

NPERS

Ameritas Mobile Site Walkthrough

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8-17-2020

Edited by Anna Hayden-Roy
11-04-2020



Ameritas
Accounts

Sign In

User ID

Password

Remember Me

[Forgot Password](#)

**Mobile
version of
the
Ameritas
login Page**



11:16

LTE

Password

Remember Me

[Forgot Password](#)

Sign In

New user? [Register](#)



Need help signing in?

Call Tech Support at 888-331-2714, option 2

Privacy

Legal / Terms of Use

Report Fraud

**Account
Creation:
To create an
account,
click on the
blue
“Register”
link next to
“New user?”**

We need to find you.

To find you in our system, we need to collect some information.

Last 4 of SSN or Full Client ID

Date of Birth (MM/DD/YYYY)

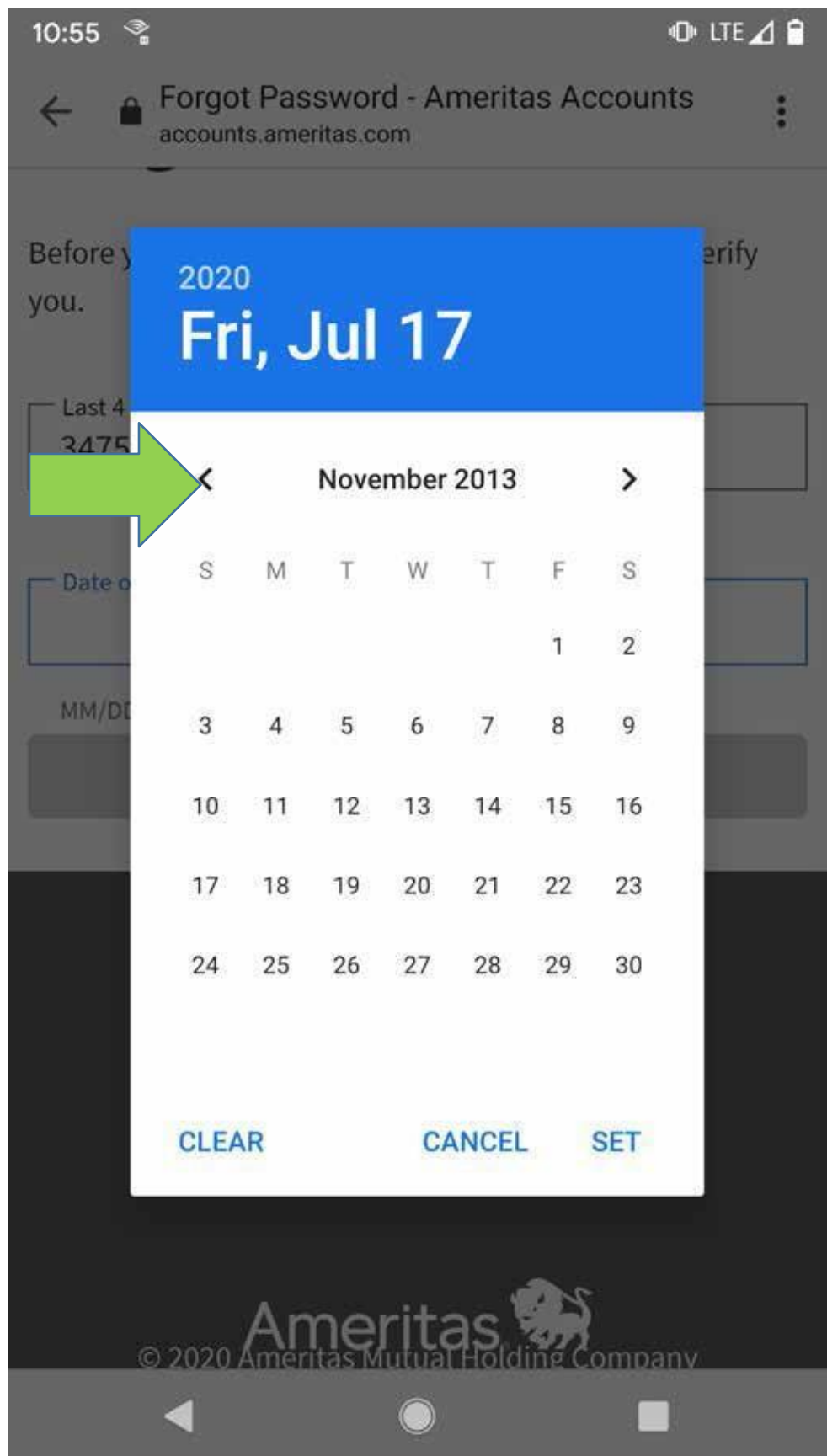
Certificate or Policy or Contract Number

[Where can I find this?](#)

Continue

**The
account
creation
page
looks
like this.**

On the mobile version of the page, you cannot type in your date of birth. You will have to hit the back button each month until you reach your date of birth.



Once you have created your account, you should be able to login normally.

When you log in, you'll be redirected here: the accounts page.

The screenshot shows a mobile web browser interface for the Ameritas Accounts website. At the top, the status bar displays the time 11:00, signal strength, LTE, and battery level. The browser address bar shows a back arrow, a lock icon, the text "Accounts - Ameritas Accounts", the URL "accounts.ameritas.com", and a menu icon. Below the browser bar is a navigation header with a hamburger menu icon, the Ameritas logo (a red circle with a white lion), the text "Ameritas Accounts", and a user profile icon. The main content area features a large blue heading "Retirement Plan". Below this, the text "Account Balance" is followed by a large green number "\$5,757.94". A horizontal line with a downward-pointing V-shape separates this from a table of account details. The table has two columns: labels on the left and values on the right. The details are: Participant Name: Joe Smith; Certificate Number: 123456789; Plan Name: STATE OF NEBRASKA EMPLOYEES RETIREMENT PLAN. At the bottom of the content area, there is a light gray bar containing a phone icon and the number "(800) 277-9739" on the left, and a blue link "View Account >" on the right. The bottom of the screen shows the standard Android navigation bar with back, home, and recent apps buttons.

11:00

Accounts - Ameritas Accounts
accounts.ameritas.com

Ameritas
Accounts

Retirement Plan

Account Balance

\$5,757.94

Participant Name	Joe Smith
Certificate Number	123456789
Plan Name	STATE OF NEBRASKA EMPLOYEES RETIREMENT PLAN

(800) 277-9739 [View Account >](#)

From this page you can click on three items to accomplish different tasks.

The Hamburger Icon

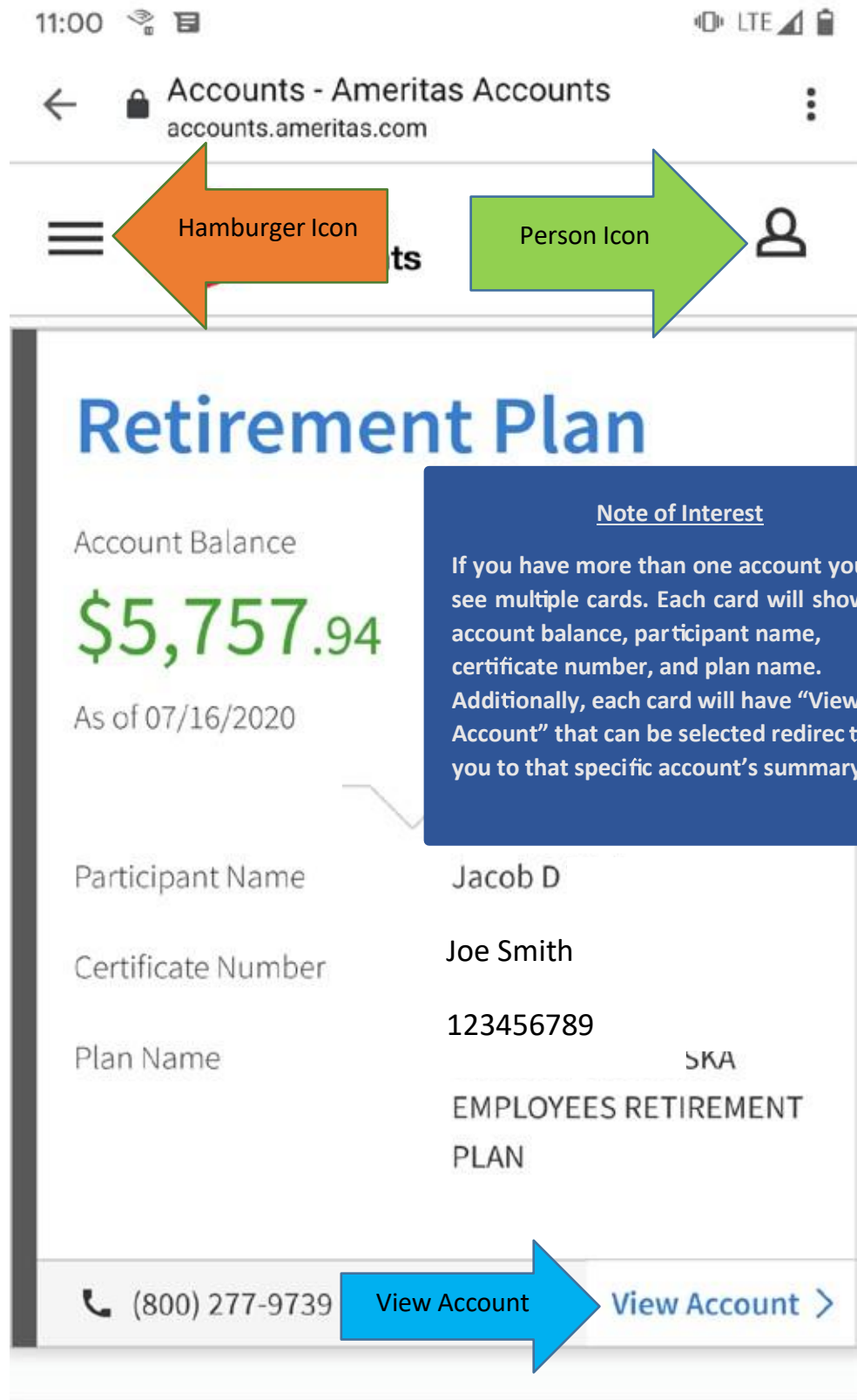
will take you to a blue page where you can access the message system for Ameritas (see p.7).

