



New Mexico Educational Retirement Board

MyNMERB Tutorial

MyNMERB works best with:



28.0



36.0.1985.143m

MyNMERB is an online self service tool for active and inactive NMERB members. Active and inactive NMERB members are members who have retirement funds on account with NMERB but are not yet retired.

This tutorial will guide you with step by step instructions for each menu item in MyNMERB.

If you have questions or problems
please contact NMERB at the contact information below or
send an email to member.help@state.nm.us

New Mexico Educational Retirement Board
701 Camino de los Marquez, Santa Fe, NM 87501
8500 Menaul Blvd NE, Suite B-450, Albuquerque, NM 87112
Toll Free Number: 1-866-691-2345 Fax: (505) 827-1855

All Active and Inactive NMERB members must register for MyNMERB.

To start the registration process, click “Register.”

To continue, you must read the “Terms of Service” and “Decline” or “Accept.”

To continue, click “Accept”

Enter your Social Security Number, Last Name and Date of Birth, click “Validate.”

If you get an error message, please contact NMERB to verify your information is correct.

****If you get an error message after 3 attempts, close out of your internet browser completely and try again. If you are still getting an error message, please send an email to member.help@state.nm.us.**

Account Setup:

- Create a username
- Create a password
- Confirm the password

- Pick a security question
- Enter an answer

- Enter your email address
- Confirm your email address

Click "Submit"

Account Setup

Account

All fields are required. The password is case sensitive.

Person: Smith, Jane)

Username:

Enter New Password:

Confirm New Password:

Security Questions

Security questions are used in-case you ever need to recover your password.

Select First Security Question:

Enter Answer to First Question:

Email Address

Your email address is used for all communications from the fund office. It will remain private and it will not be shared with outside companies.

Enter Email Address:

Re-enter Email Address:

You'll get a "Registration Successful" confirmation and will be redirected to MyNMERB Log In screen.

Registration Successful

Your account has been successfully created. You currently are redirected to the login page.

Now log in with your new Username and Password.

Click "Log In"

Log In

User Name

Password

[Register](#)

Menu

The Menu will navigate you through the self service functions.

Home

The home page will list your mailing address if NMERB has your address entered to your profile.

NMERB will communicate announcements to you using the “News” and/or “Alerts” function.

Your beneficiaries will be listed, if NMERB has your beneficiaries entered to your profile. Please contact NMERB to confirm you have a beneficiary.

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- Home
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Home

Using this website you will be able view and update the information that the fund office has on file for you. If you find any errors with the information, please contact the fund office.

PO BOX
TJLERAS, NEW MEXICO 87059-0000
US

News

Alerts

Dependents

The Dependent is your pre-retirement beneficiary. To confirm your current beneficiary, please send an email inquiry to ERB-memberhelp@state.nm.us.

Name	SSN	Relation	Birth Date	Marital Status	Marriage Date

Beneficiaries

For ERB use only.

Showing Records 1 - 0 of 0

Account (top right corner)

The **Account Settings** will allow you to:

- Reset your password
- Update your security questions
- Update your email address

When finished, click “Home”

Account Settings

You can update your password, email as well as a variety of other settings that affect your user account.

Reset Password
Please remember to frequently update your password.

Update Email Address
Your email address is our primary means of communicating with you. Please make sure that you keep it up to date.

Update Security Questions
Your security questions are used when you forget your password.

[Home](#)

Profile

The profile page will indicate general information about the member.

