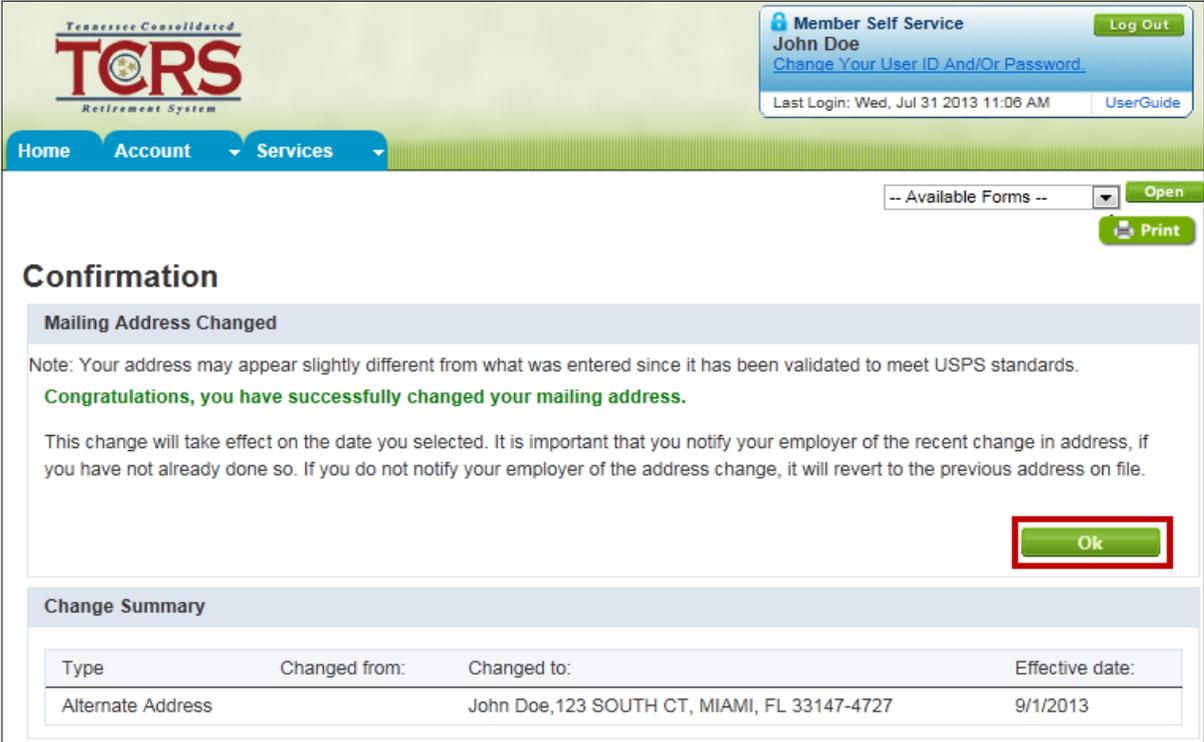
Mailing Address Information		Alternate Mailing Address Information	
Foreign:	<input type="checkbox"/>	From:	* 09 - September 01 2013
Mail To:	John Doe	To:	* 04 - April 01 2014
Effective Date:	* 7/31/2013	Foreign:	<input type="checkbox"/>
Care Of:		Mail To:	
Address Line 1:	* 400 Main St	Care Of:	
Address Line 2:		Address Line 1:	* 123 South St
City:	* Nashville	Address Line 2:	
County:	* Davidson	City:	* Miami
	<i>Only required for Tennessee.</i>	County:	
State:	* Tennessee		<i>Only required for Tennessee.</i>
Zip Code:	* 37206-4215	State:	* Florida
		Zip Code:	* 33010

Click here to add an alternate mailing address.

* Required field

Save Cancel

Step 6 -- A message displays on the **Confirmation** screen, indicating the alternate address change is complete. Click  to view the pending address change.



Tennessee Consolidated
TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password.](#)
Last Login: Wed, Jul 31 2013 11:06 AM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#) [Print](#)

Confirmation

Mailing Address Changed

Note: Your address may appear slightly different from what was entered since it has been validated to meet USPS standards.

Congratulations, you have successfully changed your mailing address.

This change will take effect on the date you selected. It is important that you notify your employer of the recent change in address, if you have not already done so. If you do not notify your employer of the address change, it will revert to the previous address on file.



Change Summary

Type	Changed from:	Changed to:	Effective date:
Alternate Address		John Doe, 123 SOUTH CT, MIAMI, FL 33147-4727	9/1/2013

3.4. Changing an Alternate Address

The following steps describe how to change an existing alternate address. You must input the required information on each screen to successfully change alternate address information.

Step 1 -- Follow the steps from Section 3.1, Navigating to the Contact Information Screen.

Step 2 -- Click [Change your alternate address information click here.](#)

Member Self Service [Log Out](#)
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Wed, Jul 31 2013 10:24 AM [UserGuide](#)

Home Account Services

-- Available Forms -- [Open](#)

Contact Information

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

Mailing Address Information

All correspondence will be sent to your mailing address unless you have selected email as your preferred method of contact.

Mailing Address: John Doe
400 MAIN ST
NASHVILLE, TN 37206-4215

[Change your address information click here.](#)
[Change your alternate address information click here.](#)
[View address changes click here.](#)

Step 3 -- The **Edit Address** screen displays. Enter the updated information in the *Alternate Mailing Address Information* section that requires a change. Select the date range the **Alternate Mailing Address** is effective.



Tennessee Consolidated
TCRS
Retirement System

Member Self Service Log Out

John Doe

[Change Your User ID And/Or Password.](#)

Last Login: Wed, Jul 31 2013 11:06 AM UserGuide

Home
Account
Services

-- Available Forms -- Open

Edit Address

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

[Change your address information click here.](#)

Mailing Address Information

Your mailing address is shown below. If you do not want to make any changes to your existing information, please click the Cancel button.

Mailing Address Information

Foreign:

Mail To: John Doe

Effective Date: *

Care Of:

Address Line 1: *

Address Line 2:

City: *

County: *

Only required for Tennessee.

State: *

Zip Code: *

Alternate Mailing Address Information

From: *

To: *

Foreign:

Mail To:

Care Of:

Address Line 1: *

Address Line 2:

City: *

County:

Only required for Tennessee.

State: *

Zip Code: *

Step 4 -- Click





Member Self Service [Log Out](#)
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Wed, Jul 31 2013 11:06 AM [UserGuide](#)

[Home](#) [Account](#) [Services](#)

-- Available Forms -- [Open](#)

Edit Address

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

[Change your address information click here.](#)

Mailing Address Information

Your mailing address is shown below. If you do not want to make any changes to your existing information, please click the Cancel button.

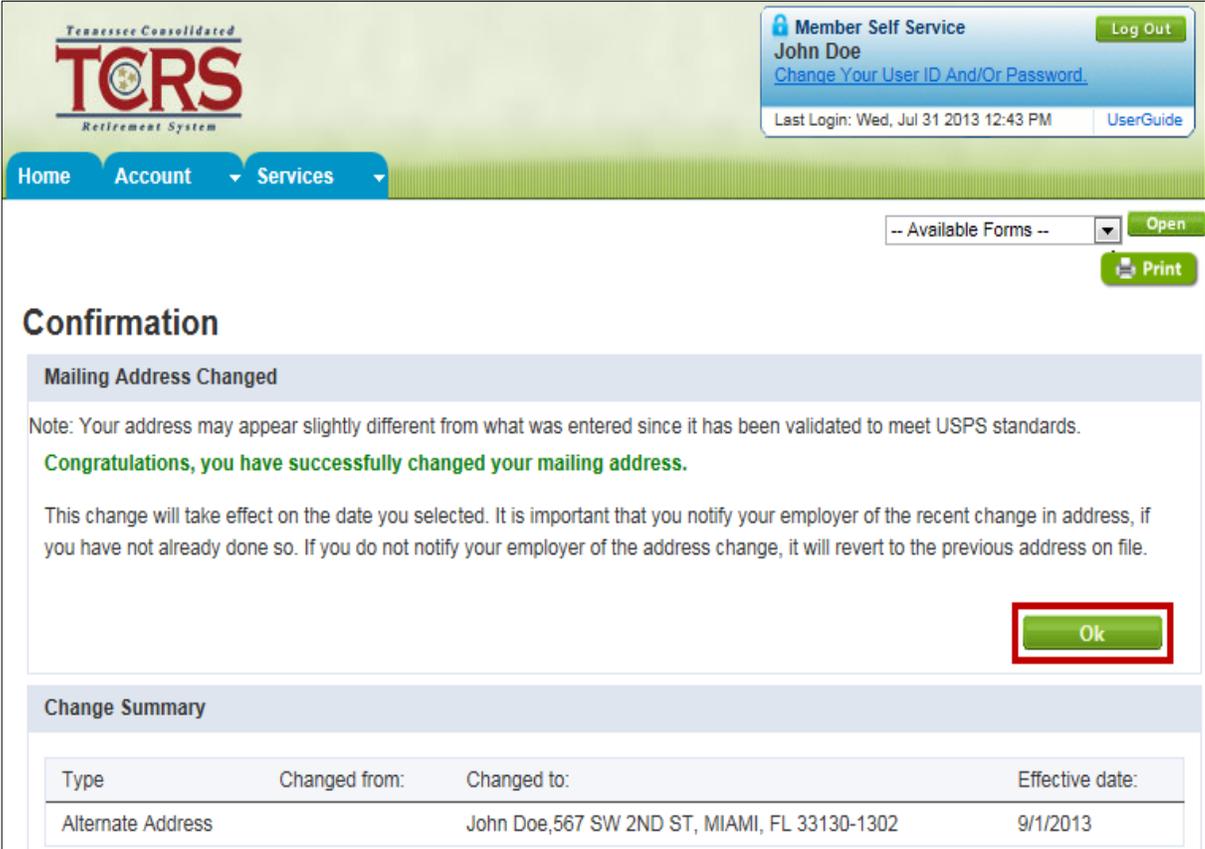
Mailing Address Information		Alternate Mailing Address Information	
Foreign:	<input type="checkbox"/>	From: *	09 - September 01 2013
Mail To:	John Doe	To: *	04 - April 01 2014
Effective Date: *	7/31/2013	Foreign:	<input type="checkbox"/>
Care Of:		Mail To:	
Address Line 1: *	400 Main St	Care Of:	
Address Line 2:		Address Line 1: *	567 Second St
City: *	Nashville	Address Line 2:	
County: *	Davidson	City: *	Miami
	<i>Only required for Tennessee.</i>	County:	
State: *	Tennessee		<i>Only required for Tennessee.</i>
Zip Code: *	37206-4215	State: *	Florida
		Zip Code: *	33010

[Click here to add an alternate mailing address.](#)

* Required field

[Save](#) [Cancel](#)

Step 5 -- A message displays on the **Confirmation** screen, indicating the alternate address change is complete. Click  to view the pending alternate address change.



The screenshot shows the TCRS Member Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right, a user profile box displays "Member Self Service", "John Doe", and a link to "Change Your User ID And/Or Password". Below this, it shows "Last Login: Wed, Jul 31 2013 12:43 PM" and a "UserGuide" link. A navigation bar contains "Home", "Account", and "Services" tabs. Below the navigation bar, there is a dropdown menu for "Available Forms" and "Open" and "Print" buttons. The main content area is titled "Confirmation" and contains a section "Mailing Address Changed". A note states: "Note: Your address may appear slightly different from what was entered since it has been validated to meet USPS standards." Below the note, a green message says: "Congratulations, you have successfully changed your mailing address." A paragraph follows: "This change will take effect on the date you selected. It is important that you notify your employer of the recent change in address, if you have not already done so. If you do not notify your employer of the address change, it will revert to the previous address on file." A red box highlights the "Ok" button. Below this is a "Change Summary" section with a table:

Type	Changed from:	Changed to:	Effective date:
Alternate Address		John Doe,567 SW 2ND ST, MIAMI, FL 33130-1302	9/1/2013

3.5. Changing Phone Number / Email Address Information

The following steps describe how to change phone number or email address contact information. You must input the required information on each screen to successfully change phone number or email address information.

Note: TCRS will only use phone number contact information if other methods have been unsuccessful.

Step 1 -- Follow the steps from Section 3.1, Navigating to the Contact Information Screen.

Step 2 -- Click [Change your current contact information click here.](#)

The screenshot displays the TCRS Member Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right, the user is identified as "John Doe" with a "Log Out" button and a link to "Change Your User ID And/Or Password". Below this, it shows the last login time as "Wed, Jul 31 2013 12:43 PM" and a "UserGuide" link. A navigation bar contains "Home", "Account", and "Services" tabs. A dropdown menu for "Available Forms" is set to "-- Available Forms --" with an "Open" button. The main content area is titled "Contact Information" and is divided into several sections:

- Plan Selection:** A notice stating that all information reflects the selected plan(s) and that users should uncheck boxes if they do not wish to view a plan.
- Membership Information:** A table listing:
 - Member ID: 1800458
 - Social Security Number: XXX-XX-0457
 - Name: John Doe
 - Birth Date: 1/10/1983
 - Retirement System: TCRS - Tennessee Consolidated Retirement System
- Mailing Address Information:** A notice that correspondence will be sent to the mailing address unless email is preferred. The mailing address is:
 - John Doe
 - 400 MAIN ST
 - NASHVILLE, TN 37206-4215
- Contact Information:** A list of current contact details:
 - Home phone: (555) 555-5550
 - Work phone:
 - Cell phone:
 - Fax number:
 - Email: johndoe@email.com (marked with a green checkmark)

At the bottom, under "If you want to:", there are two links:

- [Change your current contact information click here.](#) (This link is highlighted with a red box in the original image.)
- [View your previous contact information changes click here.](#)

Step 3 -- The **Edit Phone / Email** screen displays. Update any information that requires a change. Enter an **Effective Date** for each change made.

Note: The **Effective Date** will automatically default to the current date. If **Email** is chosen as the preferred method of contact, all correspondence will be sent via email.

Tennessee Consolidated TCRS Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Wed, Jul 31 2013 12:43 PM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- Open

Edit Phone/Email

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Preferred Contact Method

Please select your preferred method of contact.

Mail
 Email

Edit Contact Information

Please enter your contact information below. Once you have updated each item click the Save button below to save your changes. If you do not wish to make any changes please click the Cancel button.

	Effective Date	Contact Information
Home Phone:	<input type="text" value="7/31/2013"/>	<input type="text" value="(555) 555-5555"/> (999) 999-9999
Work Phone:	<input type="text" value="7/31/2013"/>	<input type="text"/> (999) 999-9999
Cell Phone:	<input type="text" value="7/31/2013"/>	<input type="text"/> (999) 999-9999
Fax:	<input type="text" value="7/31/2013"/>	<input type="text"/> (999) 999-9999
Email:	<input type="text" value="7/31/2013"/>	<input type="text" value="email@domain.com"/>

[Save](#) [Cancel](#)

Step 4 -- Click





Member Self Service
John Doe
[Change Your User ID And/Or Password.](#)
Last Login: Wed, Jul 31 2013 12:43 PM [UserGuide](#)

[Home](#) [Account](#) [Services](#)

-- Available Forms -- [Open](#)

Edit Phone/Email

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Preferred Contact Method

Please select your preferred method of contact.

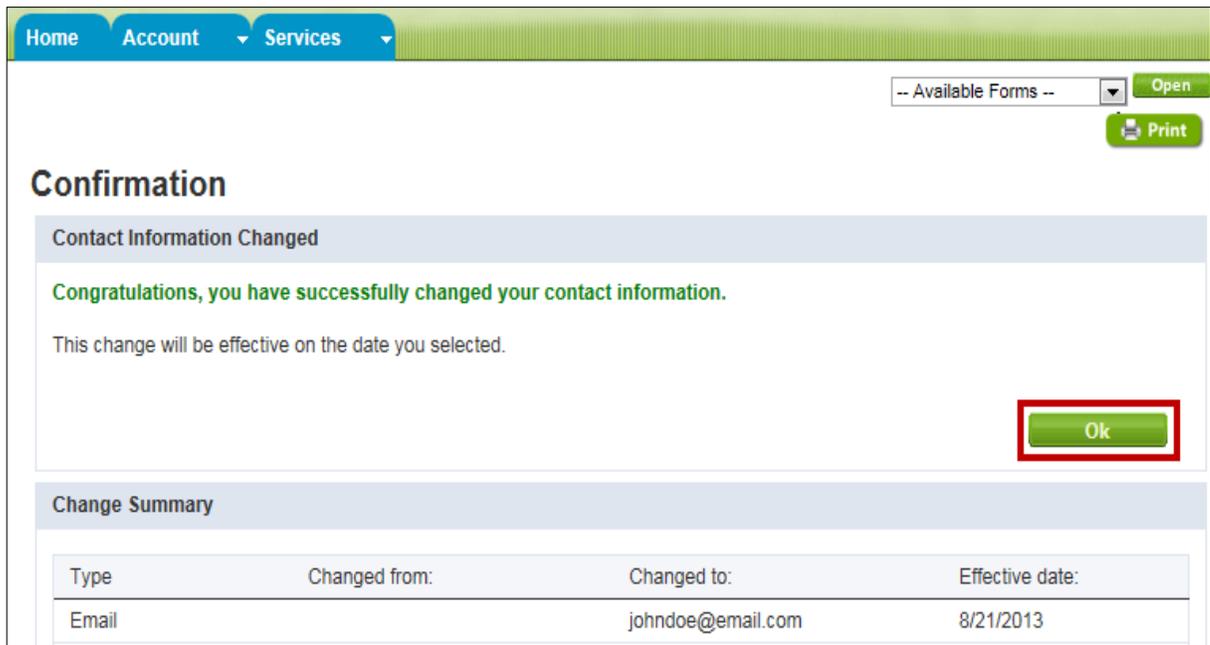
Mail
 Email

Edit Contact Information

Please enter your contact information below. Once you have updated each item click the Save button below to save your changes. If you do not wish to make any changes please click the Cancel button.

	Effective Date	Contact Information
Home Phone:	<input type="text" value="7/31/2013"/>	<input type="text" value="(555) 555-5555"/> (999) 999-9999
Work Phone:	<input type="text" value="7/31/2013"/>	<input type="text"/> (999) 999-9999
Cell Phone:	<input type="text" value="7/31/2013"/>	<input type="text" value="(555) 555-4444"/> (999) 999-9999
Fax:	<input type="text" value="7/31/2013"/>	<input type="text"/> (999) 999-9999
Email:	<input type="text" value="7/31/2013"/>	<input type="text" value="johndoe@email.com"/> email@domain.com

Step 5 -- The **Confirmation** screen displays with the changed information listed in the *Change Summary* section. Click .



Home Account Services

-- Available Forms -- Open

Print

Confirmation

Contact Information Changed

Congratulations, you have successfully changed your contact information.

This change will be effective on the date you selected.



Change Summary

Type	Changed from:	Changed to:	Effective date:
Email		johndoe@email.com	8/21/2013

3.6. Viewing Pending Address Changes

Changes that are pending in the system are listed on the **View Address Changes** screen. Address updates can only be made to address changes that are in a pending status. These pending address changes will have effective dates listed in the future. The following steps describe how to navigate to this screen.

Step 1 -- Follow the steps from Section 3.1, Navigating to the Contact Information Screen.

Step 2 -- Click [View address changes click here.](#)

The screenshot displays the TCRS Member Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". To the right, a user profile box shows "Member Self Service John Doe" with a "Log Out" button and a link to "Change Your User ID And/Or Password". Below this is the "Last Login: Wed, Jul 31 2013 12:43 PM" and a "UserGuide" link. A navigation bar contains "Home", "Account", and "Services" dropdown menus. On the right side of the page, there is a dropdown menu for "Available Forms" and an "Open" button. The main content area is titled "Contact Information" and is divided into three sections: "Plan Selection", "Membership Information", and "Mailing Address Information". The "Membership Information" section contains a table with the following data:

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

The "Mailing Address Information" section includes a note: "All correspondence will be sent to your mailing address unless you have selected email as your preferred method of contact." Below this, the mailing address is listed as "John Doe, 400 MAIN ST, NASHVILLE, TN 37206-4215". At the bottom of the page, there are three links: "Change your address information click here.", "Change your alternate address information click here.", and "View address changes click here.", which is highlighted with a red box.

Step 3 -- The **View Address Changes** screen displays. The benefit account information, pending address changes, and address change history are listed on this screen. Click  to view the pending address change details.



Member Self Service Log Out

John Doe

[Change Your User ID And/Or Password.](#)

Last Login: Thu, Aug 01 2013 2:33 PM [UserGuide](#)

Home Account Services

-- Available Forms -- Open

View Address Changes

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Pending Address Changes

You have Pending Address Changes. These will be made at 12:00 am on the date you specified. To view or edit your pending changes click the gear image next to the pending address change you wish to view.

	Request Date	Effective Date	Address Type
	7/31/2013	9/1/2013	Mailing Address

Address Change History

To view the details of your previous address changes click the magnifying glass image next to the previous address change you wish to view.

	Effective Date	Address Type
	8/1/2013	Mailing Address
	7/30/2013	Mailing Address
	6/17/2013	Mailing Address
	7/31/2013	Mailing Address

Step 4 -- The details of the pending address change display on the **Edit Address** screen.

Tennessee Consolidated TCRS Retirement System

Member Self Service
John Doe
Change Your User ID And/Or Password.
Last Login: Thu, Aug 01 2013 2:33 PM
Log Out
UserGuide

Home Account Services

-- Available Forms -- Open

Edit Address

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

[Change your alternate address information click here.](#)

Mailing Address Information

Your mailing address is shown below. If you do not want to make any changes to your existing information, please click the Cancel button.

Mailing Address Information

Foreign:	<input type="checkbox"/>
Mail To:	John Doe
Effective Date: *	<input type="text" value="8/2/2013"/>
Care Of:	<input type="text"/>
Address Line 1: *	<input type="text" value="100 North St"/>
Address Line 2:	<input type="text"/>
City: *	<input type="text" value="Nashville"/>
County: *	<input type="text" value="Davidson"/>
<i>Only required for Tennessee.</i>	
State: *	<input type="text" value="Tennessee"/>
Zip Code: *	<input type="text" value="37206-4215"/>

Click here to add an alternate mailing address.

* Required field

Save Cancel

Step 5 -- If necessary, you can make changes on this screen. Click **Save** after appropriate changes are made. Click **Cancel** if no changes are required.

Note: After clicking either option, you will be redirected to the **Contact Information** screen.

Tennessee Consolidated TCRS Retirement System

Member Self Service **John Doe** Log Out
Change Your User ID And/Or Password.
Last Login: Thu, Aug 01 2013 2:33 PM UserGuide

Home Account Services

-- Available Forms -- Open

Edit Address

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

[Change your alternate address information click here.](#)

Mailing Address Information

Your mailing address is shown below. If you do not want to make any changes to your existing information, please click the Cancel button.

Mailing Address Information

Foreign:	<input type="checkbox"/>
Mail To:	John Doe
Effective Date: *	8/2/2013
Care Of:	
Address Line 1: *	100 North St
Address Line 2:	
City: *	Nashville
County: *	Davidson
<i>Only required for Tennessee.</i>	
State: *	Tennessee
Zip Code: *	37206-4215

Click here to add an alternate mailing address.

* Required field

Save Cancel

3.7. Viewing Address Change History

The history of changes made to an active member's mailing address is displayed under the *Address Change History* section on the **View Address Changes** screen. The following steps describe how to navigate to this screen.

Step 1 -- Follow the steps from Section 3.1 Navigating to the Contact Information Screen.

Step 2 -- Click [View address changes click here.](#)

The screenshot shows the TCRS Member Self Service interface. At the top, there is a navigation bar with 'Home', 'Account', and 'Services' tabs. The 'Account' tab is selected. The page title is 'Contact Information'. Below the title, there are three main sections: 'Plan Selection', 'Membership Information', and 'Mailing Address Information'. The 'Membership Information' section contains the following details:

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

The 'Mailing Address Information' section contains the following details:

Mailing Address:	John Doe 400 MAIN ST NASHVILLE, TN 37206-4215
------------------	---

At the bottom of the page, there are three links: 'Change your address information click here.', 'Change your alternate address information click here.', and 'View address changes click here.' The last link is highlighted with a red box.

Step 3 -- The **View Address Changes** screen displays. Click  to view the details of an address change listed.



Tennessee Consolidated
TCRS
Retirement System

Member Self Service Log Out

John Doe

[Change Your User ID And/Or Password](#)

Last Login: Thu, Aug 01 2013 2:33 PM UserGuide

Home
Account ▾
Services ▾

-- Available Forms -- ▾ Open

View Address Changes

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID: 1800458

Social Security Number: XXX-XX-0457

Name: John Doe

Birth Date: 1/10/1983

Retirement System: TCRS - Tennessee Consolidated Retirement System

Pending Address Changes

You have Pending Address Changes. These will be made at 12:00 am on the date you specified. To view or edit your pending changes click the gear image next to the pending address change you wish to view.

	Request Date	Effective Date	Address Type
	7/31/2013	9/1/2013	Mailing Address

Address Change History

To view the details of your previous address changes click the magnifying glass image next to the previous address change you wish to view.

	Effective Date	Address Type
	8/1/2013	Mailing Address
	7/30/2013	Mailing Address
	6/17/2013	Mailing Address
	7/31/2013	Mailing Address

Step 4 -- The **Edit Address** screen displays with the details of the address change.

Tennessee Consolidated TCRS Retirement System

Member Self Service
John Doe
Change Your User ID And/Or Password
Last Login: Thu, Aug 01 2013 2:33 PM
Log Out
UserGuide

Home Account Services

-- Available Forms -- Open

Edit Address

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

[Change your alternate address information click here.](#)

Mailing Address Information

Your mailing address is shown below. If you do not want to make any changes to your existing information, please click the Cancel button.

Mailing Address Information

Foreign:	<input type="checkbox"/>
Mail To:	John Doe
Effective Date: *	<input type="text" value="8/2/2013"/>
Care Of:	<input type="text"/>
Address Line 1: *	<input type="text" value="100 North St"/>
Address Line 2:	<input type="text"/>
City: *	<input type="text" value="Nashville"/>
County: *	<input type="text" value="Davidson"/>
<i>Only required for Tennessee.</i>	
State: *	<input type="text" value="Tennessee"/>
Zip Code: *	<input type="text" value="37206-4215"/>

Click here to add an alternate mailing address.

* Required field

Save Cancel

Step 5 -- If necessary, you can make changes on this screen for the selected address change. Click **Save** after appropriate changes are made. Click **Cancel** if no changes are required.

Note: After clicking either option, the active member is taken back to the **Contact Information** screen.

Tennessee Consolidated TCRS Retirement System

Member Self Service **John Doe** [Log Out](#)
[Change Your User ID And/Or Password](#)
 Last Login: Thu, Aug 01 2013 2:33 PM [UserGuide](#)

Home Account Services

-- Available Forms -- [Open](#)

Edit Address

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID: 1800458
 Social Security Number: XXX-XX-0457
 Name: John Doe
 Birth Date: 1/10/1983
 Retirement System: TCRS - Tennessee Consolidated Retirement System

[Change your alternate address information click here.](#)

Mailing Address Information

Your mailing address is shown below. If you do not want to make any changes to your existing information, please click the Cancel button.

Mailing Address Information

Foreign:

Mail To: John Doe

Effective Date: * 8/2/2013

Care Of:

Address Line 1: * 100 North St

Address Line 2:

City: * Nashville

County: * Davidson

Only required for Tennessee.

State: * Tennessee

Zip Code: * 37206-4215

Click here to add an alternate mailing address.

* Required field

Save Cancel

3.8. Viewing Previous Contact Information Changes

Previous contact information changes are listed on the **View Phone / Email Changes** screen. The following steps describe how to navigate to this screen.

Step 1 -- Follow the steps from Section 3.1, Navigating to the Contact Information Screen.

Step 2 -- Click [View your previous contact information changes click here.](#)

The screenshot displays the TCRS Member Self Service interface. At the top, the TCRS logo is on the left, and the user's name 'John Doe' and 'Member Self Service' are on the right. Below the logo is a navigation bar with 'Home', 'Account', and 'Services' tabs. A dropdown menu for 'Services' is open, showing 'Available Forms' and an 'Open' button. The main content area is titled 'Contact Information' and is divided into several sections: 'Plan Selection', 'Membership Information', 'Mailing Address Information', and 'Contact Information'. The 'Membership Information' section lists details such as Member ID (1800458), Social Security Number (XXX-XX-0457), Name (John Doe), Birth Date (1/10/1983), and Retirement System (TCRS - Tennessee Consolidated Retirement System). The 'Mailing Address Information' section shows the current mailing address: John Doe, 100 NORTH ST, NASHVILLE, TN 37206-4215. The 'Contact Information' section lists current phone and email addresses. The email address 'johndoe@email.com' is marked with a green checkmark. At the bottom, there are links to 'Change your current contact information click here.' and 'View your previous contact information changes click here.', with the latter link highlighted by a red box.

Member Self Service [Log Out](#)
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Thu, Aug 01 2013 2:33 PM [UserGuide](#)

Home Account Services

-- Available Forms -- [Open](#)

Contact Information

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

Mailing Address Information

All correspondence will be sent to your mailing address unless you have selected email as your preferred method of contact.

