

How to produce a General Service Benefit Estimate in Online Member Services (OMS)

Step One

Access Online Member Services (OMS) by going to the PERS website:

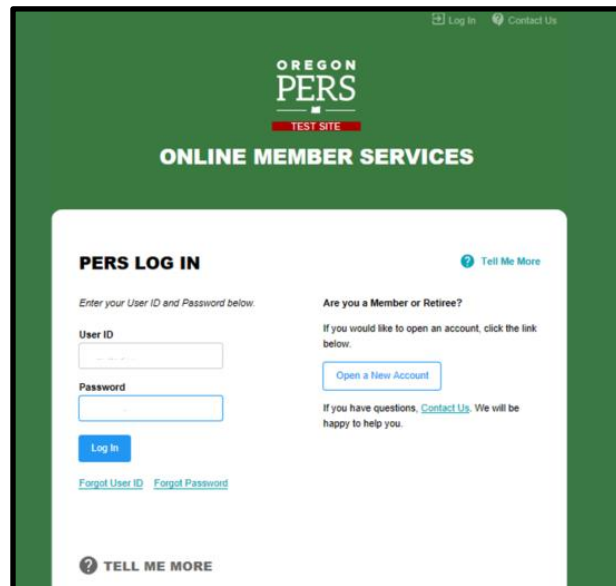
<https://www.oregon.gov/PERS>

Click on the green “OMS Login” button under Online Member Services (OMS)



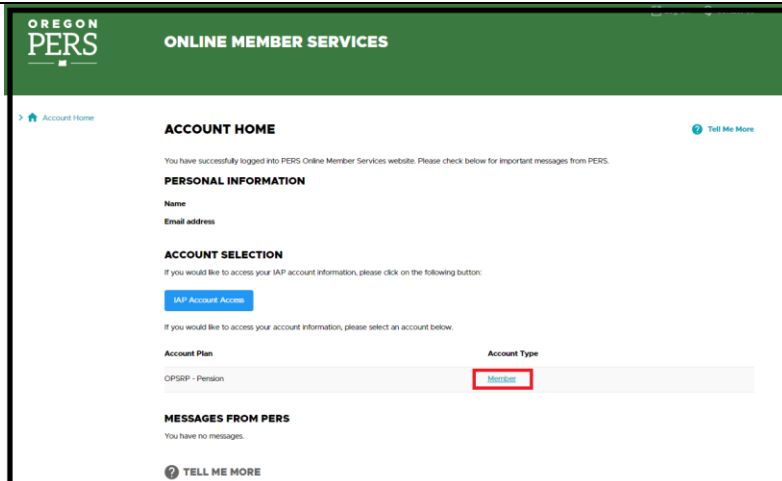
Step Two

Login to your Online Member Services Account (OMS) by entering your User ID and Password



Step Three

Your “Account Home” page will now appear on the screen. To access your PERS account, click on the “Member” link under “Account Type”. This will now take you to the “Account Summary” page



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Step Four

While on the “Account Summary” page, click on the “Benefit Estimate” option on the left-hand side. This will take you to the “Benefit Estimate” page

The screenshot shows the 'ACCOUNT SUMMARY' page. On the left-hand side, there is a navigation menu with the following items: Account Home, Account Summary, Employment Information, Service Credit Information, Salary Information, Profile, Ask PERS a Question, **Benefit Estimate** (highlighted with a red box), Payment History, Tax Forms, Data Verification, IAP Voluntary Contribution Election, IAP TDF Information, and IAP Login. The main content area is titled 'ACCOUNT SUMMARY' and includes a 'PERSONAL DETAILS' section with fields for First Name, Middle Name, Last Name, Date of Birth, Phone, Email, and Address. A blue 'Update Personal Information' button is located at the bottom of this section.

Step Five

Click on the “Create New Benefit Estimate” button

The screenshot shows the 'BENEFIT ESTIMATE' page. The 'Create New Benefit Estimate' button is highlighted with a red box. Below the button, it states 'There are no saved benefit estimates on file.' A 'TELL ME MORE' section provides information about the estimate's accuracy and the disclaimer that PERS is not bound by any estimate provided through Online Member Services (ORS 238.455(6)).

Step Six

In the “Retirement Date*” box, please enter the Retirement Date you are wanting to produce the estimate for and click the “Next” Button.

The screenshot shows the 'BENEFIT ESTIMATE' page at the 'Initial Parameters' step. A progress bar at the top indicates four steps: 1. Initial Parameters (active), 2. Additional Parameters, 3. Final Average Salary, and 4. Payment Options. Below the progress bar, a legend states '* Indicates a required field'. The 'Retirement Date*' field is highlighted with a red box. There are 'Next' and 'Cancel' buttons at the bottom of the form. A 'TELL ME MORE' link is also present.

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Step Seven

Fill out the information needed in this step and hit the “Next” button. An explanation of each field can be found at the bottom of the page under the “Tell me more” section.

BENEFIT ESTIMATE

Initial Parameters

* - Indicates a required field

Reference #

Creation Date

Status

Retirement Date

Retirement Eligibility

Retirement Eligibility

Retirement Date

Termination Date*

Date of Birth

Age at Retirement

Step Eight

Review the information in this page and once confirmed is correct, click the “Next” button.

BENEFIT ESTIMATE

Final Average Salary

Retirement Eligibility

Total Service Credit

Monthly Final Average Salary

Next Back Delete Cancel

Step Nine

Your Payment Options based on the information entered will display. If you want to create a new Benefit Estimate, follow the steps again starting with Step Four

BENEFIT ESTIMATE

Information
A benefit estimate has been calculated and saved.

Payment Options

Option	Monthly Amount	Alternate Payee's Monthly Amount
Single Life Option		N/A
Full Survivorship Option		N/A
Full Survivorship Increase Option		N/A
Half Survivorship Option		N/A
Half Survivorship Increase Option		N/A