

DEPARTMENT OF RETIREMENT SYSTEMS

Online Account Enhancements



Direct Deposit

Online Account Access enhancement gives retirees the ability to start or change their direct deposit after retirement.

Since December 10th 2015, 757 direct deposits have been updated online.

New option to View/Change Direct Deposit is selected through the My Account screen.

Online Account Access

WELCOME

PERS 3 ▾

Service Credit Detail

Benefit Summary

Return To Work

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Plan 3

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MY ACCOUNT

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DRS News

Glossary

IRS Withholding Calculator

My Account

Manage Account Information

If you need to make a change please select the item below.

Account Item

Email Address	View/Change
IRS Withholding Tax	View/Change
Mailing Address	View/Change
Paper Benefit Statement	View/Change
Direct Deposit	View/Change
Password	View/Change
Phone Number	View/Change
User ID	View/Change
Email Subscriptions	View/Change

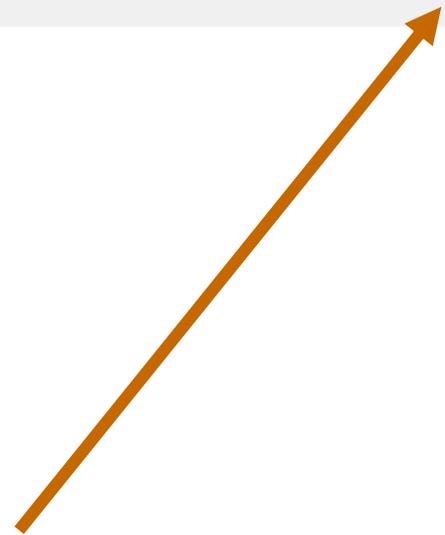
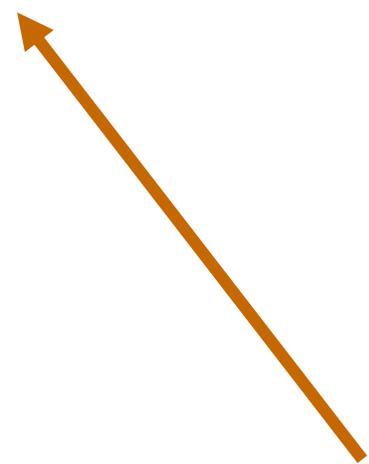
Online Account Access

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Change Direct Deposit

Here is a list of your monthly retirement payments. Please select the benefit you wish to view or change your direct deposit for.

	System	Plan	Current Direct Deposit Detail	Current Paper Benefit Statement Delivery Option	
View/Edit	PERS	2	Bk of Amer NA	When a change is made to my account and at the end of the year.	Download/Print
View/Edit	TRS	2	Bk of Amer NA	When a change is made to my account and at the end of the year.	Download/Print



The Change Direct Deposit screen will list all of a retiree's system plans. Retirees will also have the ability to download or print their direct deposit information from this screen.

Change Direct Deposit

Current Direct Deposit for PERS 1

[Return to Direct Deposit List](#)

Status: Ready for Direct Deposit		
Next Payment Date: 04/29/2016	Financial Institution:	U.S. Bank NA
Will deposit to: U.S. Bank NA	Transit Routing Number:	125000105
	Account Type:	Checking
	Account Number:	XXXXXXXXXX6789
	Benefit Paper Statement Option:	When a change is made to my account and at the end of the year.
	Established:	12/02/2015
	Status:	Ready for Direct Deposit

Change Direct Deposit

Once a customer selects a system plan, they can view their current direct deposit status and information.

New Transit Routing Number:

[\[Explain this?\]](#)

Confirm New Transit Routing Number:

Validate Number

Change Direct Deposit

Current Direct Deposit for PERS 1

[Return to Direct Deposit List](#)

Status: Ready for Direct Deposit		
Next Payment Date: 04/29/2016	Financial Institution:	U.S. Bank NA
Will deposit to: U.S. Bank NA	Transit Routing Number:	125000105
	Account Type:	Checking
	Account Number:	XXXXXXXXXX6789
	Benefit Paper Statement Option:	When a change is made to my account and at the end of the year.
	Established:	12/02/2015
	Status:	Ready for Direct Deposit

Change Direct Deposit

Bank Account Number on File:

Please enter the bank account number DRS has on file for your direct deposit. [\[Explain this?\]](#)

New Transit Routing Number:

[\[Explain this?\]](#)

Confirm New Transit Routing Number:

Validate Number

For security purposes, customers with an existing direct deposit are required to validate their current bank account information before updating their direct deposit.

