

# Member Access

September 5, 2024



# Friendly reminders

- This presentation contains general information to be used as a guide during the webinar. For more information, please visit <u>www.TRSL.org</u>
- All participants are muted.
  - Have a question? Type your question in the Q&A Box.
  - We will answer questions during the webinar and at Q&A periods.
- This webinar will be recorded. Our recordings & PDFs are available at <u>www.trsl.org/members/webinars</u>
- Check out our YouTube page @TRSLOnline

If you have any specific questions about your retirement, please contact us at <u>AskTRSL.org</u> so we can look up your account and assist you directly.



### Agenda

- What is Member Access?
- Logging In
- Registering for Access
- Reset Your Password
- Forgot User ID
- Employment History
- Account History
- Updating Your Information
- Calculator
- Apply For Retirement



### Member Access - Active Members

### My Account

- Employment Summary
- Account History
- Current Year Earnings & Contributions
- Sick Leave
- Member Account Statement

### My Self Service

• Change your name, mailing address, email address

### **My Estimates**

- Estimate your retirement benefit
- Estimate cost to purchase refunded service credit

### My Retirement

• Apply for service retirement, ILSB or DROP



## Member Access - Retired Members

### My Account

- Benefit Summary
- Account History
- Benefit Payment History
- DROP Account Summary/History/Statement (if applicable)
- Sick Leave
- Member Account Statements
- Print Form 1099-R

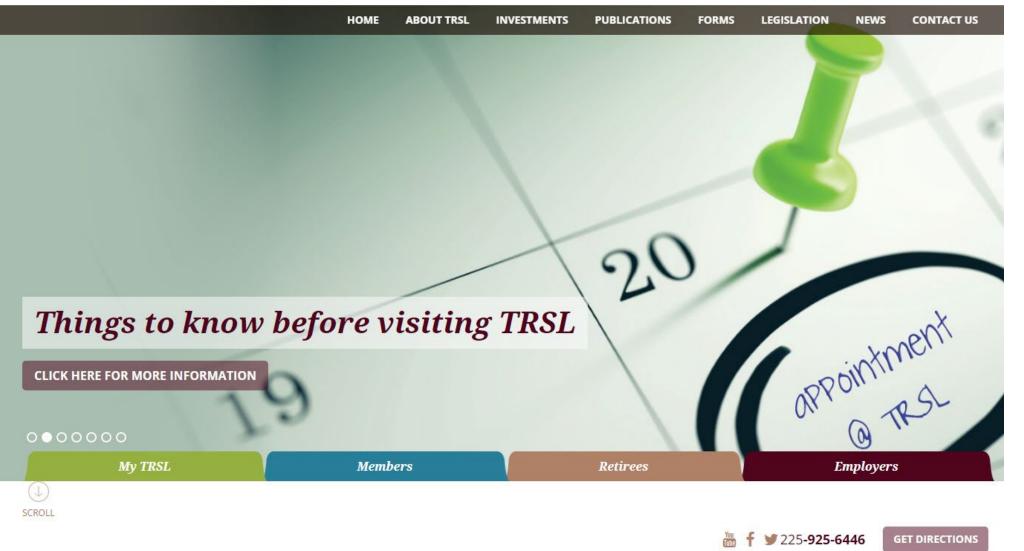
### My Self Service

- Change your email address
- Estimate your federal income tax withholding
- Social Security verification request letter
- Income verification letter









**TRSL** 

### **Register for Access**

**ATRSL** Teachers' Retirement System of Louisiana

#### Welcome to TRSL's Member Access!

Technical Assistance: If you need assistance registering or logging into Member Access, please contact our HelpDesk at Desk at (225) 925-6460 or helpdesk@trsl.org.

