PRE-RETIREMENT PROCESS
PREPARING FOR YOUR APPOINTMENT

As your prepare for retirement, you will need to provide ERF with several forms and documents so we can prepare your application for review and strive to meet your preferred retirement date.

To submit these forms, you will need to complete all the tasks assigned to you in the Pre-Retirement Portal.

STEP ONE: LOGIN TO myERF & RUN A PENSION ESTIMATE

You will need your pension estimate to complete your Retirement Application, if you do not have a myERF account, click here to create one, https://erfprodmss.v3locity.com/registration.

1. Login to my ERF, https://erfprodmss.v3locity.com/login

2. Go to the Pension Estimator Tab.

3. Click the Create Estimate button to begin.

4. Click Agree and Proceed.

5. All fields must be completed to generate an estimate.

   » Choose a retirement target; Date Specific, Earliest Retirement or Normal Retirement.

   » If you choose date specific, select the date specific button and enter the date.

   » If you would like to compare several retirement types, click Add another estimate and enter retirement type details again.

   » Once all desired retirement type information has been entered, enter their marriage details including marital status and spouse's date of birth.

   » Click Next

   » You will see a summary of all the retirement types you have entered, click confirm to save estimate.

   » Estimate Results will include the Total Service, Base Benefit and Reduction amount along with the Total Retirement Benefit.

   » The options summary will include estimates for Joint & Survivor ½, Joint & Survivor Fun and Life with 10 Year Certain.

   » After the information is confirmed, the estimate results will appear on the tab.

6. Back in the Pension Estimator Tab, click the Pension ID to view the estimate (s) details. From there, you can download and print your estimate.

» If you are married, enter your spouse's date of birth.

» The Pension estimator tool calculates your benefit based on information from the City of Dallas and assumptions that they input.

» Estimates do not include lump sum vacation pay and may not reflect all leave without pay.

» The actual pension benefit will be calculated after termination of employment when final data is received from the City of Dallas.

» The Final Average Salary information displayed is estimated based on contributions and service credit.

STEP TWO: COMPLETE THE COURSES ASSIGNED BY COMPLETING THE FOLLOWING STEPS

1. Click on the name of any course assigned to you, course details will open in a new window.

2. Click on the first lesson, you will see another pop-up window of either a PDF document or a video.

   » For PDF documents, read and then sign the document by clicking 'Yes' at the bottom of the window.

   » For videos, you must watch the entire video to complete the course. You will see a link at the bottom of the window to open the required form in a new browser tab.

3. Once you have completed all the lessons for a course, it will be moved to the 'Completed' section of your portal.

STEP THREE: COMPLETE AND NOTARIZE YOUR FORMS

1. While watching the video in any lesson, you can click the link at the bottom of the video to open the form for that course. The form will open in a new browser window.

2. Once the form has opened, choose print or download. A new pop-up will appear, choose 'Open' to open the form in Adobe Reader. Click here if you need to download a free copy.

3. You do not need to print the form to complete it, you can type directly into the blue boxes on the form.

4. Once you have completed all the fields of the form, you will need to sign the form.

   » Click the sign icon at the top of the form
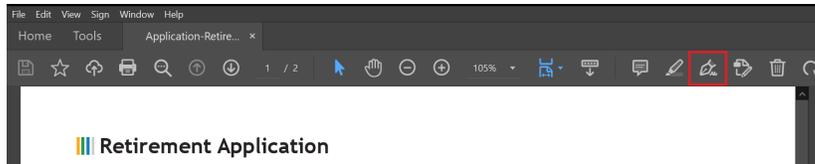
   » Select Add Signature
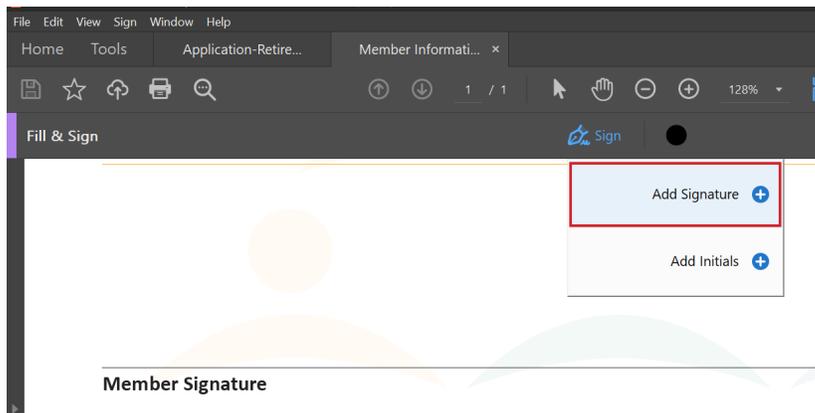
   » Follow the instructions to create your signature. You can type your full name and select a font of your choice, use a stylus to sign your name or upload a picture of your signature.

   » Click Apply.

   » Your signature will appear, click on the Signature line to place your digital signature.
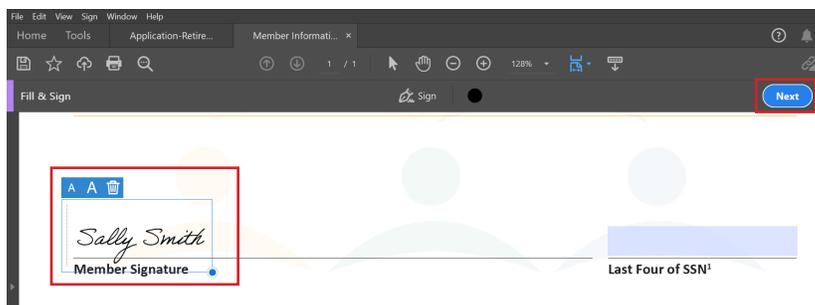
   » Click Next to save the form to your computer. ***Once you have saved the signed form, you can no longer edit the form. If you need to make edits, you will need start over.***

5. If your document required notarization, you need to have it notarized prior to submitting it.

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STEP FOUR: UPLOADING YOUR FORMS & DOCUMENTS

1. Click the 'Completed' tab and click upload to submit your completed form or scanned document.

2. Click Upload in the Document column for each completed course to upload the appropriate form or document.

    »   If you need assistance with your forms or documents, click Contact Us at the top of the page to send a message to an ERF Benefit Counselor.

3. Once you have uploaded all of your forms and documents, contact ERF by phone at 214-580-7700 or via email at retirement_fund@dallaserf.org to schedule an appointment.