The Person Icon

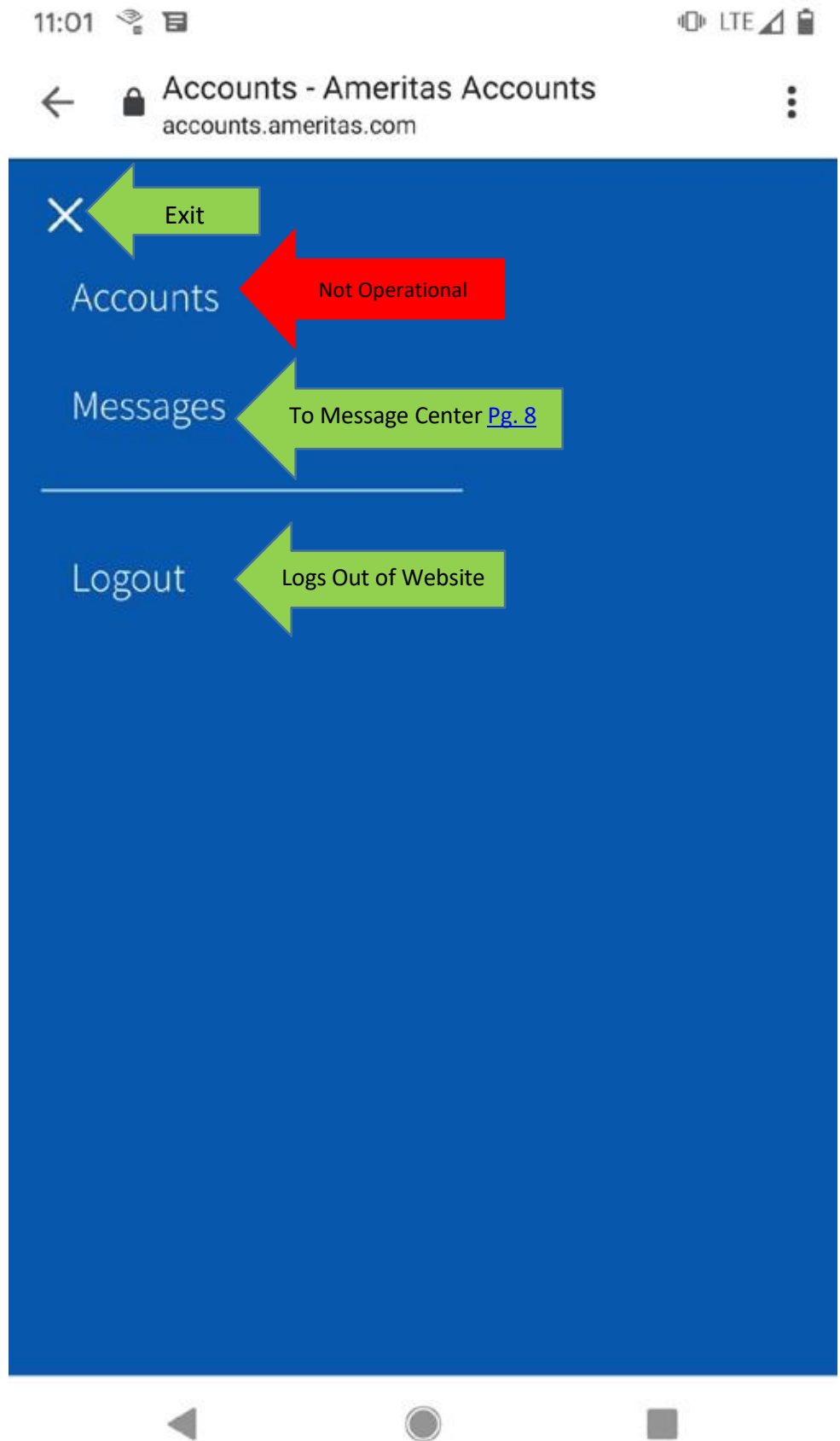
will take you to a menu to update your email, phone number, and password. (see p.10)

View Account

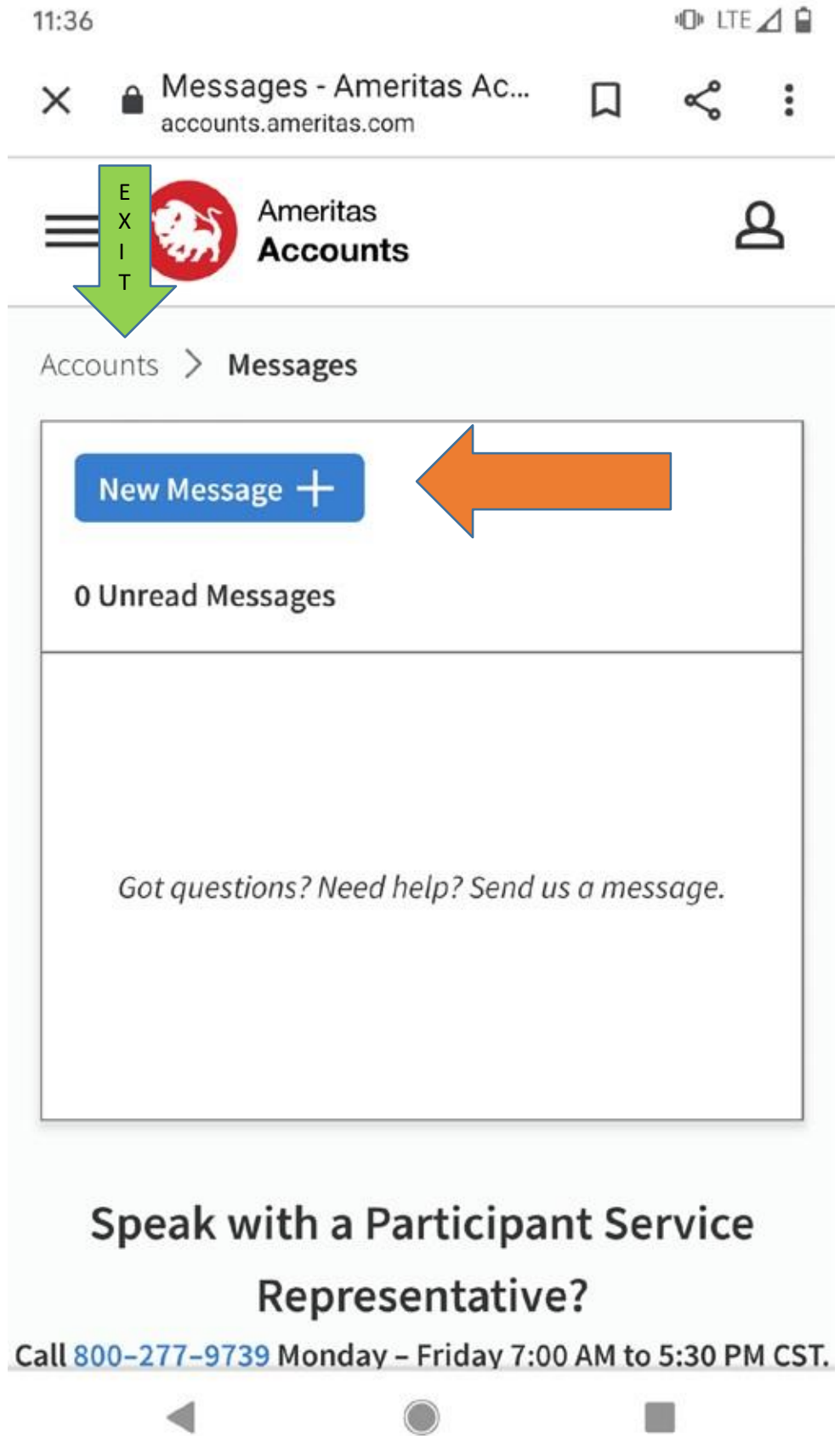
will take you to the overview page. (see p.11)