		Welcome Jane Smith	03/17/2014												
Menu Home Profile Address Work History Benefit Estimator Service Credit Purchase Estimator Retirement/Refund Application Statement of Account Help	<h3>Member</h3> <hr/> <table> <tr> <td>Participant:</td> <td>Smith, Jane</td> <td>Marital Status:</td> <td></td> </tr> <tr> <td>Date of Birth:</td> <td>Jun 13, 1955</td> <td>SSN:</td> <td>XXX-XX- 1234</td> </tr> <tr> <td>Status:</td> <td>Active</td> <td>Type:</td> <td>ERB</td> </tr> </table> <p>Please review the displayed information and contact NMERB Benefit Funds if you find any information that does not look correct. Please call or send your question in writing and include any supporting documentation that you may have. For security reasons, we do not want you to send us your personal information via email.</p>	Participant:	Smith, Jane	Marital Status:		Date of Birth:	Jun 13, 1955	SSN:	XXX-XX- 1234	Status:	Active	Type:	ERB		
Participant:	Smith, Jane	Marital Status:													
Date of Birth:	Jun 13, 1955	SSN:	XXX-XX- 1234												
Status:	Active	Type:	ERB												

Address

The address page will indicate your mailing address if NMERB has an address entered to your profile. It will also indicate the email address you entered upon registration.

		Welcome Jane Smith	03/17/2014
Menu Home Profile Address Work History Benefit Estimator Service Credit Purchase Estimator Retirement/Refund Application Statement of Account Help	<h3>Address</h3> <hr/> <div style="border: 1px solid gray; padding: 2px; width: fit-content;">Correspondence</div> <p>PO BOX TIJERAS, NM US 87059-0000</p> <p>Email: Primary: email@emai.com</p> <p>To update your address, please complete a Change of Address Form. You can access the form here: http://www.nmerb.org/Downloadable_Forms.html</p>		

Work History

The work history page will indicate the member's past and current employers. You can sort this information by Employer or by Year. The "Action" column is for NMERB use.

Welcome Jane Smith 03/17/2014

Work History

Below is the history of your employment with the fund office.

Employer: All Year: All

[Print](#) [Export](#)

Start Date	Stop Date	Employer	Billing Location	Status	Action
01/01/2014	01/31/2014	ALBUQUERQUE PUBLIC SCHOOLS	ALBUQUERQUE PUBLIC SCHOOL SYST	ACT	Details
12/01/2013	12/31/2013	ALBUQUERQUE PUBLIC SCHOOLS	ALBUQUERQUE PUBLIC SCHOOL SYST	ACT	Details
11/01/2013	11/30/2013	ALBUQUERQUE PUBLIC SCHOOLS	ALBUQUERQUE PUBLIC SCHOOL SYST	ACT	Details
10/01/2013	10/31/2013	ALBUQUERQUE PUBLIC SCHOOLS	ALBUQUERQUE PUBLIC SCHOOL SYST	ACT	Details
09/01/2013	09/30/2013	ALBUQUERQUE PUBLIC SCHOOLS	ALBUQUERQUE PUBLIC SCHOOL SYST	ACT	Details
08/01/2013	08/31/2013	ALBUQUERQUE PUBLIC SCHOOLS	ALBUQUERQUE PUBLIC SCHOOL SYST	ACT	Details
06/01/2013	06/30/2013	ALBUQUERQUE PUBLIC SCHOOLS	ALBUQUERQUE PUBLIC SCHOOL SYST	ACT	Details
05/01/2013	05/31/2013	ALBUQUERQUE PUBLIC SCHOOLS	ALBUQUERQUE PUBLIC SCHOOL SYST	ACT	Details
04/01/2013	04/30/2013	ALBUQUERQUE PUBLIC SCHOOLS	ALBUQUERQUE PUBLIC SCHOOL SYST	ACT	Details
03/01/2013	03/31/2013	ALBUQUERQUE PUBLIC SCHOOLS	ALBUQUERQUE PUBLIC SCHOOL SYST	ACT	Details

Page 1 of 14 Showing Records 1 - 10 of 139

Below the Work History is your unaudited **Member Contribution History** report. This report is sorted by quarters and will be helpful when calculating a retirement benefit. You can print this report for your reference. Please note that this report is unaudited. Your NMERB account is officially audited when you get closer to retirement and request a retirement estimate.