Current Direct Deposit for TRS 2

[Return to Direct Deposit List](#)

Status: Ready for Direct Deposit		
Next Payment Date: 12/31/2015	Financial Institution: Transit Routing Number:	Bk of Amer NA 12500024
Will deposit to: Bk of Amer NA	Account Type: Account Number:	Checking XXXX1395
	Benefit Paper Statement Option: Established:	When a change is made to my account and at the end of the year. 04/30/2013
	Status:	Ready for Direct Deposit

Change Direct Deposit

DRS System Financial Institution Detail for Routing Number Entered

Transit Routing Number:	325081403
Financial Institution Name:	Boeing Empl CU

NEXT DIRECT DEPOSIT DATE THIS CHANGE CAN EFFECT: 12/31/2015

Account Type: Checking Savings

Account Number:

[\[Explain this?\]](#)

Confirm Account Number:

Financial Institution Phone Number (optional):

Area	Phone	Ext
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Send a paper benefit statement:

When a change is made to my account and at the end of the year.

Do not send me paper statements.

Apply this change to: PERS 2 TRS 2

Submit and Authorize

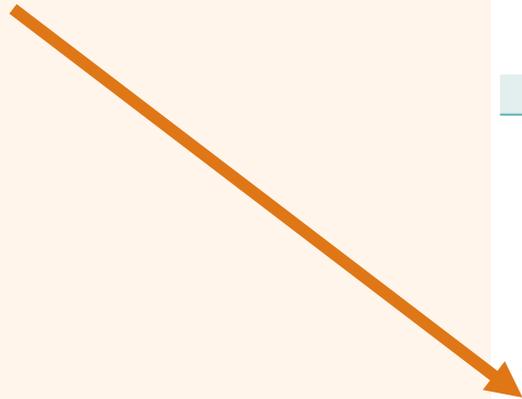
By submitting this request for direct deposit I verify that:

- I am not the power of attorney or the legal guardian for this payee
 - I am an owner on this deposit account
 - I acknowledge submitting this change cancels my existing direct deposit arrangement and may result in the initial benefit being mailed to my mailing address if the direct deposit cannot be verified and set up before the next payment cutoff
 - I am aware that due to federal restrictions DRS cannot transfer funds electronically if the funds will be immediately credited to an account outside the United States.
- And I authorize and request:
- The Department of Retirement Systems(DRS) transfer the full amount of my monthly benefit payment, after authorized deductions, to the designated financial institution for deposit
 - The designated financial institution provide information to DRS regarding address changes and account information to ensure proper and timely processing of deposit transactions
 - The designated financial institution refund to DRS any overpayments to my account made subsequent to my death or payments made in error

By checking this box, I agree to the information above.

When a retiree enters a routing number, the financial institution name will be displayed on the Change Direct Deposit Screen.

Dynamic warning messages are also displayed on the Change Direct Deposit screen.



Change Direct Deposit

Current Direct Deposit for PERS 1

[Return to Direct Deposit List](#)

Status: Ready for Direct Deposit		
Next Payment Date: 03/31/2016	Financial Institution:	U.S. Bank NA
Will deposit to: U.S. Bank NA	Transit Routing Number:	125000105
	Account Type:	Checking
	Account Number:	XXXXXXXXXXXXXXXX6789
	Benefit Paper Statement Option:	When a change is made to my account and at the end of the year.
	Established:	12/02/2015
	Status:	Ready for Direct Deposit

Change Direct Deposit

Financial Institution Detail

Transit Routing Number: 125000105

Financial Institution Name: U.S. Bank NA

NEXT DIRECT DEPOSIT DATE THIS CHANGE CAN EFFECT: 04/29/2016

Your next payment has already been processed. If you submit your request today your payment for 03/31/2016 will be sent via the same payment delivery method as your prior payments and subsequent payments will be deposited to your new financial institution.

Account Type: Checking Savings

Account Number:

[\[Explain this?\]](#)

Confirm Account Number:

Financial Institution Phone Number (optional): Area Phone Ext

Send a paper benefit statement:

- When a change is made to my account and at the end of the year.
- Do not send me paper statements.