Clicking on the hamburger icon will take you to this page. Here you can access the messaging system for Ameritas and logout of the website. The “Accounts” listing is not operational and will not lead to another page.



Clicking on “Messages” will direct you to this page. By Clicking on “New Message” you can send messages to Ameritas that will then be forwarded to NPERS. On this page you can review messages you have sent. However, you will receive a response through the email associated with your account.




Clicking on “New Message” will direct you to this page, where you should select “Retirement Plan” as the account type. The other options should be self-explanatory.


2:04     LTE 

Accounts > Messages > New Message

Send Ameritas a message

From **Joe** > To **Ameritas** 


Regarding

Select Account Type 

Subject


Subject

How can we help you?

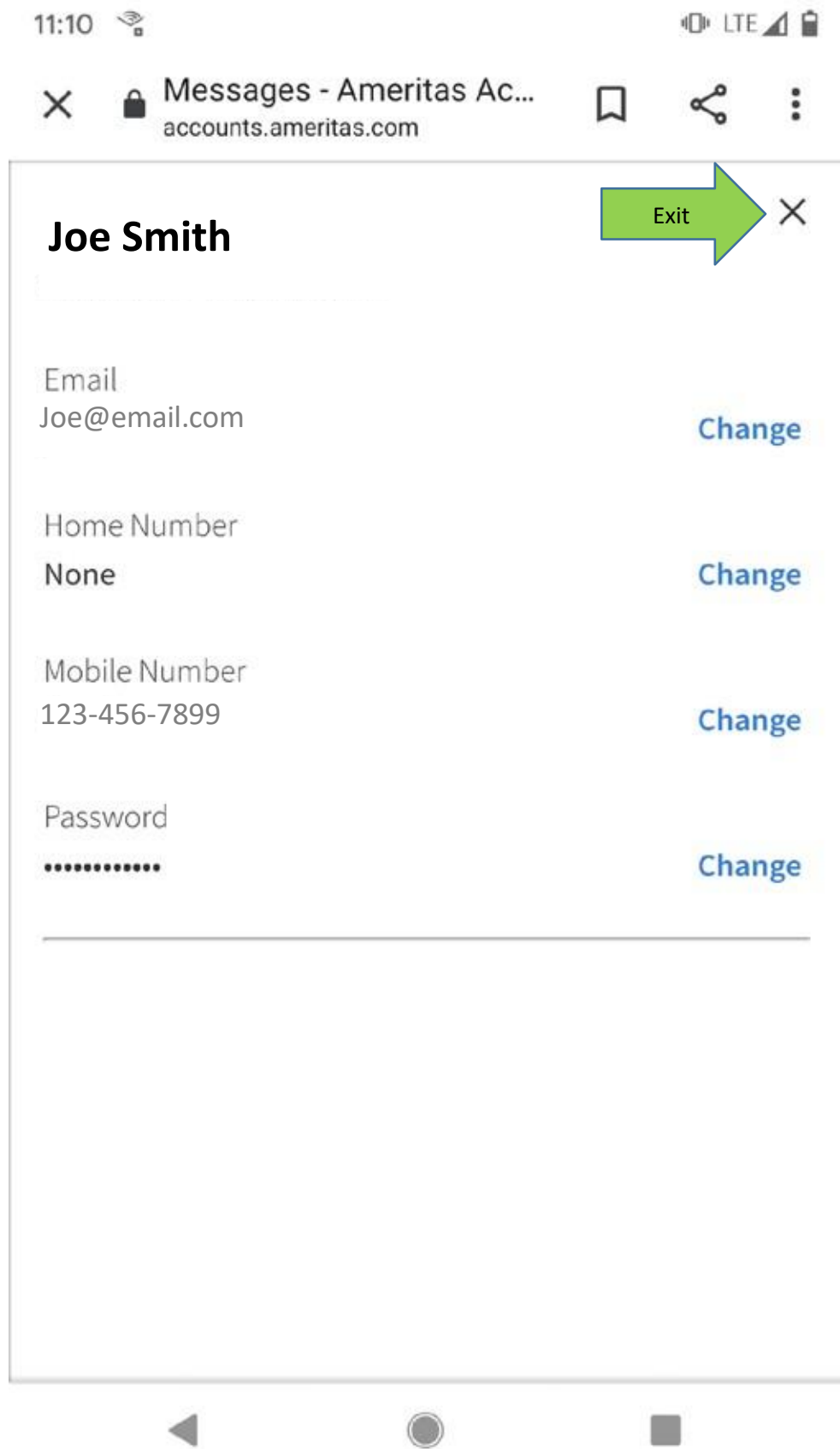
 Click “Send Message” to send

Send Message

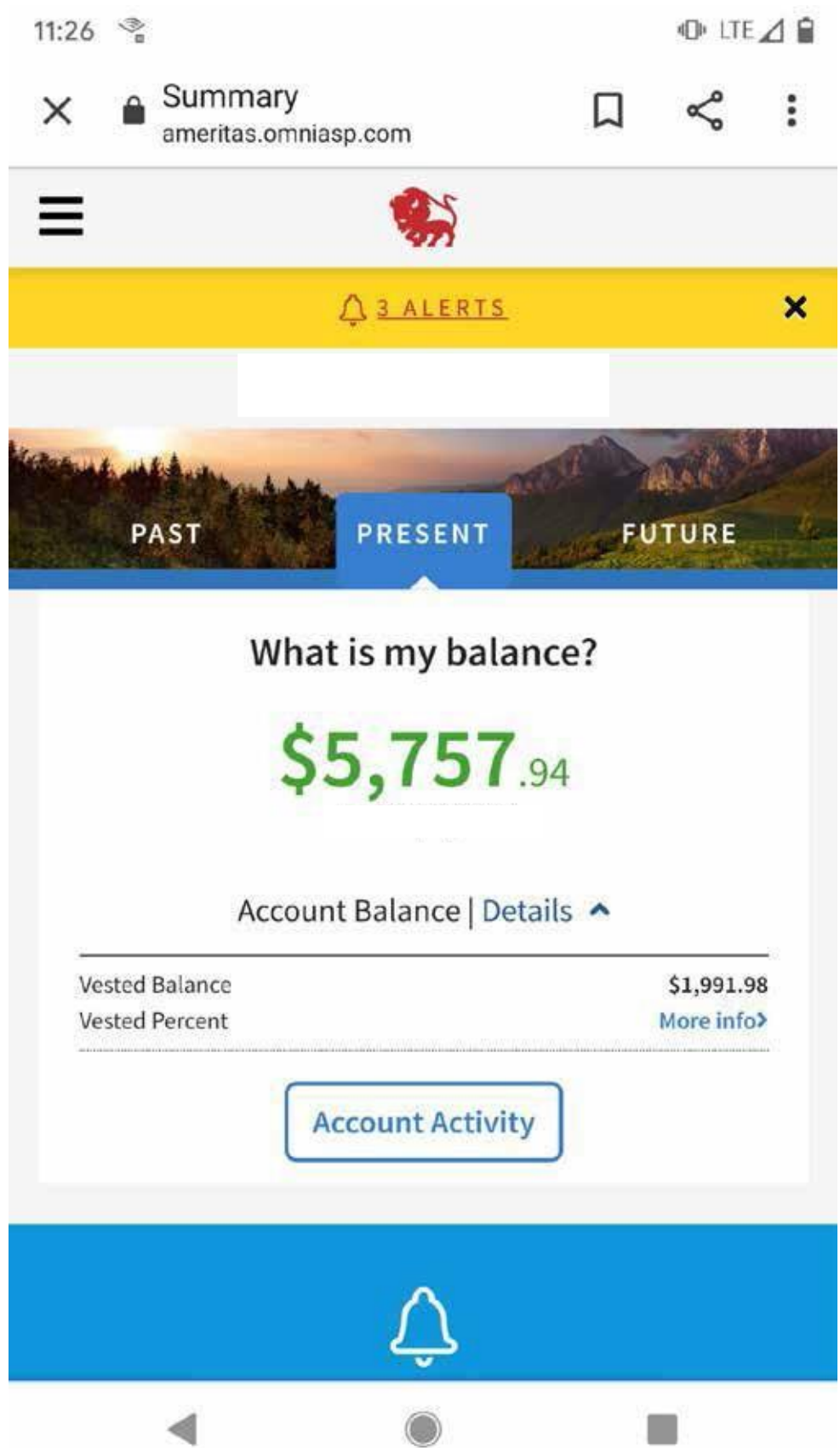
** Allow two business days for a response.