New Mexico Educational Retirement Board

Member Contribution History / Active

Name :

Birth Date :

Available Alwd. Crdt : 5.00

SSN :

Age :

Total Alwd. Crdt Purchased : 0.00

Maiden Name :

Gender : Female

Option :

Earned Dt	School Name / Purchase Type	Salary	Contribution	Crdt Emrd	Crdt Alwd	FYTD Salary
09/30/2012	UNIVERSITY OF NEW MEXICO	32,499.99	3,054.99	0.25		32,499.99
12/31/2012	UNIVERSITY OF NEW MEXICO	32,499.99	3,054.99	0.25		64,999.98
03/31/2013	UNIVERSITY OF NEW MEXICO	37,250.01	3,501.51	0.25		102,249.99
06/30/2013	UNIVERSITY OF NEW MEXICO	38,650.01	3,633.11	0.25		140,900.00
YTD		140,900.00	13,244.60	1.00	0.00	
09/30/2013	UNIVERSITY OF NEW MEXICO	39,662.76	4,005.93	0.25		39,662.76
12/31/2013	UNIVERSITY OF NEW MEXICO	39,662.76	4,005.93	0.25		79,325.52
03/31/2014	UNIVERSITY OF NEW MEXICO	39,662.76	4,005.93	0.25		118,988.28
06/30/2014	UNIVERSITY OF NEW MEXICO	13,220.92	1,335.31	0.25		132,209.20
YTD		132,209.20	13,353.10	1.00	0.00	
Grand Total		273,109.20	26,597.70	2.00	0.00	

Benefit Estimator

The Benefit Estimator will calculate a retirement estimate with Options A, B and C.

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Benefit Estimator

SSN: XXX-X 1234
 Name:

Retirement Date:

Member DOB:

Beneficiary DOB:

Check if Spouse:

Actual	Estimated
Earned Credits: 19.75	Earned Credits: <input type="text" value="20.00"/>
Allowed Credits: 0.00	Allowed Credits: <input type="text" value="0.00"/>
Total Credits: 19.75	Total Credits: <input type="text" value="20"/>
Estimated Fas: \$51,564.05	Estimated Fas: <input type="text" value="51,564.05"/>
OptionA Est: \$1,946.48	OptionA Est: <input type="text" value="\$1,971.12"/>
OptionB Est: \$1,762.15	OptionB Est: <input type="text" value="\$1,784.46"/>
OptionC Est: \$1,849.74	OptionC Est: <input type="text" value="\$1,873.16"/>

6. Click "Calc Estimate" Calc Estimate

[Click here](#) for information concerning retirement qualifications and retirement option definitions.

The Retirement Benefits Calculator provides you an unofficial ERB benefit estimate. You can use this estimate to guide you in retirement planning. Any calculation does not guarantee you a benefit. All benefits are determined according to the Educational Retirement Board Law.

1. The date indicated is the date you first meet one of the three qualifications; you can change this date.

2. Enter your beneficiary's birth date.

3. Check the box if your beneficiary is your spouse.

4. Enter the amount of earned credits at the time of your retirement date

5. Enter your estimated FAS (see 'actual' column)

Options A, B and C will populate. These are gross, monthly amounts.

Legend:

Actual

The Actual column will have your current information as of the end of the most recent quarter. Options A, B and C will indicate \$0.00 until your calculation is complete. For the retirement qualifications, click on Help from the Menu and then Benefit Estimator.

Estimated

The estimated column will have zeros until you enter the information. **Earned credits** is the amount of earned service credit by your retirement date. **Allowed credits** is service credit you plan to buy. If you are not buying service credit, leave this field alone. **Total credits** will populate after you enter your earned and allowed credits. **Estimated FAS** is your most current estimated *Final Average Salary*; your Final Average Salary is the average of your highest consecutive five years' salaries that your employer has reported to NMERB as of the end of the most recent quarter.

Earned Credits

You earn service credit by quarters in the fiscal year. The fiscal year is July 1 to June 30. The quarters end in September, December, March and June. Refer to your Member Contribution History report for help on figuring out your earned credits.