Mailing Address: John Doe
100 NORTH ST
NASHVILLE, TN 37206-4215

[Change your address information click here.](#)
[Change your alternate address information click here.](#)
[View address changes click here.](#)

Contact Information

Your current home phone number on file is:	(555) 555-5555
Your current work phone number on file is:	
Your current cell phone number on file is:	
Your current fax number on file is:	
Your current email address on file is:	<input checked="" type="checkbox"/> johndoe@email.com

If you want to:

- [Change your current contact information click here.](#)
- [View your previous contact information changes click here.](#)

Step 3 -- The **View Phone / Email Changes** screen displays. The history of contact information changes is listed under the *Contact Information Change History* section of the screen.

Member Self Service
 John Doe
[Change Your User ID And/Or Password.](#)
 Last Login: Thu, Aug 01 2013 2:33 PM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- Open

View Phone/Email Changes

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID: 1800458
 Social Security Number: XXX-XX-0457
 Name: John Doe
 Birth Date: 1/10/1983
 Retirement System: TCRS - Tennessee Consolidated Retirement System

Contact Information Change History

These are all previous contact information changes you have made.

Effective Date	Type	Value
7/24/2013	Email Address	johndoe@email.com
7/30/2013	Home Phone Number	(555) 555-5555

If you want to:

- [View your current contact information click here.](#)
- [Change your current contact information click here.](#)

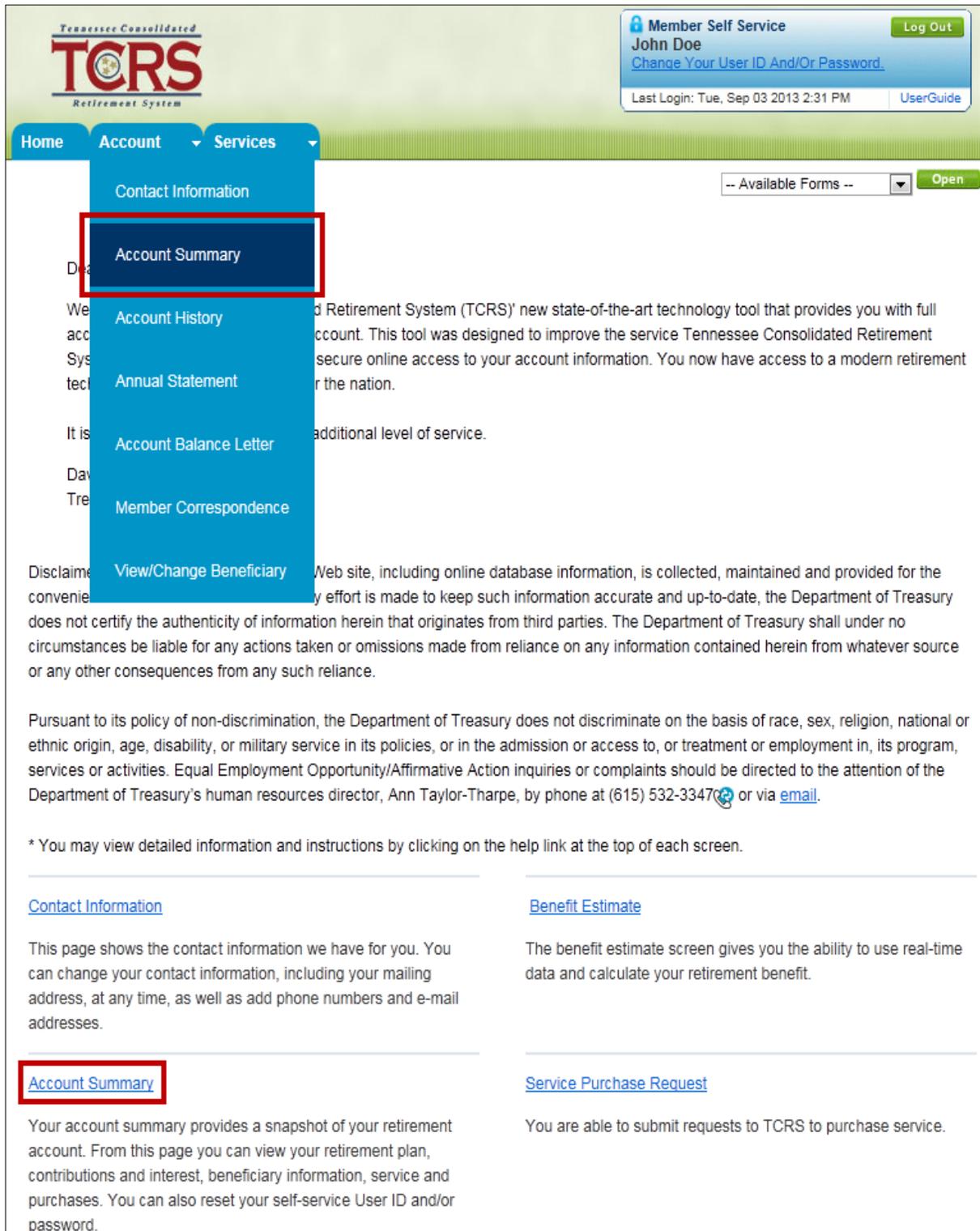
4. Account Summary

The **Account Summary** screen allows you to view information regarding membership and enrollment, contributions and interest, and service available for purchase. The *Return to Work Information* section displays for those members who have returned to work after receiving a benefit from TCRS.

4.1. Navigating to the Account Summary Screen

Step 1 -- Navigate to the **Account Summary** screen by clicking either [Account Summary](#) or the following menu options from the **Home** screen:

Account > Account Summary



The screenshot displays the TCRS Member Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right, a user profile box shows "Member Self Service", "John Doe", and a "Log Out" button. Below the profile box, it indicates "Last Login: Tue, Sep 03 2013 2:31 PM" and a "UserGuide" link. A navigation bar contains "Home", "Account", and "Services" menus. The "Account" menu is open, showing a list of options: "Contact Information", "Account Summary" (highlighted with a red box), "Account History", "Annual Statement", "Account Balance Letter", "Member Correspondence", and "View/Change Beneficiary". To the right of the menu is a dropdown menu labeled "-- Available Forms --" with an "Open" button. Below the navigation bar, there is a disclaimer and a notice about non-discrimination. At the bottom, there are four service links: "Contact Information", "Benefit Estimate", "Account Summary" (highlighted with a red box), and "Service Purchase Request". Each link has a brief description of the service.

Member Self Service [Log Out](#)
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Tue, Sep 03 2013 2:31 PM [UserGuide](#)

Home Account Services

Contact Information

Account Summary

Account History

Annual Statement

Account Balance Letter

Member Correspondence

View/Change Beneficiary

-- Available Forms -- [Open](#)

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* You may view detailed information and instructions by clicking on the help link at the top of each screen.

[Contact Information](#)

This page shows the contact information we have for you. You can change your contact information, including your mailing address, at any time, as well as add phone numbers and e-mail addresses.

[Benefit Estimate](#)

The benefit estimate screen gives you the ability to use real-time data and calculate your retirement benefit.

[Account Summary](#)

Your account summary provides a snapshot of your retirement account. From this page you can view your retirement plan, contributions and interest, beneficiary information, service and purchases. You can also reset your self-service User ID and/or password.

[Service Purchase Request](#)

You are able to submit requests to TCRS to purchase service.

Step 2 -- The Account Summary screen displays.



TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password.](#)

Last Login: Fri, Aug 02 2013 10:12 AM [UserGuide](#)

[Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)
[Print](#)

Account Summary

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

	Retirement System	Retirement Plan	Most Recent Employer	Status	Participation Date	End Date
<input checked="" type="checkbox"/>	TCRS	0030075-275	PUBLIC SAFETY BRIDGE FUND	ACTV	1/1/2013	

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Retirement Plan Summary Information

Your current Retirement Plan information is below.

Retirement Plan	Pre Tax Contribution	Post Tax Contribution	Interest	Total Contributions & Interest
0030075-275 - Bridge Payment Polisub	\$1,308.24	\$0.00	\$0.00	\$1,308.24
Total:	\$1,308.24	\$0.00	\$0.00	\$1,308.24

Beneficiary Information

Your designated beneficiary(ies) for your account are listed below. Requests to change beneficiary(ies) designations for your retirement account must be submitted to the Retirement Systems by fax or mail on a properly completed Beneficiary Designation Form 2035. The form can be found in the dropdown list at the top on the page

Beneficiaries

Name	Date of Birth	Relationship
DOE, KRISTI	11/21/1965	Sibling

Service Summary Information

Your service through June 2013 is below.

Plan	Service Credit Months
0030075-275 - Bridge Payment Polisub	12
Total:	12

Service Purchase Information

Your current service credit available for purchase is below.
 For more information on the types of service available for purchase, please review the [Member Handbook](#).

The *Plan Selection* section displays the retirement system(s) in which you have an account. **Note:** If you have refunded service, it will display as a second row in this section.

Plan Selection						
The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.						
<input type="checkbox"/>	Retirement System	Retirement Plan	Most Recent Employer	Status	Participation Date	End Date
<input checked="" type="checkbox"/>	TCRS	0030075-275	PUBLIC SAFETY BRIDGE FUND	ACTV	1/1/2013	

The *Membership Information* section displays the your member ID, social security number, name, birth date, and current retirement system.

Membership Information	
Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

The *Retirement Plan Summary Information* section displays the current retirement plan information. This includes the breakdown of contributions and interest for each plan in which you contributed.

Retirement Plan Summary Information				
Your current Retirement Plan information is below.				
Retirement Plan	Pre Tax Contribution	Post Tax Contribution	Interest	Total Contributions & Interest
0030075-275 - Bridge Payment Polisub	\$1,308.24	\$0.00	\$0.00	\$1,308.24
Total:	\$1,308.24	\$0.00	\$0.00	\$1,308.24

The *Beneficiary Information* section displays the current beneficiary elections on record with TCRS.

Beneficiary Information						
Your designated beneficiary(ies) for your account are listed below. Requests to change beneficiary(ies) designations for your retirement account must be submitted to the Retirement Systems by fax or mail on a properly completed Beneficiary Designation Form 2035. The form can be found in the dropdown list at the top on the page						
Beneficiaries						
Name	Date of Birth	Relationship				
DOE, KRISTI	11/21/1965	Sibling				

The *Service Summary Information* section displays the service credit through the previous month.

Service Summary Information	
Your service through June 2013 is below.	
Plan	Service Credit Months
0030075-275 - Bridge Payment Polisub	12
Total:	12

The *Service Purchase Information* section displays the types of service available for purchase. This only displays service for which you have provided documentation of to TCRS.

Service Purchase Information		
Your current service credit available for purchase is below.		
For more information on the types of service available for purchase, please review the Member Handbook .		
Plan	Service Credit Months	Service Purchase Type
0030075-275 - Bridge Payment Polisub	54.00	Delinquent Contributions

The *Return to Work Information* section displays, if applicable.

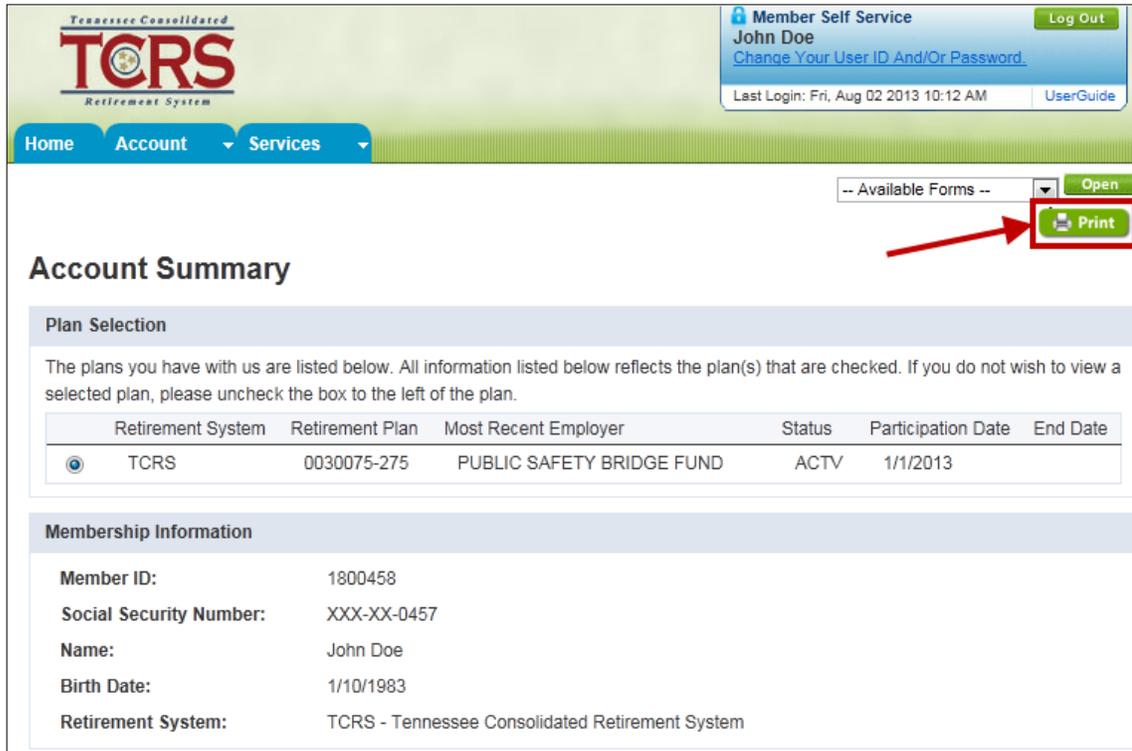
Return To Work Information		
Please note that if you exceed the conditions of the 120 work day period and/or salary limits, you may jeopardize your retirement benefits.		
Return To Work period:	7/1/1988 to 7/1/1989	
Remaining amount of time:	60.00 days	
Maximum allowed salary:	\$7,200.00	
Salary:	\$1,000.00	
Month / Year	Service Credit Months	Salary
May / 2013	1	\$1,000.00
June / 2013	1	\$1,000.00
July / 2013	1	\$1,000.00

4.2. Printing Account Summary Information

The following steps describe how to print the information displayed on the **Account Summary** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Follow the steps from Section 4.1, Navigating to the Account Summary Screen.

Step 2 -- Click  .



Tennessee Consolidated TCRS Retirement System

Member Self Service **John Doe** [Log Out](#)
[Change Your User ID And/Or Password](#)
 Last Login: Fri, Aug 02 2013 10:12 AM [UserGuide](#)

Home Account Services

-- Available Forms -- [Open](#)
[Print](#)

Account Summary

Plan Selection

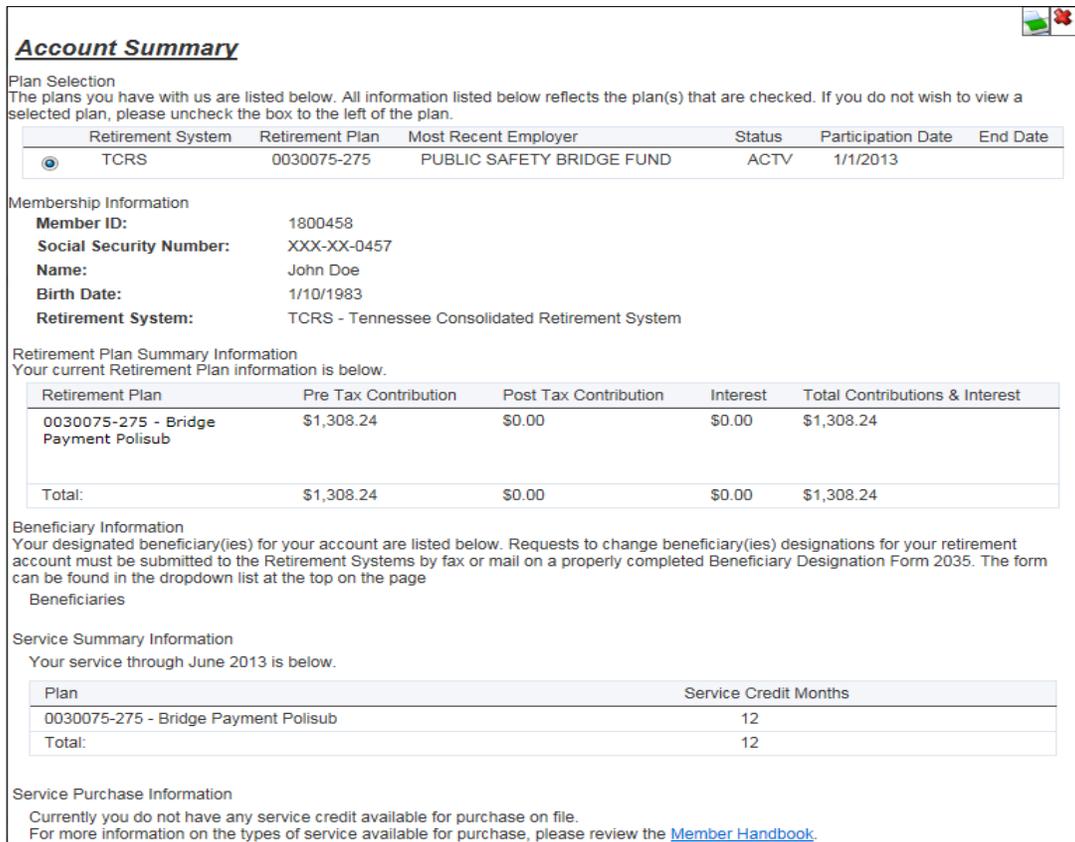
The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Retirement System	Retirement Plan	Most Recent Employer	Status	Participation Date	End Date
<input checked="" type="checkbox"/>	TCRS	0030075-275	PUBLIC SAFETY BRIDGE FUND	ACTV	1/1/2013

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Step 3 -- The Account Summary print preview pop-up window displays.



Account Summary

Plan Selection
 The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Retirement System	Retirement Plan	Most Recent Employer	Status	Participation Date	End Date
<input checked="" type="checkbox"/>	TCRS	0030075-275	PUBLIC SAFETY BRIDGE FUND	ACTV	1/1/2013

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Retirement Plan Summary Information
 Your current Retirement Plan information is below.

Retirement Plan	Pre Tax Contribution	Post Tax Contribution	Interest	Total Contributions & Interest
0030075-275 - Bridge Payment Polisub	\$1,308.24	\$0.00	\$0.00	\$1,308.24
Total:	\$1,308.24	\$0.00	\$0.00	\$1,308.24

Beneficiary Information
 Your designated beneficiary(ies) for your account are listed below. Requests to change beneficiary(ies) designations for your retirement account must be submitted to the Retirement Systems by fax or mail on a properly completed Beneficiary Designation Form 2035. The form can be found in the dropdown list at the top on the page

Beneficiaries

Service Summary Information
 Your service through June 2013 is below.

Plan	Service Credit Months
0030075-275 - Bridge Payment Polisub	12
Total:	12

Service Purchase Information
 Currently you do not have any service credit available for purchase on file.
 For more information on the types of service available for purchase, please review the [Member Handbook](#).

Step 4 -- Click  to print the screen or  to cancel the print request.




Account Summary

Plan Selection
The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Retirement System	Retirement Plan	Most Recent Employer	Status	Participation Date	End Date
<input checked="" type="checkbox"/>	TCRS	0030075-275	PUBLIC SAFETY BRIDGE FUND	ACTV	1/1/2013

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Retirement Plan Summary Information
Your current Retirement Plan information is below.

Retirement Plan	Pre Tax Contribution	Post Tax Contribution	Interest	Total Contributions & Interest
0030075-275 - Bridge Payment Polisub	\$1,308.24	\$0.00	\$0.00	\$1,308.24
Total:	\$1,308.24	\$0.00	\$0.00	\$1,308.24

Beneficiary Information
Your designated beneficiary(ies) for your account are listed below. Requests to change beneficiary(ies) designations for your retirement account must be submitted to the Retirement Systems by fax or mail on a properly completed Beneficiary Designation Form 2035. The form can be found in the dropdown list at the top on the page

Beneficiaries

Service Summary Information
Your service through June 2013 is below.

Plan	Service Credit Months
0030075-275 - Bridge Payment Polisub	12
Total:	12

Service Purchase Information
Currently you do not have any service credit available for purchase on file.
For more information on the types of service available for purchase, please review the [Member Handbook](#).

5. Account History

The **Account History** screen allows you to view details regarding service and contributions by retirement plan. From this screen you can access a historical summary of service, salaries, and contributions by fiscal year.

The following steps describe how to navigate to the **Account History** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **Account History** screen by clicking either [Account History](#) or the following menu options from the **Home** screen:

Account > Account History

The screenshot displays the TCRS Member Self Service interface. At the top right, the user is identified as Ron Doe, with options to Log Out, Change User ID/Password, and view the User Guide. The last login was on Tue, Sep 03 2013 at 1:54 PM. A navigation menu is open under the 'Account' tab, listing options such as Contact Information, Account Summary, Account History (highlighted with a red box), Annual Statement, Account Balance Letter, Member Correspondence, and View/Change Beneficiary. Below the menu, there are sections for Contact Information, Account Summary, and Account History, each with a brief description of the service. The Account History section is also highlighted with a red box at the bottom of the page.

Step 2 -- The **Account History** screen displays.



TCRS
Retirement System

Member Self Service Log Out

Ron Doe

[Change Your User ID And/Or Password.](#)

Last Login: Wed, Sep 04 2013 10:27 AM [UserGuide](#)

Home
Account ▾
Services ▾

-- Available Forms -- ▾ Open

Account History

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

	Retirement System	Retirement Plan	Most Recent Employer	Status	Participation Date	End Date
<input checked="" type="radio"/>	TCRS	0030075-275	PUBLIC SAFETY BRIDGE FUND	ACTV	7/1/1988	
<input type="radio"/>	TCRS	0080870-051	HUMBOLDT	ACTV	7/1/1988	
<input type="radio"/>	TCRS	0080880-051	SHILOH REG LIB	ACTV	7/1/1988	
<input type="radio"/>	TCRS	0080910-051	LAKEWOOD	ACTV	7/1/1988	

Membership Information

Member ID: 1800632
Social Security Number: XXX-XX-0631
Name: Ron Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Account History Information

Your service, salary, and contribution history for this account through June 2013 is below. If you have earned any service prior to 1994, it may be displayed in a lump sum amount and show in the first fiscal year you participated. Any service for purchases you have made will reflect in the fiscal year in which you made the purchase.

Fiscal Year	Service Type	Plan	Service Credit Months	Fiscal Year Salary	Pre Tax Contrib	Post Tax Contrib	Interest	Total Contributions & Interest
<input checked="" type="checkbox"/> 2011 - 2012	Membership	0030075-275 - Bridge Payment Polisub	12	\$130,824.00	\$2,616.48	\$0.00	\$0.00	\$2,616.48

The *Plan Selection* section displays the retirement system(s) in which you have an account.

Note: If you have refunded service, it will display as a second row in this section

Plan Selection						
The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.						
<input type="checkbox"/>	Retirement System	Retirement Plan	Most Recent Employer	Status	Participation Date	End Date
<input checked="" type="checkbox"/>	TCRS	0030075-275	PUBLIC SAFETY BRIDGE FUND	ACTV	7/1/1988	
<input type="checkbox"/>	TCRS	0080870-051	HUMBOLDT	ACTV	7/1/1988	
<input type="checkbox"/>	TCRS	0080880-051	SHILOH REG LIB	ACTV	7/1/1988	
<input type="checkbox"/>	TCRS	0080910-051	LAKEWOOD	ACTV	7/1/1988	

The *Membership Information* section displays your member ID, social security number, name, birth date, and current retirement system.

Membership Information	
Member ID:	1800632
Social Security Number:	XXX-XX-0631
Name:	Ron Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

Step 3 -- The *Account History Information* section displays a fiscal year breakdown of the service, salary, and contributions reported to TCRS by the employer. To view the monthly breakdown of a fiscal year, click .

Account History Information									
Your service, salary, and contribution history for this account through June 2013 is below. If you have earned any service prior to 1994, it may be displayed in a lump sum amount and show in the first fiscal year you participated. Any service for purchases you have made will reflect in the fiscal year in which you made the purchase.									
Fiscal Year	Service Type	Plan	Service Credit Months	Fiscal Year Salary	Pre Tax Contrib	Post Tax Contrib	Interest	Total Contributions & Interest	
 2011 - 2012	Membership	0030075-275 - Bridge Payment Polisub	12	\$130,824.00	\$2,616.48	\$0.00	\$0.00	\$2,616.48	

Step 4 -- The monthly breakdown of the selected fiscal year displays.

Account History Information								
Your service, salary, and contribution history for this account through June 2013 is below. If you have earned any service prior to 1994, it may be displayed in a lump sum amount and show in the first fiscal year you participated. Any service for purchases you have made will reflect in the fiscal year in which you made the purchase.								
Fiscal Year	Service Type	Plan	Service Credit Months	Fiscal Year Salary	Pre Tax Contrib	Post Tax Contrib	Interest	Total Contributions & Interest
2011 - 2012	Membership	0030075-275 - Bridge Payment Polisub	12	\$130,824.00	\$2,616.48	\$0.00	\$0.00	\$2,616.48
Reported Month	Service Credit Months	Monthly Salary	Pre Tax Contrib	Post Tax Contrib	Interest	Total Contributions & Interest		
06/01/2012	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		
05/01/2012	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		
04/01/2012	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		
03/01/2012	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		
02/01/2012	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		
01/01/2012	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		
12/01/2011	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		
11/01/2011	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		
10/01/2011	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		
09/01/2011	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		
08/01/2011	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		
07/01/2011	1	\$10,902.00	\$218.04	\$0.00	\$0.00	\$218.04		

6. Annual Statement

The **Annual Statement** screen allows you to view and print annual statements. The annual statement provides you with a snapshot of the retirement account as of the end of the previous fiscal year. The annual statement will generate as a PDF document. Only annual statements generated after 2014 will display in MSS.

The following steps describe how to navigate to the **Annual Statement** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **Annual Statement** screen by clicking either [Annual Statement](#) or the following menu options from the **Home** screen:

Account > Annual Statement

The screenshot shows the TCRS Member Self Service interface. At the top right, there is a user profile for 'John Doe' with options to 'Log Out', 'Change Your User ID And/Or Password', and 'UserGuide'. Below this is a navigation bar with 'Home', 'Account', and 'Services' tabs. The 'Account' dropdown menu is open, listing several options: 'Contact Information', 'Account Summary', 'Account History', 'Annual Statement' (highlighted with a red box), 'Account Balance Letter', 'Member Correspondence', and 'View/Change Beneficiary'. To the right of the menu is a form selection area with a dropdown menu set to '-- Available Forms --' and an 'Open' button. The main content area contains a disclaimer and a list of service links with brief descriptions. The 'Annual Statement' link at the bottom left of the list is also highlighted with a red box.

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Tue, Sep 03 2013 1:54 PM [UserGuide](#) [Log Out](#)

Home Account Services

Contact Information
Account Summary
Account History
Annual Statement
Account Balance Letter
Member Correspondence
View/Change Beneficiary

-- Available Forms -- Open

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* You may view detailed information and instructions by clicking on the help link at the top of each screen.

Contact Information This page shows the contact information we have for you. You can change your contact information, including your mailing address, at any time, as well as add phone numbers and e-mail addresses.	Benefit Estimate The benefit estimate screen gives you the ability to use real-time data and calculate your retirement benefit.
Account Summary Your account summary provides a snapshot of your retirement account. From this page you can view your retirement plan, contributions and interest, beneficiary information, service and purchases. You can also reset your self-service User ID and/or password.	Service Purchase Request You are able to submit requests to TCRS to purchase service.
Account History Your account history gives an overview of your contributions, salaries, and service since you began participation.	Service Purchase Status and Payment History You have the ability to track the service purchase costs you have requested and make payments or set up an installment plan. You can also check your history of payments.
Annual Statement	Maintain IPS Contract

Step 2 -- The **Annual Statement** screen displays.

Tennessee Consolidated TCRS Retirement System

Member Self Service
John Doe
Change Your User ID And/Or Password.
Last Login: Fri, Aug 02 2013 3:21 PM
UserGuide

Home Account Services

-- Available Forms -- Open

Annual Statement

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Annual Statement Summary

The service credit, salary and contribution information listed on your annual statement is listed below. You can review and print a copy of the statement by clicking the magnifying glass to the left of the year you wish to review.

Note: Only statements generated by Concord will be available for viewing.

	Fiscal Year	Service Credit Months
	2013 - 2014	1
	2012 - 2013	12

Step 3 -- To view an annual statement click  next to the appropriate fiscal year.

Tennessee Consolidated TCRS Retirement System

Member Self Service
John Doe
Change Your User ID And/Or Password.
Last Login: Fri, Aug 02 2013 3:21 PM
UserGuide

Home Account Services

-- Available Forms -- Open

Annual Statement

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Annual Statement Summary

The service credit, salary and contribution information listed on your annual statement is listed below. You can review and print a copy of the statement by clicking the magnifying glass to the left of the year you wish to review.

Note: Only statements generated by Concord will be available for viewing.

	Fiscal Year	Service Credit Months
	2013 - 2014	1
	2012 - 2013	12

Step 4 -- The PDF document displays. The Annual Statement document is broken down into the following sections: *Service History and Salary Detail, Employment History, Your highest average salary over 60 consecutive months, Your Earned Benefit, Your Project Benefit, Beneficiary Information, and Account Balance Information.*



TENNESSEE CONSOLIDATED RETIREMENT SYSTEM
 502 Deaderick Street
 Nashville, Tennessee 37243-0001
 1-800-770-8277 | <http://tcrs.tn.gov>

TCRS 2010 - 2011 Annual Statement

Name:	Doe Fiftyfive, John
SSN:	XXX-XX-0015
Member ID:	1800298
Gender:	Male
Date of Birth:	04/20/1977

SERVICE HISTORY AND SALARY DETAIL

TCRS benefits are based on your years of creditable service and the average of your five highest consecutive years of salary. Please review the following service and salary information and compare it with your records. These 3 sections show the total service you have established in TCRS as of June 30, 2011, a history of your employment, and your highest average salary over 60 consecutive months. If you disagree with the reported information, please contact your department's personnel office to correct your TCRS account.

