



Office of Retirement Services
Federated City Employees' Retirement System
Police and Fire Department Retirement Plan

September 25, 2019

Dear ,

Office of Retirement Services has just launched the new member portal – MemberDirect. By way of this letter, ORS is inviting you to enroll in the portal to view your account information available in the pension system. You must complete this one-time enrollment process for MemberDirect to view your current pension information, even if you previously had an account on the former portal known as Web Member Services (WMS). **Please carefully follow the instructions provided below or you may encounter difficulty during the enrollment process.**

Below you will find your MemberDirect Enrollment Personal Identification Number (PIN). You will need to enroll soon as this PIN will expire on October 25, 2019. If your PIN has expired, you can contact ORS at 408-794-1000 for a new one. Please keep this PIN in a secure location, and do not share it with others.

PIN: 2KYLZGZS

To enroll, follow the steps below:

1. Go to the website at <https://memberdirect.sjretirement.com> or click on the “My Account” link on the Federated or Police and Fire Retirement Services website (www.sjretirement.com).
2. Click on the “Enroll Now!” button.
3. Enter the PIN shown above in the Enrollment PIN box. The PIN is not case sensitive.
4. Enter your SSN, Last Name, Birth Date and Home Zip Code, following the formatting shown next to the entry box. If you live in a foreign country, leave the zip code blank and select the Country from the drop-down.
5. Enter your new account information:
 - a. Username – Must be at least 8 characters and be alphanumeric.
 - b. Email and Confirm Email – The email address where you will receive all MemberDirect communications. If Email and Confirm Email do not match, you will receive an error message – *Emails do not match - and you should correct the error to proceed.
 - c. Password and Confirm Password – The password you will use to access your account. It must be at least 8 characters and contain both upper and lower case and be alphanumeric. If the passwords do not match, you will receive an error message - *Passwords do not match – and you should correct the error to proceed.
6. Challenge questions for identity protection:
 - a. Select a question from Question #1 drop-down and provide the answer.
 - b. Select a question from Question #2 drop-down and provide the answer.
 - c. Select questions and answers that you can easily remember as you may be requested to answer these questions upon MemberDirect login in the future.
7. Read the Disclosure.

8. Read the Terms and Conditions. Click on the words "Terms and Conditions" in the second paragraph of the Disclosure to go to the Terms and Conditions document.
9. Check the box "I understand and agree".
10. Security Check:
 - a. Click on the box "I'm not a robot".
 - b. Pictures may be displayed next. If so, follow the instructions provided and click on "Verify".
11. Click "Enroll". If you have finished entering all the information on the screen and have clicked Enroll and your Password did not meet the entry criteria, you will receive an error message notifying you of that. If that occurs you will need to re-enter both your PIN and SSN, a Password that does meet the entry criteria and answer the Challenge Questions and Security Check again before you click Enroll again.
12. If there are no entry errors, you will receive a message that you are successfully enrolled.
13. Click on "Login to MemberDirect".
14. On the Sign in Section: Enter your Username and Password.
15. Click on "Login".
16. You will need to enter the responses to your Challenge Questions.
17. If you are on your personal computer and **not a public computer**, it is recommended that you set up your device as a Trusted Device. That way, MemberDirect will recognize you and not ask you to answer your Challenge Questions upon next login. To establish your device as a Trusted Device, click on "Trust this Device" and enter a name that you would like this device to be known as. It is merely a nickname and can be any name you like, there is no entry criteria.
18. You will be asked next if you want to take a Tour – if so, click Yes. If you click No, Thanks, and Don't show this again, you can still take the tour anytime in the future by clicking on the left menu item Help>Site Tour.

Welcome to MemberDirect! If you have problems enrolling or logging in, please contact us at 408-794-1000 or toll-free at 800-732-6477, or send an email to retirement.dept@sanjoseca.gov.

Sincerely,

The Office of Retirement Services