New U	sers	Existing Users
New Users	You will need to be able to verify some information about yourself and	Log In
have a:		User ID:
	a ta grade na	Password:
	d personal email address and	
<ul> <li>Soci</li> </ul>	al Security number	Log In
Only TRSI	members and retirees, or individuals legally authorized to act on their	Forgot password?
and the second second		
behalf, are permitted to establish online access to member and retiree personal accounts.		Forgot User ID?
All other p	ersons, including TRSL benefit recipients, such as beneficiaries,	
Deriver and the second second	ex-spouses receiving benefits, do not have authorization to	
establisł	ne access in the name of a TRSL member or retiree.	
TRSL bei	recipients can seek authorization to establish online access to their	
own per	TRSL accounts.	
REGISTER	FOR ACCESS	



# **Register for Access**

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	TRSL Teachers' Retirement System of Louisiana	070 (70 (70)
	System of Louisiana	
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000-		
	Register for access to your account	
	Registration Help * All fields are required.	
	(Digits only, no dashes, no spaces) SSN:	
	(mm/dd/yyyy) Date of Birth:	
	First Name: *	
	Last Name: *	
	First employer's name: 🔍 👻 *	
	(yyyy) First year of employment: *	
	(A non-work related email address is * recommended) Email:	
	Confirm Email:	
	(Between 9 and 26 characters) User ID:	
	(Case sensitive) Password: *	
	(Case sensitive) Confirm Password: *	
	Password must be	
	between 8 and 16 characters, contain at	
	least one number, one	
	lower case letter, one upper case letter and one	
	of the following special	
	characters: #,%,\$,@,* or &.	
	Select and answer both security questions	
	* Question 1:	
	* Answer 1:	
	* Confirm Answer 1:	
	* Question 2:	
	* Answer 2:	
	* Confirm Answer 2:	
	Create Account	620620620



**TRSL** Teachers' Retirement System of Louisiana

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New Users	Existing Users	
New Users You will need to be able to verify some information about yourself and	Log In	186-
have a:	User ID:	
Valid personal email address and	Password:	1020
Social Security number	Log In	20
Only TRSL members and retirees, or individuals legally authorized to act on their	Forgot password?	
behalf, are permitted to establish online access to member and retiree personal accounts.	Forgot User ID?	T C
All other persons, including TRSL benefit recipients, such as beneficiaries,		020
survivors, or ex-spouses receiving benefits, do not have authorization to		
establish online access in the name of a TRSL member or retiree.		320
TRSL benefit recipients can seek authorization to establish online access to their		201
own personal TRSL accounts.		020
REGISTER FOR ACCESS		



### Password Reset

2 TRSL Teachers' Retirement System of Louisiana					
80	System of Louisi	ana			
	User ID :	Forgot password.			
	estation and	Cancel			
©2012 TRSL	225-925-6446 or toll free 1-877-ASK-TRSL Questions or comm	. (1-877-275-8775)   8401 United Plaza B nents? E-mail us: <u>web.master@trsl.org</u>	oulevard   Baton Rouge, LA 70809	•2• •2• •2•	



### Password Reset

19-19-19 <b>(</b>		
	TRSL Teachers' Retirement System of Louisiana	
	Forgot password.	
	User ID:	
	You must answer both security questions.           Question 1: In what city did you meet your spouse/significant other?         V	
	Answer 1:	
	Question 2: In what city does your nearest sibling live?	
	Answer 2:	
	New Password: Confirm	
	Password:	
	Change Password	
	Cancel	
©2012 TRSL	225-925-6446 or toll free 1-877-ASK-TRSL (1-877-275-8775)   8401 United Plaza Boulevard   Baton Ro	uge, LA 70809
	Questions or comments? E-mail us: web.master@trsl.org	



### Password Reset

**ATRSL** Teachers' Retirement System of Louisiana

#### Your password has been reset.

Please use the login link below to access your account.

Login

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### Forgot User ID

TRSL Teachers' Retirement System of Louisiana

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New Users	Existing Users	
New Users You will need to be able to verify some information about yourself and have a:	Log In User ID:	
Valid personal email address and	Password:	
Social Security number	Log In	
Only TRSL members and retirees, or individuals legally authorized to act on their	Forgot password?	
behalf, are permitted to establish online access to member and retiree personal accounts.	Forgot User ID?	
All other persons, including TRSL benefit recipients, such as beneficiaries,		
survivors, or ex-spouses receiving benefits, do not have authorization to		
establish online access in the name of a TRSL member or retiree.		
TRSL benefit recipients can seek authorization to establish online access to their		
own personal TRSL accounts.		
REGISTER FOR ACCESS		



