

# MEMBER SERVICES

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A brief update by Debbie Munoz

# TMRS Direct – Vision Becoming Reality!

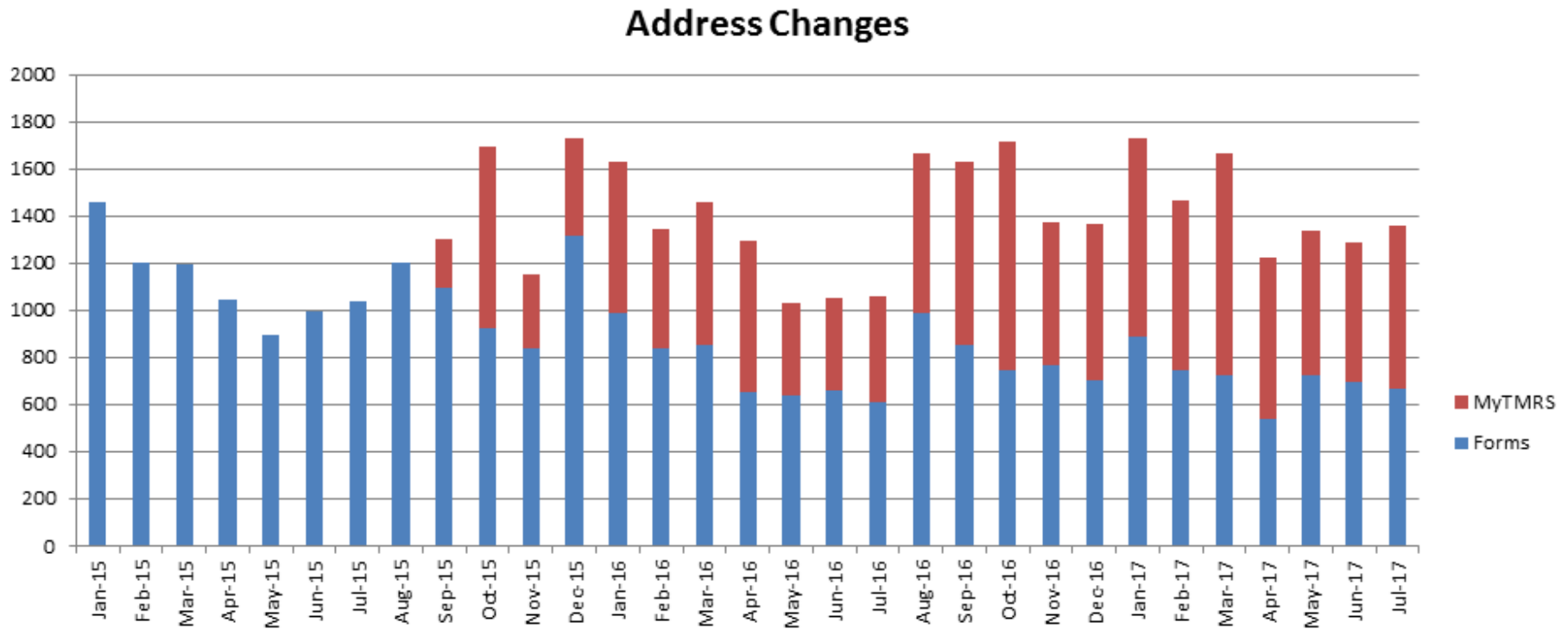
## *Current online functionality:*

- *Address changes*
- *Withholding changes*
- *Requests for account balance/annuity verification statements*
- *Member Annual Statement / Retirement Account Statement Downloads*
- *Retirement Estimates*
- *Beneficiary Updates*

*New online functionality trending towards less paper, more service, and current data.*

# Address Changes

(deployed September 2015)