Apply this change to: PERS 1

Status: Ready for Direct Deposit		
Next Payment Date: 12/31/2015	Financial Institution: Transit Routing Number: Account Type: Account Number: Benefit Paper Statement Option: Established: Status:	Bk of Amer NA 125000024 Checking XXXX1395 When a change is made to my account and at the end of the year. 04/30/2013 Ready for Direct Deposit
Will deposit to: Bk of Amer NA		

Change Direct Deposit

DRS System Financial Institution Detail for Routing Number Entered

Transit Routing Number: 325081403
 Financial Institution Name: Boeing Empl CU

NEXT DIRECT DEPOSIT DATE THIS CHANGE CAN EFFECT: 12/31/2015

Account Type: Checking Savings

Account Number:

[\[Explain this?\]](#)

Confirm Account Number:

Financial Institution Phone Number (optional):
 Area Phone Ext

Send a paper benefit statement:

- When a change is made to my account and at the end of the year.
- Do not send me paper statements.

Apply this change to: PERS 2 TRS 2

Submit and Authorize

By submitting this request for direct deposit I verify that:

- I am not the power of attorney or the legal guardian for this payee
 - I am an owner on this deposit account
 - I acknowledge submitting this change cancels my existing direct deposit arrangement and may result in the initial benefit being mailed to my mailing address if the direct deposit cannot be verified and set up before the next payment cutoff
 - I am aware that due to federal restrictions DRS cannot transfer funds electronically if the funds will be immediately credited to an account outside the United States.
- And I authorize and request:
- The Department of Retirement Systems(DRS) transfer the full amount of my monthly benefit payment, after authorized deductions, to the designated financial institution for deposit
 - The designated financial institution provide information to DRS regarding address changes and account information to ensure proper and timely processing of deposit transactions
 - The designated financial institution refund to DRS any overpayments to my account made subsequent to my death or payments made in error

By checking this box, I agree to the information above.

Save Cancel

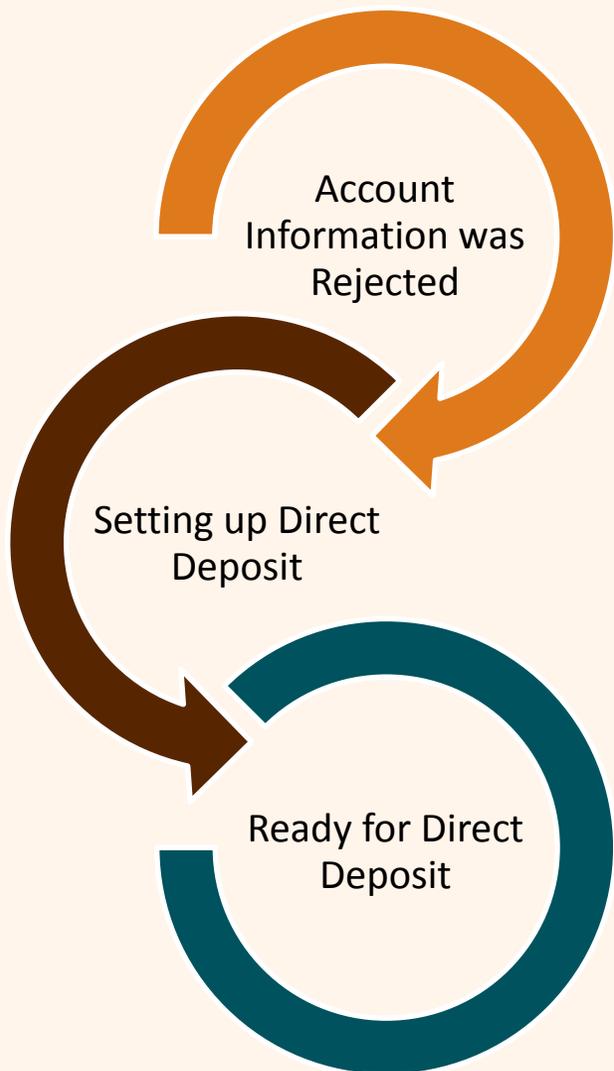
If a retiree is receiving multiple benefits, they can update them all from this page.