Referring back to [page 6](#), clicking on the person icon will allow you to access a page where you can edit your email, phone number, and password

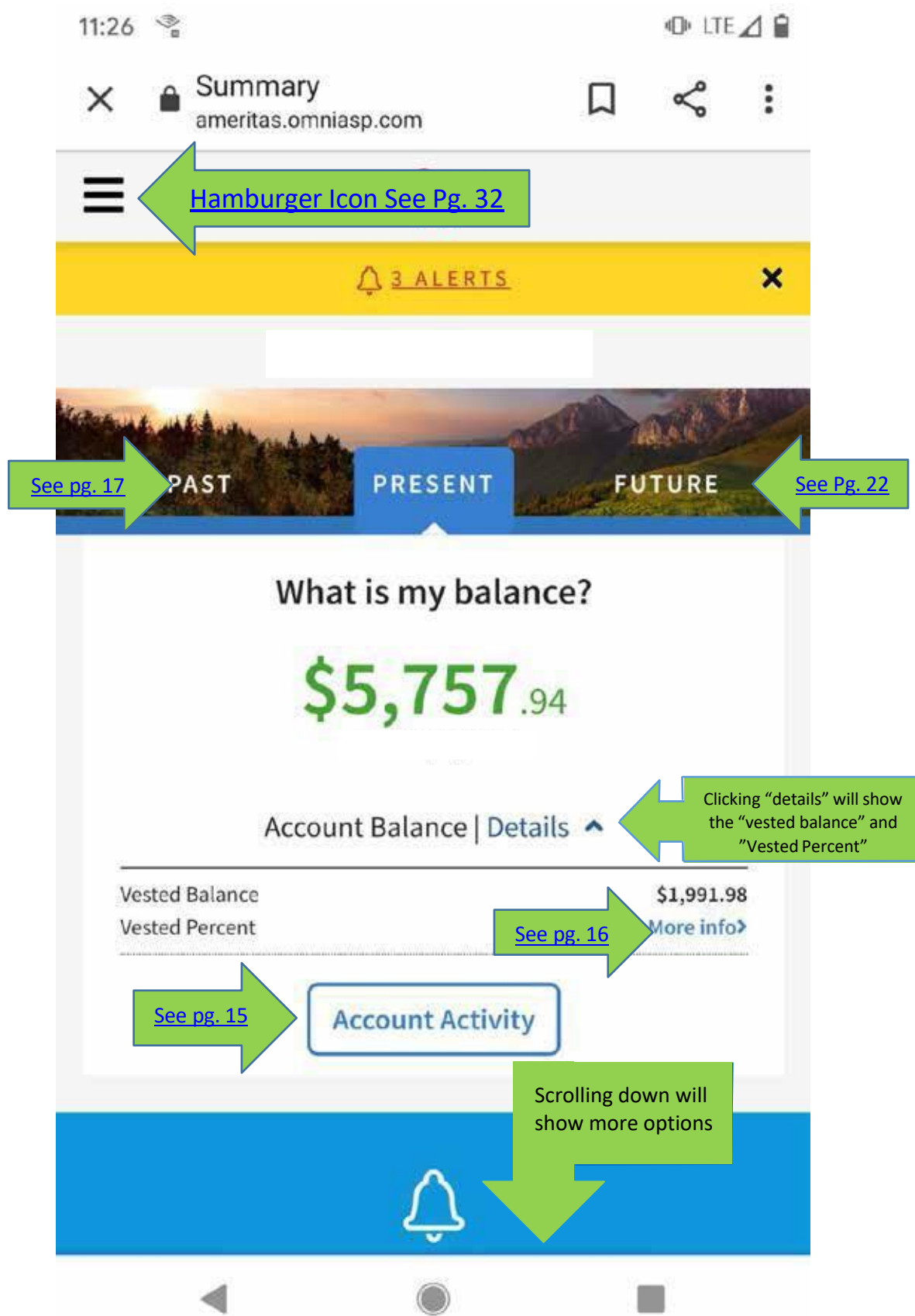


Referring back to [page six](#), clicking on “View Account” will redirect you to the overview page of the Ameritas online account.



As you can see from the many arrows to the right, you have many choices when navigating Ameritas' website. The following pages will go into more detail on each path.

Click the links in each arrow to be redirected to the page in question.





Account Balance | Details ▾

Account Activity

Estimate progress toward savings goals

Only available to DCP and DC members: See [Pg. 25](#) or for a walkthrough [Pg. 38](#)



Your Future Investments

Available to all members: See [Pg. 26](#)



Your Statements & Confirmations

***This is the overview page when you scroll down.**

The following pages will go into the different paths you can take when navigating the website.

