

MemberDirect: Guide to Updating Your Tax Withholding

This guide includes instructions on how to view and update federal and state tax withholding in MemberDirect.

Mendocino County Employees
Retirement Association
625-B Kings Court
Ukiah, CA 95482
(707) 463-4328
2/27/2018

1. Begin by logging in to Member Direct:

<https://mcera-prod.pensiongoldhosting.com/WMSWebsite/Login.aspx>

If you have a MemberDirect account, enter your user name and password. If you do not have an account, enroll in MemberDirect by clicking “Enroll Now” to use the site.

MENDOCINO COUNTY EMPLOYEES RETIREMENT ASSOCIATION

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MemberDirect [Enroll Now](#) | [Contact Information](#)

Welcome to MemberDirect

Sign-in

Username
Password

*Forgot your password?
Forgot your username?*

Why Register?

As a Member

- View your member information
- Estimate your benefit
- Download and complete forms
- View and register for upcoming seminars
- [Enroll Now](#)

As a Retiree or Recipient

- View your payment history and receipts
- View tax withholding and other deductions
- Update your personal information
- Update your tax withholding and direct deposit information
- [Enroll Now](#)

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For additional information on signing up for MemberDirect, please download the [MemberDirect Guide for Retired Members](#).

2. Click on Withholding Elections on the left-hand menu.

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MemberDirect [Hi, \[User Name\]](#) | [Profile](#) | [Sign Out](#)

BENEFIT SUMMARY

Benefit Information
Benefit Summary
Benefit Payment History
Withholding Elections
Direct Deposit Elections
Year to Date
1099-R
Personal Information
Beneficiaries

Seminars
Forms
Communications
Correspondence
Statements
Help
Help Contents
Contact Information

User
Profile
Communication Settings
Sign Out

Benefit Summary

Benefit Type: Service Retirement
Payment Method: Contingent Joint & Survivor
Benefit Status: Active
Effective: 1/9/2007

Benefit Amount as of 2/12/2018

\$3,931.62	Pension
\$1,675.68	Annuity
\$1,713.02	Adjustments
+	\$0.00
\$7,320.32	Total Gross
(\$1,707.16)	Withholding
(\$1.00)	Deductions
-	\$0.00
\$5,612.16	Net Amount

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3. The following page will open and you will see cards displaying your current federal and state withholding amounts. You can click on “include prior elections” to display additional cards with any previous withholding you may have had. Clicking on “view as grid” will display a table listing all of your current and past withholding amounts.

The screenshot shows the MemberDirect portal for the Mendocino County Employees Retirement Association. The page is titled "WITHHOLDING ELECTIONS" and displays "Tax Withholdings" for a user viewing "Service Retirement (Active)". The page is divided into two main sections: "Federal Withholding" and "State Withholding".

Federal Withholding:

- Effective: 6/1/2017
- Termination:
- Election: Tax Table + Extra
- Amount: N/A
- Percent: 0.00 %
- Filing Status: Married
- Exemptions: 0
- Extra: \$900.00
- Calculated Withholding: \$1,382.16**

State Withholding:

- Effective: 10/30/2015
- Termination:
- Election: Flat Amount
- Amount: \$325.00
- Percent: 0.00 %
- Filing Status:
- Allowance: 0
- Add Allowance: 0
- Extra: \$0.00
- Calculated Withholding: \$325.00**

Links for "include prior elections" and "view as grid" are visible in the top right of the Federal Withholding section. Two black arrows point to these links.

4. To update your Federal withholding, click on the downward facing arrow in the top right corner of the Federal Withholding card, and then click “Update Election.”

This screenshot shows the same MemberDirect portal as the previous one, but with a focus on the "Federal Withholding" card. A black arrow points to a downward-facing arrow in the top right corner of the card, which is used to open a dropdown menu. The dropdown menu is open, showing the "Update Election" button. The card details are the same as in the previous screenshot.

5. A Withholding Maintenance screen will open. Here you can make changes to your withholding election by clicking on the drop-down menu next to Election and choosing either No Withholding, Tax Table, or Tax Table + Extra Amount.

Withholding Maintenance

Withholding Type: Federal

Election: Tax Table + Extra Amount

Amount:

Percent:

Filing Status: Tax Table + Extra Amount

Exemptions: 6

Extra Withholding: 900.00

Changes Will Be Effective As Of 3/1/2018

Calculate New Net Benefit Cancel

6. Fill in the remaining available fields. Click “Calculate New Net Benefit” to preview what your benefit will be before saving the changes.

Withholding Maintenance

Withholding Type: Federal

Election: Tax Table

Amount:

Percent:

Filing Status: Single

Exemptions: 0

Extra Withholding:

Changes Will Be Effective As Of 3/1/2018

Calculate New Net Benefit Cancel

7. A new Net Benefit Breakdown will open, displaying your benefit details with the new withholding election. You can click “Save Withholding” to save your changes or “Back” to avoid making any changes.

Net Benefit Breakdown as of 3/1/2018

Base Benefit Amount:	\$5,607.30
Adjustments:	\$1,713.02
Supplements:	\$0.00
Gross Benefit Amount:	\$7,320.32
Taxable Amount:	\$7,320.32
Federal Withholding:	(\$1,207.08)
State Withholding:	(\$325.00)
Deductions:	(\$1.00)
Insurance:	\$0.00
Net Benefit Amount:	\$5,787.24

Save Withholding Back

8. Follow the same procedure to update State (CA) Withholding.
9. After saving your withholding changes, you will receive a notification informing you of when your new withholding will take effect and that you will receive an email notification of your tax withholding changes. An additional card will display your future withholding change.

The screenshot displays the MemberDirect portal for the Mendocino County Employees Retirement Association. The header includes the association's logo and name, along with contact information: 6258 Kings Court, Ukiah, CA 95482, and phone number (707) 463-4328. The user is logged in as 'Hi, [redacted]' and can access their profile or sign out.

The main section is titled 'WITHHOLDING ELECTIONS'. A green notification box states: 'Your new withholding is effective 3/1/2018 and will be reflected in your March 2018 payment. You will receive an e-mail confirmation of your new election.' Below this, the user's name is partially visible as '(XXX-XX-XXXX)' and it indicates they are viewing 'Service Retirement (Active)'.

The 'Tax Withholdings' section is divided into 'Federal Withholding' and 'State Withholding'. Under 'Federal Withholding', there are two cards:

- Federal (Effective: 6/1/2017):** Termination: 2/28/2018, Election: Tax Table + Extra, Amount: N/A, Percent: 0.00%, Filing Status: Married, Exemptions: 6, Extra: \$900.00. Calculated Withholding: **\$1,382.16**.
- Federal (Effective: 3/1/2018):** Termination: N/A, Election: Tax Table, Amount: N/A, Percent: 0.00%, Filing Status: Single, Exemptions: 0, Extra: \$0.00. Calculated Withholding: **\$1,207.08**.

Under 'State Withholding', there is one card:

- State (CA) (Effective: 10/30/2015):** Termination: N/A, Election: Flat Amount, Amount: \$325.00, Percent: 0.00%, Filing Status: N/A, Allowance: 0, Add Allowance: 0, Extra: \$0.00. Calculated Withholding: **\$325.00**.

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Contact MCERA at 707-463-4328 if you have additional questions.