There are three direct deposit status conditions that customers might receive.



Status: Ready for Direct Deposit	
<p>Next Payment Date: 03/31/2016</p> <p>Will deposit to: U.S. Bank NA</p>	<p>Financial Institution: U.S. Bank NA</p> <p>Transit Routing Number: 125000105</p> <p>Account Type: Checking</p> <p>Account Number: XXXXXXXXXXXXXXX6789</p> <p>Benefit Paper Statement Option: When a change is made to my account and at the end of the year.</p> <p>Established: 12/02/2015</p> <p>Status: Ready for Direct Deposit</p>

Email notifications will have the same information as Online Account Access.



From: apphealth@drs.wa.gov [mailto:apphealth@drs.wa.gov]
Sent: Tuesday, December 01, 2015 10:38 AM
To: Scharber, Kris (DRS) <KrisS@DRS.WA.GOV>
Subject: Department of Retirement Systems(DRS) Change Confirmation
Importance: High

Dear

You have submitted an Authorization for Direct Deposit request using your [online account](#) with the Department of Retirement Systems.

Status: Ready for Direct Deposit	
Next Payment Date: 12/31/2015	Financial Institution: iQ Credit Union Transit Routing Number: 323383378 Account Type: Checking Account Number: XX3456 Benefit Paper Statement Option: Do not send me paper statements. Established: 12/01/2015 Status: Ready for Direct Deposit
Will deposit to: iQ Credit Union	

Your direct deposit has been successfully updated and your next benefit payment will go to the financial institution listed above.

If you have any questions, please reply to this email or contact us at 360-664-7000 (Olympia area) or 1-800-547-6657 (toll-free).

Beneficiary Designation

Online Account Access enhancement allows active or inactive customers to update their beneficiary information.

Since February 25th 2016, 5252 customers have updated their beneficiaries online.

Two ways to access the Beneficiary Designation Tool

Online Account Access

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- Plan Summary
- Service Credit Detail
- Annual Statement
- Employment History
- Benefit Estimator
- Purchasing Service

RETIREMENT

- Steps to Retirement
- Request an Estimate

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- Plan 3
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MY DOCUMENTS

MY ACCOUNT

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- Glossar

My Account

Manage Account Information

If you need to make a change please select the item below.

Account Item

Email Address	View/Edit
Mailing Address	View/Edit
Beneficiary	View/Edit
Password	View/Edit
Phone Number	View/Edit
User ID	View/Edit
Email Subscriptions	View/Edit

My Account Screen

Online Account Access

WELCOME [Help](#)

PERS 2 ▼

- Plan Summary
- Service Credit Detail
- Annual Statement
- Employment History
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- Purchasing Service

RETIREMENT

- Steps to Retirement

MY INVESTMENTS ▼

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- DCP

MY DOCUMENT

MY ACCOUNT

Plan Summary

This screen presents information reported by you or your employer as of Thursday, April 07, 2016. If information displayed on this page is incorrect, please see the instructions on how to [make changes](#).

Membership Summary

Name:	Joan Smith
System/Plan:	School Employees' Retirement System Plan 3
Status:	Withdrawn
Entry Date:	11/01/2004
Service Credit:	75.25 months or 6.27 years

Account Balance

Access your Plan 3 investment account information [here](#). You will be automatically logged into your account.

Beneficiary for defined contribution [View/Edit Complete List](#)

Primary
Tammy Smith

Beneficiary for defined benefit

Primary

If you are vested and you die prior to retirement, state law requires the defined benefit be paid to your surviving spouse or qualified domestic partner or, if none, to your surviving minor children. If you have no surviving spouse or qualified domestic partner or minor children, no defined benefit will be paid.

Beneficiary for Duty-Related Death

Plan Summary Screen

WELCOME

Plan Summary

This screen presents information reported by you or your employer as of Thursday, April 07, 2016. If information displayed on this page is incorrect, please see the instructions on how to [make changes](#).

Membership Summary

Name: Joan Smith
System/Plan: School Employees' Retirement System Plan 3
Status: Withdrawn
Entry Date: 11/01/2004
Service Credit: 75.25 months or 6.27 years

Account Balance

Access your Plan 3 investment account information [here](#). You will be automatically logged into your account.