Ameritas
Retirement00200 STATE OF NEBRASKA EMPLOYEES RETIREMENT
PLAN

Summary

**But First,
A note of
caution!**

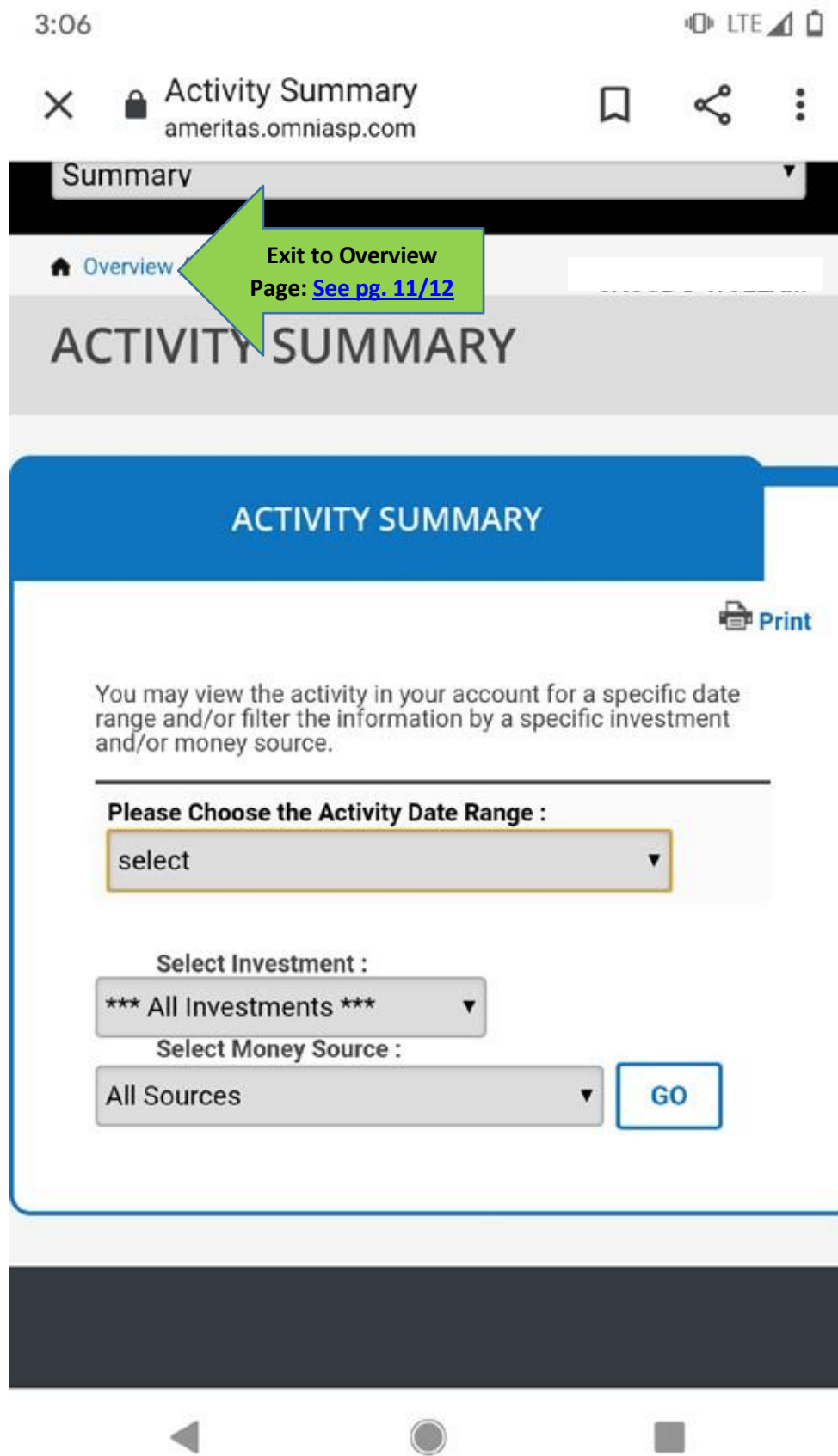
Note of Caution

When navigating the Ameritas mobile site you will come across this drop box which appears on most pages. It will redirect you to the five places listed below:

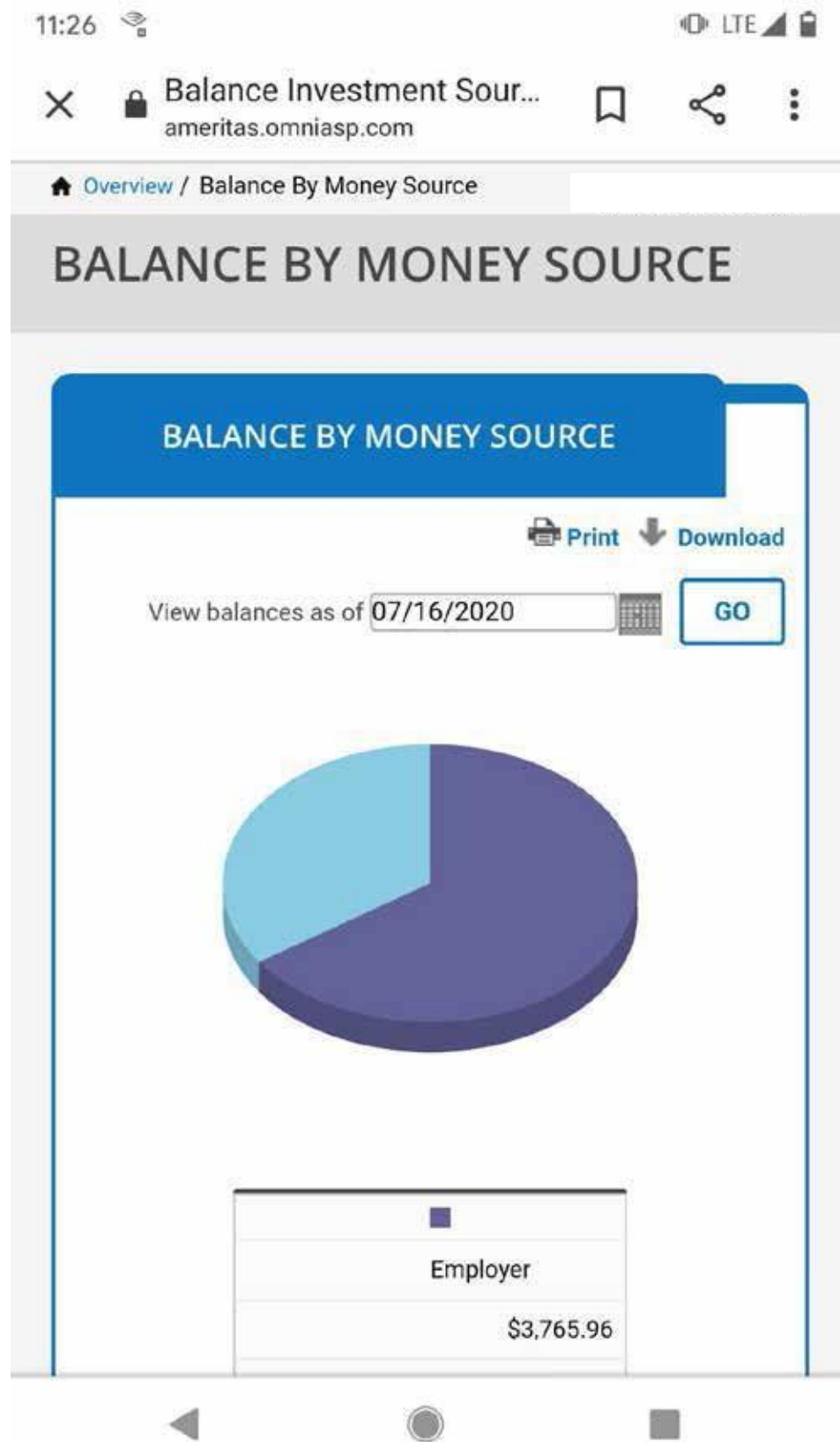
1. [Balance by Investment Pg. 34](#)
2. [Balance by Source Pg. 16](#)
3. [Balance by Asset Class](#) (Requires Admin Access which you will not have)
4. [Investment Prices Pg. 49](#)
5. [Investment Performance](#): This selection will redirect you to a page that will only show the balance of each fund. If you want to see performance of an investment over time, you should select "Historical Performance" as show on [page 35](#). This page will redirect you to the NPERS website where we store the PDFs for investment performance.

In general, the drop-down menu may cause confusion due to access restriction and page redirection.

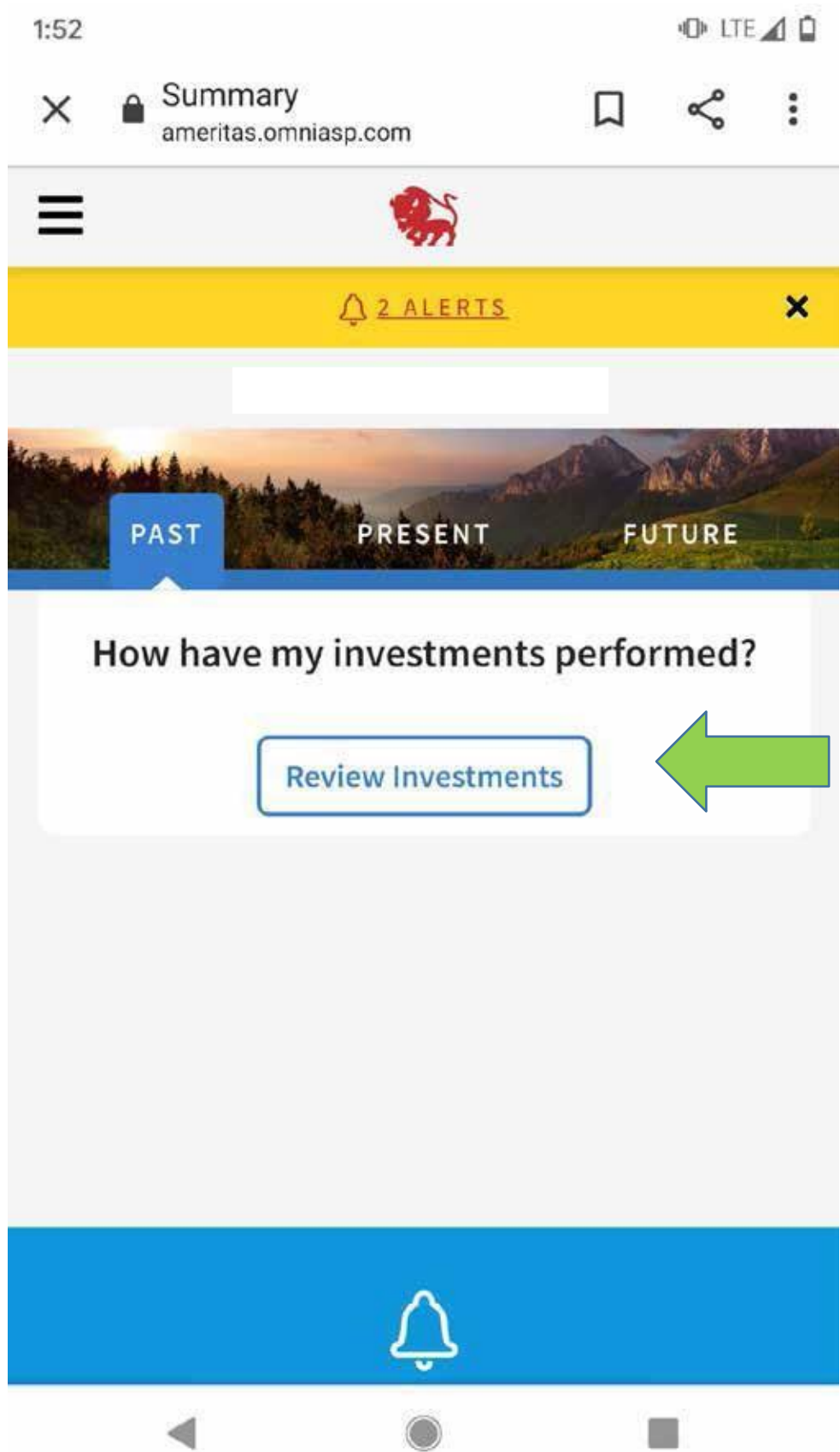
Now, referring back to [page 12](#) when you have the “Present” tab selected, you can click on “Account Activity” which will direct you to the “Activity Summary” page. Here you can view losses and gains to your entire account or individual funds using the date range drop box.



