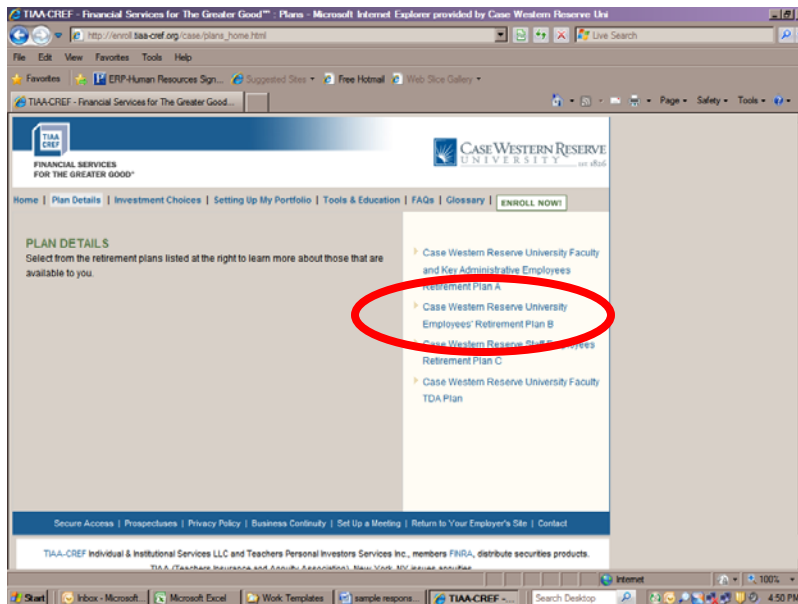


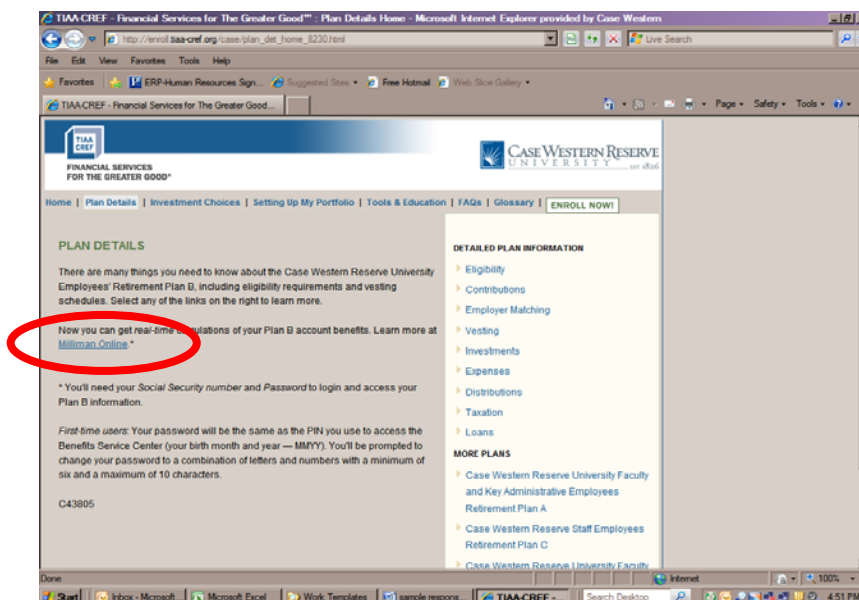
## Case Western Reserve University Staff Retirement Plan B On-line Tool

Participants in the Case Western Reserve University Employee's Retirement Plan B pension have the opportunity to view their benefit on-line.