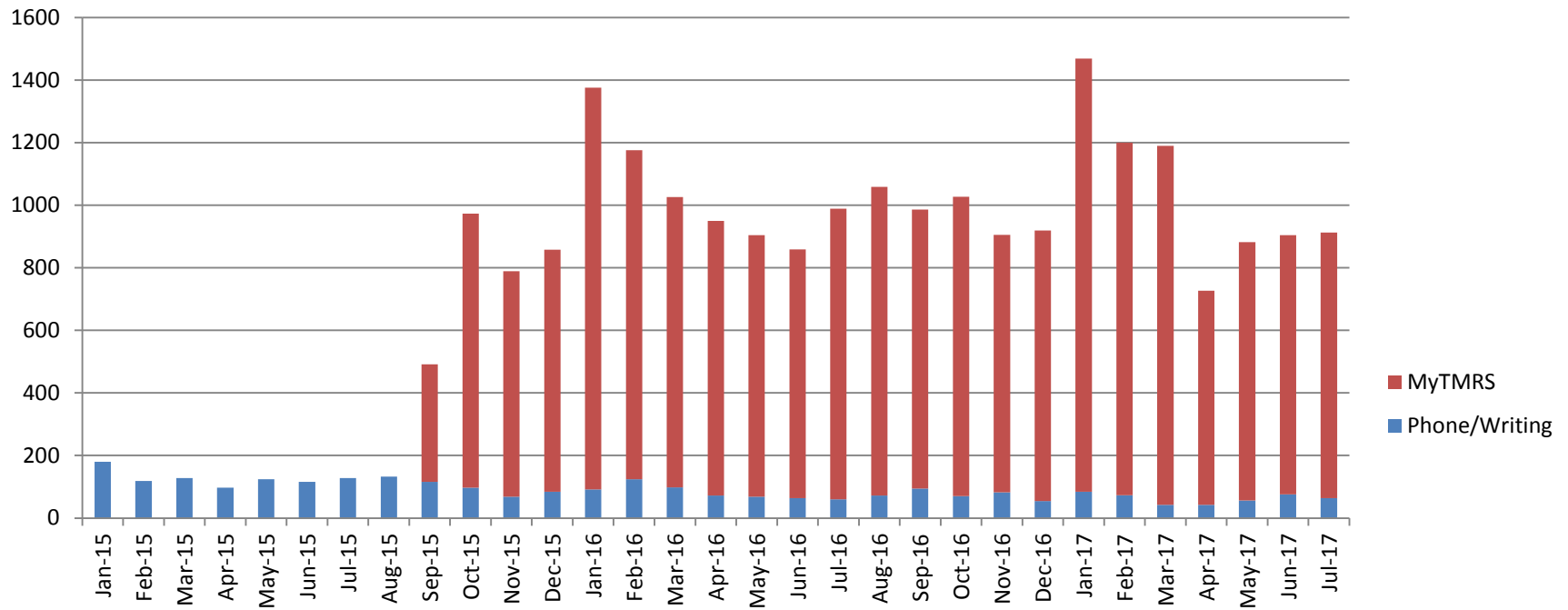


	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16	Apr-16	May-16	Jun-16	Jul-16	Aug-16	Sep-16	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17
MyTMRS									202	774	320	407	641	505	607	644	393	398	455	682	778	967	607	665	844	716	942	683	616	596	693
Forms	1459	1205	1195	1041	894	996	1039	1200	1096	921	834	1319	988	836	849	651	635	657	607	986	851	745	763	703	886	747	726	539	721	693	663

# Account Balance Requests

(deployed September 2015)