Referring again to [page 12](#), with “Present” selected you can expand the “details” arrow and click “More Info” leading you to the “Balance by Money Source” page. This page will show the percentage of the account contributed by you and by your employer. DC and DCP accounts will be 100% “Member” while CB accounts will be broken up between “Employer” and “Member”.



From the Overview page you can select “Past” to access the “Review Investments” button. See the next few pages for those pages’ descriptions.





How is my money being invested?

By Fund ?

By Source ?



Investments by fund

Fund Name	Balance	% of Total
CASH BALANCE BENEFIT	\$5,766.41	100.00%
Total	\$5,766.41	100%

\$5,766.41

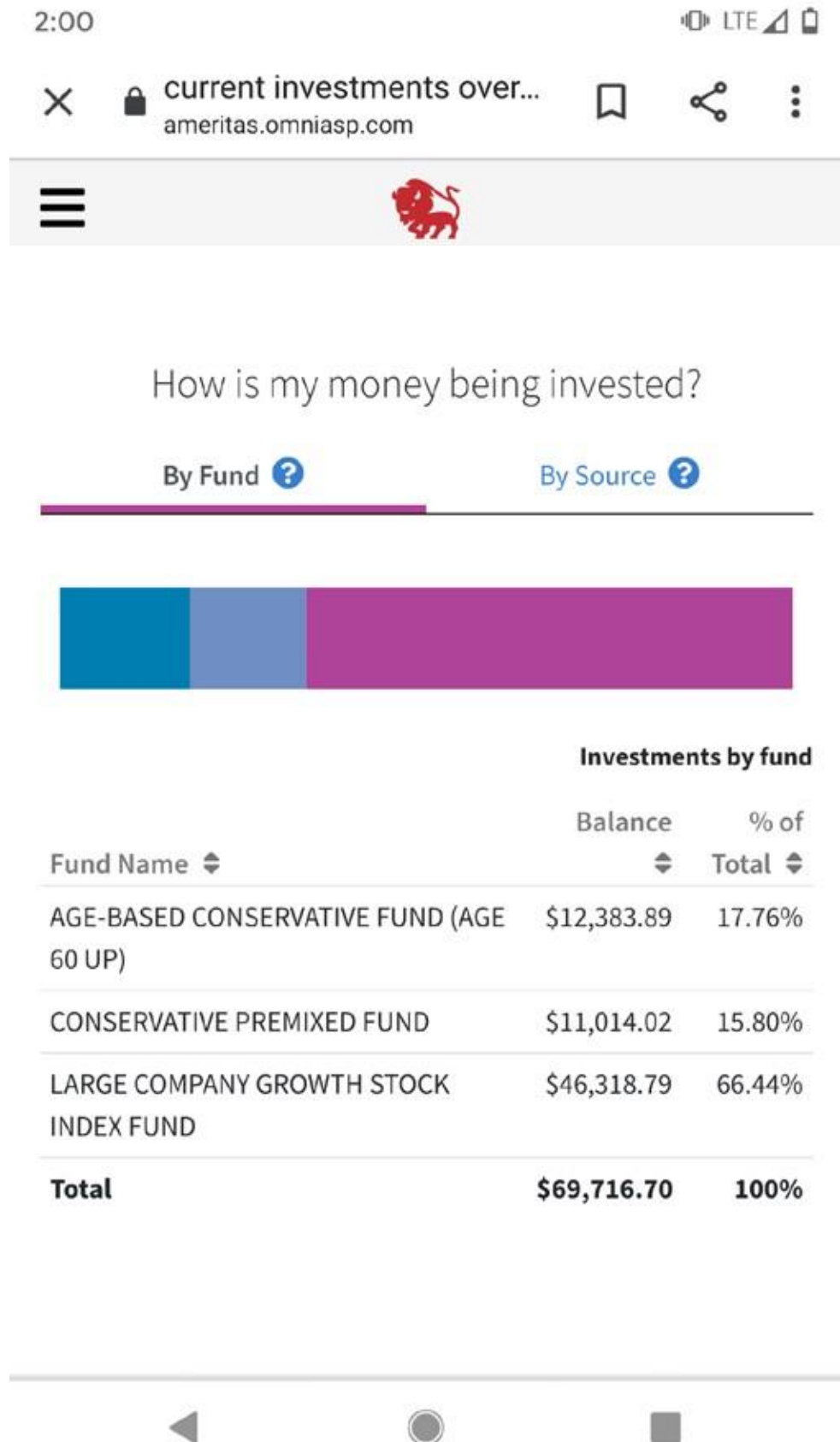
Total Balance (100%)

On the investment review page, you will be able to view your current investments by fund and source. For CB members 100% of your funds will be in Cash Balance.

Clicking “By Source”, will allow you to see how much was contributed by your employer and yourself respectively. Both CB and DC accounts should have member and employer portions.



If you have a DC or DCP account, you will see your individual funds in the “By Fund” section.



If you are a DCP member, the “By Source” page will show that 100 % of the funds in this account are being contributed by you.

Clicking “Manage My Money” will take you to the [“Manage My Investments”](#) Page

2:00 LTE

current investments over...
ameritas.omniasp.com

How is my money being invested?

By Fund ? By Source ?