Option A, B and C

Options A, B and C are your survivor's benefit options upon retirement.

Service Credit Purchase Estimator

The Service Credit Purchase Estimator will calculate a purchase estimate for Out of State, NM Private School and/or Military Service.

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Service Credit Purchase Estimator

SSN: XXX-XX- 1234
Name: Smith, Jane

Type of Purchase to Estimate:

Allowed Services:

Military Services:

Includes BIA Service in NM, Military Dependent School, Out of State Service, Private NM School:

Military Service ie. you wish to claim service for time spent in the military:

For Non-Reported and Free Military Service please contact ERB directly

Proceed

Please, do not send any payments based on these calculations. Any payments received by ERB without an official billing and an established receivable account will result in monies returned to sender. The Retirement Benefits Calculator provides you an unofficial ERB benefit estimate. You can use this estimate to guide you in retirement planning. Any calculation does not guarantee you a benefit. All benefits are determined according to the Educational Retirement Board Law.

1. Select the type of service credit for which you wish to calculate a purchase estimate.

2. Click "Proceed"

Out of State or NM Private School Purchase Estimate

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Allowed Service Credit Purchase

SSN: XXX-XX- 1234
Name: Smith, Jane

Current Age:

Current Service:

Current Annual Salary:

Service Credit:

Cost:

1. Enter your current salary

2. Enter Service Credit to purchase in quarters (eg. 0.25, 0.75, 1.5):

4. The purchase estimated will populate here.

Calculate

3. Click "Calculate"

Click on the following link to see: [Allowed Service Rules](#)

Please, do not send any payments based on these calculations. Any payments received by ERB without an official billing and an established receivable account will result in monies returned to the sender. The Retirement Benefits calculator provides you an unofficial ERB benefit estimate. You can use this estimate to guide you in retirement planning. Any calculation does not guarantee you a benefit. All benefits are determined according to the Educational Retirement Board Law.

US Military Service Purchase Estimate (you need at least 5 years of service credit to use this function)

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Military Service Credit Purchase

SSN: XXX-XX- 1234
Name: Smith, Jane

5 Years Average Salary: } Your current 5 year average salary will be calculated for you. An estimated purchase date will automatically populate for 2 months from now.

Purchase Date:

Service Credit: 1. Enter Service Credit to purchase in months (eg. .0833, 1.25, 2.0):

Induction Date: 2. Enter your induction and discharge dates here. Check the box for an honorable discharge.

Discharge Date:

Honorable Discharge:

Cost: 4. The purchase estimate will populate here.

3. Click "Calculate" Calculate

Click on the following link to see: [Military Service Rules](#)

Please, do not send any payments based on these calculations. Any payments received by ERB without an official billing and an established receivable account will result in monies returned to the sender.:

Retirement/Refund Application

This page will navigate you to the Download Forms link on NMERB's public website. You can print a Retirement Application Package or a Request for Refund/Rollover Form.

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Retirement and Refund Applications

SSN: XXX-XX- 1234
Name: Smith, Jane
Address:

Application for Retirement

You should obtain this form from your local personnel or business office 60-90 days prior to your planned effective date of retirement. There are four pages in the retirement application, they are: (1) Retirement Application Instructions, (2) Application for Retirement Checklist, (3) Member Information, and (4) the Employer Certification. Complete the Member Information Form and return it to your personnel or business office where the Employer Certification will be completed. Your employer will then forward the completed application to our office. Our staff will review your application for eligibility and mail to you your retirement documents, which include: an information memorandum, a final computation of your retirement benefit, a final selection of benefit form, and a direct deposit authorization form. (The New Mexico Retiree Health Care Authority will automatically mail you a retirement packet. For more information on the NMRHCA, call 1-800-233-2576.)

[Retirement Application Package](#)

Request for Refund

[Request for Refund and/or Rollover](#)

Statement of Account

This page will indicate your total member contribution amount and interest earned as of the end of the most recent quarter.