Service and Salary from that last Fiscal Year

Month	Service	Salary
July 2010		\$28,418.00
August 2010		\$28,418.00
September 2010		\$28,418.00
October 2010		\$28,418.00
November 2010		\$28,418.00
December 2010		\$28,418.00
January 2011		\$28,418.00
February 2011		\$28,418.00
March 2011		\$28,418.00
April 2011		\$28,418.00
May 2011		\$28,418.00
June 2011		\$28,418.00
TOTALS		\$341,016.00

7. Account Balance Letter

The **Account Balance Letter** screen allows you to request a letter containing information about your account, including total service, contribution, and interest. This type of letter may be requested by a third party, such as a bank, to provide documentation of the amount invested in a retirement plan.

Note: The requested letter can be sent by email or mail to you or to a third party.

The following steps describe how to navigate to the **Account Balance Letter** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **Account Balance Letter** screen by clicking either [Account Balance Letter](#) or the following menu options from the **Home** screen:

Account > Account Balance Letter

The screenshot shows the TCRS Member Self Service portal. At the top right, it displays the user's name 'John Doe', a 'Log Out' button, and a link to 'Change Your User ID And/Or Password'. Below this, it shows the last login time as 'Tue, Sep 03 2013 1:54 PM' and a 'UserGuide' link. The main navigation bar includes 'Home', 'Account', and 'Services'. The 'Account' menu is expanded, showing options: 'Contact Information', 'Account Summary', 'Account History', 'Annual Statement', 'Account Balance Letter' (highlighted with a red box), and 'Member Correspondence'. Below the menu, there is a section for 'Available Forms' with a dropdown menu and an 'Open' button. The main content area contains a disclaimer and a list of links to various services, including 'Contact Information', 'Benefit Estimate', 'Account Summary', 'Service Purchase Request', 'Account History', 'Service Purchase Status and Payment History', 'Annual Statement', 'Maintain IPS Contract', 'Account Balance Letter' (highlighted with a red box), and 'Seminars'.

Step 2 -- The **Account Balance Letter** screen displays.

Tennessee Consolidated TCRS Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password.](#)
Last Login: Fri, Aug 02 2013 3:21 PM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- Open

Account Balance Letter

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

Account Balance Letter

An account balance letter provides a breakdown of your contributions, interest and service credit by membership and plan. To request an account balance letter, please choose the delivery method and enter the appropriate address. Your request will be sent the next business day.

Please choose a delivery method: Mail Email

Step 3 -- Select the **Mail** or **Email** radio button for the desired delivery method of the letter.

Tennessee Consolidated TCRS Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password.](#)
Last Login: Fri, Aug 02 2013 3:21 PM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- Open

Account Balance Letter

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

Account Balance Letter

An account balance letter provides a breakdown of your contributions, interest and service credit by membership and plan. To request an account balance letter, please choose the delivery method and enter the appropriate address. Your request will be sent the next business day.

Please choose a delivery method: Mail Email

Step 4 -- Confirm the mailing or email address that displays on the screen. This is the address where the letter will be sent.

Note: The information on record is prepopulated into the fields on the screen. The mailing address and email can be updated if necessary.

A. If the **Mail** radio button is selected, the following fields will display.

Account Balance Letter

An account balance letter provides a breakdown of your contributions, interest and service credit by membership and plan. To request an account balance letter, please choose the delivery method and enter the appropriate address. Your request will be sent the next business day.

Please choose a delivery method: Mail Email

Name: *

Care Of:

Address Line 1: *

Address Line 2:

City: *

State: *

ZIP Code: *

** Required fields for the option you selected.*

B. If the **Email** radio button is selected, the following fields will display.

Account Balance Letter

An account balance letter provides a breakdown of your contributions, interest and service credit by membership and plan. To request an account balance letter, please choose the delivery method and enter the appropriate address. Your request will be sent the next business day.

Please choose a delivery method: Mail Email

Email: *

** Required fields for the option you selected.*

Step 5 -- Click **Send Letter**.

Account Balance Letter

An account balance letter provides a breakdown of your contributions, interest and service credit by membership and plan. To request an account balance letter, please choose the delivery method and enter the appropriate address. Your request will be sent the next business day.

Please choose a delivery method: Mail Email

Name: *

Care Of:

Address Line 1: *

Address Line 2:

City: *

State: *

ZIP Code: *

** Required fields for the option you selected.*

Send Letter

Step 6 -- The **Confirmation** screen displays. Click **Ok** to return to the **Home** screen.

Note: The letter will be sent within one business day to the confirmed mailing or email address.

Tennessee Consolidated
TCRS
Retirement System

Member Self Service **John Doe** **Log Out**
[Change Your User ID And/Or Password.](#)
Last Login: Fri, Aug 02 2013 3:21 PM [UserGuide](#)

Home Account Services

-- Available Forms -- **Open**
Print

Confirmation

sent!

Congratulations! Your letter will be sent within one business day.

Ok

8. Member Correspondence

The **Member Correspondence** screen allows you to view a list of work items being processed by TCRS, the assigned status of each work item, and recent documents TCRS has on file.

The following steps describe how to navigate to the **Member Correspondence** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **Member Correspondence** screen by clicking either [Member Correspondence](#) or the following menu options from the **Home** screen:

Account > Member Correspondence

The screenshot displays the TCRS Member Self-Service interface. At the top, the user is logged in as John Doe, with options to change their User ID and/or Password, and a Log Out button. The last login was on Tue, Sep 03 2013 1:54 PM. A navigation menu is open under the 'Account' tab, listing several options: Contact Information, Account Summary, Account History, Annual Statement, Account Balance Letter, Member Correspondence (highlighted with a red box), and View/Change Beneficiary. Below the menu, there are several informational sections with links to various services, including Contact Information, Benefit Estimate, Account Summary, Service Purchase Request, Account History, Service Purchase Status and Payment History, Annual Statement, Maintain IPS Contract, Account Balance Letter, Seminars, and Online Retirement Application. The 'Member Correspondence' link at the bottom left of the page is also highlighted with a red box.

Step 2 -- The **Member Correspondence** screen displays.

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
 Last Login: Sun, Aug 04 2013 2:27 PM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Member Correspondence

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Current Account Activity

We are currently working on the items listed below.

Process	Status	Date Initiated
Process Service Retirement	In Progress	7/24/2013 7:49 AM

Recent Correspondence

These documents have been filed to your account in the past 3 months.

Document Type	Document Title	Date Created
MSS Retirement Application	CBP087 - MSS Retirement Application	7/24/2013 7:48 AM
MSS Retirement Application	CBP087 - MSS Retirement Application	7/24/2013 7:00 AM

The *Membership Information* section displays your member ID, social security number, name, birth date, and current retirement system.

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

The *Current Account Activity* section displays a list of items currently being worked by TCRS.

Current Account Activity		
We are currently working on the items listed below.		
Process	Status	Date Initiated
Process Service Retirement	In Progress	7/24/2013 7:49 AM

The *Recent Correspondence* section displays any documents that TCRS has received within the last 30 days.

Recent Correspondence		
These documents have been filed to your account in the past 3 months.		
Document Type	Document Title	Date Created
MSS Retirement Application	CBP087 - MSS Retirement Application	7/24/2013 7:48 AM
MSS Retirement Application	CBP087 - MSS Retirement Application	7/24/2013 7:00 AM

9. View / Change Beneficiary

The **View / Change Beneficiary** screen allows you to view, add, edit, or delete beneficiaries. If you have not selected a beneficiary, the designation will default to Estate.

9.1. Navigating to the View / Change Beneficiary Screen

The following steps describe how to navigate to the **View/Change Beneficiary** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **View / Change Beneficiary** screen by clicking either [View/Change Beneficiary](#) or the following menu options from the **Home** screen:

Account > View / Change Beneficiary

The screenshot shows the TCRS Member Self-Service interface. At the top right, the user is identified as John Doe with a 'Log Out' button and a 'Change Your User ID And/Or Password' link. The last login is noted as Tue, Sep 03 2013 1:54 PM. A navigation bar includes 'Home', 'Account', and 'Services'. The 'Account' dropdown menu is open, listing options such as 'Contact Information', 'Account Summary', 'Account History', 'Annual Statement', 'Account Balance Letter', 'Member Correspondence', and 'View/Change Beneficiary'. The 'View/Change Beneficiary' option is highlighted with a red box. Below the menu, there is a disclaimer and a help link. The main content area is a grid of service links with brief descriptions: 'Contact Information', 'Benefit Estimate', 'Account Summary', 'Service Purchase Request', 'Account History', 'Service Purchase Status and Payment History', 'Annual Statement', 'Maintain IPS Contract', 'Account Balance Letter', 'Seminars', 'Member Correspondence', 'Online Retirement Application', and 'Request Refund'. The 'View/Change Beneficiary' link at the bottom left of the grid is also highlighted with a red box.

Step 2 -- The **View / Change Beneficiary** screen displays.

Member Self Service [Log Out](#)
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Sun, Aug 04 2013 2:27 PM [UserGuide](#)

Home Account Services

-- Available Forms -- Open

View / Change Beneficiary

Beneficiary Information

Your designated beneficiary(ies) for your account are listed below. If you have not selected a beneficiary, your beneficiary designation will default to Estate. You may not have a named beneficiary and an Estate listed at the same time

Beneficiaries

SSN	Name	Date of Birth	Relationship	
---	DOE, KRISTI	11/21/1965	Sibling	Update / Delete

If you would like to add a new beneficiary, please click here: [Add a new beneficiary](#)

The *Beneficiaries* section displays a list of designated beneficiaries for your account.

Beneficiaries				
SSN	Name	Date of Birth	Relationship	
---	DOE, KRISTI	11/21/1965	Sibling	Update / Delete

9.2. Adding a New Beneficiary

The following steps describe how to add a new beneficiary.

Step 1 -- Follow the steps from Section 9.1, Navigating to the View / Change Beneficiary Screen.

Step 2 -- Click [Add a new beneficiary](#).

Note: When you add a new beneficiary, the distribution percentage automatically allocates evenly across each beneficiary adding up to a total allocation percentage of 100%. For example, a single beneficiary would have 100%, two beneficiaries would each have 50%. This is not editable and is calculated by the system.

Tennessee Consolidated
TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Sun, Aug 04 2013 2:27 PM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- Open

View / Change Beneficiary

Beneficiary Information

Your designated beneficiary(ies) for your account are listed below. If you have not selected a beneficiary, your beneficiary designation will default to Estate. You may not have a named beneficiary and an Estate listed at the same time

Beneficiaries

SSN	Name	Date of Birth	Relationship	
---	DOE, KRISTI	11/21/1965	Sibling	Update / Delete

If you would like to add a new beneficiary, please click here [Add a new beneficiary](#)

Step 3 -- Enter the new beneficiary information under the *Add a New Beneficiary* section.

Tennessee Consolidated
TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Sun, Aug 04 2013 2:27 PM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- Open

View / Change Beneficiary

Add a New Beneficiary

To add a new beneficiary, please complete the fields below.

SSN:

First Name: *

Last Name: *

Date of Birth: *

Gender: *

Relationship: *

Address:

Foreign

Address Line 1:

Address Line 2:

City:

State:

Zip:

[Save](#) [Cancel](#)

Step 4 -- Click



View / Change Beneficiary

Add a New Beneficiary

To add a new beneficiary, please complete the fields below.

SSN:

First Name: *

Last Name: *

Date of Birth: *

Gender: *

Relationship: *

Address:

Foreign

Address Line 1:

Address Line 2:

City:

State:

Zip:

Step 5 -- The **View / Change Beneficiary** screen displays with the added beneficiary information.

Note: The SSN for a beneficiary is optional. When you have previously entered the SSN for a particular beneficiary, the last four digits will display. When you have not entered an SSN, three dashes will display.

View / Change Beneficiary

Beneficiary Information

Your designated beneficiary(ies) for your account are listed below. If you have not selected a beneficiary, your beneficiary designation will default to Estate. You may not have a named beneficiary and an Estate listed at the same time

Beneficiaries

SSN	Name	Date of Birth	Relationship	Distribution %	
XXX-XX-3123	DOE, JILL	6/8/1959	Sibling	50.00	Update / Delete
---	DOE, KRISTI	11/21/1965	Sibling	50.00	Update / Delete

If you would like to add a new beneficiary, please click here: [Add a new beneficiary](#)

9.3. Updating a Beneficiary

The following steps describe how to update information for an existing beneficiary.

Step 1 -- Follow the steps from Section 9.1, Navigating to the View / Change Beneficiary Screen.

Step 2 -- Click [Update](#) for the beneficiary requiring an update.

View / Change Beneficiary

Beneficiary Information

Your designated beneficiary(ies) for your account are listed below. If you have not selected a beneficiary, your beneficiary designation will default to Estate. You may not have a named beneficiary and an Estate listed at the same time

SSN	Name	Date of Birth	Relationship	Distribution %	
XXX-XX-3123	DOE, JILL	6/8/1959	Sibling	50.00	Update / Delete
---	DOE, KRISTI	11/21/1965	Sibling	50.00	Update Delete

If you would like to add a new beneficiary, please click here: [Add a new beneficiary](#)

Step 3 -- The **View / Change Beneficiary** screen displays. Update any necessary information for the selected beneficiary in the *Update Beneficiary* section.

Update Beneficiary

To update the beneficiary information click on the fields below.

SSN:

First Name: *

Last Name: *

Date of Birth: *

Gender: *

Relationship: *

Address:

Foreign

Address Line 1:

Address Line 2:

City:

State:

Zip:

Step 4 -- Click



Update Beneficiary

To update the beneficiary information click on the fields below.

SSN: 123456789

First Name: KRISTI

Last Name: DOE

Date of Birth: 11/21/1965

Gender: Female

Relationship: Sibling

Address:

Foreign

Address Line 1:

Address Line 2:

City:

State:

Zip:

Save **Cancel**

Step 5 -- The View / Change Beneficiary screen displays with the updated beneficiary information.

Beneficiary Information

Your designated beneficiary(ies) for your account are listed below. If you have not selected a beneficiary, your beneficiary designation will default to Estate. You may not have a named beneficiary and an Estate listed at the same time

SSN	Name	Date of Birth	Relationship	Distribution %	
---	DOE, JILL	6/8/1959	Sibling	50.00	Update / Delete
XXX-XX-6789	DOE, KRISTI	11/21/1965	Sibling	50.00	Update / Delete

If you would like to add a new beneficiary, please click here: [Add a new beneficiary](#)

9.4. Deleting a Beneficiary

The following steps describe how to delete an existing beneficiary.

Step 1 -- Follow the steps from Section 9.1 Navigating to the View / Change Beneficiary Screen.

Step 2 -- Click [Delete](#) for the beneficiary that requires deletion.

View / Change Beneficiary

Beneficiary Information

Your designated beneficiary(ies) for your account are listed below. If you have not selected a beneficiary, your beneficiary designation will default to Estate. You may not have a named beneficiary and an Estate listed at the same time

SSN	Name	Date of Birth	Relationship	Distribution %	
---	DOE, JILL	6/8/1959	Sibling	50.00	Update Delete
XXX-XX-6789	DOE, KRISTI	11/21/1965	Sibling	50.00	Update / Delete

If you would like to add a new beneficiary, please click here: [Add a new beneficiary](#)

Step 3 -- The *Delete Beneficiary* section displays, confirming whether the beneficiary should be deleted or not. Click [Delete](#).

View / Change Beneficiary

Delete Beneficiary

SSN	Name	Date of Birth	Relationship	Distribution %
	JILL,DOE	06/08/1959	SIB	50.00

Are you sure you want to delete this beneficiary?

[Delete](#) [Cancel](#)

Step 4 -- A message displays on the **View / Change Beneficiary** screen confirming the deletion. Click



The screenshot shows the TCRS Member Self Service interface. At the top right, the user is identified as John Doe, with a 'Log Out' button and a link to 'Change Your User ID And/Or Password'. The last login is noted as Wednesday, August 07, 2013, at 9:14 AM. The navigation menu includes 'Home', 'Account', and 'Services'. A dropdown menu for 'Available Forms' is set to 'Open'. The main heading is 'View / Change Beneficiary'. Below this, a section titled 'Delete Beneficiary' contains a table with the following data:

SSN	Name	Date of Birth	Relationship	Distribution %
	JILL,DOE	06/08/1959	SIB	50.00

Below the table, a message states: "You have deleted the selected beneficiary". A red arrow points to a green 'OK' button.

Step 5 -- The **View / Change Beneficiary** screen displays, showing the beneficiary update as complete.

The screenshot shows the TCRS Member Self Service interface. At the top right, the user is identified as John Doe, with a 'Log Out' button and a link to 'Change Your User ID And/Or Password'. The last login is noted as Wednesday, August 07, 2013, at 9:14 AM. The navigation menu includes 'Home', 'Account', and 'Services'. A dropdown menu for 'Available Forms' is set to 'Open'. The main heading is 'View / Change Beneficiary'. Below this, a section titled 'Beneficiary Information' contains the following text: "Your designated beneficiary(ies) for your account are listed below. If you have not selected a beneficiary, your beneficiary designation will default to Estate. You may not have a named beneficiary and an Estate listed at the same time". Below this text, a table titled 'Beneficiaries' contains the following data:

SSN	Name	Date of Birth	Relationship	
XXX-XX-6789	DOE, KRISTI	11/21/1965	Sibling	Update / Delete

At the bottom of the section, there is a link: "If you would like to add a new beneficiary, please click here: [Add a new beneficiary](#)".

10. Benefit Estimate Request

The **Benefit Estimate** screen allows you to create a retirement benefit estimate based on real-time demographic, service, and salary data at any given date and / or age.

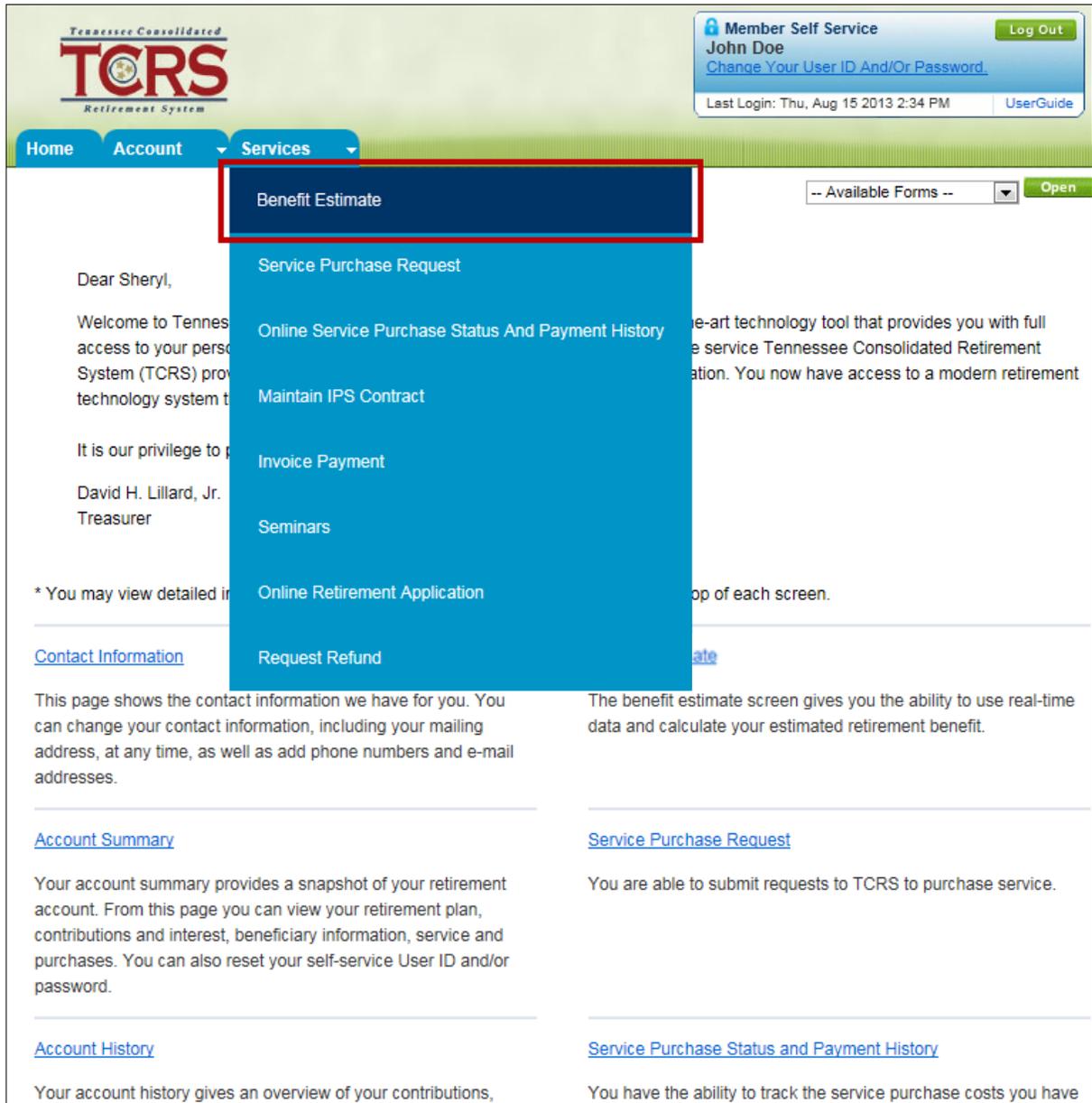
Note: If there are errors with the data, or if corrections need to be made to your account, a link will display to submit to the appropriate department of TCRS to process the Benefit Estimate Request. See Section 10.3, Requesting a Benefit Estimate Review for more information about this process.

10.1. Navigating to the Benefit Estimate Screen

The following steps describe how to navigate to the **Benefit Estimate** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **Benefit Estimate** screen by clicking either [Benefit Estimate](#) or the following menu options from the **Home** screen:

Services > Benefit Estimate



The screenshot displays the TCRS Member Self Service interface. At the top right, a user profile for John Doe is shown with a 'Log Out' button and a 'Change Your User ID And/Or Password' link. Below the navigation bar, the 'Services' dropdown menu is open, with 'Benefit Estimate' highlighted in a red box. Other menu items include Service Purchase Request, Online Service Purchase Status And Payment History, Maintain IPS Contract, Invoice Payment, Seminars, Online Retirement Application, and Request Refund. The main content area contains several sections: 'Contact Information', 'Account Summary', and 'Account History' on the left; and 'Service Purchase Request', 'Service Purchase Status and Payment History', and 'Request Refund' on the right. Each section includes a brief description of the service.

Step 2 -- The Benefit Estimate screen displays.



Member Self Service
John Doe
[Change Your User ID And/Or Password.](#)
Last Login: Thu, Aug 15 2013 2:34 PM

Log Out
UserGuide

Home Account Services

-- Available Forms -- Open

Benefit Estimate

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Benefit Estimate Calculator

You can generate a customized benefit estimate by completing the information below and clicking on the Show Estimate button. This calculator does not perform any disability calculations. If you have questions about disability retirement, contact our office.

Membership Information

Your benefit estimate will automatically be calculated using all of your membership(s). Uncheck any memberships that you do not want included in the benefit estimate by clicking the box to the left of the membership.

Retirement System	Retirement Plan	Status	Participation Date	End Date
Tennessee Consolidated Retirement System	0030075-275 - Bridge Payment Polisub	ACTV	1/1/2013	
Tennessee Consolidated Retirement System	0080870-051 - County Officials After 7/1/77 Con	ACTV	1/1/2013	
Tennessee Consolidated Retirement System	0080880-051 - County Officials After 7/1/77 Con	ACTV	1/1/2013	
Tennessee Consolidated Retirement System	0080910-051 - County Officials After 7/1/77 Con	ACTV	1/1/2013	

Beneficiary Information

Your current beneficiary on file is listed below. You may use a different beneficiary for the estimate by updating the information below. You can also add additional beneficiaries. Multiple beneficiaries could decrease the amount of your benefit at retirement.

Beneficiaries

First Name	Last Name	Date of Birth	Relationship	
* KRISTI	* DOE	* 11/21/1965	* Sibling	Delete

If you would like to add a new beneficiary, please click here: [Add a new beneficiary](#)

Sick Leave Balance

The fields below display any sick leave or compensatory time that has been reported to us by your employer. You may use these amounts, or you can change them to customize your request.

Days

Service Purchase Information

Do you wish to include approved-unpaid service purchases? * Yes No

Compute Dates
Clear

This estimate is for illustrative purposes only. This estimate is based on service and salary provided by you. It is intended to assist with long-term financial planning. It is not a guarantee of benefits that may be available to a member at retirement. Any reliance on information obtained through this benefits estimator must be done solely at the user's own risk. No decisions should be made regarding actual retirement choices based on whole or in part upon information obtained through this benefits estimator. Before making any final retirement plans, a member should contact a Retirement Systems benefits counselor. In no event shall a member be entitled to benefits greater than or less than those provided for the Revised Statutes. All member accounts are subject to audit.

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10.2. Requesting a Benefit Estimate

The **Benefit Estimate** screen allows you to calculate monthly retirement benefits using real data that has been reported to TCRS. Benefits can be calculated for the first eligible retirement date, first unreduced benefit, or a specific retirement date. The option to use current average salary, current salary, or project raises is also included in the estimate. The benefit estimate can be calculated assuming service purchases as well. The following steps describe how to request a benefit estimate.

Step 1 -- Follow the steps from Section 10.1, Navigating to the Benefit Estimate Screen.

Step 2 -- Verify the *Membership Information* section.

Membership Information	
Member ID:	1800458
Social Security Number:	XXX-XX-0457
Name:	John Doe
Birth Date:	1/10/1983
Retirement System:	TCRS - Tennessee Consolidated Retirement System

Step 3 -- Verify the beneficiary information listed in the *Beneficiary Information* section. If the information is incorrect or requires an update, any of the fields in this section can be changed for the purpose of the estimate.

Note: The system will automatically display the beneficiaries on file. You can also add multiple beneficiaries to project your benefit estimate. If your estate is selected, no other beneficiaries can be added.

Beneficiary Information				
Your current beneficiary on file is listed below. Statutes require that members may have only one beneficiary at retirement. You may use a different beneficiary for the estimate by updating the information below. This will have no bearing on your beneficiary selection on file.				
Beneficiaries				
First Name	Last Name	Date of Birth	Relationship	
* KRISTI	* DOE	* 11/21/1965	* Sibling	Delete
If you would like to add a new beneficiary, please click here: Add a new beneficiary				

Step 4 -- Review the leave balances TCRS has on record. You may update this section if you would like to assume a different amount of leave.

Sick Leave Balance
The fields below display any sick leave or compensatory time that has been reported to us by your employer. You may use these amounts, or you can change them to customize your request.
<input type="text" value="0"/> Days

Step 5 -- Select whether to include service purchases in the estimate.

Service Purchase Information		
Do you wish to include approved-unpaid service purchases?	*	<input type="radio"/> Yes <input checked="" type="radio"/> No

- A. If the **No** radio button is selected, continue to Step 6 below.
- B. If the **Yes** radio button is selected, additional fields will display. Indicate if the purchase is for a retribution of refund and enter the start date for that period of service.

Service Purchase Information		
Do you wish to include approved-unpaid service purchases?	*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Retirement Plan	Service Type	ServiceCredit
Are any of these a retribution of refund?	*	<input checked="" type="radio"/> Yes <input type="radio"/> No
What is the start date for the refunded period of service?		<input type="text"/>

Step 6 -- Click **Compute Dates** to calculate the estimated retirement date, or click **Clear** to start over.



TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Thu, Aug 15 2013 2:34 PM [UserGuide](#)

Home Account Services
-- Available Forms -- [Open](#)

Benefit Estimate

Membership Information

Member ID: 1800458
 Social Security Number: XXX-XX-0457
 Name: John Doe
 Birth Date: 1/10/1983
 Retirement System: TCRS - Tennessee Consolidated Retirement System

Benefit Estimate Calculator

You can generate a customized benefit estimate by completing the information below and clicking on the Show Estimate button. This calculator does not perform any disability calculations. If you have questions about disability retirement, contact our office.

Membership Information

Your benefit estimate will automatically be calculated using all of your membership(s). Uncheck any memberships that you do not want included in the benefit estimate by clicking the box to the left of the membership.

Retirement System	Retirement Plan	Status	Participation Date	End Date
Tennessee Consolidated Retirement System	0030075-275 - Bridge Payment Polisub	ACTV	1/1/2013	
Tennessee Consolidated Retirement System	0080870-051 - County Officials After 7/1/77 Con	ACTV	1/1/2013	
Tennessee Consolidated Retirement System	0080880-051 - County Officials After 7/1/77 Con	ACTV	1/1/2013	
Tennessee Consolidated Retirement System	0080910-051 - County Officials After 7/1/77 Con	ACTV	1/1/2013	

Beneficiary Information

Your current beneficiary on file is listed below. Statutes require that members may have only one beneficiary at retirement. You may use a different beneficiary for the estimate by updating the information below. This will have no bearing on your beneficiary selection on file.