# What's my User ID?

• <u>?</u> • • <u>?</u> •	CRSL System of Louisiana	-222
	Recover User ID Please answer the following to recover your User ID.	
	Last 4 digits of SSN Birth Date (MM/DD/YYYY)	
	E-m ail Address <i>E-mail a ddress must match the E-mail address we have on record.</i> Recover User ID	
	Cancel	
20-20	The system is unavailable from midnight till 3am CST Monday through Friday and midnight till 3am CST the last Saturday of the month. It is available at all other times unless unscheduled maintenance is required. * ©2011 TRSL   225-925-6446 or toll free 1-877-ASK-TRSL (1-877-275-8775)   8401 United Plaza Boulevard   Baton Rouge, LA 70809 Questions or comments? E-mail us: web.master@trsl.org	-222
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TRSL Teachers' Retirement System of Louisiana

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New Users	Existing Users
New Users You will need to be able to verify some information about yourself and have a:	Log In User ID:
Valid personal email address and	Password:
Social Security number	Log In
Only TRSL members and retirees, or individuals legally authorized to act on their	Forgot password?
behalf, are permitted to establish online access to member and retiree personal accounts.	Forgot User ID?
All other persons, including TRSL benefit recipients, such as beneficiaries,	
survivors, or ex-spouses receiving benefits, do not have authorization to	
establish online access in the name of a TRSL member or retiree.	
TRSL benefit recipients can seek authorization to establish online access to their	
own personal TRSL accounts.	
REGISTER FOR ACCESS	



### Your Access Page

 Home
 My Account
 My Self Service
 My Retirement
 Help
 Logout

 Welcome,
 Your last login was January 26, 2017, at 11:43 AM.

System of Louisiana

#### **Member Access**

Member Access provides a variety of information and services regarding your retirement account as described below. Just click on the menu bar above when you have decided where you want to go.

#### **Active Members**

#### My Account

- Employment Summary: view personal information currently on file
- Account History: view past earnings, contributions, and service credit
- Current Year Earnings & Contributions
- Sick Leave
- Member Account Statement

#### My Self Service

- Change your name
- Change your mailing address
- Change your email address

#### My Retirement

- Estimate your retirement benefit
- Apply for retirement

#### Retirees & Beneficiaries

#### My Account

- Benefit Summary: view personal information currently on file
- Account History: view past earnings, contributions, and service credit
- Benefit Payment History: view your benefit payments and deductions
- DROP/ILSB Account Summary/History (only available to those who participated in DROP)
- DROP/ILSB Payment History (only available to those who participated in DROP)
- DROP/ILSB Account Statement (only available to those who participated in DROP)
- Sick Leave
- Print Form 1099-R

#### My Self Service

- Change your email address
- Change your federal income tax withholding

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### **Employment Summary**



#### **Employment Summary**

TEACHER IMA	Designated Beneficiaries	
1234 MAIN STREET ANY TOWN LA 70000-0000	HUBSAND IM HER	SPOUSE

#### DROP ELIGIBILITY: The first time you reach one of the following: 25 Years Age 55, 10 Years Age 60, 30 Years Any Age

This area may include employment dates for time periods where service credit was refunded. Refunded years that have not been restored are not included in your total service credit.

#### Employment History

Employer ID	Employer Name	Plan Name	Start Date	End Date
0001	ANY SCHOOL BOARD	Regular Plan	06/30/2000	99/99/9999

#### TRSL Regular Plan Information

Service credit earned cannot exceed 1.00 year in a fiscal year.

Unaudited Service Credi	it	Member Contributions Summary	
Prior years' service credit for ber computat		Beginning balance as of 06/30/2016:	0.00
Purchases/Transfers/Refu	nds: 0.00	Estimated current FY contributions 7/1/2016 through 12/31/2016:	0.00
Prior years' servce credit for ber computation correcti		Purchases/Transfers/Refunds:	0.00
Total unaudited service credit for benefit		Prior Year Contributions Corrections:	0.00
computati	on*: 0.00	Estimated balance as of 1/18/2017:	
Total unaudited service credit fo computation as of 06/30/20		Total unaudited service credit for eligibility purposes as of 06/30/2016*:	
Service Type Amo Regular 0.	unt 00	Monthly Average Compensation:	\$0.00