Welcome **Jane Smith** 03/14/2014

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Statement of Account

Date:	12/31/2013
SSN:	XXX-XX- 1234
Name:	Smith, Jane
Maiden Name:	
Date of Birth:	06/13/1955
Age:	58.5
Gender:	Female


Total credits:	19.75
Total tax Deferred Member Contributions:	\$63,203.53
Total Taxed Contributions:	\$0.00
Total Interest on Contributions:	\$18,154.26
Total Contributions + Interest :	\$81,357.79
Total Annuity Paid:	\$0.00
Total Refund Amount:	\$81,357.79

IMPORTANT INFORMATION REGARDING THIS REFUND CALCULATION

- The interest amount calculated on this refund is valid for 30 days from the date noted above. (excluding statements provided in June prior to rate changes)
- Interest rates are changed at the start of each fiscal year, which begin on July 1. Currently, the ERB has set interest rates at the interest rate for the 5-year U.S. Treasury Note (Constant Maturity) as of the last business day in March preceding July 1. For example, the rate that will be effective as of July 1, 2010 will be the rate in effect on the last business day in March 2010. Interest on member's contributions is compounded quarterly at the rate in effect that fiscal year.
- The 20% withholdings are only on amounts directly refunded to the member (does not apply to roll-overs to a tax deferred account).
- Information provided is based on our current records. If an error or irregularities are discovered, the amounts shown are subject to change.
- This statement is in no way a guarantee of benefits earned.

Member Help

These pages will give you definitions and explanations of each menu item within MyNMERB.



**NEW MEXICO
EDUCATIONAL
RETIREMENT
BOARD**

Last Logon | Account | Logout

Welcome **Jane Smith** 03/14/2014

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Member Help

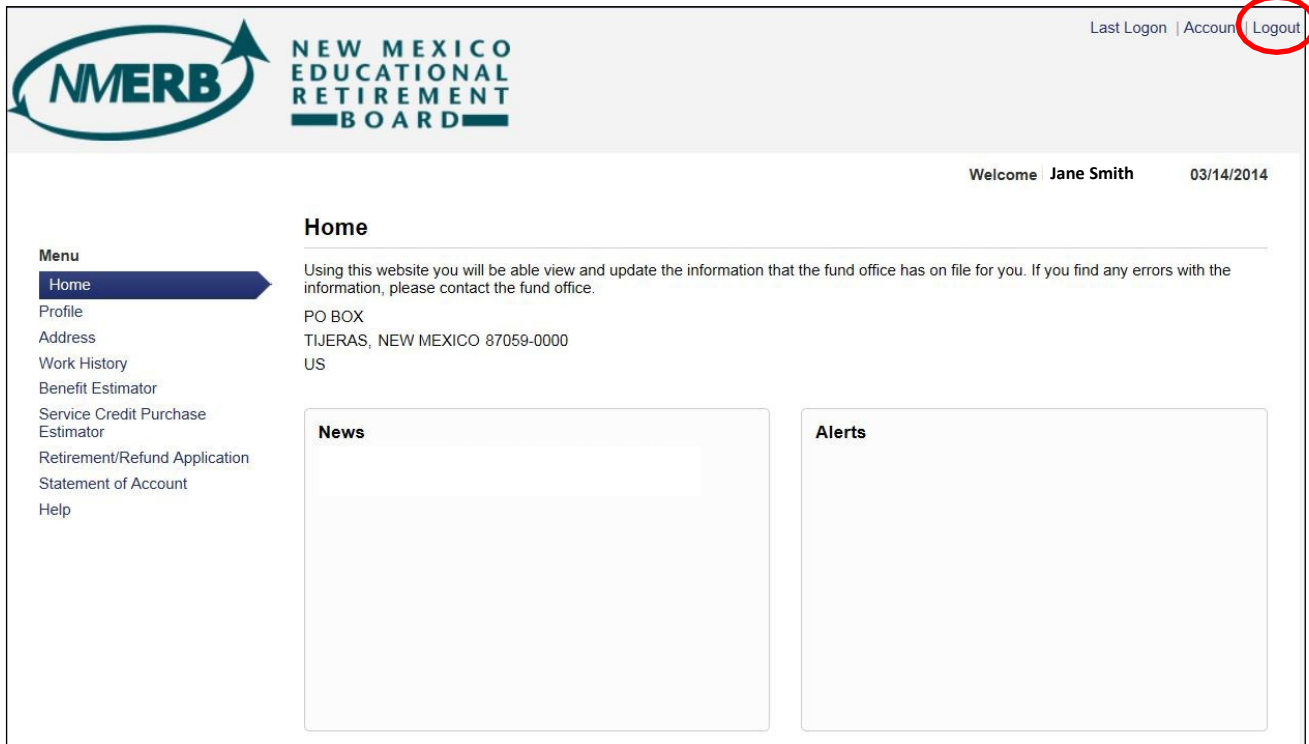
- Profile
- Benefit Estimator
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- Change Password