Beneficiaries

First Name	Last Name	Date of Birth	Relationship	
* KRISTI	* DOE	* 11/21/1965	* Sibling	Delete

If you would like to add a new beneficiary, please click here: [Add a new beneficiary](#)

Sick Leave Balance

The fields below display any sick leave or compensatory time that has been reported to us by your employer. You may use these amounts, or you can change them to customize your request.

Days

Service Purchase Information

Do you wish to include approved-unpaid service purchases? Yes No

Compute Dates

Clear

←

This estimate is for illustrative purposes only. This estimate is based on service and salary provided by you. It is intended to assist with long-term financial planning. It is not a guarantee of benefits that may be available to a member at retirement. Any reliance on information obtained through this benefits estimator must be done solely at the user's own risk. No decisions should be made regarding actual retirement choices based on whole or in part upon information obtained through this benefits estimator. Before making any final retirement plans, a member should contact a Retirement Systems benefits counselor. In no event shall a member be entitled to benefits greater than or less than those provided for the Revised Statutes. All member accounts are subject to audit.

Step 7 -- After clicking **Compute Dates**, the additional *Retirement Date Information* and *Salary Information* sections display.

Retirement Date Information

Select the retirement date you wish to assume for your benefit estimate. You can customize your retirement date or termination date by selecting the last option. The first eligible and first unreduced retirement dates may not reflect any future service purchases or sick leave.

Criteria	Retirement Date	Termination Date
<input checked="" type="radio"/> Project to first eligible retirement date.	7/1/2018	6/30/2018
<input type="radio"/> Project to first unreduced retirement date.	7/1/2018	6/30/2018
<input type="radio"/> Project to other retirement date. *	* <input type="text"/>	* <input type="text"/>
<input type="radio"/> Project to age: *	* <input type="text"/> years	* <input type="text"/> months

Salary Information

Please input your monthly gross salary, and optional Social Security payment at age 62. These fields may already be populated; you can overwrite them if you wish. You may also wish to assume you receive annual increments. If so, enter the month you receive your increment, and the percentage you will receive. Once the system has generated your Final Compensation, you can override it to a different amount, or use the computed amount.

Estimated age 62 Social Security monthly benefit:

Monthly Salary (computed: \$10,902.00): \$130,824.00 *

Project current salary (\$130,824.00) to termination date (6/30/2018).

Project current salary (\$130,824.00) to termination date (6/30/2018) plus percentage increases each year on specified month.

Month of increase: *

Percentage increase: *

Calculate Avg High Salaries

Average Final Compensation (AFC)

Computed: \$133,041.36

Override:

Fiscal Year	Salary	Months
2017 - 2018	\$130,824.00	12
2016 - 2017	\$130,824.00	12
2015 - 2016	\$130,824.00	12
2014 - 2015	\$130,824.00	12
2013 - 2014	\$119,922.00	11
	\$643,218.00	59

Step 8 -- Select the retirement criteria for the projected retirement date. The first eligible retirement date and first unreduced retirement date will automatically be populated. You may enter a different date in the **Project to other retirement date** field.

Note: If already eligible for retirement, the first eligible retirement date will not display.

Note: If an alternative date is entered instead of using one of the pre-populated dates, the retirement date must be the first of the month. Any termination date can be used, as long as it is prior to the retirement date.

Retirement Date Information		
Select the retirement date you wish to assume for your benefit estimate. You can customize your retirement date or termination date by selecting the last option. The first eligible and first unreduced retirement dates may not reflect any future service purchases or sick leave.		
Criteria	Retirement Date	Termination Date
<input checked="" type="radio"/> Project to first eligible retirement date.	7/1/2018	6/30/2018
<input type="radio"/> Project to first unreduced retirement date.	7/1/2018	6/30/2018
<input type="radio"/> Project to other retirement date.	* <input type="text"/>	* <input type="text"/>
<input type="radio"/> Project to age:	* <input type="text"/> years	* <input type="text"/> months

Step 9 -- Complete the *Salary Information* section. Enter the **Estimated age 62 Social Security monthly benefit** amount, if desired, and current **Monthly Salary**. Select the salary projection method desired. If you select the option to assume an increase, select the month and amount of the increase.

Salary Information		
Please input your monthly gross salary, and optional Social Security payment at age 62. These fields may already be populated; you can overwrite them if you wish. You may also wish to assume you receive annual increments. If so, enter the month you receive your increment, and the percentage you will receive. Once the system has generated your Final Compensation, you can override it to a different amount, or use the computed amount.		
Estimated age 62 Social Security monthly benefit:		<input type="text"/>
Monthly Salary (computed: \$10,902.00):	\$130,824.00	* <input type="text" value="\$10,902.00"/>
<input checked="" type="radio"/> Project current salary (\$130,824.00) to termination date (6/30/2018).		
<input type="radio"/> Project current salary (\$130,824.00) to termination date (6/30/2018) plus percentage increases each year on specified month.		
	Month of increase:	* <input type="text"/> <input type="button" value="v"/>
	Percentage increase:	* <input type="text"/>

Step 10 -- Click **Calculate Avg High Salaries** to update the Average Final Compensation.

Note: Select to use the Average Final Compensation calculated by the system or select the **Override** radio button and enter the amount desired.

Salary Information

Please input your monthly gross salary, and optional Social Security payment at age 62. These fields may already be populated; you can overwrite them if you wish. You may also wish to assume you receive annual increments. If so, enter the month you receive your increment, and the percentage you will receive. Once the system has generated your Final Compensation, you can override it to a different amount, or use the computed amount.

Estimated age 62 Social Security monthly benefit:

Monthly Salary (computed: \$10,902.00): \$130,824.00 *

Project current salary (\$130,824.00) to termination date (6/30/2018).

Project current salary (\$130,824.00) to termination date (6/30/2018) plus percentage increases each year on specified month.

Month of increase: * ▾

Percentage increase: *

Calculate Avg High Salaries

Average Final Compensation (AFC)

Computed: \$133,041.36

Override:

Fiscal Year	Salary	Months
2017 - 2018	\$130,824.00	12
2016 - 2017	\$130,824.00	12
2015 - 2016	\$130,824.00	12
2014 - 2015	\$130,824.00	12
2013 - 2014	\$119,922.00	11
	\$643,218.00	59

Step 11 -- Click **Show Estimate** to calculate the estimate or **Clear** to start over.

Average Final Compensation (AFC)

Computed: \$133,041.36

Override:

Fiscal Year	Salary	Months
2017 - 2018	\$130,824.00	12
2016 - 2017	\$130,824.00	12
2015 - 2016	\$130,824.00	12
2014 - 2015	\$130,824.00	12
2013 - 2014	\$119,922.00	11
	\$643,218.00	59

Show Estimate **Clear**

Step 12 -- The *Calculation Results* section displays at the bottom of the **Benefit Estimate** screen. This section provides a breakdown of all information used to calculate a monthly retirement payment, including the amount of service at the time of retirement, the final compensation, the factors used to calculate the retirement benefits, any reductions (if necessary), and the formula used to calculate the basic retirement benefit. The following is an example of a *Calculation Results* section.

Note: If retiring from more than one system or plan, the results will be separated by each system or plan.

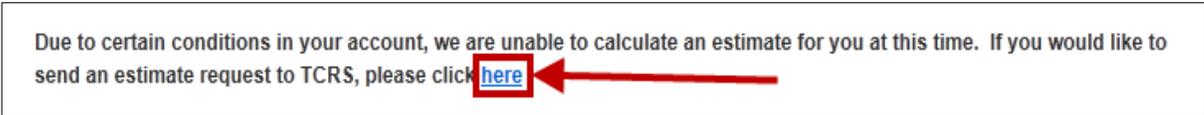
Calculation Results				
Retirement Type:	Early Retirement			
Retirement Date:	10/29/2013			
Earliest Participation Date:	1/1/1985			
Member Date of Birth:	2/1/1965			
Member Age at Retirement:	48 Years 8 Months			
Total Months of Service:	343			
Benefit(s)				
Option	Monthly	One-time	Survivor Monthly	Survivor One-time
<input checked="" type="checkbox"/> Regular Maximum	\$1,890.40	\$0.00	\$0.00	\$0.00
Plan	Monthly Benefit	One-time Benefit	Survivor Benefit	Survivor One-time
0080030-054	\$1,890.40	\$0.00	\$0.00	\$0.00
0080030-054				
Months of Service:				343
Total Months of Service:				343
Final Compensation:	(A)			\$40,311.70
Benefit Factor:	(B)			0.01875
Total Years of Service:	(C)			28.583333
Maximum Annual Benefit:	(D) = (A)*(B)*(C)			\$21,604.55
Maximum Monthly Benefit:	(E) = (D)/(12)			\$1,800.38
Early Retirement Factor:	(F)			0.932000000
Basic Benefit:	(E)*(F)			\$1,677.95
Annual 415b Limit:				\$832,156.00
Fiscal Year	AFC Salary	AFC Months		
2013-2014	\$7,103.38	2		
2012-2013	\$41,784.60	12		
2011-2012	\$40,965.24	12		
2010-2011	\$40,162.08	12		
2009-2010	\$39,374.52	12		
2008-2009	\$32,168.70	10		
	\$201,558.52	60		

10.3. Requesting a Benefit Estimate Review

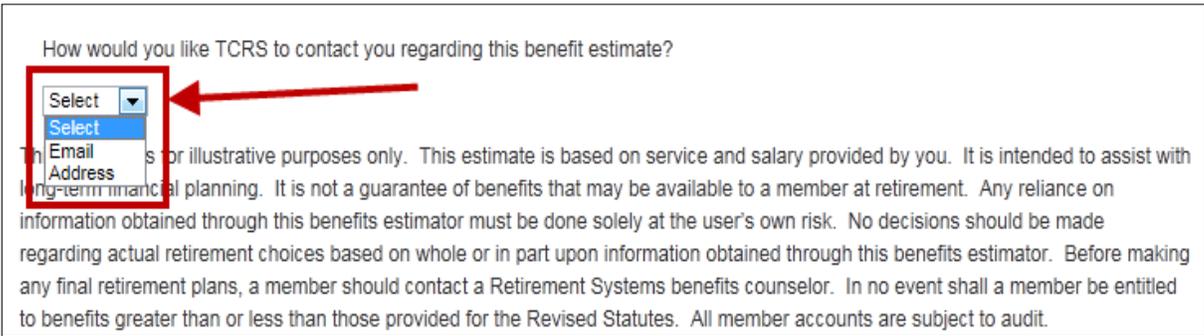
You can submit a request for TCRS staff to review the benefit estimate. When you generate your own estimate, the system will verify the estimate. If Concord identifies a possible issue, it will display the estimate along with a warning message, allowing you to submit a request for a TCRS professional to review your account and provide an estimate. The following steps describe how to submit this request.

Step 1 -- Follow the steps from Section 10.2, Requesting a Benefit Estimate.

Step 2 -- Click [here](#).

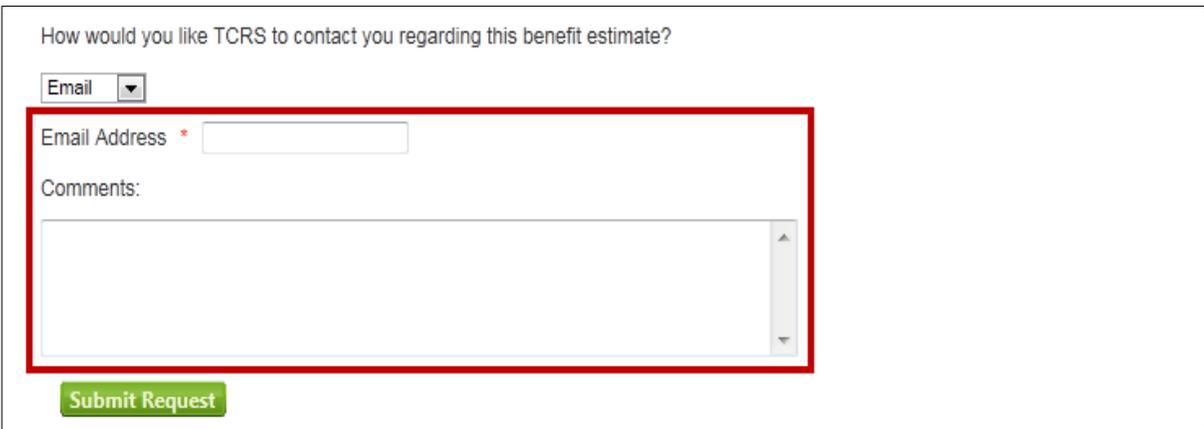


Step 3 -- Select the preferred method of contact from the drop down menu.



Step 4 -- Enter the required contact information.

A. If **Email** is selected from the drop down menu, the following fields display.



B. If **Address** is selected from the drop down menu, the following fields display.

How would you like TCRS to contact you regarding this benefit estimate?

Address ▾

Address:

Use Address On File:

Foreign:

Address Line 1: *

Address Line 2:

City: *

State: * ▾

Zip: *

Comments:

Step 5 -- Click .

How would you like TCRS to contact you regarding this benefit estimate?

Address ▾

Address:

Use Address On File:

Foreign:

Address Line 1: *

Address Line 2:

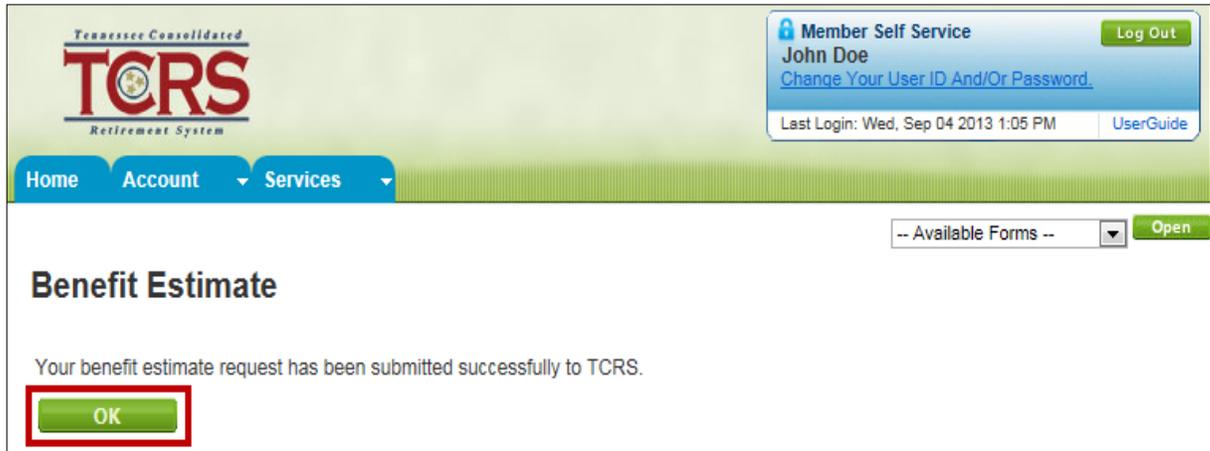
City: *

State: * ▾

Zip: *

Comments:

Step 6 -- A message displays confirming the request was submitted successfully. Click .



11. Online Service Purchase Request

The **Online Service Purchase Request** screen allows you to request a service purchase request. Service purchase requests may only be applied for if you are eligible. The type of service purchase request will determine the specific fields that display on each screen during the process.

The following is a list of the most common categories for service purchases:

- Re-contribution of Refund: Your retirement contributions from previous employment can be regained by re-paying any withdrawn contributions plus interest. Once re-paid, the retirement service credit will be added to the active membership.
- Military: You are entitled to receive retirement service credit for active military duty. The following is a list of the types of Military related service purchase(s).
 - Interrupted Military: You are entitled to receive retirement service credit if they left TCRS for active military duty and then later become re-employed by TCRS within 6 months of an honorable discharge.
 - Armed Conflict: An active or retired member who served during any period of an armed conflict is eligible for a retirement service purchase without charge. The following is the armed conflict periods:

W.W.I	04/07/17	to	11/11/18
W.W.II	12/07/41	to	12/31/46
Korean Conflict	06/27/50	to	01/31/55
Vietnam Era	02/28/61	to	05/07/75
 - Peacetime Military: You are entitled to receive military retirement service credit at no cost if you performed peacetime military duty (non-armed conflict) any time during October 15, 1940 through to May 7, 1975. Concord reflects this service credit as Persian Gulf rather than Interrupted Military.
 - You are entitled to receive Peacetime Military service credit if your military duty interrupted your employment any time after August 2, 1990. You must meet the conditions for Interrupted Military service.
- Back Payments: The **Process Service Purchase** module allows for different types of Back

Payments to be used for service credits. If you are entitled to receive retirement service but your employer did not report the service to TCRS, then you can obtain service credit by paying the contributions for that period as a Back Payment. The following is a list of the types of Back Payments:

- Delinquent
 - You may purchase service that you were entitled to that was not reported to TCRS. You may obtain service by paying the employee contributions on the period of Delinquent service.
- Probationary
 - You may purchase service for time served in a probationary position that occurred with a participating agency.
- Temporary
 - You may purchase service for time served in a temporary position that occurred with a participating agency.
- Out-of-State
 - You may purchase out-of-state service that has been credited in a state or locally-administered defined benefit retirement plan. You must show that you have received a refund or are not eligible for a retirement benefit from the period of out of state service. You must also submit a copy of the job description for your out of state public service.
- Educational Leave
 - You may purchase service credit for approved educational leave.
- Internal Transfer of Service (between employer groups)
 - Members participating in TCRS may pay the cost to convert eligible service from one group to another.
- ORP Transfer: An Optional Retirement Plan (ORP) transfer allows staff to transfer member's service credit and contributions from one retirement system into another. Service and contributions from the external retirement system (ORP) will be transferred to TCRS and Concord.

11.1. Navigating to the Online Service Purchase Request Screen

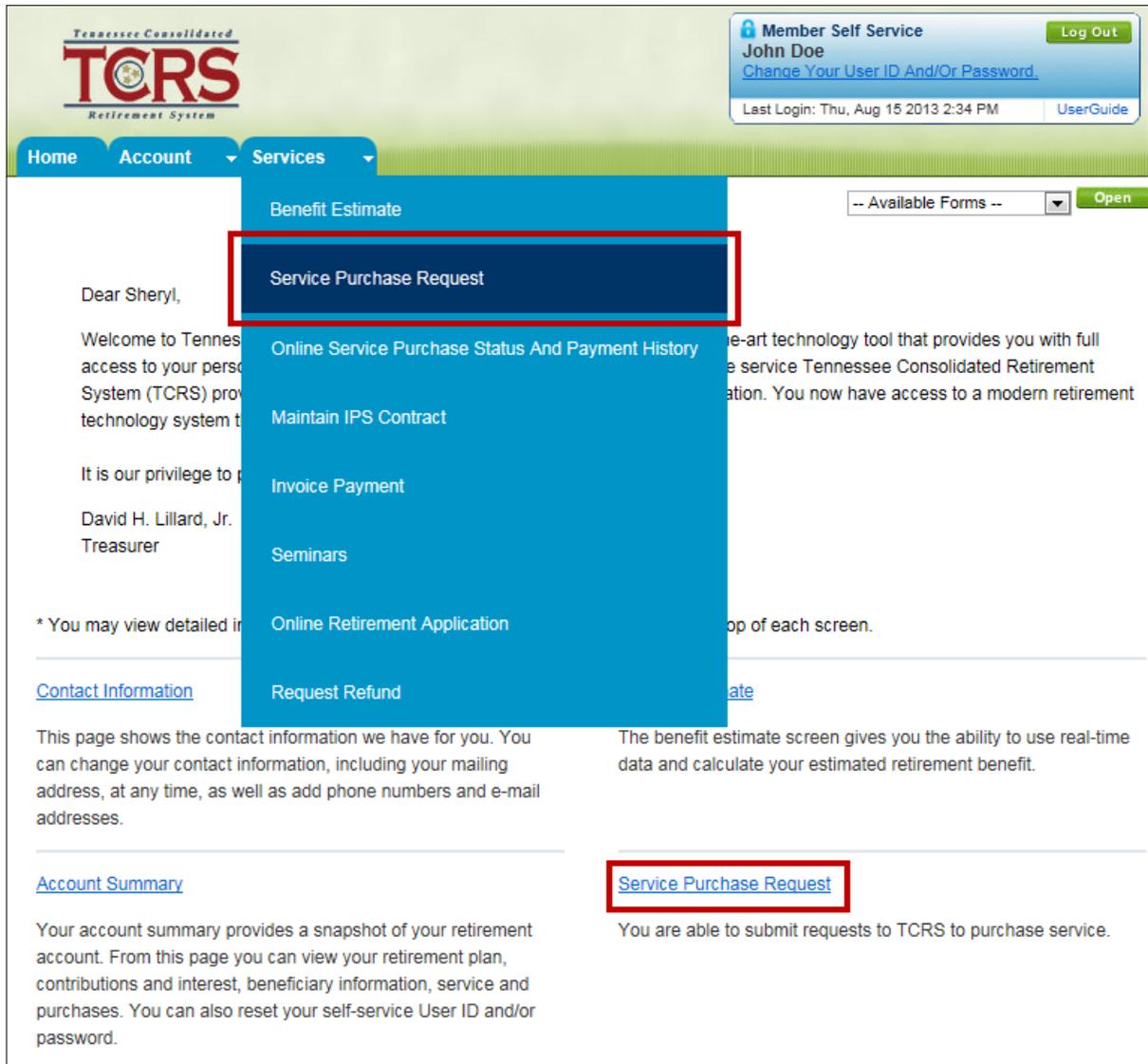
The following steps describe how to navigate to the **Online Service Purchase Request** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **Online Service Purchase Request** screen by clicking either

[Service Purchase Request](#)

or the following menu options from the **Home** screen:

Services > Service Purchase Request



11.2. Requesting an Online Service Purchase Request

The following steps describe how to request an online service purchase request.

Step 1 -- Follow the steps from Section 11.1, Navigating to the Online Service Purchase Request Screen.

Step 2 -- The **Online Service Purchase Request** screen displays. Select the **Service Purchase Type** from the drop down menu.

Note: The types of service purchase requests include: Military, Educational Leave, Prior Service, Recontribution of Refunds, ORP Transfer, and Part of Prior Service. You can submit multiple service purchase requests to TCRS if the purchase period dates do not overlap.

Member Self Service
John Doe
Change Your User ID And/Or Password
Last Login: Mon, Aug 12 2013 12:08 PM
Log Out
UserGuide

Home Account Services

-- Available Forms -- Open

Online Service Purchase Request

Plan Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

Retirement System	Retirement Plan	Most Recent Employer	Status	Participation Date	End Date
<input checked="" type="radio"/>	TCRS	0030075-275	PUBLIC SAFETY BRIDGE FUND	ACTV	1/1/2013
<input type="radio"/>	TCRS	0080870-051	HUMBOLDT	ACTV	1/1/2013
<input type="radio"/>	TCRS	0080880-051	SHILOH REG LIB	ACTV	1/1/2013
<input type="radio"/>	TCRS	0080910-051	LAKEWOOD	ACTV	1/1/2013

Service Purchase Request

Active members of TCRS may be eligible to purchase prior service under certain circumstances, depending on eligibility and vesting requirements. Many purchases require documentation verifying the service; if you wish to inquire further, please contact our office.

You can create a service purchase request by filling out the following information below.

Mailing Address Information

All correspondence will be sent to your mailing address.

Mailing Address: John Doe
100 NORTH ST
NASHVILLE, TN 37206-4215

If you would like to change your mailing address information please click [here](#)

Note: You can return to this page through the Service Purchase Request option in the Services menu.

Contact Information

Your current home phone number on file is: (555) 555-5555

Your current work phone number on file is:

Your current cell phone number on file is:

Your current fax number on file is:

Your current email address on file is: johndoe@email.com

If you would like to change your contact information please click [here](#)

Note: You can return to this page through the Service Purchase Request option in the Services menu.

Service Purchase Request

Service Purchase Type: *

Note: The following are the possible options for **Service Purchase Type**:

The screenshot shows the 'Service Purchase Request' form. The 'Service Purchase Type' dropdown menu is open, displaying the following options: Delinquent Contributions, Educational Leave, Enrollment Service, Military Service, Out of State Service, Part Time Adjunct Faculty, Probationary, and Temporary Disability. The 'Temporary Disability' option is highlighted in blue.

Step 3 -- Conditional fields display, corresponding to the **Service Purchase Type** selected from the drop down menu previously. Enter all required information in the conditional fields.

The screenshot shows the 'Service Purchase Request' form with 'Temporary Disability' selected in the 'Service Purchase Type' dropdown. The 'Service Purchase Request Details' section is highlighted with a red border and contains the following fields:

- Purchase Period Start Date: * 01/01/2013
- Purchase Period End Date: * 08/02/2013
- Employer: * PUBLIC SAFETY BRIDGE FUND
- Retirement Plan: * 0030075-275
- Have you ever refunded your account? * Yes No
- Is this service being claimed in a retirement plan other than TCRS? * Yes No

The 'Additional Info' section contains an 'Additional Information:' label and a text area. A green 'Submit' button is located at the bottom of the form.

Step 4 -- Click



Service Purchase Request

Service Purchase Type: * Temporary Disability

Service Purchase Request Details

Purchase Period Start Date: * 01/01/2013

Purchase Period End Date: * 08/02/2013

Employer: * PUBLIC SAFETY BRIDGE FUN

Retirement Plan: * 0030075-275

Have you ever refunded your account? * Yes No

Is this service being claimed in a retirement plan other than TCRS? * Yes No

Additional Info

Additional Information:

Submit



Step 5 -- A message displays on the screen confirming the online request was submitted successfully.

Tennessee Consolidated TCRS Retirement System

Member Self Service John Doe Log Out
Change Your User ID And/Or Password
Last Login: Mon, Aug 12 2013 12:40 PM UserGuide

Home Account Services

-- Available Forms -- Open

Online Service Purchase Request

Your service purchase request for Temporary Disability was submitted successfully on Monday, August 12, 2013 at 11:49:00 AM Central Time

Purchase Period Start Date: 01/01/2013
Purchase Period End Date: 08/02/2013

Employer: PUBLIC SAFETY BRIDGE FUND
Retirement Plan: 0030075-275
Have you ever refunded your account?: No
Is this service being claimed in a retirement plan other than TCRS?: No

You can check the status of your service purchase request by clicking on the Service Purchase Status & Payment History services menu option.

OK



12. Online Service Purchase Status and Payment History

The **Online Service Purchase Status and Payment History** screen allows you to check the status of an online service purchase request and view the history of prior payments.

12.1. Navigating to the Online Service Purchase Request Screen

The following steps describe how to navigate to the **Online Service Purchase Status and Payment History** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **Online Service Purchase Status and Payment History** screen by clicking either [Service Purchase Status and Payment History](#) or the following menu options from the **Home** screen:

Services > Online Service Purchase Status and Payment History

The screenshot displays the TCRS Member Self Service interface. At the top, the TCRS logo is visible on the left, and the user's login information (John Doe) and last login time (Thu, Aug 15 2013 2:34 PM) are shown on the right. A navigation bar includes 'Home', 'Account', and 'Services'. The 'Services' dropdown menu is open, listing various options: 'Benefit Estimate', 'Service Purchase Request', 'Online Service Purchase Status And Payment History' (highlighted with a red box), 'Maintain IPS Contract', 'Invoice Payment', 'Seminars', 'Online Retirement Application', and 'Request Refund'. Below the navigation bar, the main content area is divided into two columns. The left column contains sections for 'Contact Information', 'Account Summary', and 'Account History'. The right column contains sections for 'Service Purchase Request' and 'Service Purchase Status and Payment History' (also highlighted with a red box). The 'Service Purchase Status and Payment History' section in the right column provides a brief description of the feature: 'You have the ability to track the service purchase costs you have requested and make payments or set up an installment plan. You can also check your history of payments.'

12.2. Viewing Online Service Purchase Status and Payment History

The following steps describe how to view an online service purchase request status and history of prior payments.

Step 1 -- Follow the steps from Section 12.1, Navigating to the Online Service Purchase Status and Payment History Screen.

Step 2 -- The **Online Service Purchase Status and Payment History** screen displays. You can view information regarding the service purchase status and the payment history.

Member Self Service
 Ron Doe
[Change Your User ID And/Or Password](#)
 Last Login: Wed, Sep 04 2013 10:17 AM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#) [Print](#)

Online Service Purchase Status And Payment History

Service Purchases

Please select the applicable service purchase

	Service Type	Retirement System	Retirement Plan	Request Date	Status	Service Credit	Payment Due Date	Cost	Paid Amount	Remaining Amount	CostID
<input checked="" type="radio"/>	Delinquent Contributions	TCRS	0030075-275	08/19/2013	Approved	2.0	10/31/2013	\$344.06	\$0.00	\$344.06	5241
<input type="radio"/>	Delinquent Contributions	TCRS	0030075-275	08/28/2013	Approved	1.0	10/31/2013	\$116,581.22	\$0.00	\$116,581.22	5961
<input type="radio"/>	Delinquent Contributions	TCRS	0030075-275	08/29/2013	Approved	2.2	10/31/2013	\$912.61	\$0.00	\$912.61	5969
<input type="radio"/>	Delinquent Contributions	TCRS	0030075-275	08/29/2013	In Work	1.0	08/31/2013				5994
<input type="radio"/>	Military Service	TCRS	0030075-275	08/29/2013	Submitted	1.0	08/31/2013	\$0.00	\$0.00	\$0.00	5973

[Set Up/Make a Payment](#)

Service is not credited to your records nor do any pension rights accrue until all installments payments have been made. If you wish to pay account in full, Please call our office at (615) 741-4868.