## Account Balance

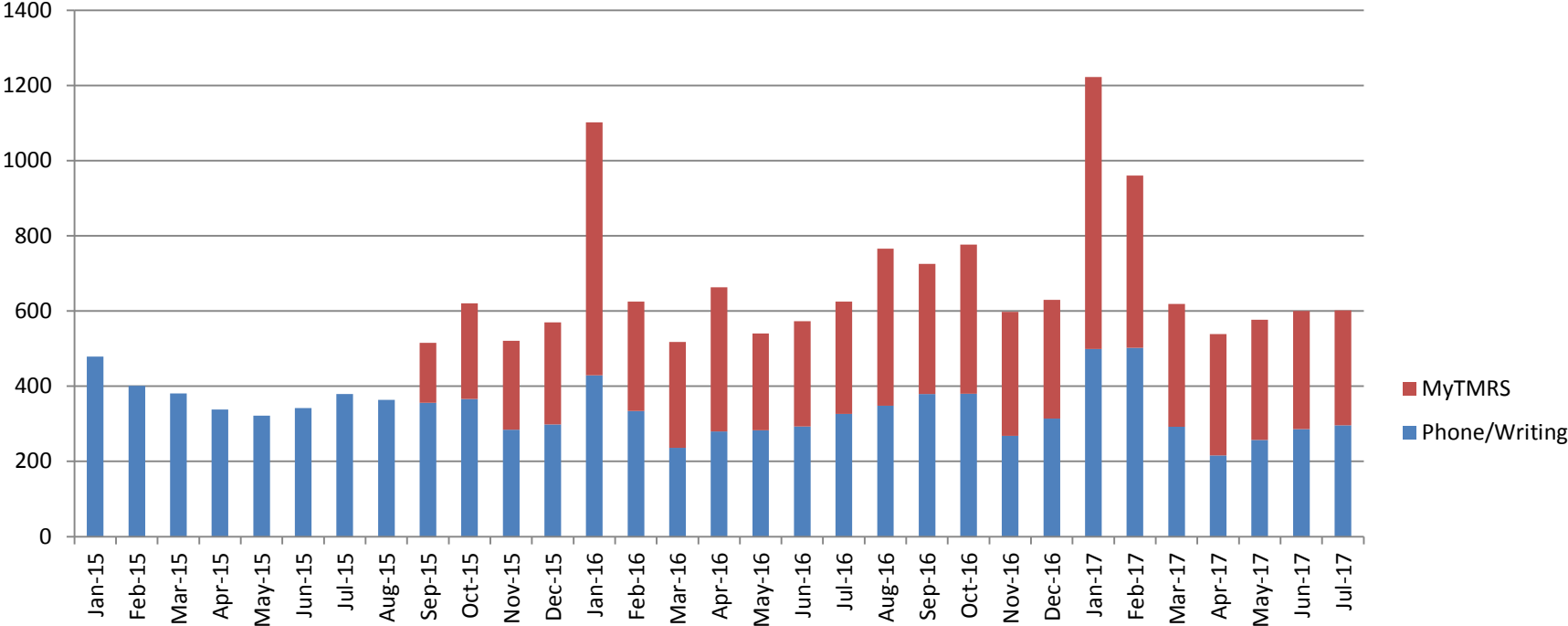


	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16	Apr-16	May-16	Jun-16	Jul-16	Aug-16	Sep-16	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17
MyTMRS									375	876	721	774	128	105	928	878	836	795	929	987	892	957	823	865	138	112	114	685	826	828	849
Phone/Writing	180	119	128	97	124	116	128	133	116	97	68	84	92	124	98	72	68	64	60	72	94	70	82	54	84	73	42	42	56	76	64

# Annuity Verification Requests

(deployed September 2015)

## Annuity Verifications

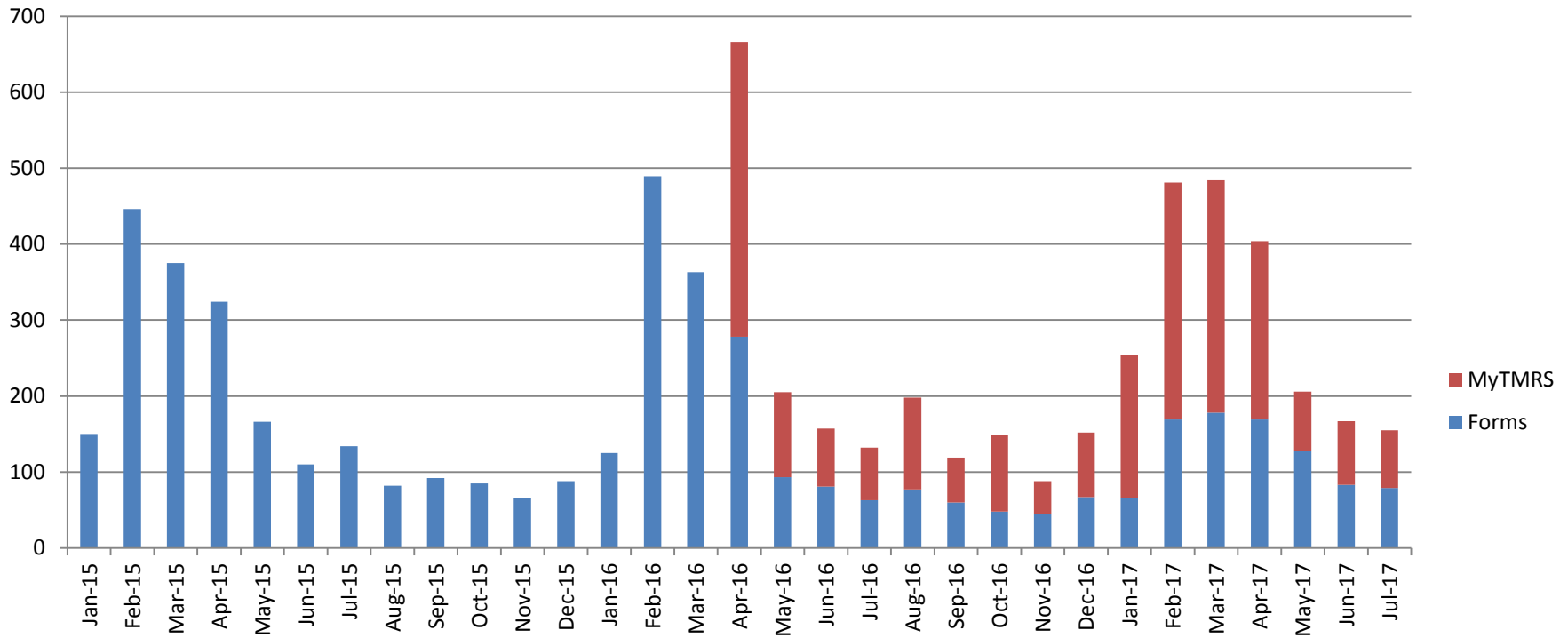


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MyTMRS									159	254	237	272	673	291	282	383	257	280	299	418	346	397	330	316	723	458	327	323	320	314	306
Phone/Writing	479	401	381	338	322	342	379	364	356	366	284	298	429	334	236	280	283	293	326	348	379	380	268	314	499	502	292	216	257	286	296