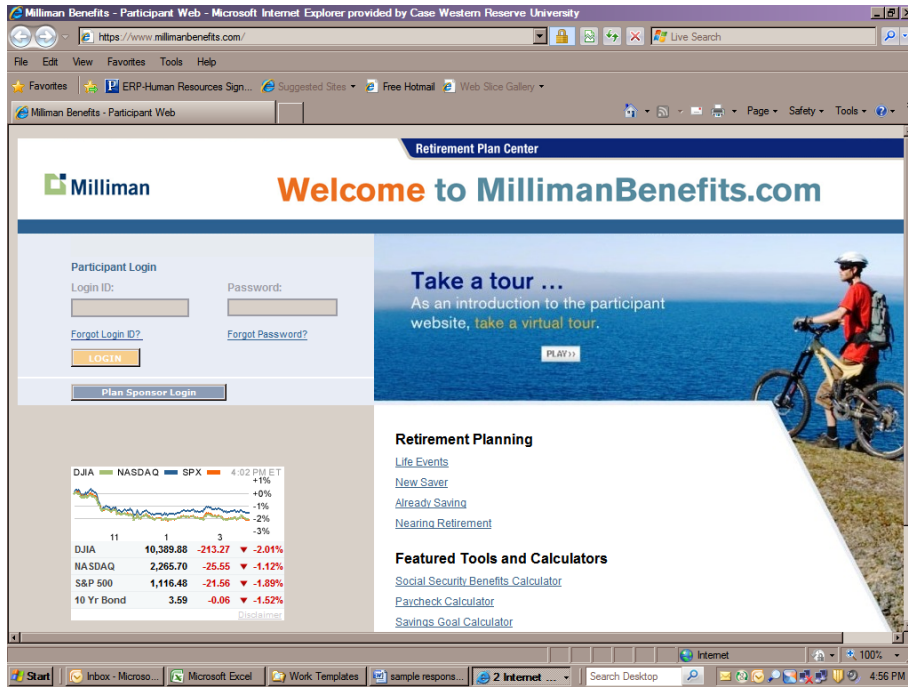
- ▶ Go to [http://enroll.tiaa-cref.org/case/plans\\_home.html](http://enroll.tiaa-cref.org/case/plans_home.html)
- ▶ Click on Case Western Reserve University Employee's Retirement Plan B (right menu box)



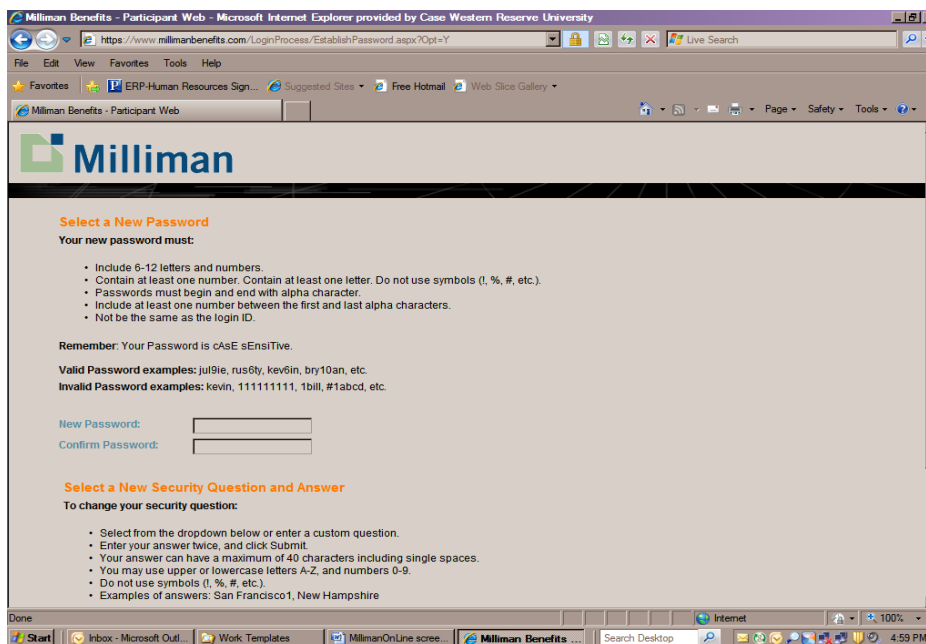
- ▶ Click on the "Milliman Online" link.