Pending Payments

Payment Date	Payment Type	Payment Source	Paid Amount
8/29/2013	Service Purchase Payment	BANK OF AMERICA, N.A. A/C 635243356632	\$19,505.63
8/29/2013	Service Purchase Payment	FEDERAL RESERVE BANK A/C 12	\$210.00
8/31/2013	Service Purchase Payment	BANK OF HAMPTON ROADS A/C 1234	\$19,505.63
8/31/2013	Service Purchase Payment	BANK OF HAMPTON ROADS A/C 1234	\$19,505.63
9/4/2013	Service Purchase Payment	BANK OF AMERICA, N.A. A/C 12345	\$344.06

13. Online Service Purchase and IPS Payment

You can make online payments either by setting up an Installment Purchase of Service (IPS) or making a Lump Sum Total Payment.

13.1. Making a Lump Sum Total Payment

The following steps describe how to make a Lump Sum Total Payment.

Step 1 -- Follow the steps from Section 13.1, Navigating to the Online Service Purchase Status and Payment History Screen.

Step 2 -- The **Online Service Purchase Status and Payment History** screen displays. Click

Set Up/Make a Payment

The screenshot shows the TCRS Member Self Service interface. At the top left is the TCRS logo. At the top right is a user profile box for 'Member Self Service Ron Doe' with a 'Log Out' button and a 'Change Your User ID And/Or Password' link. Below the logo is a navigation menu with 'Home', 'Account', and 'Services' tabs. A dropdown menu for 'Services' is open, showing '-- Available Forms --' and an 'Open' button. A 'Print' button is also visible. The main heading is 'Online Service Purchase Status And Payment History'. Below this is a section titled 'Service Purchases' with the instruction 'Please select the applicable service purchase'. A table lists the service purchase details:

	Service Type	Retirement System	Retirement Plan	Request Date	Status	Service Credit	Payment Due Date	Cost	Paid Amount	Remaining Amount	CostID
<input checked="" type="radio"/>	Delinquent Contributions	TCRS	0030075-275	08/19/2013	Approved	2.0	07/31/2013	\$330.00	\$0.00	\$330.00	5241

Below the table is a 'Set Up/Make a Payment' button, which is highlighted with a red box. At the bottom of the page, there is a disclaimer: 'Service is not credited to your records nor do any pension rights accrue until all installments payments have been made. If you wish to pay account in full, Please call our office at (615) 741-4868'.

Step 3 -- Select the **Make a lump sum total payment** radio button.

The screenshot shows the TCRS Member Self Service interface. At the top, there is a navigation bar with 'Home', 'Account', and 'Services' tabs. A user profile box in the top right identifies the user as 'Ron Doe' and shows the last login time as 'Wed, Aug 21 2013 4:38 PM'. Below the navigation, there is a dropdown menu for 'Available Forms' and an 'Open' button. The main heading is 'Set Up Payment'. Underneath, there is a section for 'Service Purchase Request Details' containing a table with the following data:

Service Type	Retirement System	Request Date	Status	Payment Due Date	Cost
Delinquent Contributions	TCRS	08/19/2013	Approved	07/31/2013	\$330.00

Below the table, there are two radio button options: 'Make a lump sum total payment' (which is selected and highlighted with a red box) and 'Set Up IPS Contract'. The word 'or' is centered between the two options.

Step 4 -- Enter information into the *Payment Details* section.

This screenshot shows the same 'Set Up Payment' page as in Step 3, but with the 'Payment Details' section expanded. The 'Make a lump sum total payment' radio button is now selected. The 'Payment Details' section contains the following fields:

- Amount from Bank Account: *
- Routing Number: *
- Account Type: *
- Bank Account Number: *
- Re-enter Bank Account Number: *
- Bank Name: (text input)

The first five fields are grouped together and highlighted with a red box. Below the form, there is a blue link that says 'Your Payment will be drafted tonight'.

Step 5 -- Click

Save

Tennessee Consolidated TCRS Retirement System

Member Self Service
Ron Doe
[Change Your User ID And/Or Password](#)
Last Login: Wed, Aug 21 2013 4:38 PM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Set Up Payment

Service Purchase Request Details

Service Type	Retirement System	Request Date	Status	Payment Due Date	Cost
Delinquent Contributions	TCRS	08/19/2013	Approved	07/31/2013	\$330.00

Make a lump sum total payment

or

Set Up IPS Contract

Payment Details

Amount from Bank Account: *

Routing Number: *  Bank Name: BANK OF AMERICA, N.A.

Account Type: *

Bank Account Number: *

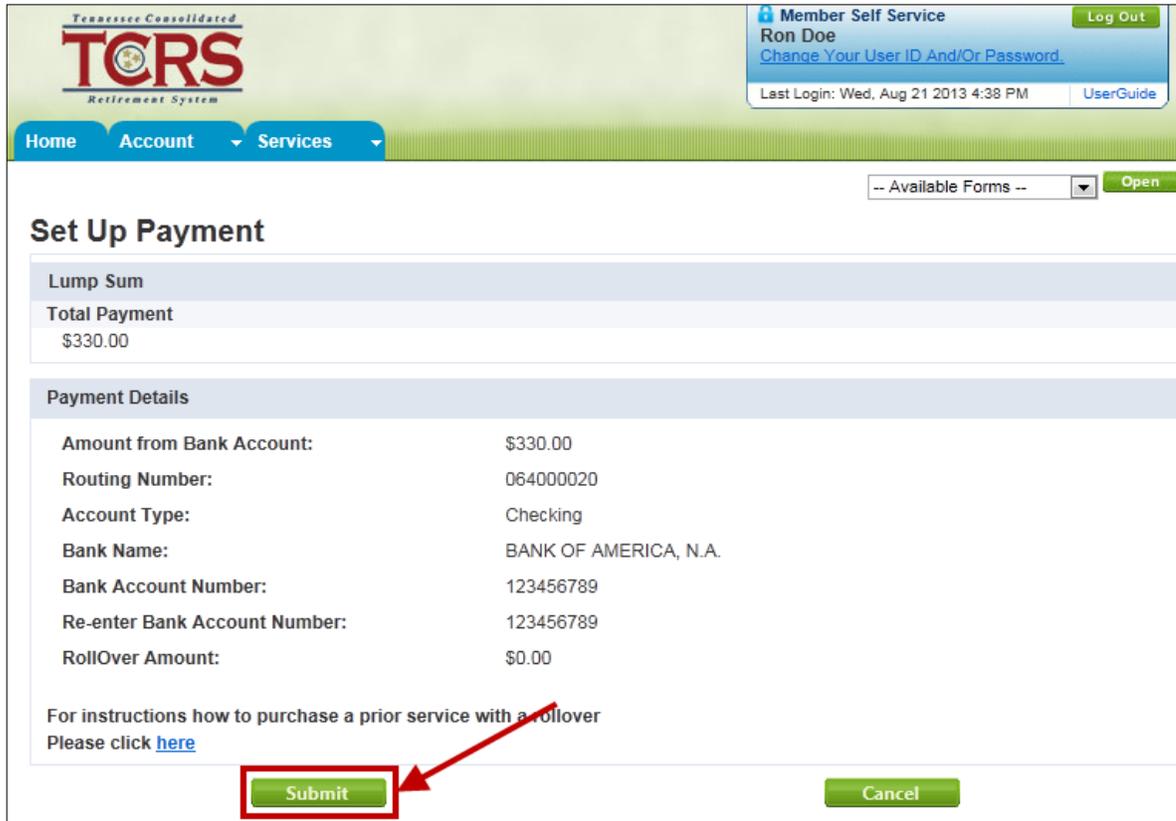
Re-enter Bank Account Number: *

Your Payment will be drafted tonight

RollOver Amount: For instructions how to buy prior service with a rollover
Please Click [here](#)

Save [Cancel](#)

Step 6 -- The **Set Up Payment** screen displays. Click  .



Tennessee Consolidated
TCRS
Retirement System

Member Self Service
Ron Doe
[Change Your User ID And/Or Password.](#)
Last Login: Wed, Aug 21 2013 4:38 PM
[UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- Open

Set Up Payment

Lump Sum
Total Payment
\$330.00

Payment Details

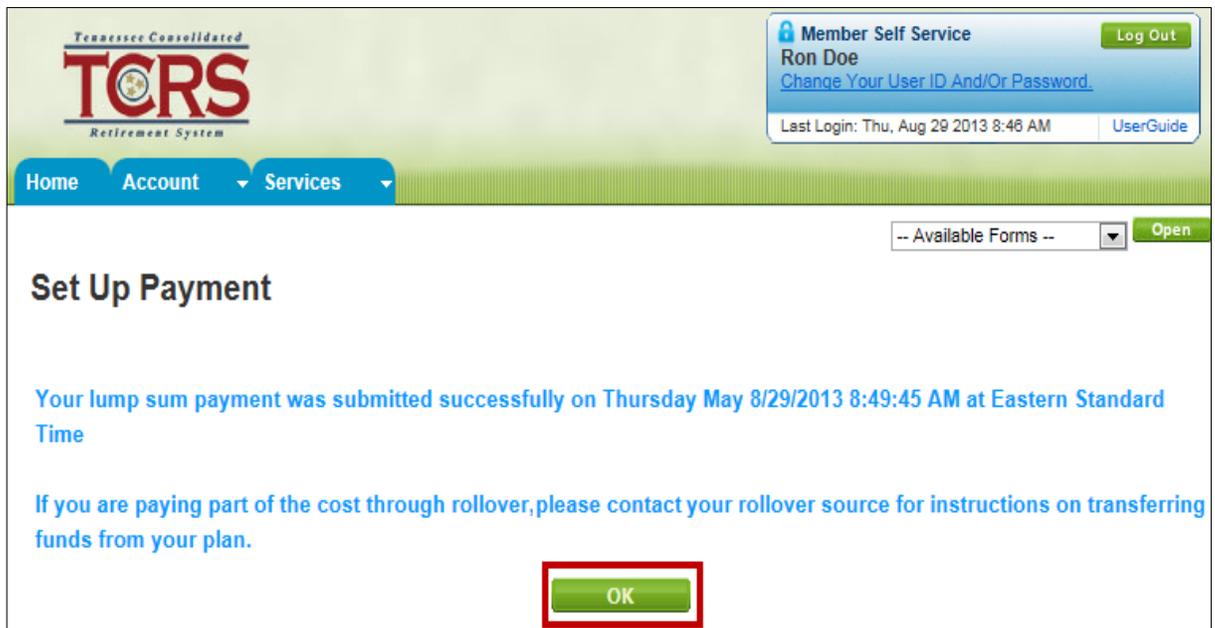
Amount from Bank Account:	\$330.00
Routing Number:	064000020
Account Type:	Checking
Bank Name:	BANK OF AMERICA, N.A.
Bank Account Number:	123456789
Re-enter Bank Account Number:	123456789
RollOver Amount:	\$0.00

For instructions how to purchase a prior service with a rollover
Please click [here](#)

Step 7 -- A message displays on the screen confirming the request. Click  .

Note: An email notification is sent to you with the details of the request for the Lump Sum Total Payment.



Tennessee Consolidated
TCRS
Retirement System

Member Self Service
Ron Doe
[Change Your User ID And/Or Password.](#)
Last Login: Thu, Aug 29 2013 8:46 AM
[UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- Open

Set Up Payment

Your lump sum payment was submitted successfully on Thursday May 8/29/2013 8:49:45 AM at Eastern Standard Time

If you are paying part of the cost through rollover, please contact your rollover source for instructions on transferring funds from your plan.



13.2. Setting Up an IPS Contract

The following steps describe how to set up an Installment Purchase of Service (IPS) Contract.

Step 1 -- Follow the steps from Section 13.1, Navigating to the Online Service Purchase Status and Payment History Screen.

Step 2 -- The **Online Service Purchase Status and Payment History** screen displays. Select the appropriate radio button and click **Set Up/Make a Payment**.

The screenshot shows the TCRS Member Self Service portal. At the top, there is a navigation menu with 'Home', 'Account', and 'Services'. The user profile section displays 'Member Self Service', 'Ron Doe', and options to 'Log Out' and 'Change Your User ID And/Or Password'. The main content area is titled 'Online Service Purchase Status And Payment History' and contains a table of service purchases. A 'Set Up/Make a Payment' button is highlighted with a red box.

	Service Type	Retirement System	Retirement Plan	Request Date	Status	Service Credit	Payment Due Date	Cost	Paid Amount	Remaining Amount	CostID
<input type="radio"/>	Delinquent Contributions	TCRS	0030075-275	08/19/2013	Approved	2.0	09/30/2013	\$341.06	\$0.00	\$341.06	5241
<input type="radio"/>	Delinquent Contributions	TCRS	0030075-275	08/28/2013	Approved	1.0	09/30/2013	\$115,865.22	\$0.00	\$115,865.22	5961
<input checked="" type="radio"/>	Delinquent Contributions	TCRS	0030075-275	08/29/2013	Approved	2.2	09/30/2013	\$906.61	\$0.00	\$906.61	5969
<input type="radio"/>	General Assembly Service	TCRS	0080880-051	08/29/2013	Submitted	1.0	09/30/2013	\$0.00	\$0.00	\$0.00	5980
<input type="radio"/>	Military Service	TCRS	0030075-275	08/29/2013	Submitted	1.0	09/30/2013	\$0.00	\$0.00	\$0.00	5973

Step 3 -- Select the **Set Up IPS Contract** radio button.

Member Self Service
Ron Doe
Change Your User ID And/Or Password
Last Login: Thu, Aug 29 2013 8:46 AM UserGuide

Home Account Services

-- Available Forms -- Open

Set Up Payment

Service Purchase Request Details

Service Type	Retirement System	Request Date	Status	Payment Due Date	Cost
Delinquent Contributions	TCRS	08/29/2013	Approved	09/30/2013	\$906.61

Make a lump sum total payment
 or
 Set Up IPS Contract

Step 4 -- Select desired IPS contract option and enter payment details.

Member Self Service
Ron Doe
Change Your User ID And/Or Password
Last Login: Thu, Aug 29 2013 8:46 AM UserGuide

Home Account Services

-- Available Forms -- Open

Set Up Payment

Service Purchase Request Details

Service Type	Retirement System	Request Date	Status	Payment Due Date	Cost
Delinquent Contributions	TCRS	08/29/2013	Approved	09/30/2013	\$906.61

Make a lump sum total payment
 or
 Set Up IPS Contract

Your IPS Options

Contract Length	Monthly Payment Amount	Total Interest Amount	Total Payback Amount
<input checked="" type="radio"/> 6 Months	\$19,505.63	\$2,600.54	\$117,033.76

Payment Details

Routing Number: * 064000020 Bank Name: BANK OF AMERICA, N.A.
 Account Type: * Checking
 Bank Account Number: * 123456789
 Re-enter Bank Account Number: * 123456789
 Effective Date: * 9/1/2013 (Or next business day)

Save Cancel

Step 5 -- Click

Save

Member Self Service [Log Out](#)
Ron Doe
[Change Your User ID And/Or Password](#)
Last Login: Thu, Aug 29 2013 8:46 AM [UserGuide](#)

Home Account Services

-- Available Forms -- **Open**

Set Up Payment

Service Purchase Request Details

Service Type	Retirement System	Request Date	Status	Payment Due Date	Cost
Delinquent Contributions	TCRS	08/29/2013	Approved	09/30/2013	\$906.61

Make a lump sum total payment

or

Set Up IPS Contract

Your IPS Options

Contract Length	Monthly Payment Amount	Total Interest Amount	Total Payback Amount
<input checked="" type="radio"/> 6 Months	\$19,505.63	\$2,600.54	\$117,033.76

Payment Details

Routing Number: * 064000020 Bank Name: BANK OF AMERICA, N.A.

Account Type: * Checking ▾

Bank Account Number: * 123456789

Re-enter Bank Account Number: * 123456789

Effective Date: * 9/1/2013 (Or next business day)

Save **Cancel**

Step 6 -- Click



Member Self Service
Ron Doe
Change Your User ID And/Or Password
Last Login: Thu, Aug 29 2013 8:46 AM
UserGuide

Home Account Services

-- Available Forms -- Open

Set Up Payment

Please verify your IPS Contract details below and click on submit.

Your IPS Options

Contract Length	Monthly Payment Amount	Total Interest Amount	Total Payback Amount
6 Months	\$19,505.63	\$2,600.54	\$117,033.76

Payment Details

Routing Number: 064000020
Bank Name: BANK OF AMERICA, N.A.
Account Type: Checking
Bank Account Number: 123456789
Effective Date: 9/1/2013

After submitting this request, if you decide to cancel your IPS Contract, You will be prohibited for restarting another IPS Contract for three years.

Submit Cancel

Step 7 -- A message displays on the screen confirming the request. Click



Note: An email notification is sent to you with the details of the request for the IPS Contract.

14. Maintain IPS Contract

The **Maintain IPS Contract** screen allows you to make changes to your online IPS contract. Changes can include editing bank account details, making a supplemental payment, or submitting refund requests.

14.1. Navigating to the Maintain IPS Contract Screen

The following steps describe how to navigate to the **Maintain IPS Contract** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **Maintain IPS Contract** screen by clicking either [Maintain IPS Contract](#) or the following menu options from the **Home** screen:

Services > Maintain IPS Contract

The screenshot displays the TCRS Member Self Service interface. At the top right, a user profile for John Doe is shown with options for 'Log Out' and 'Change Your User ID And/Or Password'. Below this, a navigation bar includes 'Home', 'Account', and 'Services'. The 'Services' dropdown menu is open, listing several options: 'Benefit Estimate', 'Service Purchase Request', 'Online Service Purchase Status And Payment History', 'Maintain IPS Contract' (highlighted with a red box), 'Invoice Payment', 'Seminars', 'Online Retirement Application', and 'Request Refund'. The main content area contains a welcome message from David H. Lillard, Jr., Treasurer, and several informational sections: 'Contact Information', 'Account Summary', 'Account History', 'Annual Statement', 'Service Purchase Request', 'Service Purchase Status and Payment History', and 'Maintain IPS Contract' (also highlighted with a red box). Each section provides a brief description of the service available.

14.2. Editing IPS Bank Account Details

The following steps describe how to edit the bank account details for an IPS.

Step 1 -- Follow the steps from Section 14.1, Navigating to the Maintain IPS Contract Screen.

Step 2 -- The **Maintain IPS Contract** screen displays. Click [Select](#) next to the appropriate IPS contract.

Member Self Service
John Doe
Change Your User ID And/Or Password
Last Login: Tue, Aug 13 2013 2:13 PM
UserGuide

Home Account Services

-- Available Forms -- Open

Maintain IPS Contract

Service Purchase Details

Your current IPS contracts are listed below

Service Type	Retirement System	Request Date	Status	Cost	Monthly Payment	Paid Amount	
Delinquent Contributions	TCRS	04/01/1987	IPS in Progress	\$400.00	\$68.69	\$0.00	Select
Delinquent Contributions	TCRS	01/01/1940	IPS in Progress	\$2,000.00	\$343.12	\$0.00	Select

Step 3 -- Click [Edit](#) under the *IPS Bank Account Details* section.

Member Self Service
John Doe
Change Your User ID And/Or Password
Last Login: Tue, Aug 13 2013 2:13 PM
UserGuide

Home Account Services

-- Available Forms -- Open

Maintain IPS Contract

Service Purchase Details

Your IPS contracts are listed below

Service Type	Retirement System	Request Date	Status	Cost	Monthly Payment	Paid Amount
Delinquent Contributions	TCRS	04/01/1987	IPS in Progress	\$400.00	\$68.69	\$0.00

IPS Bank Account Details

Monthly Payment Amount: \$68.69

Routing Number:

Bank Name:

Account Type:

Bank Account Number:

[Edit](#)

Make a Supplemental Payment

Click on Add, to make a supplement payment towards your service purchase.

[Add](#)

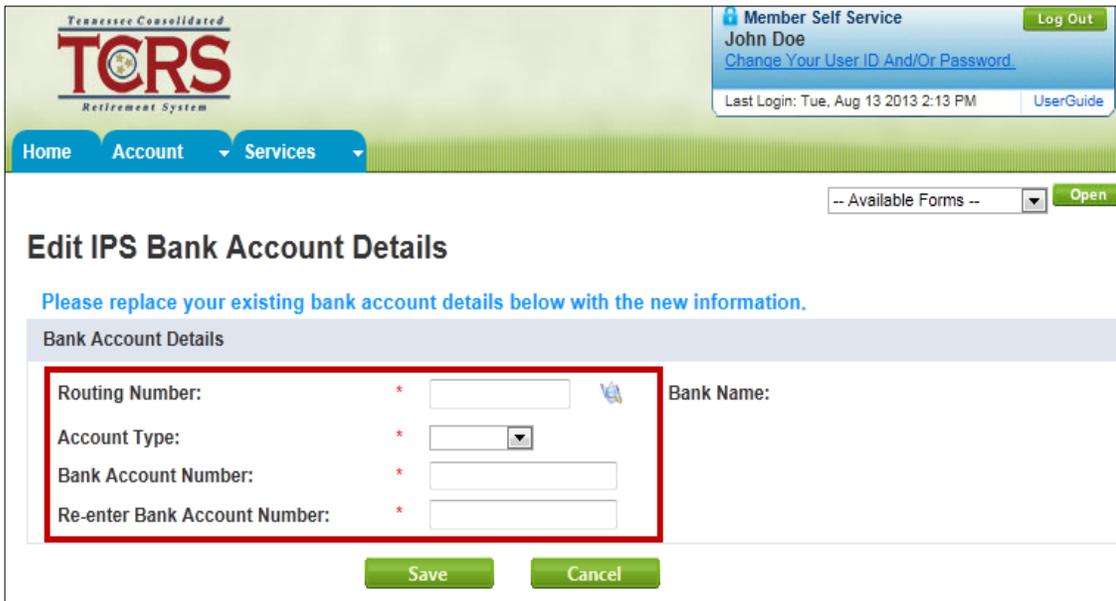
Please confirm that you would like to submit a request to refund your IPS Payments

IPS Contract Details

Contract Length	Monthly Payment Amount	Total Payments	Total Interest Amount	Remaining Amount	CostID
-----------------	------------------------	----------------	-----------------------	------------------	--------

Step 4 -- The **Edit IPS Bank Account Details** screen displays. Enter the appropriate bank account information, including the **Routing Number**, **Account Type**, and **Bank Account Number**.

Note: After entering the **Routing Number**, click  to validate the bank routing number. The **Bank Name** field automatically populates with the correlating bank's name.



Tennessee Consolidated
TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Tue, Aug 13 2013 2:13 PM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Edit IPS Bank Account Details

Please replace your existing bank account details below with the new information.

Bank Account Details

Routing Number: *  Bank Name:

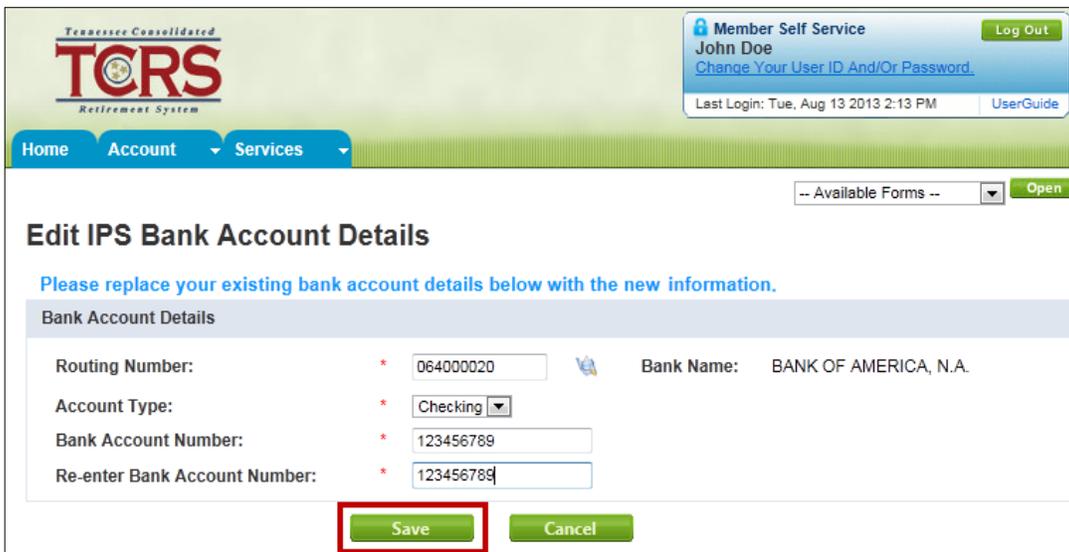
Account Type: *

Bank Account Number: *

Re-enter Bank Account Number: *

[Save](#) [Cancel](#)

Step 5 -- Click [Save](#).



Tennessee Consolidated
TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Tue, Aug 13 2013 2:13 PM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Edit IPS Bank Account Details

Please replace your existing bank account details below with the new information.

Bank Account Details

Routing Number: * 064000020  Bank Name: BANK OF AMERICA, N.A.

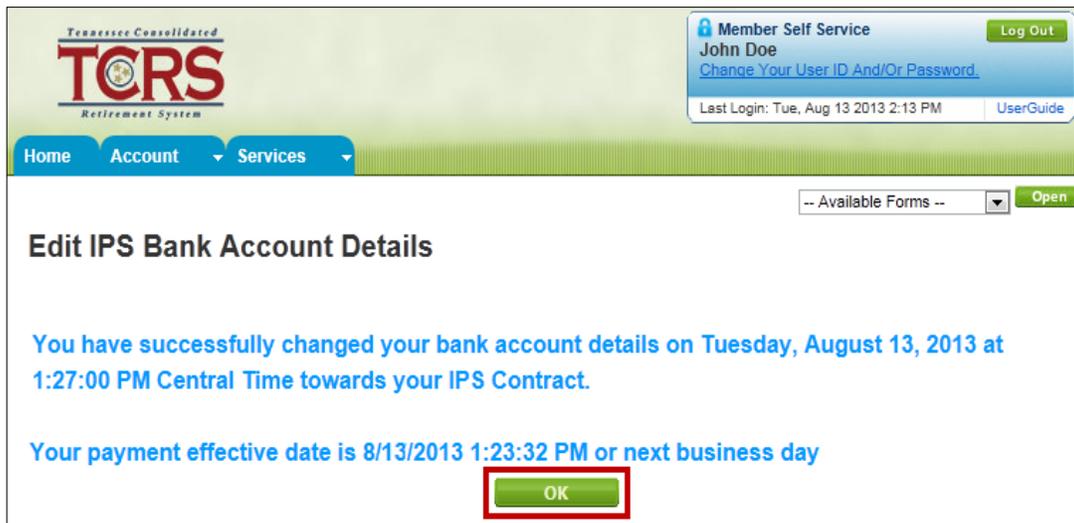
Account Type: * Checking

Bank Account Number: * 123456789

Re-enter Bank Account Number: * 123456789

[Save](#) [Cancel](#)

Step 6 -- A message displays on the screen confirming the bank account details have been successfully updated. Click .