Total



### Account History



#### **Account History**

	Na	ame: TEAC	HER IMA Retirem	ent Plan: Regular			
			Service Credit for		TURNALIS		
Seq	Eff Date Source	Contribution Amount	Benefit Computation Amount Service Type	Actual Earnings	Full Time Earnings	Transaction Type	Service Credi for Eligibility
001	6/30/2000 ANY SCHOOL						
	1ST YR W/ ROLLOVER EARNINGS OF	.04	0.56 REGULAR RT 7/30/12[AZ]	0.56	1.00	SALARY POSTING	0.56
	131 TK W/ KOLLOVEK EAKNINGS OF	FERGE	KT //SU/IZ[AZ]	0.00	1.00		
002	6/30/2001 ANY SCHOOL						
		.08	1.00 REGULAR	1.00	1.00	SALARY POSTING	1.00
003	6/30/2002 ANY SCHOOL						
		.08	1.00 REGULAR	1.00	1.00	SALARY POSTING	1.00
004	6/30/2003 ANY SCHOOL						
		.08	1.00 REGULAR	1.00	1.00	SALARY POSTING	1.00
005	6/30/2004 ANY SCHOOL						
		.08	1.00 REGULAR	1.00	1.00	SALARY POSTING	1.00
	Contributions		Service Cr	edit			
	Regular Sheltered	.36	Regular Service	4.56			
			Estimated service credit		Estima	ated service credit	
	Total contributions:	.36	for benefit computation:	4.56		for eligibility:	4.56



### Sick Leave



#### **Sick Leave**

Name:							
Fiscal Year	Employer ID	Months of Contract	Days Used	Last Updated By	Transaction Date	Summer Days Worked	Summer Percent Effort
2012	001	12	1.23	EMPLOYER-FILE	07/11/2012		
2013	001	12	16.80	EMPLOYER-FILE	07/09/2013		
2014	001	12	0.10	EMPLOYER-FILE	07/08/2014		
2015	001	12	6.33	EMPLOYER-FILE	07/09/2015		
2016	001	12	11.09	EMPLOYER-FILE	07/06/2016		

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## **DROP** Account

#### **DROP Account Statement**

Name:Teacher, Ima		DROP Start Date:	
lan Type: LaDROP		DROP End Date:	
			Click here to view
terest: Interest earned at t	the liquid asset interest rate.	DI	ROP/ILSB statement
			instructions.
	DROP/ILSB STATEMENTS GO GRE	EN!	
In or	ngoing efforts to conserve resources, effective	e July 1, DROP/ILSB	
statemen	nts will be available exclusively through TRSL		
	Paper statements will no longer be n	mailed.	
ew or collapse statement	details by clicking on the calendar year.	and the second sec	ose when expanding
▼ 2016		Beginning B	alance: 0.00
		Ending B	alance: 0.00
▼ 2015		Beginning B	alance: 0.00
		Ending B	
▼ 2014		Ending B Beginning B	alance: 0.00
▼ 2014		-	alance: 0.00 alance: 0.00
		Beginning B	alance: 0.00 alance: 0.00 alance: 0.00
		Beginning B Ending B	alance: 0.00 alance: 0.00 alance: 0.00 alance: 0.00
▼ 2013		Beginning B Ending B Beginning B	alance: 0.00 alance: 0.00 alance: 0.00 alance: 0.00 alance: 0.00
▼ 2013		Beginning B Ending B Beginning B Ending B	alance: 0.00 alance: 0.00 alance: 0.00 alance: 0.00 alance: 0.00 lance: 0.00
<ul> <li>▼ 2014</li> <li>▼ 2013</li> <li>▼ 2012</li> <li>▼ 2011</li> </ul>		Beginning B Ending B Beginning B Ending B Beginning Ba	alance:       0.00         lance:       0.00



### Print your 1099-R (for retirees)

**CALIFICATION OF CONTROL OF CONTR** 

#### Home My Account • My Self Service • Help Logout

#### Print Form 1099-R

Click the link below to display the Form 1099-R for the desired tax year and payment. A new window will open displaying the Form 1099-R.