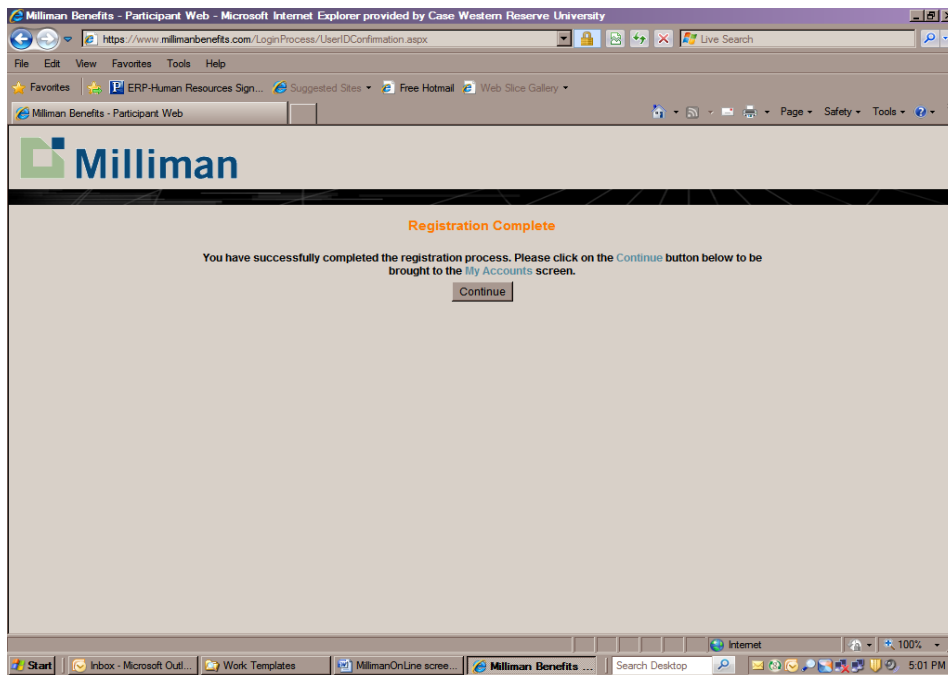
*Your default ID is your Social Security number and your default password is your birth month and year -- MMY*



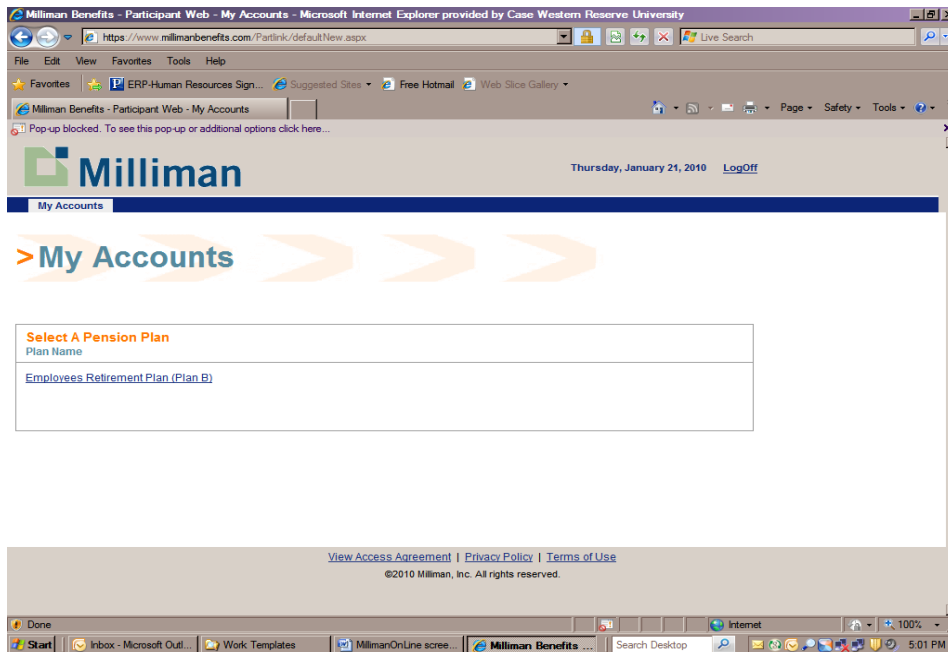
You will be prompted to change your password to a combination of letters and numbers with a minimum of six and a maximum of 10 characters. Note that the password must begin and end with an alphabetic character.