Beneficiary for defined contribution [View/Edit Complete List](#)

Primary
Tammy Smith

Beneficiary for defined benefit

Primary
If you are vested and you die prior to retirement, state law requires the defined benefit be paid to your surviving spouse or qualified domestic partner or, if none, to your surviving minor children. If you have no surviving spouse or qualified domestic partner or minor children, no defined benefit will be paid.

Beneficiary for Duty-Related Death

Primary
Tammy Smith

Only primary beneficiary information will show on the Plan Summary page.

Customers can view the rest of their beneficiaries by selecting "View/Edit Complete List."

PERS 2

- Plan Summary
- Service Credit Detail
- Annual Statement
- Employment History
- Benefit Estimator
- Purchasing Service

RETIREMENT

- Steps to Retirement

SERS 3

- Plan Summary
- Service Credit Detail
- Employment History
- Benefit Estimator
- Purchasing Service

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- Steps to Retirement

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My Account

Manage Account Information

If you need to make a change please select the item below.

Account Item

Email Address	View/Edit
Mailing Address	View/Edit
Beneficiary	View/Edit
Password	View/Edit
Phone Number	View/Edit
User ID	View/Edit
Email Subscriptions	View/Edit

Beneficiary updates can be accessed by selecting "View/Edit" on the My Account screen.

Important information is included at the top of the Change Beneficiary Designation screen.

Change Beneficiary Designation - All Beneficiaries

Current Beneficiary Designations

➤ [What You Need Before You Start](#)

➤ [Additional Information](#)

Retirement System or Program

	Beneficiary	Designation	Percentage
PERS 2	View/Edit Download/Print		
	Jane Smith	Primary	50
	Tammy Smith	Primary	25
	John Smith	Primary	25
	Make A Wish	Contingent	50
	Smith, Joan (Estate Of)	Contingent	50
SERS 3	View/Edit Download/Print		
	Tammy Smith	Primary	100
DCP	View/Edit Download/Print		
	Tammy Smith	Primary	100

Duty-Related Death Benefit

	Beneficiary	Designation	Percentage
PERS 2	View/Edit Download/Print		
	Jane Smith	Primary	50
	Tammy Smith	Primary	25
	John Smith	Primary	25
	Make A Wish	Contingent	50
	Smith, Joan (Estate Of)	Contingent	50

▼ What You Need Before You Start

Before you update your information, be sure you have each beneficiary's:

- Full name, including for an entity (such as a trust, estate or organization)
- Social Security number or Tax ID number
- Address
- Date of birth

▼ Additional Information

Contingent:

A person or entity you choose to receive your money if both you and your primary beneficiary(ies) die. Your contingent beneficiary choices must add up to 100%.

Duty-Related Death Benefit:

If you die in the line of duty, your beneficiary(ies) could receive this additional lump-sum benefit payment.

Plan 3 Defined Benefit:

If you are vested and you die before retiring, state law requires DRS pay your defined benefit to your surviving spouse or registered domestic partner. If you have neither, state law requires DRS pay your defined benefit to your surviving minor child(ren). If you have none, no defined benefit will be paid.

Retirement System or Program

	Beneficiary	Designation	Percentage
PERS 2	View/Edit Download/Print		
	Jane Smith	Primary	50
	Tammy Smith	Primary	25
	John Smith	Primary	25
	Make A Wish	Contingent	50
	Smith, Joan (Estate Of)	Contingent	50
SERS 3	View/Edit Download/Print		
	Jane Smith	Primary	50
	Tammy Smith	Primary	25
	John Smith	Primary	25
	Make A Wish	Contingent	50
	Smith, Joan (Estate Of)	Contingent	50
DCP	View/Edit Download/Print		
	Jane Smith	Primary	50
	Tammy Smith	Primary	25
	John Smith	Primary	25
	Make A Wish	Contingent	50
	Smith, Joan (Estate Of)	Contingent	50

Beneficiaries from all system plans and their designated percentages are listed on the Change Beneficiary Designation screen.