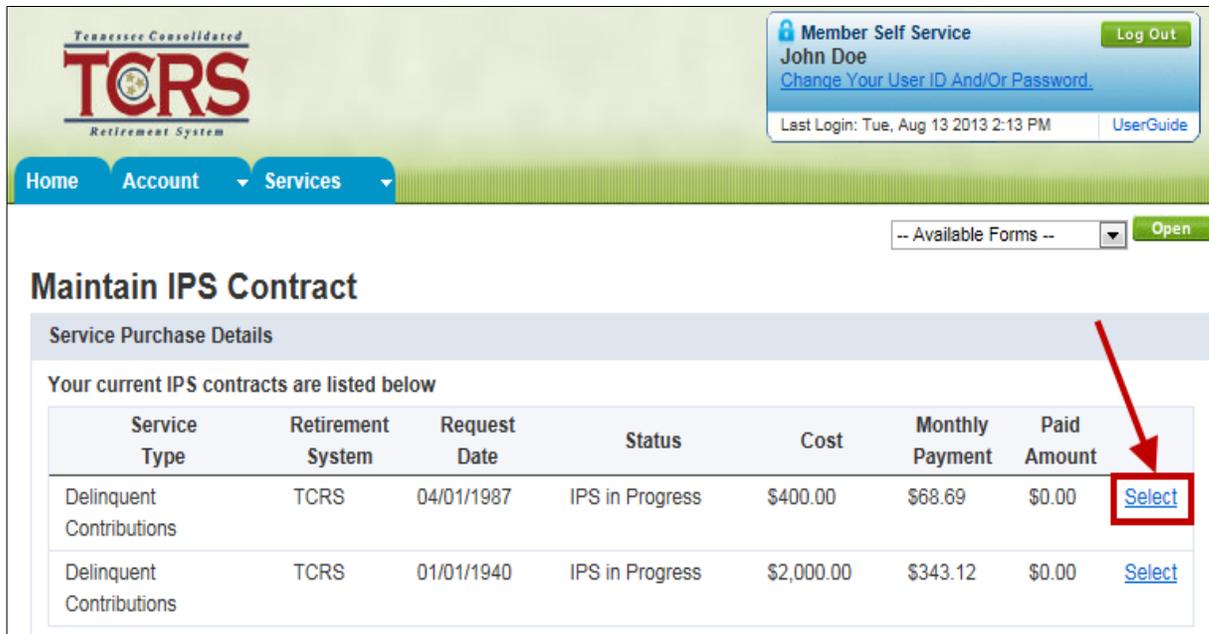


14.3. Making an IPS Supplemental Payment

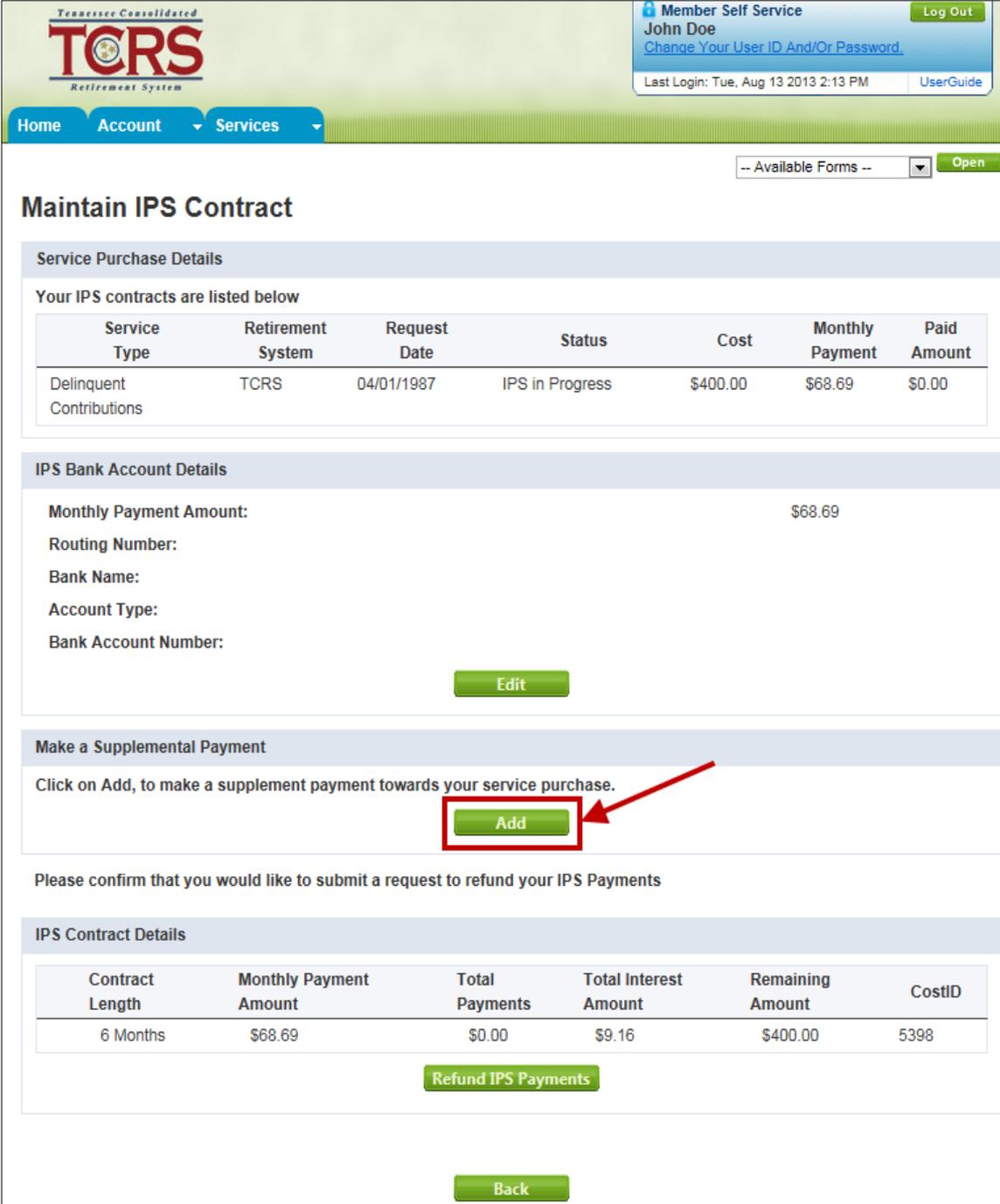
The following steps describe how to make a supplemental payment for an IPS.

Step 1 -- Follow the steps from Section 14.1, Navigating to the Maintain IPS Contract Screen.

Step 2 -- The **Maintain IPS Contract** screen displays. Click  next to the appropriate IPS contract.



Step 3 -- Click  under the *Make a Supplemental Payment* section.



Tennessee Consolidated TCRS Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Tue, Aug 13 2013 2:13 PM
[UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Maintain IPS Contract

Service Purchase Details

Your IPS contracts are listed below

Service Type	Retirement System	Request Date	Status	Cost	Monthly Payment	Paid Amount
Delinquent Contributions	TCRS	04/01/1987	IPS in Progress	\$400.00	\$68.69	\$0.00

IPS Bank Account Details

Monthly Payment Amount: \$68.69

Routing Number:

Bank Name:

Account Type:

Bank Account Number:

[Edit](#)

Make a Supplemental Payment

Click on Add, to make a supplement payment towards your service purchase.

[Add](#)

Please confirm that you would like to submit a request to refund your IPS Payments

IPS Contract Details

Contract Length	Monthly Payment Amount	Total Payments	Total Interest Amount	Remaining Amount	CostID
6 Months	\$68.69	\$0.00	\$9.16	\$400.00	5398

[Refund IPS Payments](#)

[Back](#)

Step 4 -- The **Make a Supplemental IPS Payment** screen displays. Enter the appropriate information under the *Bank Account Details* section, including the **Supplemental Payment Amount**, **Routing Number**, **Account Type**, and **Bank Account Number**.

Note: After entering the **Routing Number**, click  to validate the bank routing number. The **Bank Name** field automatically populates with the correlating bank's name.



Tennessee Consolidated
TCRS
Retirement System

Member Self Service Log Out

John Doe
[Change Your User ID And/Or Password](#)

Last Login: Tue, Aug 13 2013 2:13 PM [UserGuide](#)

Home
Account
Services

-- Available Forms -- ▼ Open

Make an IPS Supplemental Payment

Please enter the details below:

Service Purchase Details

Your IPS contracts are listed below

Service Type	Retirement System	Request Date	Status	Cost	Monthly Payment	Paid Amount
Delinquent Contributions	TCRS	04/01/1987	IPS in Progress	\$400.00	\$68.69	\$0.00

Please confirm that you would like to submit a request to refund your IPS Payments

IPS Contract Details

Contract Length	Monthly Payment Amount	Total Payments	Total Interest Amount	Remaining Amount	CostID
6 Months	\$68.69	\$0.00	\$9.16	\$400.00	5398

Bank Account Details

Supplemental Payment Amount: *

Routing Number: * 

Account Type: * ▼

Bank Account Number: *

Re-enter Bank Account Number: *

Bank Name:

Please click Save to process your request or Cancel to terminate your request.

Save
Cancel

Step 5 -- Click .

Bank Account Details

Supplemental Payment Amount:	*	<input type="text" value="150.00"/>		
Routing Number:	*	<input type="text" value="064000020"/>		Bank Name: BANK OF AMERICA, N.A.
Account Type:	*	<input type="text" value="Checking"/>		
Bank Account Number:	*	<input type="text" value="123456789"/>		
Re-enter Bank Account Number:	*	<input type="text" value="123456789"/>		

Please click Save to process your request or Cancel to terminate your request.

Step 6 -- Verify the information on the screen. Click .

 **Member Self Service** 
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Tue, Aug 13 2013 2:13 PM [UserGuide](#)

Home Account Services

-- Available Forms -- 

Make an IPS Supplemental Payment

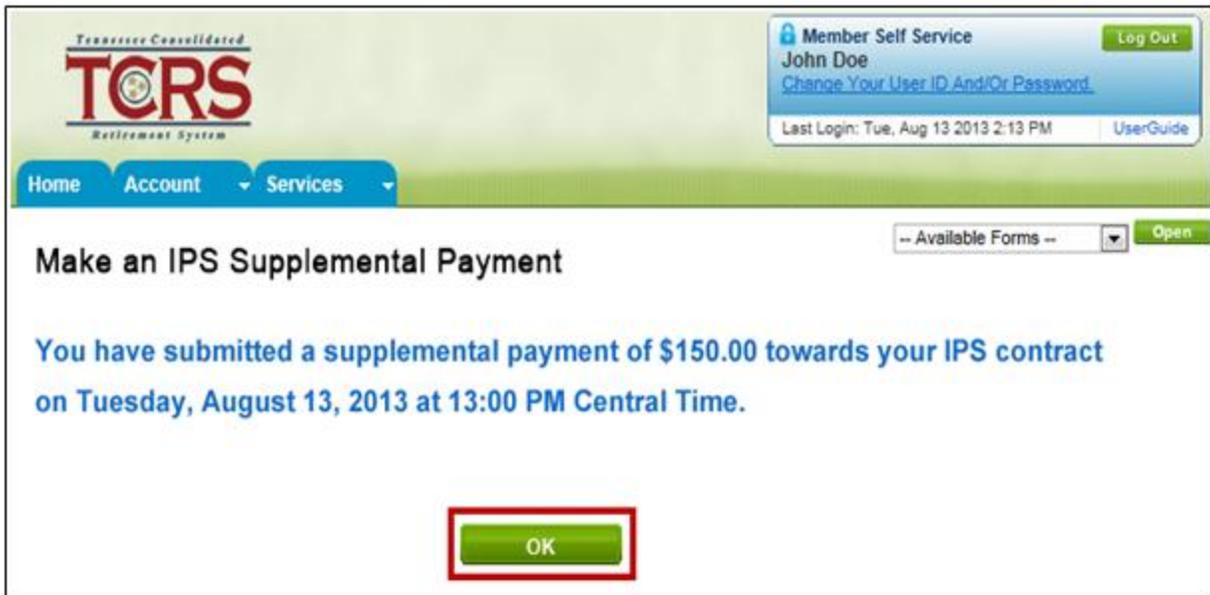
Please verify the IPS Supplemental Payment information below:

Payment Details	
Supplemental Payment Amount:	\$150.00
Routing Number:	064000020
Account Type:	Checking
Bank Name:	BANK OF AMERICA, N.A.
Bank Account Number:	123456789

Please click Submit to confirm your request or Cancel to terminate your request.

Step 7 -- A message displays on the screen confirming the supplemental payment has been successfully requested. Click .



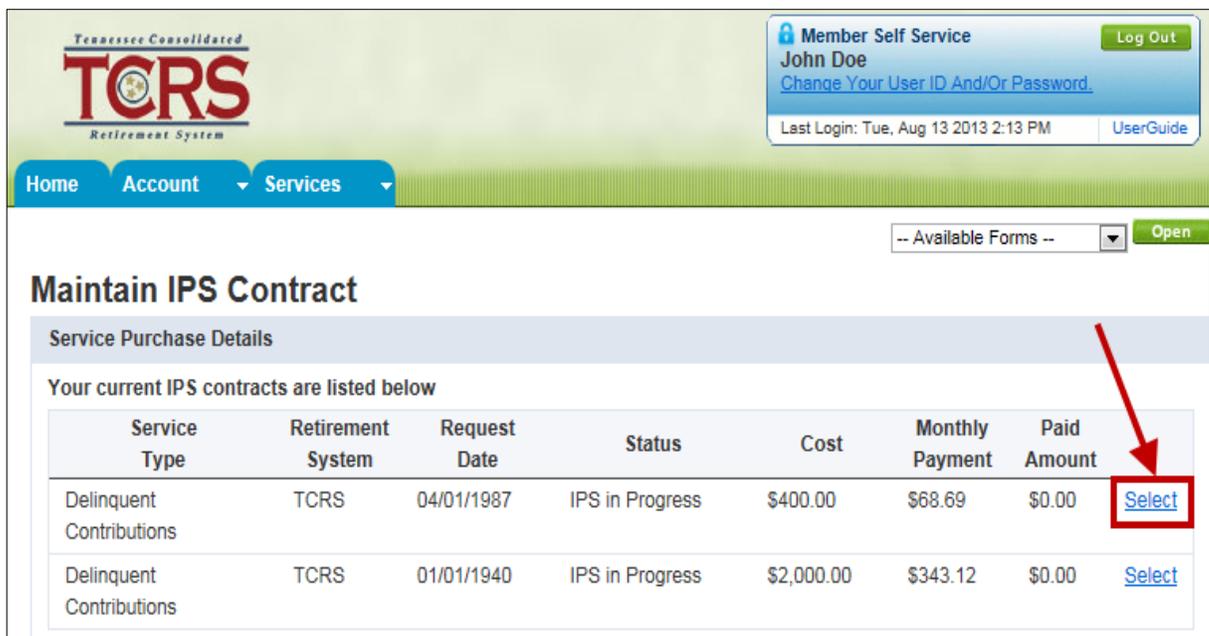
14.4. Refunding IPS Payments

The following steps describe how to refund IPS payments.

Step 1 -- Follow the steps from Section 14.1, Navigating to the Maintain IPS Contract Screen.

Step 2 -- The **Maintain IPS Contract** screen displays. Click  next to the appropriate IPS contract.

Note: If an IPS contract is terminated and refunded, you will not be able to establish a new contract for three years.



Step 3 -- Click **Refund IPS Payments** under the *IPS Contract Details* section.

Tennessee Consolidated TCRS Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Tue, Aug 13 2013 2:13 PM
[UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Maintain IPS Contract

Service Purchase Details

Your IPS contracts are listed below

Service Type	Retirement System	Request Date	Status	Cost	Monthly Payment	Paid Amount
Delinquent Contributions	TCRS	04/01/1987	IPS in Progress	\$400.00	\$68.69	\$0.00

IPS Bank Account Details

Monthly Payment Amount: \$68.69
Routing Number:
Bank Name:
Account Type:
Bank Account Number:

[Edit](#)

Make a Supplemental Payment

Click on Add, to make a supplement payment towards your service purchase.

[Add](#)

Please confirm that you would like to submit a request to refund your IPS Payments

IPS Contract Details

Contract Length	Monthly Payment Amount	Total Payments	Total Interest Amount	Remaining Amount	CostID
6 Months	\$68.69	\$0.00	\$9.16	\$400.00	5398

[Refund IPS Payments](#)

[Back](#)

Step 4 -- Click .

Note: The estimated processing time for the refund is 14 days after submission.

Contract Length	Monthly Payment Amount	Total Payments	Total Interest Amount	Remaining Amount	CostID
6 Months	\$68.69	\$0.00	\$9.16	\$400.00	5398

Step 5 -- A message displays on the screen confirming the refund request has been successfully submitted. Click .

You have successfully submitted a request to refund your IPS payments on Thursday, August 15, 2013 at 8:53:00 AM Central Time.

15. Seminars

The **Seminars** screen allows you to register for upcoming retirement planning seminars. Seminars throughout the entire state will be listed on this screen and can be selected for registration.

15.1. Navigating to the Seminars Screen

The following steps describe how to navigate to the **Seminars** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **Seminars** screen by clicking either [Seminars](#) or the following menu options from the **Home** screen:

Services > Seminars

The screenshot displays the TCRS Member Self Service interface. At the top right, a user is logged in as John Doe. A navigation menu is open under the 'Services' tab, listing various options. The 'Seminars' option is highlighted with a red box. Below the menu, the main content area contains several informational sections, each with a link to a specific service. The 'Seminars' link at the bottom right of this area is also highlighted with a red box.

Member Self Service
John Doe
[Change Your User ID And/Or Password.](#)
Last Login: Thu, Aug 15 2013 2:34 PM [UserGuide](#) [Log Out](#)

Home Account **Services**

- Benefit Estimate
- Service Purchase Request
- Online Service Purchase Status And Payment History
- Maintain IPS Contract
- Invoice Payment
- Seminars**
- Online Retirement Application
- Request Refund

Dear Sheryl,
Welcome to Tennessee Consolidated Retirement System (TCRS) providing you with a modern retirement technology system to help you manage your retirement.
It is our privilege to provide you with this modern retirement technology system.
David H. Lillard, Jr.
Treasurer

* You may view detailed information at the top of each screen.

[Contact Information](#) [Request Refund](#) [Request Refund](#)

This page shows the contact information we have for you. You can change your contact information, including your mailing address, at any time, as well as add phone numbers and e-mail addresses.

[Account Summary](#) [Service Purchase Request](#)

Your account summary provides a snapshot of your retirement account. From this page you can view your retirement plan, contributions and interest, beneficiary information, service and purchases. You can also reset your self-service User ID and/or password.

You are able to submit requests to TCRS to purchase service.

[Account History](#) [Service Purchase Status and Payment History](#)

Your account history gives an overview of your contributions, salaries, and service since you began participation.

You have the ability to track the service purchase costs you have requested and make payments or set up an installment plan. You can also check your history of payments.

[Annual Statement](#) [Maintain IPS Contract](#)

The annual statement provides you with a snapshot of retirement account as of the end of the previous fiscal year. You may view or print any annual statement that has been generated in the system.

You are able to edit your account details, or make supplemental payments towards Installment Purchase of Service IPS.

[Account Balance Letter](#) [Seminars](#)

Step 2 -- The **Seminars** screen displays.

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
 Last Login: Tue, Aug 06 2013 10:53 AM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Seminars

Membership Information

Member ID: 1800458
 Social Security Number: XXX-XX-0457
 Name: John Doe
 Birth Date: 1/10/1983
 Retirement System: TCRS - Tennessee Consolidated Retirement System

Seminars

Retirement Systems offers Pre-Retirement Educational Seminars throughout the state. At these seminars, representatives provide information about benefits, the retirement process, health insurance benefits and other retirement-related information.

Upcoming Dates:

Date Range: to

Date	Seminar	Time	Location
AUG 14	Member Regional Seminar * SEMINAR FULL	7:00 AM - 12:00 PM	State Office Building 415 Church St Nashville, TX 37219-2308 ↗
AUG 30	Member Regional Seminar 20 seats available	9:00 AM - 12:00 PM	State Office Building 300 Church St Nashville, TX 37201-1702 ↗

The *Membership Information* section displays your member ID, social security number, name, birth date, and current retirement system.

Membership Information

Member ID: 1800458
 Social Security Number: XXX-XX-0457
 Name: John Doe
 Birth Date: 1/10/1983
 Retirement System: TCRS - Tennessee Consolidated Retirement System

The *Seminars* section displays a list of seminars that fall within the selected date search criteria. The date, name, time, and location of each seminar are displayed.

Seminars

Retirement Systems offers Pre-Retirement Educational Seminars throughout the state. At these seminars, representatives provide information about benefits, the retirement process, health insurance benefits and other retirement-related information.

Upcoming Dates: Next 90 Days ▾
 Date Range: mm/dd/yyyy to mm/dd/yyyy Show

Date	Seminar	Time	Location	
AUG 14	Member Regional Seminar * SEMINAR FULL	7:00 AM - 12:00 PM	State Office Building 415 Church St Nashville, TX 37219-2308 <small>↗</small>	
AUG 30	Member Regional Seminar 20 seats available	9:00 AM - 12:00 PM	State Office Building 300 Church St Nashville, TX 37201-1702 <small>↗</small>	➔ Register

15.2. Registering for a Seminar

You can search for seminars using either a specified period of time or a specific date range. The following steps describe how to register for an upcoming seminar.

Step 1 -- Search for an upcoming seminar using the **Upcoming Dates** drop down menu or enter dates into the **Date Range** fields.

Note: If no additional seats are available, *** SEMINAR FULL** will display in place of the number of available seats. If a seminar is full, the ➔ Register will not be available.

Note: Clicking on the address link of a seminar listed will navigate you to a map of the location of the seminar.

Seminars

Retirement Systems offers Pre-Retirement Educational Seminars throughout the state. At these seminars, representatives provide information about benefits, the retirement process, health insurance benefits and other retirement-related information.

Upcoming Dates: Next 90 Days ▾
 Date Range: mm/dd/yyyy to mm/dd/yyyy Show

Date	Seminar	Time	Location	
AUG 14	Member Regional Seminar * SEMINAR FULL	7:00 AM - 12:00 PM	State Office Building 415 Church St Nashville, TX 37219-2308 <small>↗</small>	
AUG 30	Member Regional Seminar 20 seats available	9:00 AM - 12:00 PM	State Office Building 300 Church St Nashville, TX 37201-1702 <small>↗</small>	➔ Register

Step 2 -- Click .

Seminars

Retirement Systems offers Pre-Retirement Educational Seminars throughout the state. At these seminars, representatives provide information about benefits, the retirement process, health insurance benefits and other retirement-related information.

Upcoming Dates:

Date Range: to

Date	Seminar	Time	Location	
AUG 14	Member Regional Seminar * SEMINAR FULL	7:00 AM - 12:00 PM	State Office Building 415 Church St Nashville, TX 37219-2308	
AUG 30	Member Regional Seminar 20 seats available	9:00 AM - 12:00 PM	State Office Building 300 Church St Nashville, TX 37201-1702	<input type="button" value="Register"/>

Step 3 -- Select the seminar by clicking .

Seminars

Retirement Systems offers Pre-Retirement Educational Seminars throughout the state. At these seminars, representatives provide information about benefits, the retirement process, health insurance benefits and other retirement-related information.

Upcoming Dates:

Date Range: to

Date	Seminar	Time	Location	
AUG 14	Member Regional Seminar * SEMINAR FULL	7:00 AM - 12:00 PM	State Office Building 415 Church St Nashville, TX 37219-2308	
AUG 30	Member Regional Seminar 20 seats available	9:00 AM - 12:00 PM	State Office Building 300 Church St Nashville, TX 37201-1702	<input type="button" value="Register"/>

Step 4 -- The Registration screen displays.

The screenshot shows the TCRS Member Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right, a blue box displays "Member Self Service" for "John Doe", with a "Log Out" button and a link to "Change Your User ID And/Or Password". Below this, it shows the last login time as "Tue, Aug 06 2013 11:25 AM" and a "UserGuide" link. A navigation bar contains "Home", "Account", and "Services" tabs. Below the navigation bar is a dropdown menu for "Available Forms" with an "Open" button. The main content area is titled "Seminars" and contains a paragraph of instructions: "You have selected the PREP seminar listed below. Please bear in mind that member-specific retirement information will not be available at the seminar. In order to confirm your reservation, enter your preferred email address (required) and a phone number (optional). You will received a reminder email two days prior to the seminar." Below this is a "Seminar Information" section with the following details: Session: Member Regional Seminar; Topic: (blank); Date: Friday, August 30 2013; Time: 9:00 AM - 12:00 PM; Location: State Office Building - [website](#), [300 Church St](#), [Nashville, TX 37201-1702](#); Seats Available: 20. The "Contact Information" section includes input fields for E-mail (marked with a red asterisk), Home Phone, Work Phone, and Mobile Phone. At the bottom of the contact section are "Cancel" and "Submit" buttons.

Step 5 -- Enter the information under the *Contact Information* section.

The screenshot shows the TCRS Member Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right, a user profile for "John Doe" is displayed, including a "Log Out" button, a link to "Change Your User ID And/Or Password", and the last login date: "Tue, Aug 06 2013 11:25 AM". Below the header is a navigation menu with "Home", "Account", and "Services" tabs. A dropdown menu for "Available Forms" is set to "Open".

Seminars

You have selected the PREP seminar listed below. Please bear in mind that member-specific retirement information will not be available at the seminar. In order to confirm your reservation, enter your preferred email address (required) and a phone number (optional). You will received a reminder email two days prior to the seminar.

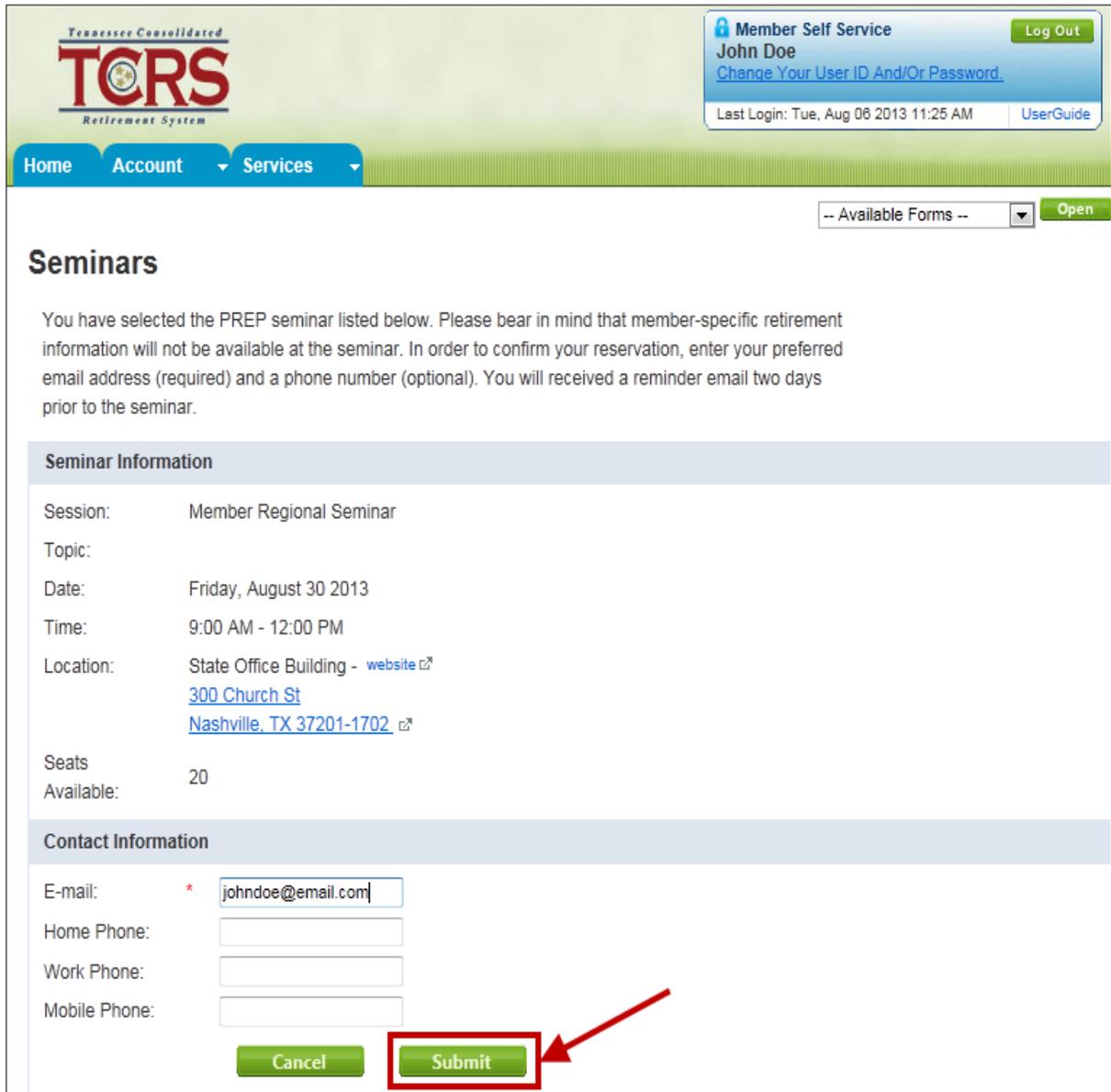
Seminar Information	
Session:	Member Regional Seminar
Topic:	
Date:	Friday, August 30 2013
Time:	9:00 AM - 12:00 PM
Location:	State Office Building - website 300 Church St Nashville, TX 37201-1702
Seats Available:	20

Contact Information	
E-mail: *	<input type="text"/>
Home Phone:	<input type="text"/>
Work Phone:	<input type="text"/>
Mobile Phone:	<input type="text"/>

At the bottom of the contact information section are two buttons: "Cancel" and "Submit". A red box highlights the contact information fields, and a red arrow points to the E-mail field.

Step 6 -- Click  .

Note: Click  at any time to cancel the registration process for the seminar.



The screenshot shows the TCRS Member Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right is a user profile box for "John Doe" with a "Log Out" button and a link to "Change Your User ID And/Or Password". Below the logo is a navigation bar with "Home", "Account", and "Services" tabs. A dropdown menu is open under "Services", showing "-- Available Forms --" and an "Open" button. The main content area is titled "Seminars" and contains a paragraph of instructions: "You have selected the PREP seminar listed below. Please bear in mind that member-specific retirement information will not be available at the seminar. In order to confirm your reservation, enter your preferred email address (required) and a phone number (optional). You will received a reminder email two days prior to the seminar." Below this is a "Seminar Information" section with the following details: Session: Member Regional Seminar; Topic: (blank); Date: Friday, August 30 2013; Time: 9:00 AM - 12:00 PM; Location: State Office Building - [website](#), [300 Church St](#), [Nashville, TX 37201-1702](#); Seats Available: 20. Below that is a "Contact Information" section with input fields for E-mail (containing "johndoe@email.com"), Home Phone, Work Phone, and Mobile Phone. At the bottom are "Cancel" and "Submit" buttons. A red box highlights the "Submit" button, and a red arrow points to it from the right.

Step 7 -- A message displays on the screen indicating the seminar registration is complete. Click

Continue

Tennessee Consolidated
TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Tue, Aug 06 2013 11:25 AM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Seminars

Registration Successful

You have successfully registered for this seminar. Please keep in mind that no individual benefit or purchase information will be available at the seminar. A confirmation/reminder email will be sent to the email address you provided.

Continue

Step 8 -- The **Seminars** screen displays with the information for the registered seminar.

Tennessee Consolidated
TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Tue, Aug 06 2013 11:25 AM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Seminars

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983
Retirement System: TCRS - Tennessee Consolidated Retirement System

Seminars

Retirement Systems offers Pre-Retirement Educational Seminars throughout the state. At these seminars, representatives provide information about benefits, the retirement process, health insurance benefits and other retirement-related information.