Welcome to Member Help

Each selection at your left corresponds with the menu selections on the NMERB Member web pages. Click on a desired menu selection you wish to learn more about.

Logout

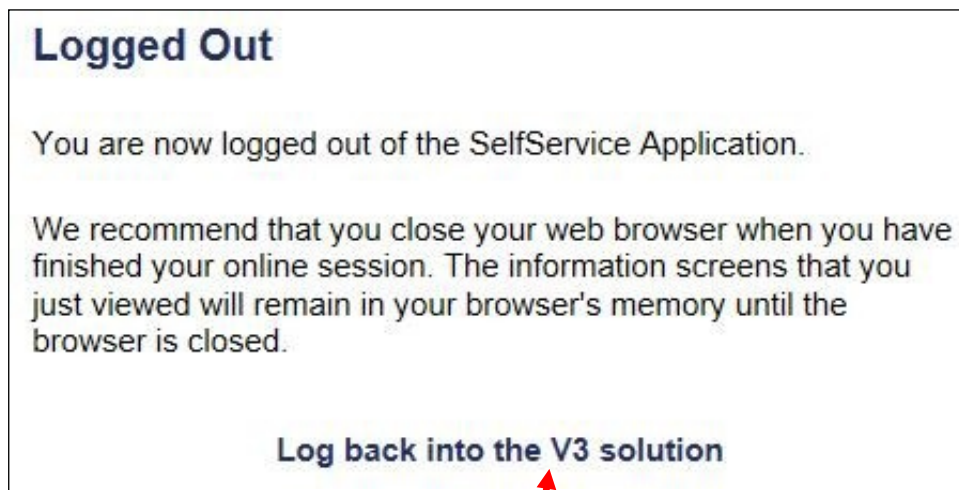
To logout of your MyNMERB, click “logout” at the top right corner of your screen.



The screenshot shows the MyNMERB website interface. At the top left is the NMERB logo. To its right is the text "NEW MEXICO EDUCATIONAL RETIREMENT BOARD". In the top right corner, there are links for "Last Logon", "Account", and "Logout", with the "Logout" link circled in red. Below the header, the user is logged in as "Jane Smith" and the date is "03/14/2014". A "Menu" is visible on the left side, with "Home" selected. The main content area is titled "Home" and contains a welcome message, contact information (PO BOX, TIJERAS, NEW MEXICO 87059-0000, US), and two empty boxes labeled "News" and "Alerts".

Logged Out

You'll get a confirmation when you have successfully logged out of MyNMERB.



The screenshot shows a "Logged Out" confirmation message. The text reads: "You are now logged out of the SelfService Application. We recommend that you close your web browser when you have finished your online session. The information screens that you just viewed will remain in your browser's memory until the browser is closed." At the bottom, there is a link that says "Log back into the V3 solution", which is highlighted with a red arrow.

You can log back into your MyNMERB by clicking here.