- ▶ After you have accepted the security agreement, click on Continue

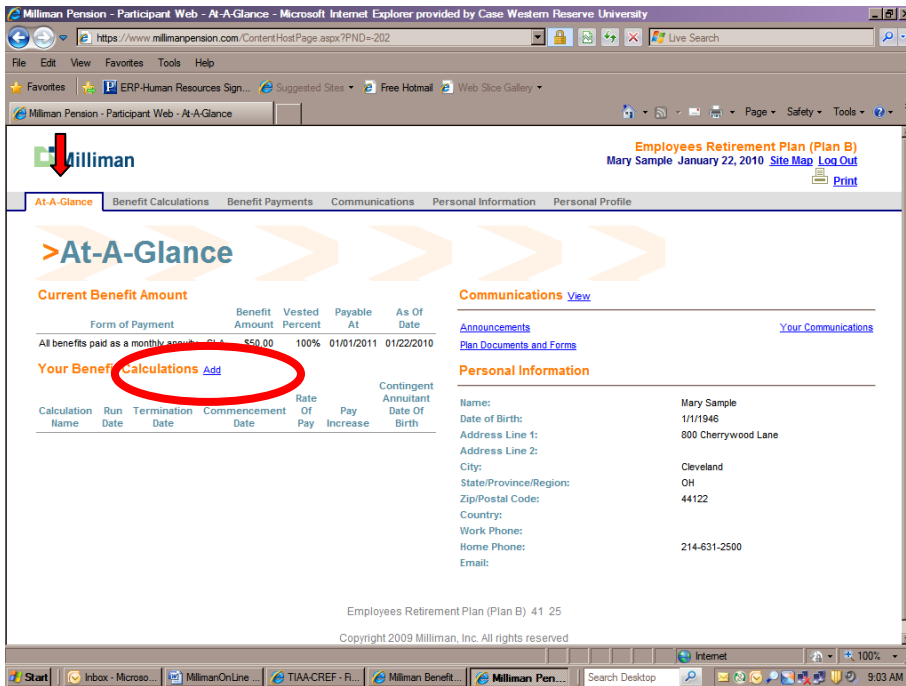


- ▶ Click on Employee Retirement (Plan B)

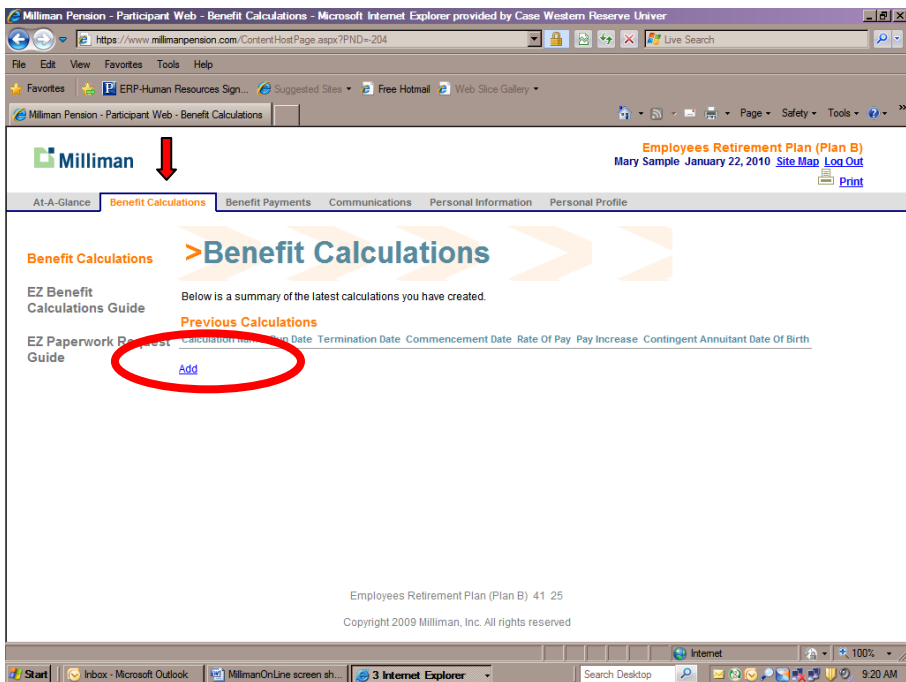


The **At-A-Glance** screen provides a summary of your current benefit and your personal information.

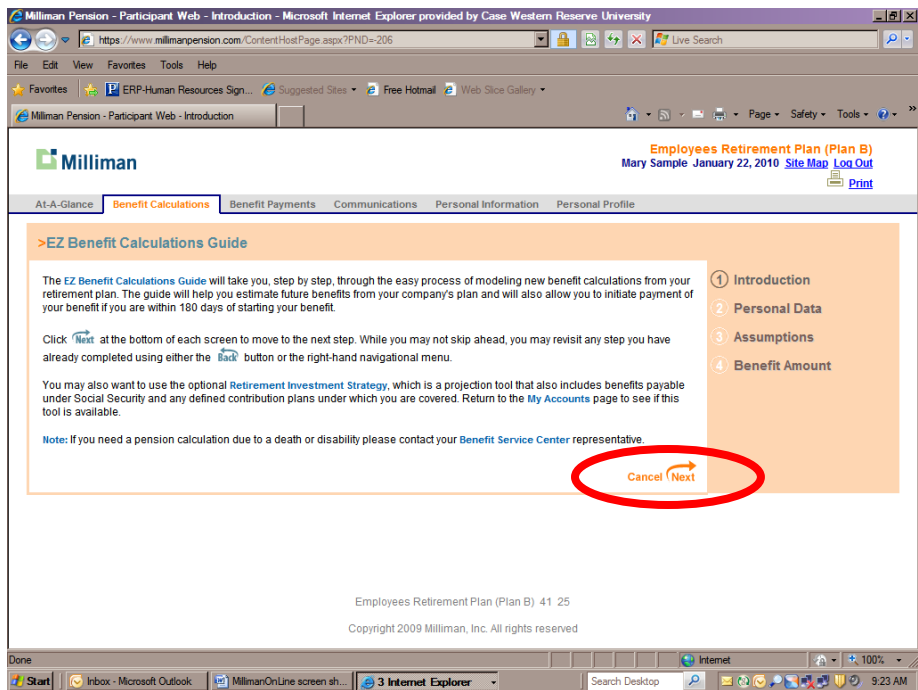
- ▶ You can run a calculation to view benefit details. Click on the Add link