Duty-Related Death Benefit

	Beneficiary	Designation	Percentage
PERS 2	View/Edit Download/Print		
	Jane Smith	Primary	50
	Tammy Smith	Primary	25
	John Smith	Primary	25
	Make A Wish	Contingent	50
	Smith, Joan (Estate Of)	Contingent	50

Retirement System or Program

	Beneficiary	Designation	Percentage
View/Edit Remove	Jane Smith	Primary	50
View/Edit Remove	John Smith	Primary	25
View/Edit Remove	Tammy Smith	Primary	25
Primary Total:			100
View/Edit Remove	Sn...	Contingent	50
View/Edit Remove	Sn...	Contingent	50
Contingent Total:			100

[Copy Beneficiaries from Existing Account](#) [Add a Beneficiary](#) [Return to All Beneficiaries List](#)

The customer can edit percentages.

The customer can also select View/Edit a beneficiary or Remove a Beneficiary.

Duty-Related Death Benefit

I name the same beneficiary(ies) as listed above.

You have chosen to name the same beneficiaries for your duty-related death benefit that you listed above. If you want to name different beneficiaries, uncheck the box.

Apply this change to:

PERS 2 SERS 3 DCP

Pay any funds related to my account to my primary beneficiary(ies) in the percentage(s) I chose or as required by law. If any beneficiaries precede me in death, share their percentages equally among the remaining primary beneficiaries. If no primary beneficiaries survive me, send any funds to my contingent beneficiaries. All the information I have entered is true and complete. These changes replace any previous beneficiary choices I have made.

I understand and agree with the changes I am submitting.

Submit

The Copy Beneficiaries link can be used to copy beneficiary information from one plan to another without having to enter all the beneficiary information again.

Change Beneficiary Designation - SERS 3

To review or edit your beneficiaries for SERS 3, select *View/Edit* below. To update your percentages, type in the box(es) and then select *Submit* at the bottom of the page.

Retirement System or Program

	Beneficiary	Designation	Percentage
View/Edit Remove	Tammy Smith	Primary	100
Primary Total:			100

[Copy Beneficiaries from an Existing Account](#) [Add a Beneficiary](#) [Return to All Beneficiaries List](#)

Apply this change to:

PERS 2 SERS 3 DCP

Pay any funds related to my account to my primary beneficiary(ies) in the percentage(s) I chose or as required by law. If any beneficiaries precede me in death, share their percentages equally among the remaining primary beneficiaries. If no primary beneficiaries survive me, send any funds to my contingent beneficiaries. All the information I have entered is true and complete. These changes replace any previous beneficiary choices I have made.

I understand and agree with the changes I am submitting.

Submit

Updates can be applied across multiple plans

Customers will not have to re-enter the information.

Prior to submitting, they will select the plan(s) they want to apply the change to.

Retirement System or Program

	Beneficiary	Designation	Percentage
View/Edit Remove	Tammy Smith	Primary	100
Primary Total:			100

[Copy Beneficiaries from an Existing Account](#) [Add a Beneficiary](#) [Return to All Beneficiaries List](#)

Apply this change to:

PERS 2 SERS 3 DCP

Pay any funds related to my account to my primary beneficiary(ies) in the percentage(s) I chose or as required by law. If any beneficiaries precede me in death, share their percentages equally among the remaining primary beneficiaries. If no primary beneficiaries survive me, send any funds to my contingent beneficiaries. All the information I have entered is true and complete. These changes replace any previous beneficiary choices I have made.

I understand and agree with the changes I am submitting.

Submit

Change Beneficiary Designation - All Beneficiaries

Your beneficiary changes were successfully submitted.

Current Beneficiary Designations

➤ [What You Need Before You Start](#)

➤ [Additional Information](#)

Retirement System or Program

	Beneficiary	Designation	Percentage
PERS 2	View/Edit Download/Print		
	Jane Smith	Primary	50
	Tammy Smith	Primary	25
	John Smith	Primary	25
	Make A Wish	Contingent	50
	Smith, Joan (Estate Of)	Contingent	50
SERS 3	View/Edit Download/Print		
	Tammy Smith	Primary	100
	Smith, Joan (Estate Of)	Contingent	100
DCP	View/Edit Download/Print		
	Tammy Smith	Primary	100

Duty-Related Death Benefit

	Beneficiary	Designation	Percentage
PERS 2	View/Edit Download/Print		
	Jane Smith	Primary	50
	Tammy Smith	Primary	25
	John Smith	Primary	25
	Make A Wish	Contingent	50
	Smith, Joan (Estate Of)	Contingent	50

Beneficiary documents can be printed or downloaded for each system plan.

Thank you!
Questions?