Upcoming Dates:

Date Range: to

Date	Seminar	Time	Location
AUG 14	Member Regional Seminar * SEMINAR FULL	7:00 AM - 12:00 PM	State Office Building 415 Church St Nashville, TX 37219-2308
AUG 30	Member Regional Seminar 19 seats available	9:00 AM - 12:00 PM	State Office Building 300 Church St Nashville, TX 37201-1702

You are currently registered for this seminar. To cancel, [click here](#).

15.3. Canceling Registration for a Seminar

The following steps describe how to cancel a registration for an upcoming seminar.

Step 1 -- Follow the steps from Section 15.1 Navigating to the Seminars Screen.

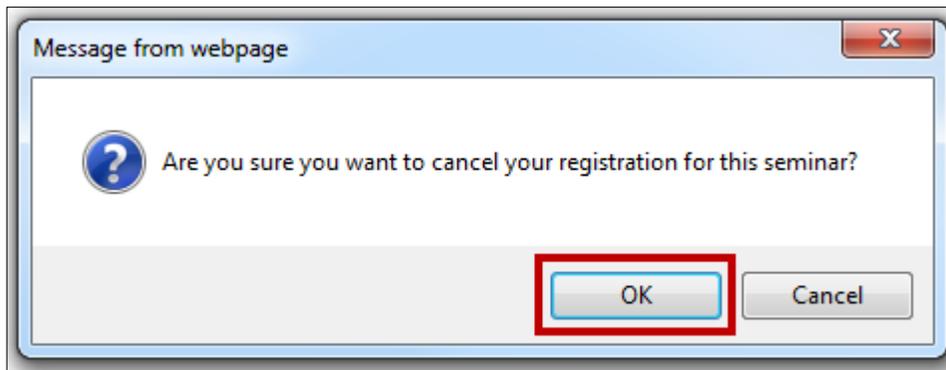
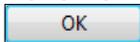
Step 2 -- Click [click here](#).

The screenshot shows the TCRS Member Self Service interface. At the top, there is a navigation bar with 'Home', 'Account', and 'Services' tabs. A user profile box in the top right identifies the user as John Doe, with a 'Log Out' button and a link to 'Change Your User ID And/Or Password'. Below the navigation bar, there is a dropdown menu for 'Available Forms' and an 'Open' button. The main content area is titled 'Seminars' and contains a 'Membership Information' section with fields for Member ID (1800458), Social Security Number (XXX-XX-0457), Name (John Doe), Birth Date (1/10/1983), and Retirement System (TCRS - Tennessee Consolidated Retirement System). Below this is a 'Seminars' section with a descriptive paragraph and two filter options: 'Upcoming Dates' (set to 'Next 90 Days') and 'Date Range' (with input fields for mm/dd/yyyy and a 'Show' button). A table lists two seminars:

Date	Seminar	Time	Location
AUG 14	Member Regional Seminar * SEMINAR FULL	7:00 AM - 12:00 PM	State Office Building 415 Church St Nashville, TX 37219-2308
AUG 30	Member Regional Seminar 19 seats available	9:00 AM - 12:00 PM	State Office Building 300 Church St Nashville, TX 37201-1702

To the right of the second seminar row, there is a message: 'You are currently registered for this seminar. To cancel [click here](#)'. A red arrow points to this link.

Step 3 -- A pop-up window displays, asking to verify if the registration should be canceled. Click



16. Online Retirement Application

The **Online Retirement Application** screen allows you to complete an application for retirement through the MSS website.

16.1. Navigating to the Online Retirement Application

The following steps describe how to navigate to the **Online Retirement Application** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **Online Retirement Application** screen by clicking either [Online Retirement Application](#) or the following menu options from the **Home** screen:

Services > Online Retirement Application

The screenshot displays the TCRS Member Self Service interface. At the top right, the user is identified as John Doe, with a 'Log Out' button and a link to 'Change Your User ID And/Or Password'. The last login is noted as Tuesday, September 3, 2013, at 1:54 PM. A 'UserGuide' link is also present. The navigation bar includes 'Home', 'Account', and 'Services'. The 'Services' dropdown menu is open, listing several options: Benefit Estimate, Service Purchase Request, Online Service Purchase Status And Payment History, Maintain IPS Contract, Invoice Payment, Seminars, and Online Retirement Application. The 'Online Retirement Application' option is highlighted with a red rectangular box. Below the menu, a 'Request Refund' link is visible. The main content area contains a welcome message from David H. Lillard, Jr., Treasurer, and a list of service links with brief descriptions: Contact Information, Account Summary, Account History, Annual Statement, Account Balance Letter, Member Correspondence, Service Purchase Request, Service Purchase Status and Payment History, Maintain IPS Contract, Seminars, and Online Retirement Application. The 'Online Retirement Application' link at the bottom right is also highlighted with a red rectangular box.

Step 2 -- The **Online Retirement Application** screen displays. There are four tabs to the online application: **Confirm Information**, **Retirement Information**, **EFT & Tax Information**, and **Confirmation**.

Note: As the information on each tab is completed, you will be taken to the next tab to complete the required fields. The tab being worked on will be highlighted blue. As each tab is complete, it will change from blue to green.

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Thu, Aug 15 2013 4:59 PM [UserGuide](#) [Log Out](#)

Home Account Services

Available Forms -- Open

Online Retirement Application

Confirm Information Retirement Information EFT and Tax Information Confirmation

Welcome to the Online Retirement Application. Before you get started, please have important information such as your bank account details and tax withholding information available.

If you have not received a benefit estimate in the last year, please use our Benefit Estimate tool from the Services menu to request a benefit estimate.

Your application will not be saved until it is submitted to TCRS. Please make decisions carefully. Limited changes can be made after retirement.

Is this a Disability Retirement? No Yes

Please confirm the information below. It will be used to calculate your benefit. You can change it by clicking on the link next to it.

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983

Beneficiary Information

Beneficiaries					
SSN	Name	Gender	Date of Birth	Relationship	Address
XXX-XX-6789	DOE, KRISTI	F	11/21/1965	Sibling	

If you would like to change your Beneficiary Information please click [here](#)

Note: You can return to this page through the Online Retirement Application option in the Services menu.

Mailing Address Information

All correspondence will be sent to your mailing address.

Mailing Address: John Doe
100 NORTH ST
NASHVILLE, TN 37206-4215

If you would like to change your mailing address information please click [here](#)

Note: You can return to this page through the Online Retirement Application option in the Services menu.

Contact Information

Your current home phone number on file is: (555) 555-5555

Your current work phone number on file is:

Your current cell phone number on file is:

Your current fax number on file is:

Your current email address on file is: johndoe@email.com

If you would like to change your contact information please click [here](#)

Note: You can return to this page through the Online Retirement Application option in the Services menu.

Next >

16.2. Submitting an Online Retirement Application

The following steps describe how to complete and submit an **Online Retirement Application**.

Step 1 -- Follow the steps from Section 16.1, Navigating to the Online Retirement Application Screen.

Step 2 -- The **Online Retirement Application** displays. Select the **Yes** or **No** radio button, indicating whether or not it is a Disability Retirement.

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Thu, Aug 15 2013 4:59 PM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Online Retirement Application

Confirm Information Retirement Information EFT and Tax Information Confirmation

Welcome to the Online Retirement Application. Before you get started, please have important information such as your bank account details and tax withholding information available.

If you have not received a benefit estimate in the last year, please use our Benefit Estimate tool from the Services menu to request a benefit estimate.

Your application will not be saved until it is submitted to TCRS. Please make decisions carefully. Limited changes can be made after retirement.

Is this a Disability Retirement? No Yes

Please confirm the information below. It will be used to calculate your benefit. You can change it by clicking on the link next to it.

Membership Information

Member ID: 1800458
Social Security Number: XXX-XX-0457
Name: John Doe
Birth Date: 1/10/1983

Beneficiary Information

Beneficiaries						
SSN	Name	Gender	Date of Birth	Relationship	Address	
XXX-XX-6789	DOE, KRISTI	F	11/21/1965	Sibling		

If you would like to change your Beneficiary Information please click [here](#)

Note: You can return to this page through the Online Retirement Application option in the Services menu.

Mailing Address Information

All correspondence will be sent to your mailing address.

Mailing Address: John Doe
100 NORTH ST
NASHVILLE, TN 37206-4215

If you would like to change your mailing address information please click [here](#)

Note: You can return to this page through the Online Retirement Application option in the Services menu.

Contact Information

Your current home phone number on file is: (555) 555-5555

Your current work phone number on file is:

Your current cell phone number on file is:

Your current fax number on file is:

Your current email address on file is: johndoe@email.com

- A. If the **No** radio button is selected, continue to Step 3 below.
- B. If the **Yes** radio button is selected, an additional question will display. Select the appropriate radio button to indicate the type of Disability Retirement.

Is this a Disability Retirement? No Yes

Is this a: Ordinary Disability Retirement Accidental Disability Retirement(On the Job Accidental Only)

Step 3 -- Confirm all information in the *Membership Information*, *Beneficiary Information*, *Mailing Address Information*, and *Contact Information* sections on the **Confirm Information** tab.

Click  .

Note: All contact information must be accurate. To update contact information, navigate to the **Contact Information** or **Beneficiary** screen in MSS to make these updates. You will have to start your retirement application again after changes have been made. If changes are necessary, these updates should be made on the applicable screens prior to proceeding with the application for retirement.

Online Retirement Application

Confirm Information Retirement Information EFT and Tax Information Confirmation

Welcome to the Online Retirement Application. Before you get started, please have important information such as your bank account details and tax withholding information available.

If you have not received a benefit estimate in the last year, please use our Benefit Estimate tool from the Services menu to request a benefit estimate.

Your application will not be saved until it is submitted to TCRS. Please make decisions carefully. Limited changes can be made after retirement.

Is this a Disability Retirement? No Yes

Please confirm the information below. It will be used to calculate your benefit
 You can change it by clicking on the link next to it.

Membership Information

Member ID: 1800458
 Social Security Number: XXX-XX-0457
 Name: John Doe
 Birth Date: 1/10/1983

Beneficiary Information

Beneficiaries

SSN	Name	Gender	Date of Birth	Relationship	Address
XXX-XX-6789	DOE, KRISTI	F	11/21/1965	Sibling	

If you would like to change your Beneficiary Information please click [here](#)

Note: You can return to this page through the Online Retirement Application option in the Services menu.

Mailing Address Information

All correspondence will be sent to your mailing address.

Mailing Address: John Doe
 100 NORTH ST
 NASHVILLE, TN 37206-4215

If you would like to change your mailing address information please click [here](#)

Note: You can return to this page through the Online Retirement Application option in the Services menu.

Contact Information

Your current home phone number on file is: (555) 555-5555

Your current work phone number on file is:

Your current cell phone number on file is:

Your current fax number on file is:

Your current email address on file is: johndoe@email.com

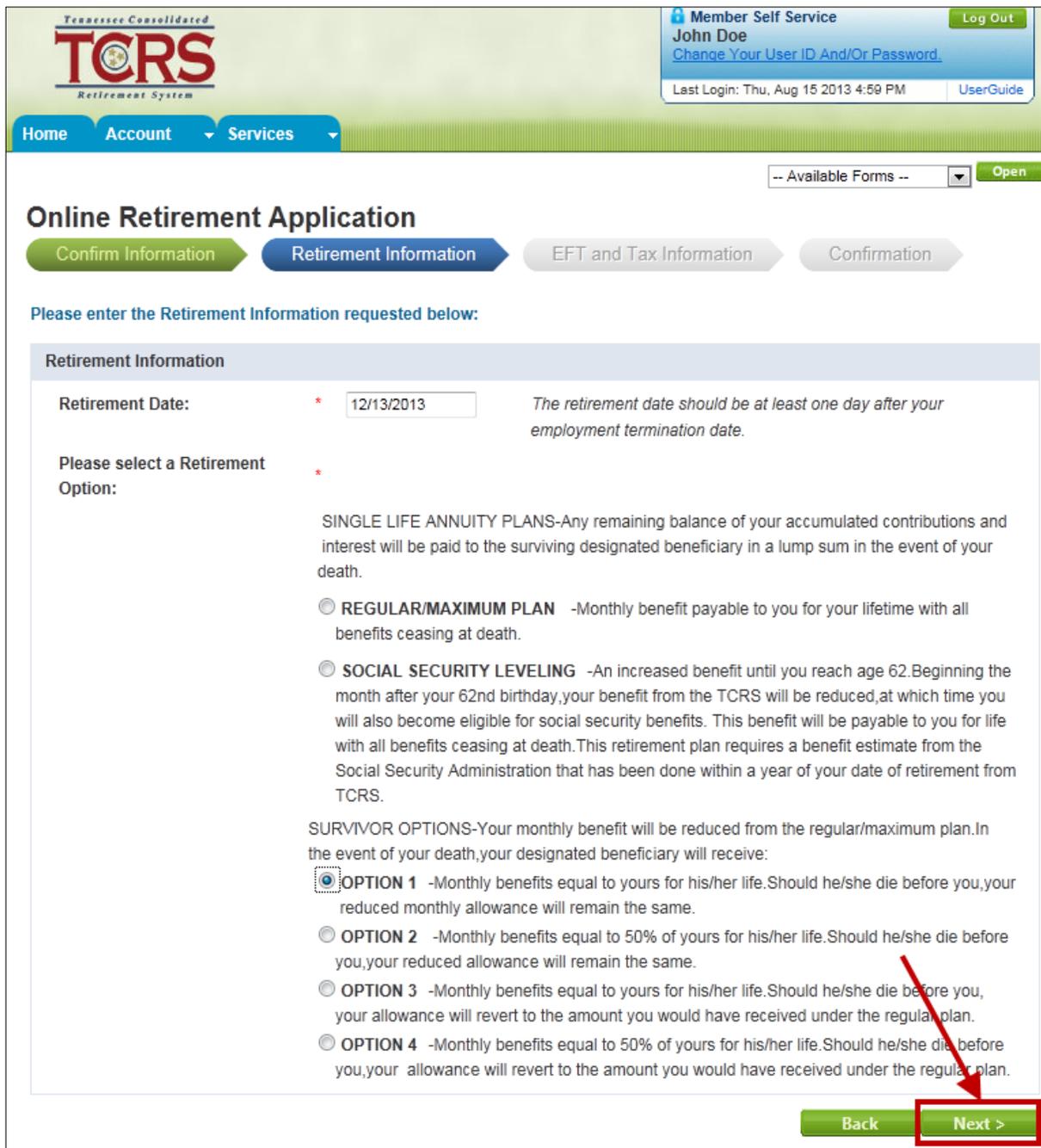
If you would like to change your contact information please click [here](#)

Note: You can return to this page through the Online Retirement Application option in the Services menu.

Next >

Step 4 -- The **Retirement Information** tab displays. Enter the **Retirement Date** and select a **Retirement Option**. Click .

Note: The date entered in the **Retirement Date** field cannot be greater than 150 days from the current date.



The screenshot shows the TCRS Retirement System Member Self Service interface. At the top, there is a navigation bar with "Home", "Account", and "Services" tabs. A user profile box displays "Member Self Service", "John Doe", and a "Log Out" button. Below the navigation bar, there is a "Retirement Information" tab selected, with other tabs for "Confirm Information", "EFT and Tax Information", and "Confirmation". The main content area is titled "Online Retirement Application" and contains a form for "Retirement Information". The form includes a "Retirement Date" field with the value "12/13/2013" and a "Please select a Retirement Option" section. The options are: "SINGLE LIFE ANNUITY PLANS", "REGULAR/MAXIMUM PLAN", "SOCIAL SECURITY LEVELING", and "SURVIVOR OPTIONS". Under "SURVIVOR OPTIONS", there are four sub-options: "OPTION 1" (selected), "OPTION 2", "OPTION 3", and "OPTION 4". A red arrow points to the "Next >" button at the bottom right of the form.

Member Self Service
John Doe
Change Your User ID And/Or Password
Last Login: Thu, Aug 15 2013 4:59 PM
UserGuide

Home Account Services

-- Available Forms -- Open

Online Retirement Application

Confirm Information Retirement Information EFT and Tax Information Confirmation

Please enter the Retirement Information requested below:

Retirement Information

Retirement Date: * *The retirement date should be at least one day after your employment termination date.*

Please select a Retirement Option: *

SINGLE LIFE ANNUITY PLANS-Any remaining balance of your accumulated contributions and interest will be paid to the surviving designated beneficiary in a lump sum in the event of your death.

REGULAR/MAXIMUM PLAN -Monthly benefit payable to you for your lifetime with all benefits ceasing at death.

SOCIAL SECURITY LEVELING -An increased benefit until you reach age 62.Beginning the month after your 62nd birthday,your benefit from the TCRS will be reduced,at which time you will also become eligible for social security benefits. This benefit will be payable to you for life with all benefits ceasing at death.This retirement plan requires a benefit estimate from the Social Security Administration that has been done within a year of your date of retirement from TCRS.

SURVIVOR OPTIONS-Your monthly benefit will be reduced from the regular/maximum plan.In the event of your death,your designated beneficiary will receive:

OPTION 1 -Monthly benefits equal to yours for his/her life.Should he/she die before you,your reduced monthly allowance will remain the same.

OPTION 2 -Monthly benefits equal to 50% of yours for his/her life.Should he/she die before you,your reduced allowance will remain the same.

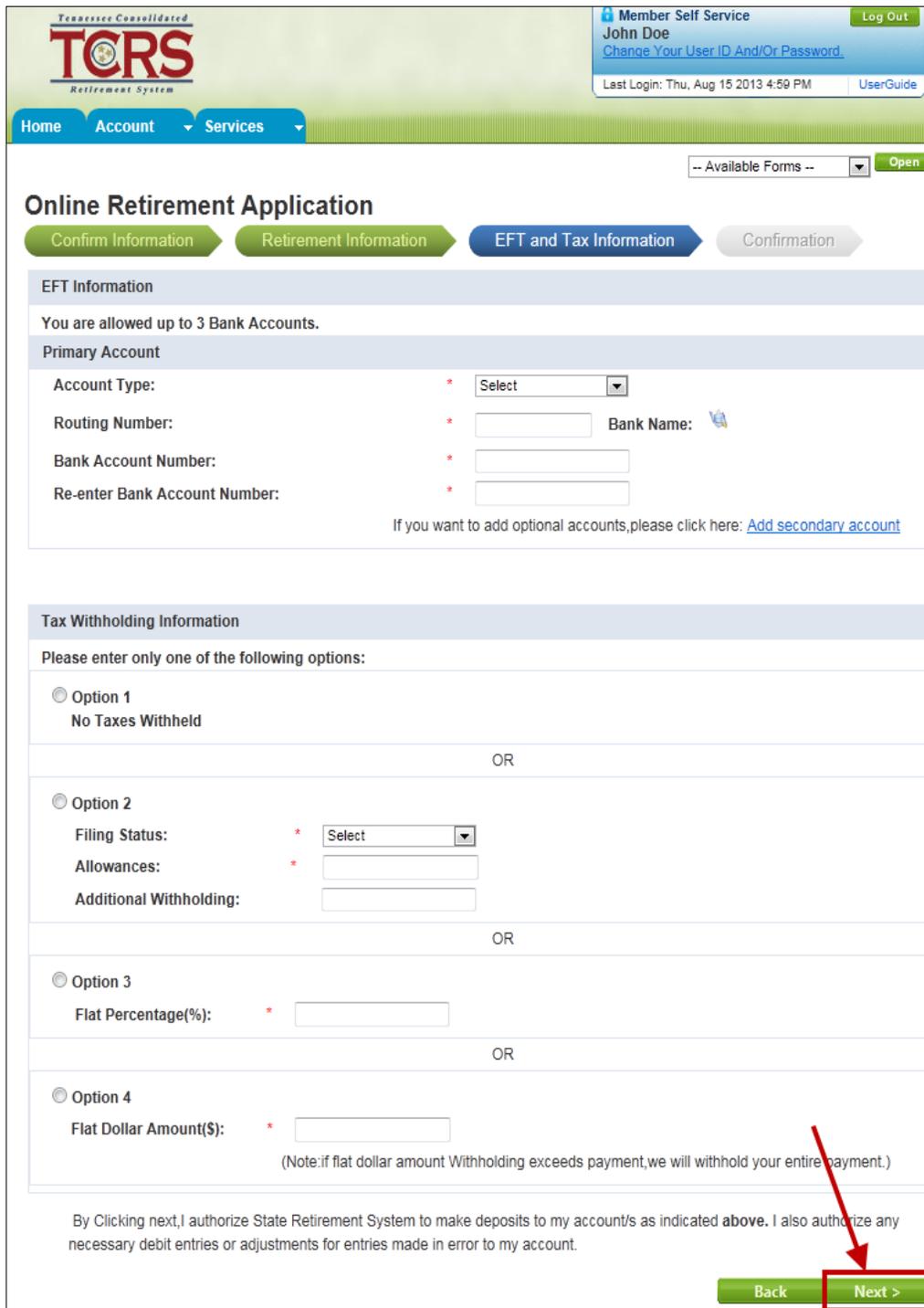
OPTION 3 -Monthly benefits equal to yours for his/her life.Should he/she die before you, your allowance will revert to the amount you would have received under the regular plan.

OPTION 4 -Monthly benefits equal to 50% of yours for his/her life.Should he/she die before you,your allowance will revert to the amount you would have received under the regular plan.

Back Next >

Step 5 -- The **EFT & Tax Information** tab displays. Enter the EFT and tax withholding information.

Click  .



The screenshot shows the 'EFT and Tax Information' step of the online retirement application. The page header includes the TCRS logo and user information for John Doe. The navigation bar shows 'Home', 'Account', and 'Services'. The main content area is titled 'Online Retirement Application' and has four tabs: 'Confirm Information', 'Retirement Information', 'EFT and Tax Information' (which is active), and 'Confirmation'. Below the tabs, there are two main sections: 'EFT Information' and 'Tax Withholding Information'. The 'EFT Information' section allows for up to 3 bank accounts and includes fields for Account Type, Routing Number, Bank Account Number, and Re-enter Bank Account Number. The 'Tax Withholding Information' section offers four options: Option 1 (No Taxes Withheld), Option 2 (Filing Status, Allowances, and Additional Withholding), Option 3 (Flat Percentage%), and Option 4 (Flat Dollar Amount\$). A red arrow points to the 'Next >' button at the bottom right of the form.

EFT Information

You are allowed up to 3 Bank Accounts.

Primary Account

Account Type: * Select

Routing Number: * Bank Name: *

Bank Account Number: *

Re-enter Bank Account Number: *

If you want to add optional accounts, please click here: [Add secondary account](#)

Tax Withholding Information

Please enter only one of the following options:

Option 1
No Taxes Withheld

OR

Option 2

Filing Status: * Select

Allowances: *

Additional Withholding:

OR

Option 3

Flat Percentage(%): *

OR

Option 4

Flat Dollar Amount(\$): *

(Note: if flat dollar amount Withholding exceeds payment, we will withhold your entire payment.)

By Clicking next, I authorize State Retirement System to make deposits to my account/s as indicated above. I also authorize any necessary debit entries or adjustments for entries made in error to my account.

Step 6 -- The **Confirmation** tab displays. Verify the entered information and select the check boxes for each TCRS acknowledgement statement.



TCRS
Retirement System

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)

Last Login: Wed, Sep 04 2013 1:52 PM [UserGuide](#)

Home
Account
Services

-- Available Forms -- Open

Online Retirement Application

Confirm Information
Retirement Information
EFT and Tax Information
Confirmation

Please verify the information you have provided:

Should you need to modify your retirement application once submitted and before it gets approved, you would have to cancel your request and submit a new application.

Is this a Disability Retirement? No

Membership Information

Member ID: 1800458
 Social Security Number: XXX-XX-0457
 Name: John Doe
 Birth Date: 1/10/1983
 Retirement System: TCRS - Tennessee Consolidated Retirement System

Beneficiary Information

Beneficiaries

Mailing Address Information

All correspondence will be sent to your mailing address.

Mailing Address: John Doe
 100 NORTH ST
 NASHVILLE, TN 37206-4215

Contact Information

Your current home phone number on file is: (555) 555-5555

Your current work phone number on file is:

Your current cell phone number on file is:

Your current fax number on file is:

Your current email address on file is: johndoe@email.com

Retirement Information

Retirement Date: 12/30/2013
 Retirement Option: REGULAR/MAXIMUM PLAN - Monthly benefit payable to you for your lifetime with all benefits ceasing at death.

EFT Information

Primary Account

Bank Name:	BANK OF AMERICA, N.A.	Account Type:	Checking
Routing Number:	064000020	Account Number:	1234
Account:	Primary		

Tax Withholding Information

Tax Status: Federal taxes have been withheld

Under the penalties of perjury, I attest that as of the date of this application for retirement benefits, I am either a United States citizen or AccessKey qualified alien as described by 8 U.S.C. §164 (b). I acknowledge and understand that should I knowingly and willfully make a false, fictitious, or fraudulent statement or representation relative to my citizenship or immigration status, or conspire to defraud the state by securing a false claim allowed or paid to another person, I shall be liable under either The Tennessee Medicaid false Claims Act pursuant to Tenn. Code Ann. §71-5-181-§71-5-185 or The False Claims Act pursuant to Tenn. Code Ann. §4-18-101- §4-18-108 and may have a criminal action brought against me alleging a violation of 18 U.S.C. §911, which provides that whoever falsely and willfully represents himself to be a citizen of the United States shall be fined under this title or imprisoned not more than three (3) years, or both.

By checking both boxes and clicking on the Submit button you are officially submitting your retirement application to the Tennessee Consolidated Retirement System for processing and you acknowledge that you have carefully completed and truthfully answered all questions contained herein to the best of your knowledge and belief. You further certify that you understand that if you obtain part-time employment on an at-will or contractual basis with an agency covered by the Tennessee Consolidated System, you are required to notify the Tennessee Consolidated Retirement System and my benefit will be suspended except as provided by Part 8, Chapter 36 of Title 8 Tennessee Code Annotated

Back
Submit

Step 7 -- Click



Under the penalties of perjury, I attest that as of the date of this application for retirement benefits, I am either a United States citizen or AccessKey qualified alien as described by 8 U.S.C. §164 (b). I acknowledge and understand that should I knowingly and willfully make a false, fictitious, or fraudulent statement or representation relative to my citizenship or immigration status, or conspire to defraud the state by securing a false claim allowed or paid to another person, I shall be liable under either The Tennessee Medicaid false Claims Act pursuant to Tenn. Code Ann. §71-5-181-§71-5-185 or The False Claims Act pursuant to Tenn. Code Ann. §4-18-101- §4-18-108 and may have a criminal action brought against me alleging a violation of 18 U.S.C. §911, which provides that whoever falsely and willfully represents himself to be a citizen of the United States shall be fined under this title or imprisoned not more than three (3) years, or both.

By checking both boxes and clicking on the Submit button you are officially submitting your retirement application to the Tennessee Consolidated Retirement System for processing and you acknowledge that you have carefully completed and truthfully answered all questions contained herein to the best of your knowledge and belief. You further certify that you understand that if you obtain part-time employment on an at-will or contractual basis with an agency covered by the Tennessee Consolidated System, you are required to notify the Tennessee Consolidated Retirement System and my benefit will be suspended except as provided by Part 8, Chapter 36 of Title 8 Tennessee Code Annotated

Step 8 -- The **Status** screen displays, showing the status of the application.

Note: A confirmation email is sent to the email address on record. Any documents that must be submitted to TCRS will be listed on the **Status** screen, along with the submission address to mail, email, or fax.

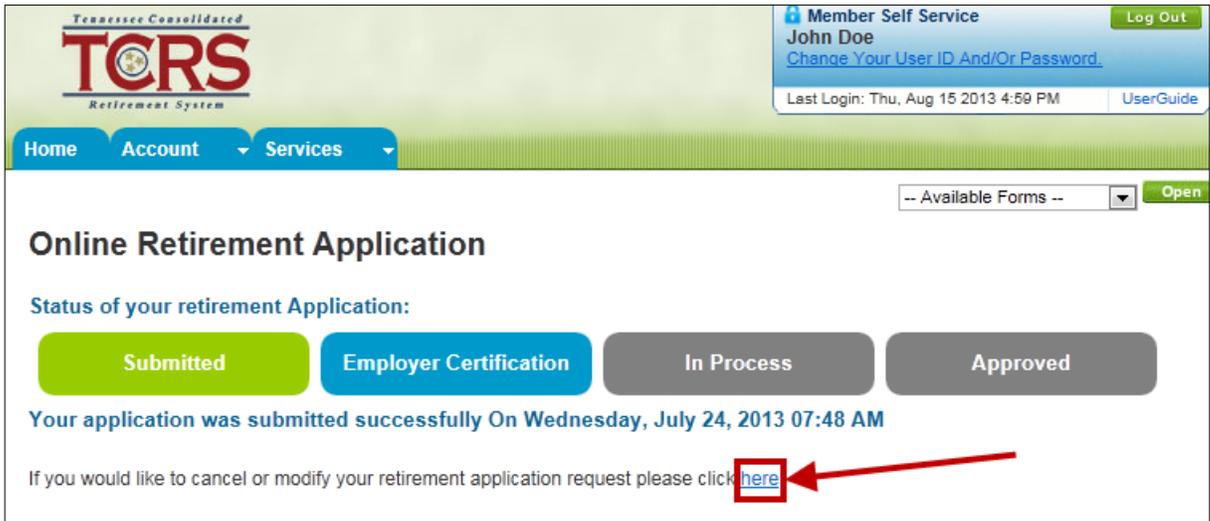
The screenshot shows the TCRS Member Self Service interface. At the top, there is a navigation bar with 'Home', 'Account', and 'Services' tabs. A user profile box for 'John Doe' is visible, including a 'Log Out' button and a 'UserGuide' link. The main content area is titled 'Online Retirement Application' and shows the status of the application as 'Submitted'. Below this, there are buttons for 'Submitted', 'Employer Certification', 'In Process', and 'Approved'. A message states: 'Your application was submitted successfully On Wednesday, July 24, 2013 07:48 AM'. There is a link to cancel or modify the application. A section titled 'In order for TCRS to process your retirement application, the following documents need to be submitted:' lists requirements for US citizens and qualified aliens. At the bottom, there is contact information for the Tennessee Consolidated Retirement System.