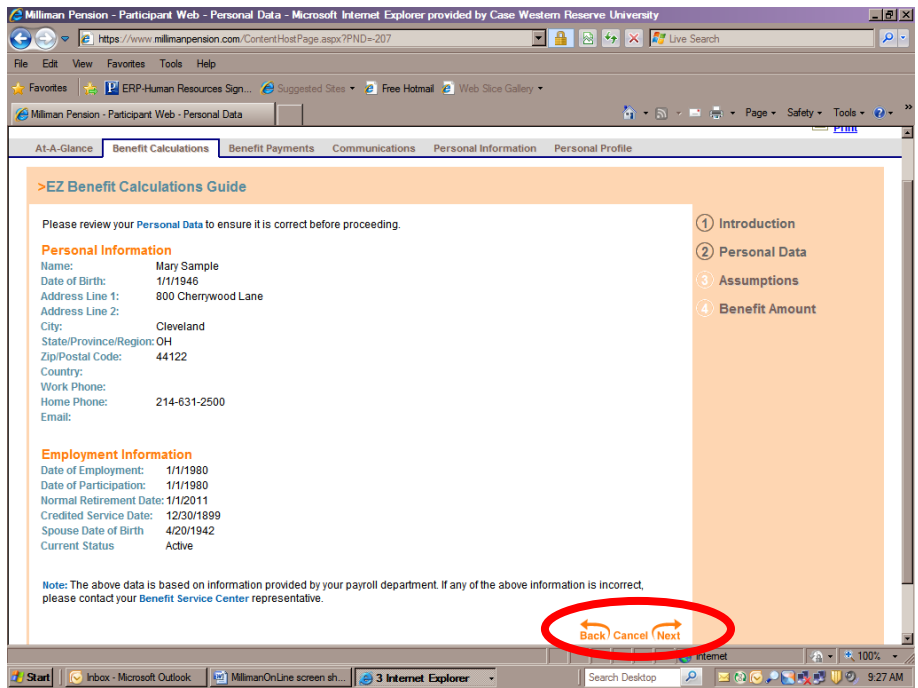
Or, go to the **Benefit Calculation** tab and click on the Add link



- ▶ After reading the instructions, click the Next button.



- ▶ Review your personal and employment information, click the Next button.



- ▶ Complete the required fields, click the Next button.