# Federal Withholding Instructions

(deployed April 2016)

## Withholding Changes

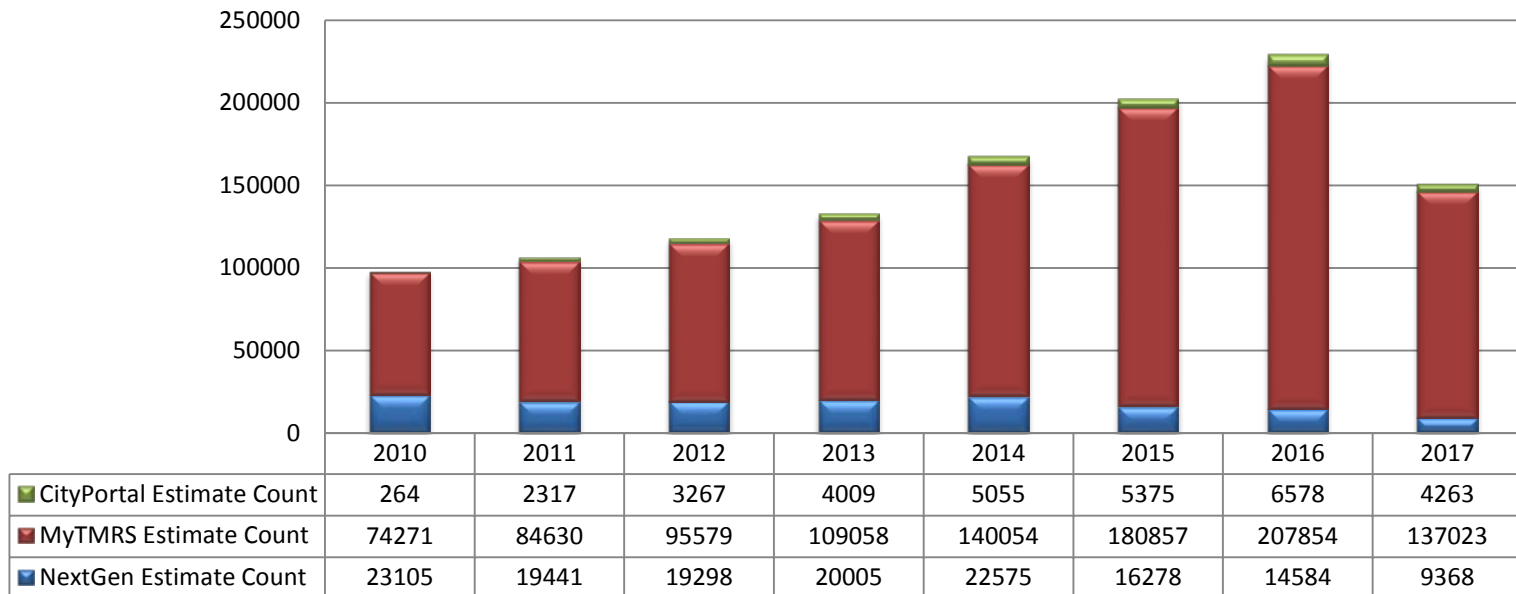


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MyTMRS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	388	112	76	69	121	59	101	43	85	188	312	306	235	78	84	76
Forms	150	446	375	324	166	110	134	82	92	85	66	88	125	489	363	278	93	81	63	77	60	48	45	67	66	169	178	169	128	83	79

# Retirement Estimates

Stats clearly illustrate the overall increase in MyTMRS estimates vs. the estimates generated by TMRS staff (NextGen estimates) and city personnel (City Portal estimates).

**Estimates for Benefits by Type**



# Beneficiary Updates

(Deployed July 2017)

- A little over 1,100 updates as of August 11, 2017!
- Most complicated feature to date
- Smooth deployment with no reported issues

Category Name	Total
Non-Vested Beneficiary Updates	22
Vested Beneficiary Updates	898
Post-Retirement Beneficiary Updates	17
SDB Beneficiary Updates	192
Grand Total	1129



# Future Deployments

- MyTMRS
  - Direct Deposit Changes
  - Refund Application
  - Service Retirement Application
- City Portal
  - Document Upload Functionality
  - Payroll Reporting Functionality