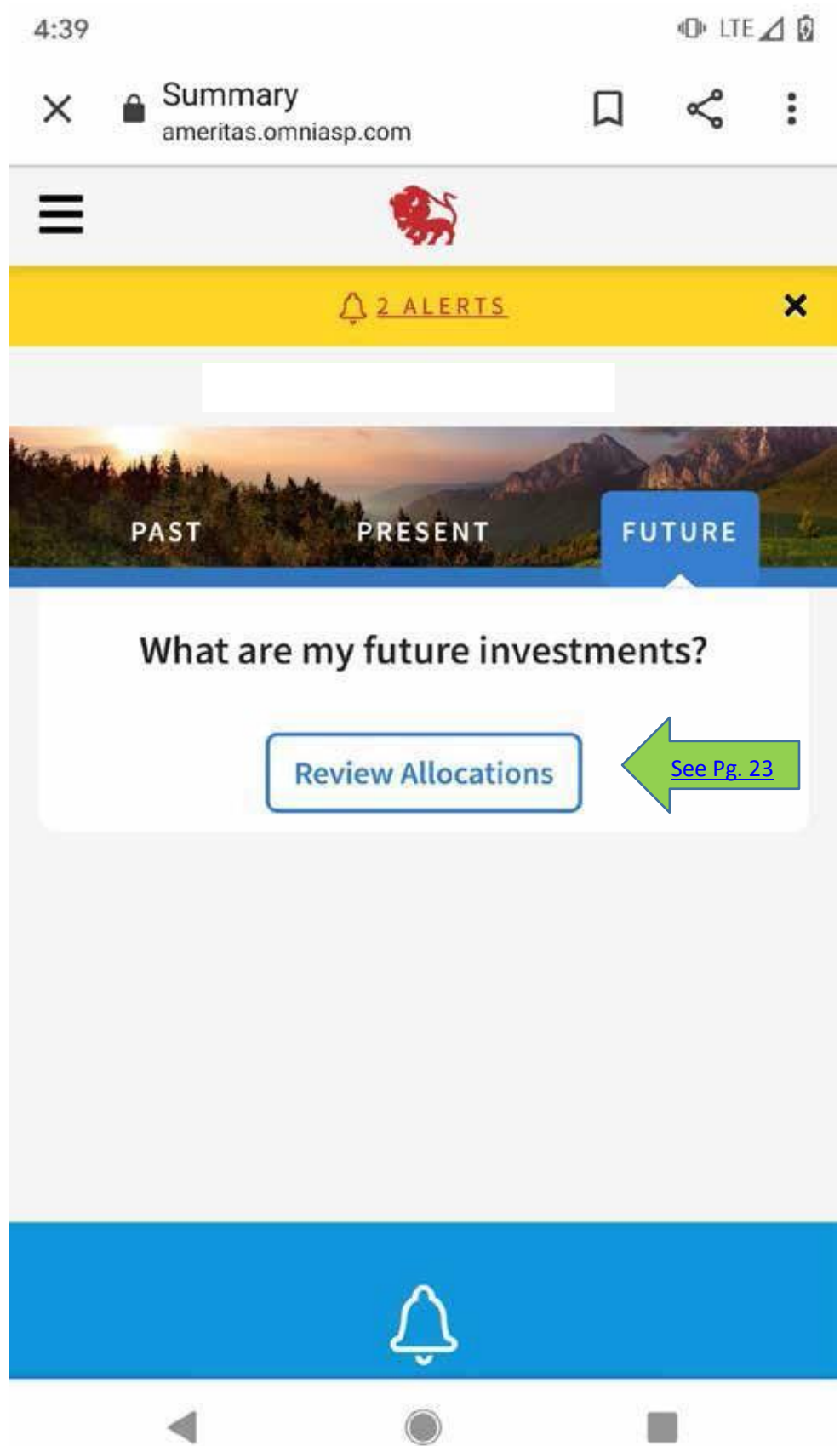
Investments by source		
Source Name	Balance	% of Total
Member Account	\$69,716.70	100.00%
Total	\$69,716.70	100%

\$69,716.70
Total Balance (100%)

Manage My Money

See Pg. 25

From the Overview page you can select “Future” to access the “Review Allocations” button. See the next few pages’ descriptions.



On the future investment review page, you will be able to view where your future contributions will be invested by both yourself and your employer. For CB members 100% of your funds will be in Cash Balance.

4:41 LTE

future investments
ameritas.omniasp.com

Future Investments
as of 07/30/2020

How will my future contributions be invested?


Employer

Fund Name	% of Source
CASH BALANCE BENEFIT	100.0%
Total	100%

If you are DC or DCP you'll see each individual fund. You can also be directed to this page by clicking "Your Future Investments" on the overview page ([Pg. 13](#)). From here, you can select "Manage My Money" to transfer funds and elect future contributions.

4:46 LTE

Member Account ▾



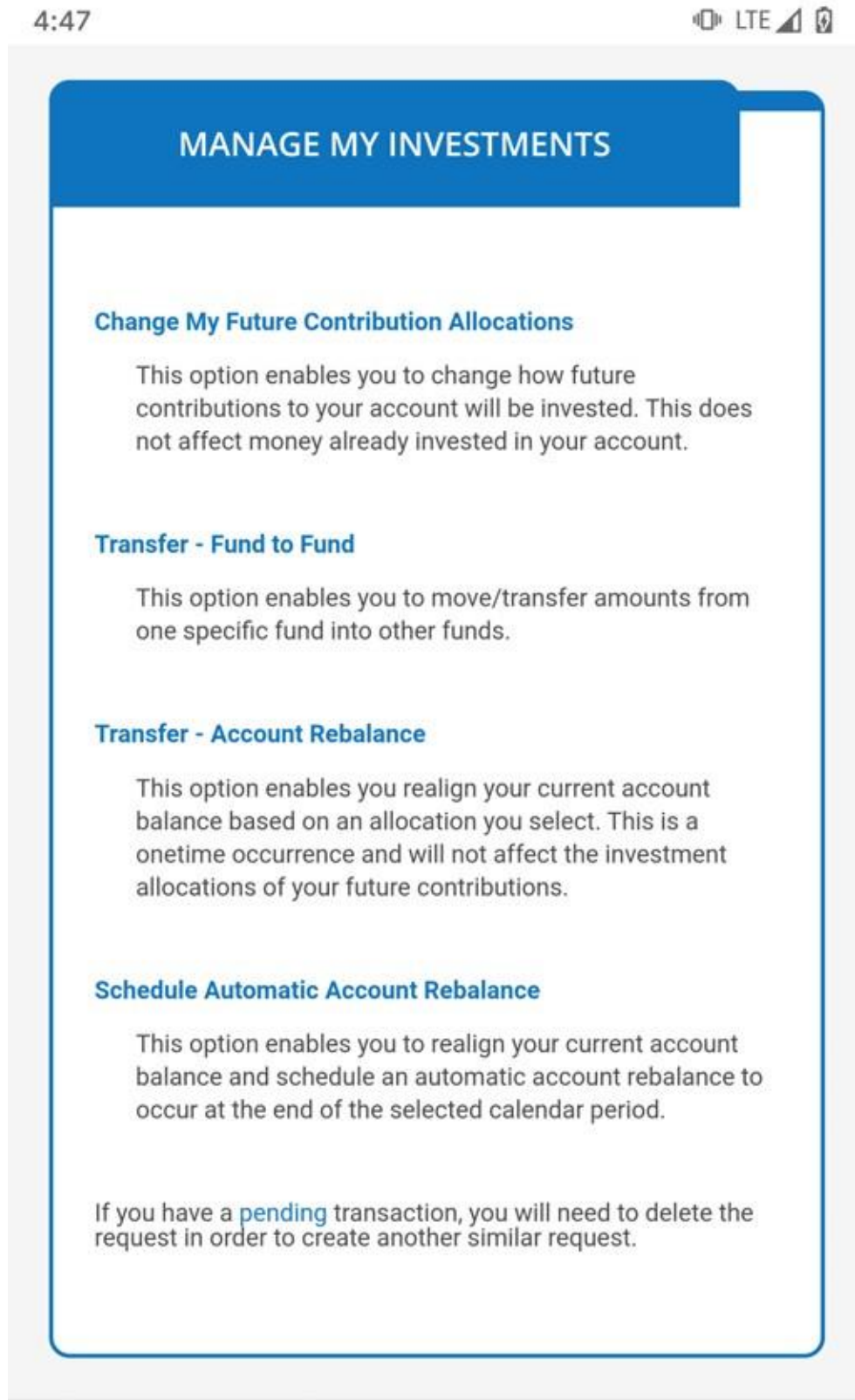
Fund Name ↕	% of Source ↕
STABLE VALUE FUND	40.0%
INTERNATIONAL STOCK INDEX FUND	30.0%
MODERATE PREMIXED FUND	30.0%
Total	100%

You can change the way your future contributions are allocated at any time.

[Manage My Money](#) ← [See Pg. 25](#)

Clicking on “Manage my Money” will redirect you to the “Manage my Investments” page.

The mobile version works identically to the desktop version. See walkthrough on [page 38](#)



Referring back to the overview page (pg. 13). You can click on “Your Statements and Confirmations”.

The first section “Statements” will show you the current calendar year’s statements, and if you need to view older statements you can select “View past years”.