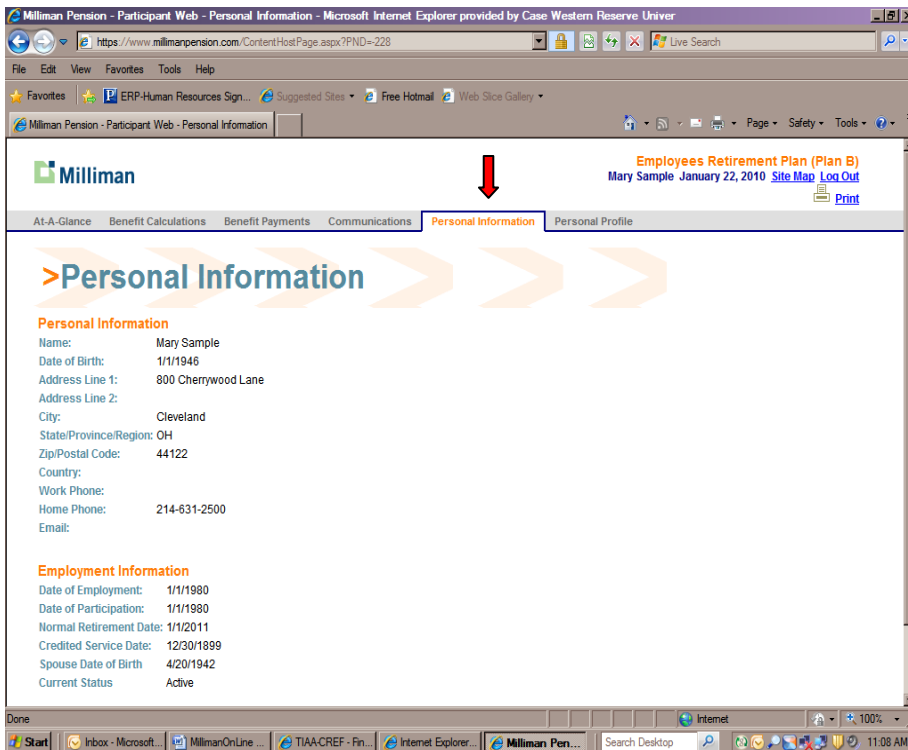
The calculation will provide benefit values for several payment options.

- ▶ Click on **EZ Paperwork Request Guide** to request benefit commencement documents, click on **Add** to run a different calculation, or click on **Finish** at bottom of page to exit.

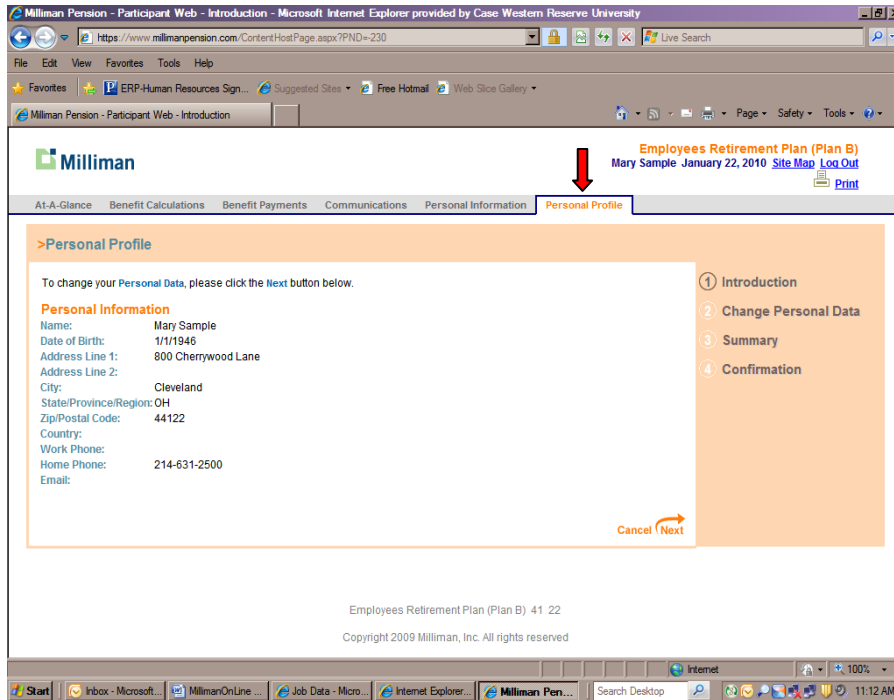
- ▶ When adding a different calculation, change the information in the required fields on the Projection Assumptions screen:
  - Calculation Name
  - Termination Date (Note: Current date is the default)
  - Commencement Date (Note: Default date is Normal Retirement at age 65, participants with 15 or more years of service can receive Early Retirement between ages 55-64)
  - Assumed Rate of Pay Adjustment (Enter your current annual income and a reasonable percentage for annual increase.)

**NOTE:** Benefit values calculated for vested participants are estimates. The final, actual benefits for commencement will be calculated by the pension consultants upon verification of termination and final actual pay received. The benefit value calculated for participants who have not yet attained the 3-year vesting requirement will be \$0.

- ▶ View your Personal and Employment Information on the **Personal Information** screen.



- Make changes/updates to your personal information from the **Personal Profile** screen.



- Click **Next**. Active participants may only change telephone numbers and e-mail addresses. Home address information is provided in the monthly data feed from HCM. Make address changes with the Records Office, Crawford Hall, Room 220. Terminated employees may update addresses via this on-line tool.