Having trouble accessing your 1099-R? Try turning off your Internet browser's pop-up blocker.

NOTE REGARDING THE ADDRESS ON YOUR FORM 1099-R: The address shown on the Form 1099-R for tax years prior to 2015 is your current home address. Starting with tax year 2015, the address shown is the address to which the Form 1099-R was sent.

Benefit Payments	DROP Account Payments
2016 Member Benefit	2016 Member Account
2015 Member Benefit	2016 Member Account
2014 Member Benefit	2016 Rollover Account
2013 Member Benefit	2015 Member Account
2012 Member Benefit	2014 Member Account
	2013 Member Account
	2012 Member Account

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### **Change Your Name**

TRSL Teachers' Retirement System of Louisiana

SP

 Home
 My Account
 My Self Service
 My Retirement
 Help
 Logout

 Welcome, Imal
 Your last login was December 16, 2015, at 9:10 PM.
 Velcome, Imal
 Your last login was December 16, 2015, at 9:10 PM.
 Velcome, Imal
 Help
 Logout

#### **Change Your Name**

Enter your new name below if your name has changed or is misspelled. Please note that no punctuation is required. Once your name change has been submitted, a confirmation letter will be sent to you requesting appropriate documentation, if applicable.

NOTE: The total characters for all fields cannot exceed 24.

Name: TEACHER IMA (Name appears in last, first, middle initial and suffix order.) Enter Your New Name Below \* indicates a required field First Name\*: Middle Initial: Last Name\*: Suffix:

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# Change Your Email

	20 chocks
TELECI Taachare' Patirement	
2 TRSL Teachers' Retirement System of Louisiana	20 0 20 0 20
koopoge	and the second
Home         My Account         My Self Service         My Retirement         Help         Logout           Welcome, Ima!         Your last login was December 16, 2015, at 9:10 PM.         Your last login was December 16, 2015, at 9:10 PM.         Your last login was December 16, 2015, at 9:10 PM.	0.0.0.
Change Your E-mail Address	
2092092	
Enter your new e-mail address below if it has changed.	
Name: TEACHER IMA E-mail Address: ima.teacher@school.net	
Enter Your New E-mail Address Below	
* indicates a required field E-mail Address*:	
Confirm E-mail Address*:	
Submit	
©2012 TRSL   225-925-6446 or toll free 1-877-ASK-TRSL (1-877-275-8775)   8401 United Plaza Boulevard   E Questions or comments? E-mail us: web.master@trsl.org	Baton Rouge, LA 70809



### Change Your Mailing Address

TRSL Teachers' Retirement System of Louisiana

 Home
 My Account
 My Self Service
 My Retirement
 Help
 Logout

 Welcome, Imal
 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
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 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
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 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:10 PM.
 Your last login was December 16, 2015, at 9:1

#### **Change Your Mailing Address**

Enter your new address below if your mailing address has changed. The street address should be on one line. However, if your entire address won't fit on one line because it contains an apartment, suite or building number, input the apartment, suite or building number on the Street Address line and the street address on the Address 2 line. You do not need to use punctuation.

TEACHER IMA
Mailing Address: 1234 MAIN STREET
ANY TOWN LA 70000-0000

#### Enter Your New Address Below

	" indicates a r	equired field	
Street Address*:			
Address 2:			
Address 3:			
City*:			
State*:	LA - LOUISIANA	~	
Zip Code*:			
City*: State*:		V	



Submit

### Create a benefit estimate

### **Online calculators loaded with your account information**



- 1. Log on to Member Access.
- 2. Under "My Estimates" drop-down menu, select "Estimate Your Retirement Benefit."
- Enter your desired retirement date and months of contract (9, 10, 11, 12), then click "Create Estimate!"

### Register for MEMBER ACCESS @ www.TRSL.org

For technical assistance with Member Access, contact <u>support@trsl.org</u>.





### Under the "My Estimates" drop-down menu, select "Estimate Your Retirement Benefit."





### Create your estimate

Enter your desired retirement date, employment contract (9, 10, 11 or 12), beneficiary DOB and click "Create Estimate!"