16.3. Canceling an Online Retirement Application

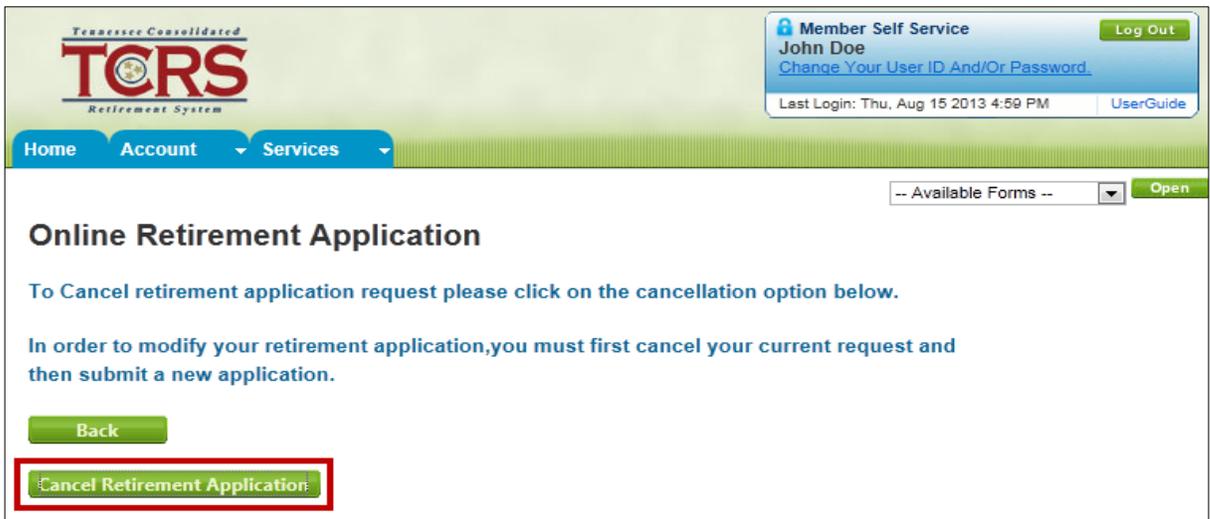
The following steps describe how to cancel an **Online Retirement Application** that was previously submitted but not yet approved.

Step 1 -- Follow the steps from Section 16.1, Navigating to the Online Retirement Application Screen.

Step 2 -- The **Online Retirement Application** screen displays with the status of the application. Click [here](#) to cancel the application.



Step 3 -- Click [Cancel Retirement Application](#).



Step 4 -- Click



The screenshot shows the TCRS Member Self Service interface. At the top left is the TCRS logo. At the top right, a user profile box displays "Member Self Service", "John Doe", and a "Log Out" button. Below the logo is a navigation bar with "Home", "Account", and "Services" tabs. A dropdown menu for "Services" is open, showing "-- Available Forms --" and an "Open" button. The main content area is titled "Online Retirement Application" and contains the message: "Your Retirement Application request for cancellation has been submitted on Wednesday, July 24, 2013 07:48 AM". A green "Ok" button is highlighted with a red border.

16.4. Checking the Status of an Online Retirement Application

The following steps describe how check the status of an **Online Retirement Application** that was previously submitted.

Step 1 -- Follow the steps from Section 16.1 Navigating to the Online Retirement Application Screen.

Step 2 -- The **Online Retirement Application** screen displays with the status of the application.

The screenshot shows the TCRS Member Self Service interface. At the top left is the TCRS logo. At the top right, a user profile box displays "Member Self Service", "John Doe", and a "Log Out" button. Below the logo is a navigation bar with "Home", "Account", and "Services" tabs. A dropdown menu for "Services" is open, showing "-- Available Forms --" and an "Open" button. The main content area is titled "Online Retirement Application" and contains the message: "Status of your retirement Application:". Below this message are four buttons: "Submitted" (highlighted with a red border), "Employer Certification", "In Process", and "Approved". Below the buttons is the message: "Your application was submitted successfully On Wednesday, July 24, 2013 07:48 AM". At the bottom, there is a link: "If you would like to cancel or modify your retirement application request please click [here](#)".

17. Request Refund

The **Request Refund** screen allows you to request a refund through the MSS website. Active members who have contributed to the retirement system and are not actively reported by a participating employer may refund their contributions and accumulated interest upon termination of employment. When accessing this transaction, the system performs a check to determine whether or not you are eligible for a monthly benefit.

17.1. Navigating to the Request Refund Screen

The following steps describe how to navigate to the **Request Refund** screen. You will first log in to the MSS website to follow the steps in the sections that follow.

Step 1 -- Navigate to the **Request Refund** screen by clicking either [Request Refund](#) or the following menu options from the **Home** screen:

Services > Request Refund

The screenshot displays the TCRS Member Self Service interface. At the top, the user is logged in as John Doe. The navigation menu includes Home, Account, and Services. The Services dropdown menu is open, showing options such as Benefit Estimate, Service Purchase Request, Online Service Purchase Status And Payment History, Maintain IPS Contract, Invoice Payment, Seminars, and Online Retirement Application. The Request Refund option is highlighted with a red box. Below the menu, the main content area contains various service links and descriptions, with the Request Refund link also highlighted with a red box.

Member Self Service
John Doe
[Change Your User ID And/Or Password](#)
Last Login: Tue, Sep 03 2013 1:54 PM [UserGuide](#) [Log Out](#)

Home Account **Services**

- Benefit Estimate
- Service Purchase Request
- Online Service Purchase Status And Payment History
- Maintain IPS Contract
- Invoice Payment
- Seminars
- Online Retirement Application
- Request Refund**

Dear John,
Welcome to Tennessee Consolidated Retirement System (TCRS) member self-service technology system.
It is our privilege to provide you with this state-of-the-art technology tool that provides you with full access to your personal retirement information. You now have access to a modern retirement system.
David H. Lillard, Jr.
Treasurer

* You may view detailed information on the top of each screen.

[Contact Information](#) [Request Refund](#)

This page shows the contact information we have for you. You can change your contact information, including your mailing address, at any time, as well as add phone numbers and e-mail addresses.

[Account Summary](#) [Service Purchase Request](#)

Your account summary provides a snapshot of your retirement account. From this page you can view your retirement plan, contributions and interest, beneficiary information, service and purchases. You can also reset your self-service User ID and/or password.

You are able to submit requests to TCRS to purchase service.

[Account History](#) [Service Purchase Status and Payment History](#)

Your account history gives an overview of your contributions, salaries, and service since you began participation.

You have the ability to track the service purchase costs you have requested and make payments or set up an installment plan. You can also check your history of payments.

[Annual Statement](#) [Maintain IPS Contract](#)

The annual statement provides you with a snapshot of retirement account as of the end of the previous fiscal year. You may view or print any annual statement that has been generated in the system.

You are able to edit your account details, or make supplemental payments towards Installment Purchase of Service IPS.

[Account Balance Letter](#) [Seminars](#)

You have the ability to issue an account balance letter to yourself via mail or e-mail, showing your total service, contributions, and interest.

You can register for upcoming retirement planning seminars.

[Member Correspondence](#) [Online Retirement Application](#)

If you have submitted a form to have information updated or request for a calculation, you can check on the status of your request, or check to see if a particular document has been submitted to your account.

You can submit a Retirement application online. It also includes the online Disability Retirement application.

[View/Change Beneficiary](#) [Request Refund](#)

You are able to designate your beneficiary (ies) and update their information on file.

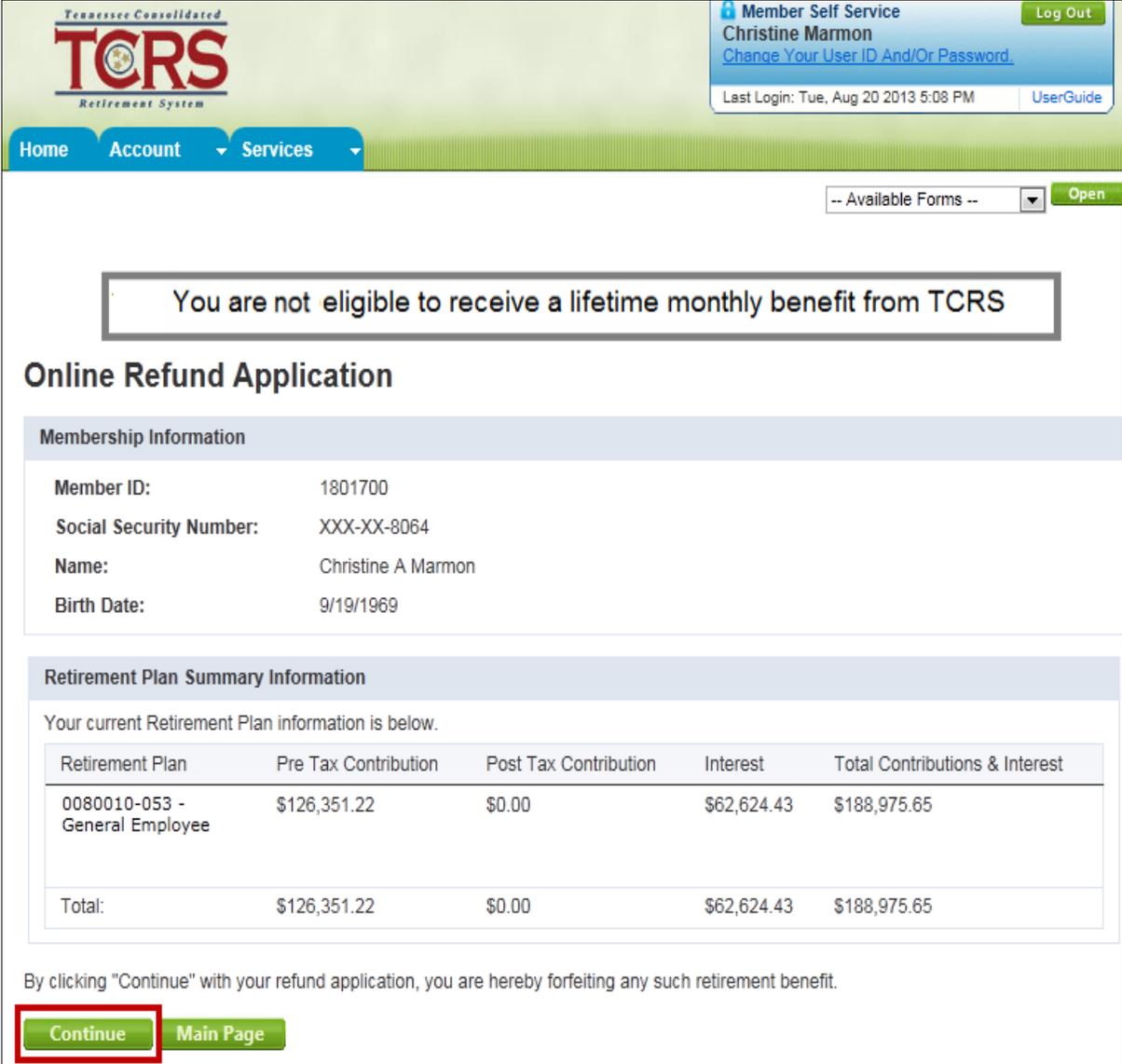
You can request your account to be refunded.

17.2. Requesting A Refund

The following steps describe how to request a refund.

Step 1 -- Follow the steps from Section 17.1 Navigating to the Request Refund Screen.

Step 2 -- If you have contributions eligible for refund, the  button displays. Click .



Tennessee Consolidated TCRS Retirement System

Member Self Service
Christine Marmon
[Change Your User ID And/Or Password.](#)
Last Login: Tue, Aug 20 2013 5:08 PM
[Log Out](#) [UserGuide](#)

Home Account Services

-- Available Forms -- Open

You are not eligible to receive a lifetime monthly benefit from TCRS

Online Refund Application

Membership Information

Member ID:	1801700
Social Security Number:	XXX-XX-8064
Name:	Christine A Marmon
Birth Date:	9/19/1969

Retirement Plan Summary Information

Your current Retirement Plan information is below.

Retirement Plan	Pre Tax Contribution	Post Tax Contribution	Interest	Total Contributions & Interest
0080010-053 - General Employee	\$126,351.22	\$0.00	\$62,624.43	\$188,975.65
Total:	\$126,351.22	\$0.00	\$62,624.43	\$188,975.65

By clicking "Continue" with your refund application, you are hereby forfeiting any such retirement benefit.

Note: If you are eligible for a monthly benefit, **Calculate Estimate** displays at the bottom of the screen. Click **Calculate Estimate** to navigate to the screen to calculate a benefit estimate.

You can click "Calculate Estimate" to calculate the benefit estimate within Member Self-Service

Calculate Estimate **Main Page**

Step 3 -- Enter the **Termination Date** in the *Member Certification* section.

Note: If the Termination Date has already been reported to TCRS, this date is pre-populated.

Tennessee Consolidated TCRS Retirement System

Member Self Service
Christine Marmon
Change Your User ID And/Or Password.
Last Login: Tue, Aug 20 2013 5:08 PM
Log Out
UserGuide

Home Account Services

-- Available Forms -- Open

Online Refund Application

Membership Information

Member ID: 1801700
Social Security Number: XXX-XX-8064
Name: Christine A Marmon
Birth Date: 9/19/1969

Retirement Plan Summary Information

Your current Retirement Plan information is below.

Retirement Plan	Pre Tax Contribution	Post Tax Contribution	Interest	Total Contributions & Interest
0080010-053 - General Employee	\$126,351.22	\$0.00	\$62,624.43	\$188,975.65
Total:	\$126,351.22	\$0.00	\$62,624.43	\$188,975.65

Member Certification

Termination Date (MM/DD/YYYY) *

Step 4 -- Select the radio button for the refund option desired.

Notice of Withholding on Refunds/Direct Transfer to Another Retirement Plan

All refunds issued directly to former members of TCRS are subject to federal income tax withholding at a rate of 20% of the taxable portion of the refund. However, the taxable portion of the refund may be transferred directly from TCRS to a traditional IRA or other retirement plan, with the nontaxable portion (if any) being refunded directly to you. If you choose to have the taxable portion transferred directly to an IRA or other retirement plan, the distribution will not be taxable and federal income tax will not be withheld. check one box:

I want the entire refund issued directly to me. (20% of the taxable portion will be withheld for federal income tax.)

I want my refund transferred directly to the IRA or retirement plan listed below. (The non-taxable portion of my balance, if any exists, will be mailed directly to you at the address.)

Step 5 -- Enter the required information for the refund option selected under the *Payment Information* section.

- A. If the first radio button is selected to have the entire refund issued directly to you, the *Payment Information* section will display. Select the radio button for the desired **Payment Type**.

Payment Information

Please select the payment type for the refund amount payable to you.

Payment Type: EFT Paper Check **Note: If you are unsure of your address, Please select EFT or change your mailing address within Member Self Service**

Routing Number: * 

Account Type: * --Select Account Type-- 

Bank Account Number: *

Re-enter Bank Account Number: *

If the **EFT** radio button is selected, complete the required fields below.

Payment Information

Please select the payment type for the refund amount payable to you.

Payment Type: EFT Paper Check **Note: If you are unsure of your address, Please select EFT or change your mailing address within Member Self Service**

Routing Number: * 

Account Type: * --Select Account Type-- 

Bank Account Number: *

Re-enter Bank Account Number: *

If the **Paper Check** radio button is selected, complete the fields below.

Payment Information

Please select the payment type for the refund amount payable to you.

Payment Type: EFT Paper Check **Note: If you are unsure of your address, Please select EFT or change your mailing address within Member Self Service**

Mail To:

Use Address on File:

Foreign

Care Of:

Address Line 1: *

Address Line 2:

City: *

State: * --Select State--

ZIP Code: *

Phone:

B. If the second radio button is selected to have the refund transferred directly to the an IRA or retirement plan, the *Rollover Information* section will display. Complete the required fields below.

Rollover Information

Please note that if the refund is being paid directly to the member, 20% of the taxable portion will be withheld for Federal Income Taxes

Pay To:	Pre Tax Amount	Post Tax Amount	Total
Christine A Marmon	126351.22	0.00	188975.65

Rollover Type: * --Select Rollover Type-- Pre Tax Amount (\$): Post Tax Amount (\$):

Foreign Address:

Institution Name: *

Mail Line 1: *

Mail Line 2:

City: *

State: * --Select State--

ZIP Code: *

Step 6 -- Select the acknowledgment check box.

I hereby make application for the return of my contributions made to the Tennessee Consolidated Retirement System (TCRS) together with the interest credited thereon. I hereby waive for myself, my heirs and my beneficiary all my rights, title and interest in all funds under the care and control of the Retirement System. This includes eligibility to participate in the State Insurance Plan. I understand that this election is [irrevocable](#).

I am aware that if I *DO NOT* withdraw my contributions, and not having acquired vesting rights, I will retain my status as a member of the Retirement System for seven years, and should I be reemployed within that period, I will retain my status as a member of the Retirement System, or having attained vesting rights, I may remain a member and elect to receive a monthly benefit at retirement age. I understand that if I *DO* withdraw my contribution, my membership in the Retirement System is terminated and if I am subsequently employed in a position requiring membership, I must enter the Retirement System with the status of a new member.

I certify that the above information is complete and correct and that I understand my rights as a member of the TCRS

I have read and agree to the TCRS Refund Tax Information available [here](#)

Step 7 -- Click .

Payment Information

Please select the payment type for the refund amount payable to you.

Payment Type: EFT Paper Check **Note: If you are unsure of your address, Please select EFT or change your mailing address within Member Self Service**

Routing Number: *  **Bank Name: BANK OF AMERICA, N.A.**

Account Type: *

Bank Account Number: *

Re-enter Bank Account Number *

I hereby make application for the return of my contributions made to the Tennessee Consolidated Retirement System (TCRS) together with the interest credited thereon. I hereby waive for myself, my heirs and my beneficiary all my rights, title and interest in all funds under the care and control of the Retirement System. This includes eligibility to participate in the State Insurance Plan. I understand that this election is [irrevocable](#).

I am aware that if I *DO NOT* withdraw my contributions, and not having acquired vesting rights, I will retain my status as a member of the Retirement System for seven years, and should I be reemployed within that period, I will retain my status as a member of the Retirement System, or having attained vesting rights, I may remain a member and elect to receive a monthly benefit at retirement age. I understand that if I *DO* withdraw my contribution, my membership in the Retirement System is terminated and if I am subsequently employed in a position requiring membership, I must enter the Retirement System with the status of a new member.

I certify that the above information is complete and correct and that I understand my rights as a member of the TCRS

I have read and agree to the TCRS Refund Tax Information available [here](#)

Step 8 -- The **Status** screen displays with a confirmation message of the application submission. The status will show as **In Progress**.

Tennessee Consolidated TCRS Retirement System

Member Self Service
Christine Marmon
[Change Your User ID And/Or Password](#)
 Last Login: Thu, Aug 22 2013 9:43 AM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Online Refund Application

Status of your refund Application:

In Progress Pending Approved Canceled

Your application was submitted successfully On **Wednesday, August 21, 2013 10:34 AM**

If you would like to cancel your refund application, please click [here](#)

17.3. No Eligible Refund Available

The following steps describe how you are notified if no refund is available.

Step 1 -- Follow the steps from Section 17.1, Navigating to the Request Refund Screen.

Step 2 -- A message displays on the **Request Refund** screen advising you that you are not eligible to receive a lifetime monthly benefit from TCRS.

Tennessee Consolidated TCRS Retirement System

Member Self Service
Geraldine Norton
[Change Your User ID And/Or Password](#)
 Last Login: Wed, Aug 21 2013 10:42 AM [UserGuide](#) [Log Out](#)

Home Account Services

-- Available Forms -- [Open](#)

Online Refund Application

You are not eligible to receive a lifetime monthly benefit from TCRS

Membership Information

Member ID: 1801699
 Social Security Number: XXX-XX-0775
 Name: Geraldine J Norton
 Birth Date: 10/27/1968

Retirement Plan Summary Information

Your current Retirement Plan information is below.

Retirement Plan	Pre Tax Contribution	Post Tax Contribution	Interest	Total Contributions & Interest
0080010-053 - General Employee	\$11,363.68	\$0.00	\$568.63	\$11,932.31
Total:	\$11,363.68	\$0.00	\$568.63	\$11,932.31

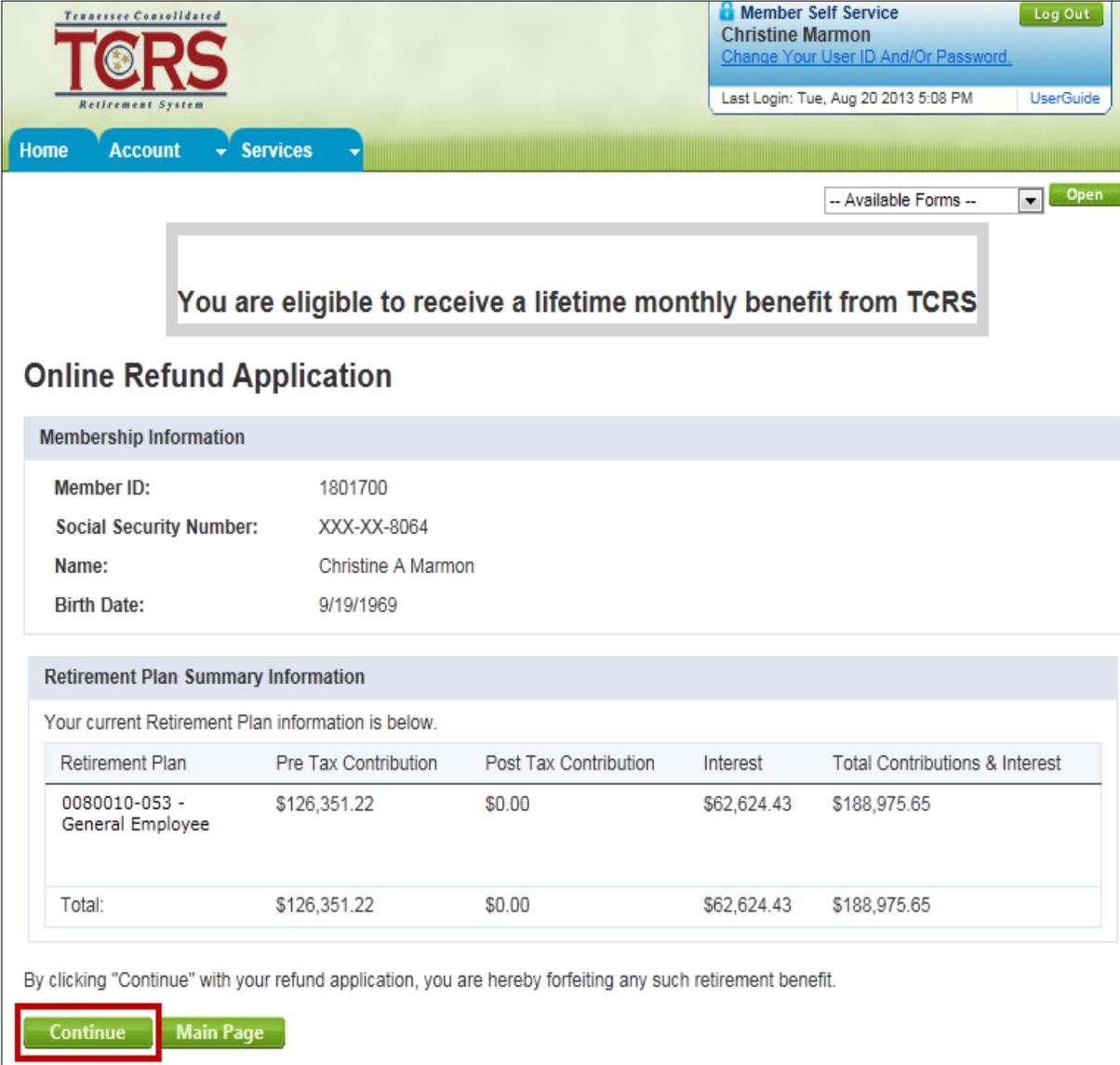
[Main Page](#)

17.4. Current Refund Request in Progress

The following steps describe how to view a refund request in progress.

Step 1 -- Follow the steps from Section 17.1, Navigating to the Request Refund Screen.

Step 2 -- Click .



The screenshot displays the TCRS Member Self Service interface. At the top, the TCRS logo is on the left, and the user's name, Christine Marmon, is on the right with a "Log Out" button. Below the logo is a navigation bar with "Home", "Account", and "Services" tabs. A dropdown menu for "Available Forms" is open, showing an "Open" button. The main content area features a message: "You are eligible to receive a lifetime monthly benefit from TCRS". Below this is the "Online Refund Application" section, which includes "Membership Information" and "Retirement Plan Summary Information".

Membership Information

Member ID:	1801700
Social Security Number:	XXX-XX-8064
Name:	Christine A Marmon
Birth Date:	9/19/1969

Retirement Plan Summary Information

Your current Retirement Plan information is below.

Retirement Plan	Pre Tax Contribution	Post Tax Contribution	Interest	Total Contributions & Interest
0080010-053 - General Employee	\$126,351.22	\$0.00	\$62,624.43	\$188,975.65
Total:	\$126,351.22	\$0.00	\$62,624.43	\$188,975.65

By clicking "Continue" with your refund application, you are hereby forfeiting any such retirement benefit.

Step 3 -- The **Online Refund Application** screen displays indicating the current status of the refund request.

Note: The status may be either **In Progress**, **Pending**, **Approved**, or **Canceled**.

The screenshot shows the TCRS Member Self Service interface. At the top, the TCRS logo is on the left, and the user's name 'Christine Marmon' and login information are on the right. Below the logo is a navigation bar with 'Home', 'Account', and 'Services'. The main content area is titled 'Online Refund Application' and shows the status of the refund application as 'In Progress'. There are buttons for 'In Progress', 'Pending', 'Approved', and 'Canceled'. A message states: 'Your application was submitted successfully On Wednesday, August 21, 2013 10:34 AM'. A link is provided to cancel the application.

17.5. Canceling a Refund Request

The following steps describe how to cancel a refund request in process.

Step 1 -- Follow the steps from Section 17.1, Navigating to the Request Refund Screen.

Step 2 -- Click .

The screenshot shows the TCRS Member Self Service interface. At the top, the TCRS logo is on the left, and the user's name 'Christine Marmon' and login information are on the right. Below the logo is a navigation bar with 'Home', 'Account', and 'Services'. The main content area is titled 'Online Refund Application' and shows a message: 'You are eligible to receive a lifetime monthly benefit from TCRS'. Below this is a table with membership information and a table with retirement plan summary information. At the bottom, there is a warning message and two buttons: 'Continue' and 'Main Page'.

Membership Information	Member ID:	1801700
	Social Security Number:	XXX-XX-8064
	Name:	Christine A Marmon
	Birth Date:	9/19/1969

Retirement Plan Summary Information	Your current Retirement Plan information is below.			
Retirement Plan	Pre Tax Contribution	Post Tax Contribution	Interest	Total Contributions & Interest
0080010-053 - General Employee	\$126,351.22	\$0.00	\$62,624.43	\$188,975.65
Total:	\$126,351.22	\$0.00	\$62,624.43	\$188,975.65

Step 3 -- The **Status** screen displays. Click [here](#) to cancel the refund application.

The screenshot shows the TCRS Retirement System Member Self Service interface. At the top right, the user is identified as Christine Marmon, with a 'Log Out' button and a 'UserGuide' link. The main navigation bar includes 'Home', 'Account', and 'Services'. Below this, there is a dropdown menu for 'Available Forms' and an 'Open' button. The central heading is 'Online Refund Application'. Underneath, it asks for the 'Status of your refund Application:' and provides four buttons: 'In Progress' (highlighted in blue), 'Pending', 'Approved', and 'Canceled'. A message states: 'Your application was submitted successfully On Wednesday, August 21, 2013 10:34 AM'. At the bottom, it says 'If you would like to cancel your refund application, please click [here](#)', with a red box around the word 'here' and a red arrow pointing to it.

Step 4 -- The **Refund Cancellation Request** screen displays. Click [Cancel Refund Application](#).

The screenshot shows the 'Refund Cancellation Request' screen. It features the same header and navigation as the previous screen. The main heading is 'Refund Cancellation Request'. Below it, a question asks: 'Are you sure you want to cancel your Refund Application?'. At the bottom, there are two buttons: 'Back' and 'Cancel Refund Application', with the latter button highlighted with a red box.

Step 5 -- The **Online Refund Cancellation** screen displays, confirming the request has been submitted. Click [Ok](#).

The screenshot shows the 'Online Refund Cancellation' confirmation screen. It features the same header and navigation. The main heading is 'Online Refund Cancellation'. Below it, a message states: 'Your Refund Cancellation request has been submitted on Thursday, August 22, 2013 09:44 AM'. At the bottom, there is a single button labeled 'Ok', which is highlighted with a red box.