Vous setisement aligibility	19 19 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Your retirement eligibility	- h-
Early retirement: during fiscal year 2031 - 2032	
Regular retirement/DROP eligibility: during fiscal year 2035 - 2036	
Your date of birth	Detail
The date of birth listed on your records is 09/11/1961.	•
Your estimated retirement date	Detail
My estimated projected date of retirement is 06/30/2036 (mm/dd/yyyy). I project that I will be employ employment contract immediately prior to this estimated date of retirement.	ved under a 09 🗸 month
Your beneficiary(ies)	Detail
● I plan to provide for a beneficiary. My beneficiary's birth date is 03/05/1963 (mm/dd/yyyy).	
I would like my beneficiary to receive \$00 per month under Option 4 or 4A (Pop Up).	
○ I do not plan to provide for a beneficiary. (Maximum Option only)	
○ I plan to provide for multiple beneficiaries. (Option 1 only)	
Create Estimate	



### Apply for Retirement

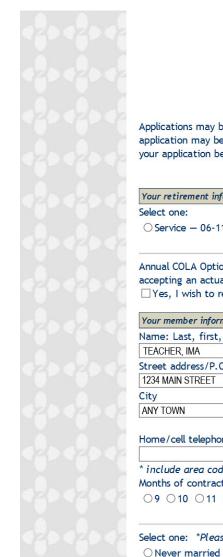
Select "Apply for Retirement" from the "My Retirement" drop-down menu.



Two weeks after submission of the Form 11, TRSL will mail you an acknowledgment letter.



# Apply to Retire



Teachers' Retirement System of Louisiana 8401 United Plaza Blvd, Ste 300 • Baton Rouge, LA 70809-7017 P.O. Box 94123 • Baton Rouge, LA 70804-9123 Telephone: 225-925-6446 • Fax: 225-925-6366 www.trsl.org

Application for Service Retirement, ILSB, or DROP

Applications may be canceled before cashing any benefit check, including estimated benefit payments and direct deposits. Your application may be submitted within six months before your effective retirement/DROP date. It is your responsibility to submit your application before your selected retirement/DROP date.

(our retirement information (Must be completed)				
elect one:			Date of retirement/DROP begin date	
○ Service – 06-11A	○ ILSB — 06-11A5	O DROP - 06-11F	(mm/dd/yyyy)	

Annual COLA Option (ACO) allows a retiring member to receive a guaranteed annual 2.5% cost-of-living adjustment (COLA) by accepting an actuarially REDUCED retirement benefit. Check the box below only if you are considering ACO.  $\Box$  Yes, I wish to receive an estimate of REDUCED benefits based on the self-funded Annual COLA Option (ACO).

000 000 000
000-000-000
Your date of birth
00/00/0000
Name of Employer
0001 ANY SCHOOL
Job title
-

O Re-married

O Legally Separated

○ Widowed

○ Married

○ Divorced\*





# Submit online application

**Electronic Signature** 

I hereby make application for retirement in accordance with Louisiana laws. I understand that I should receive an acknowledgment letter by mail approximately two weeks after the date TRSL receives my application. If I do not receive an acknowledgment letter, I will contact TRSL.

 $\Box$  I understand that by submitting my application online that I agree to conduct this transaction by electronic means and that I am signing my retirement application.



Print Application



# Need Technical Help?

# **TRSL**

TRSL Help Desk (225)925-6460

Toll free (outside Baton Rouge): 1-877-ASK-TRSL (1-877-275-8775)

Website: www.TRSL.org Email: helpdesk@trsl.org



### Summary

- Accessing your Member Access is quick and easy:
  - » You can update your name, address and email online
  - » Create an estimate of your retirement benefit
  - » Apply for retirement
- Print your 1099R (Retirees)
- Estimate your federal income tax withholding (Retirees)





- Calculate future retirement estimates
- Update name & mailing/email address
- Apply for retirement/DROP

- View DROP account
- View beneficiary(ies)
- View annual statements





### Find it online at www.TRSL.org



### We are here for you!

# **TRSL**

Local phone: (225) 925-6446

**Toll free (outside Baton Rouge):** 1-877-ASK-TRSL (1-877-275-8775)

Website: www.TRSL.org

Questions: AskTRSL.org