4:45 LTE

Notification Statements
ameritas.omniasp.com

3 ALERTS

Notifications

as of 07/30/2020

Statements Confirmations Alerts [See Pg. 31](#)

Statement Period	Effective Date	Do
2020-04-01 - 2020-06-30	07-01-2020	PDF
2020-01-01 - 2020-03-31	04-02-2020	PDF

[View past years >](#) [See Pg. 27](#)

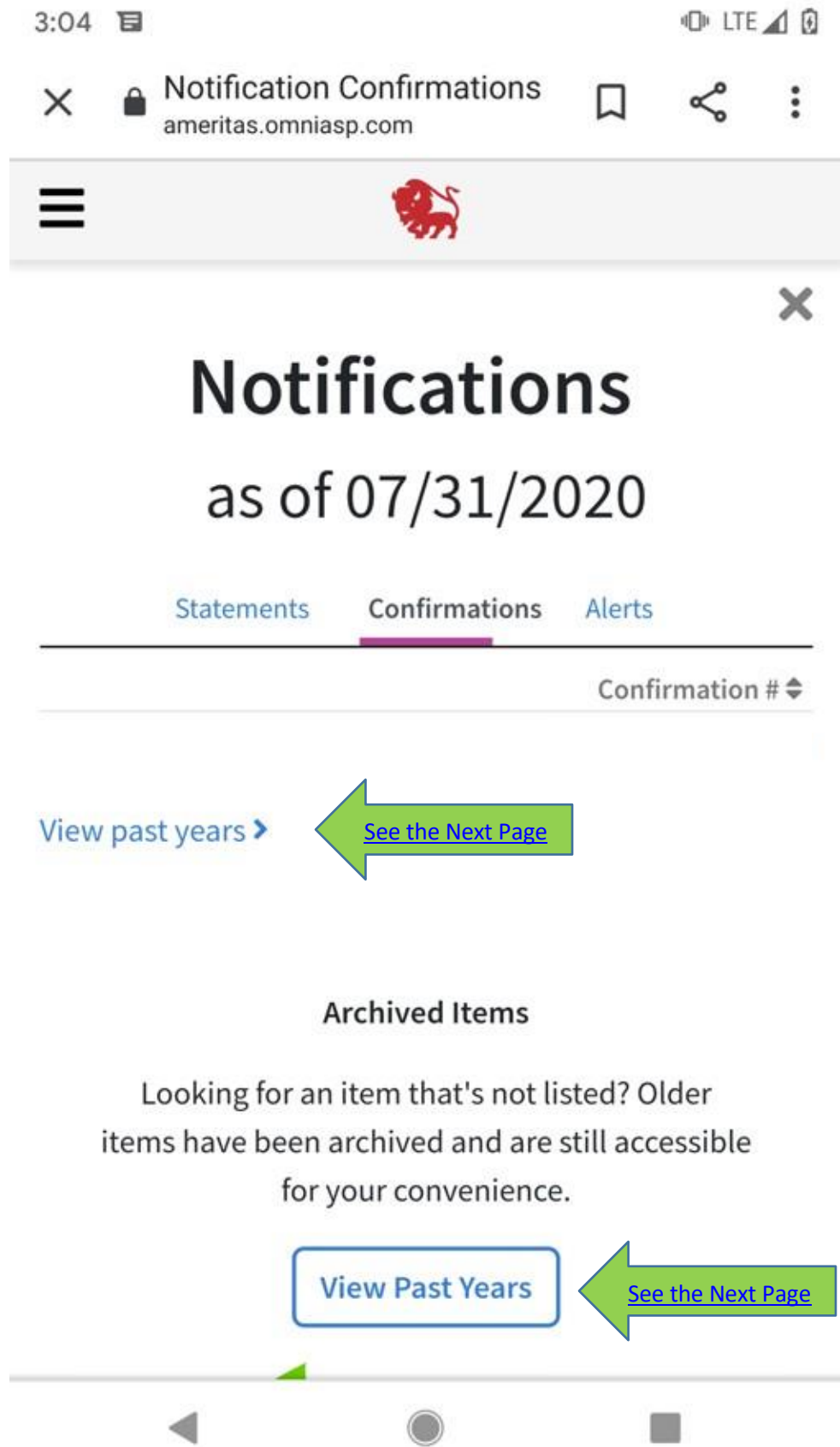
Archived Items

Looking for an item that's not listed? Older items have been archived and are still accessible for your convenience.



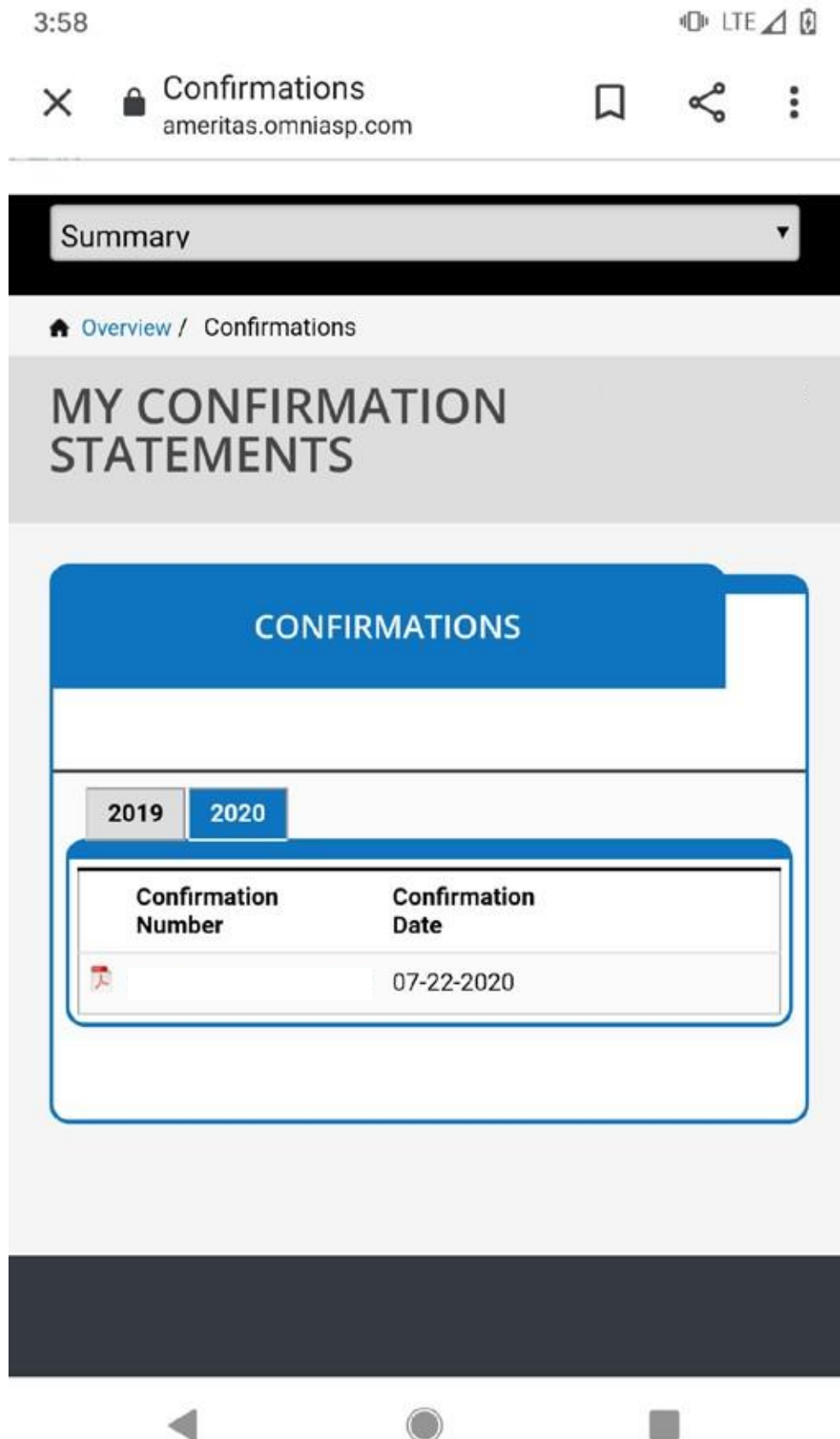
Here you can see the past year's statements.

By selecting “Confirmation” you can view the confirmation numbers of transfers you have completed, or changes to your future contributions.



Similar to statements, by selecting “Past Years” you can view confirmations of years before the current calendar year.

Additionally, you can access the page through the hamburger menu > Plan Documents > Statement Confirmations



By selecting
“Alerts” you
can view
the most
recent
alerts sent
by
Ameritas.

3:04 [notifications icon] [LTE signal icon] [battery icon]

Notifications Alerts
ameritas.omniasp.com [bookmark icon] [share icon] [menu icon]

☰ [Ameritas logo] ✕

Notifications

as of 07/31/2020

Statements Confirmations Alerts

Date ↕	Alert ↕
03/25/2020	Ameritas responds to coronavirus (COVID-19)

[View past years >](#) ← See the Next Page

Archived Items

Looking for an item that's not listed? Older items have been archived and are still accessible for your convenience.

[View Past Years](#) ← See the Next Page

[android navigation bar]

Unlike “Statements” and “Confirmations” selecting “Past Years” in either location, while on “Alerts” will take you to a page where can search alerts by date using the “From” and “To” input sections.

3:58 LTE

Manage Alerts
ameritas.omniasp.com

Manage Site Mailbox Contact Us

Ameritas Retirement | NPERS
Nebraska Public Employees Retirement Systems

002000 - STATE OF NEBRASKA DEFERRED COMPENSATION PLAN

Summary

Overview / Manage Alerts /

MANAGE ALERTS

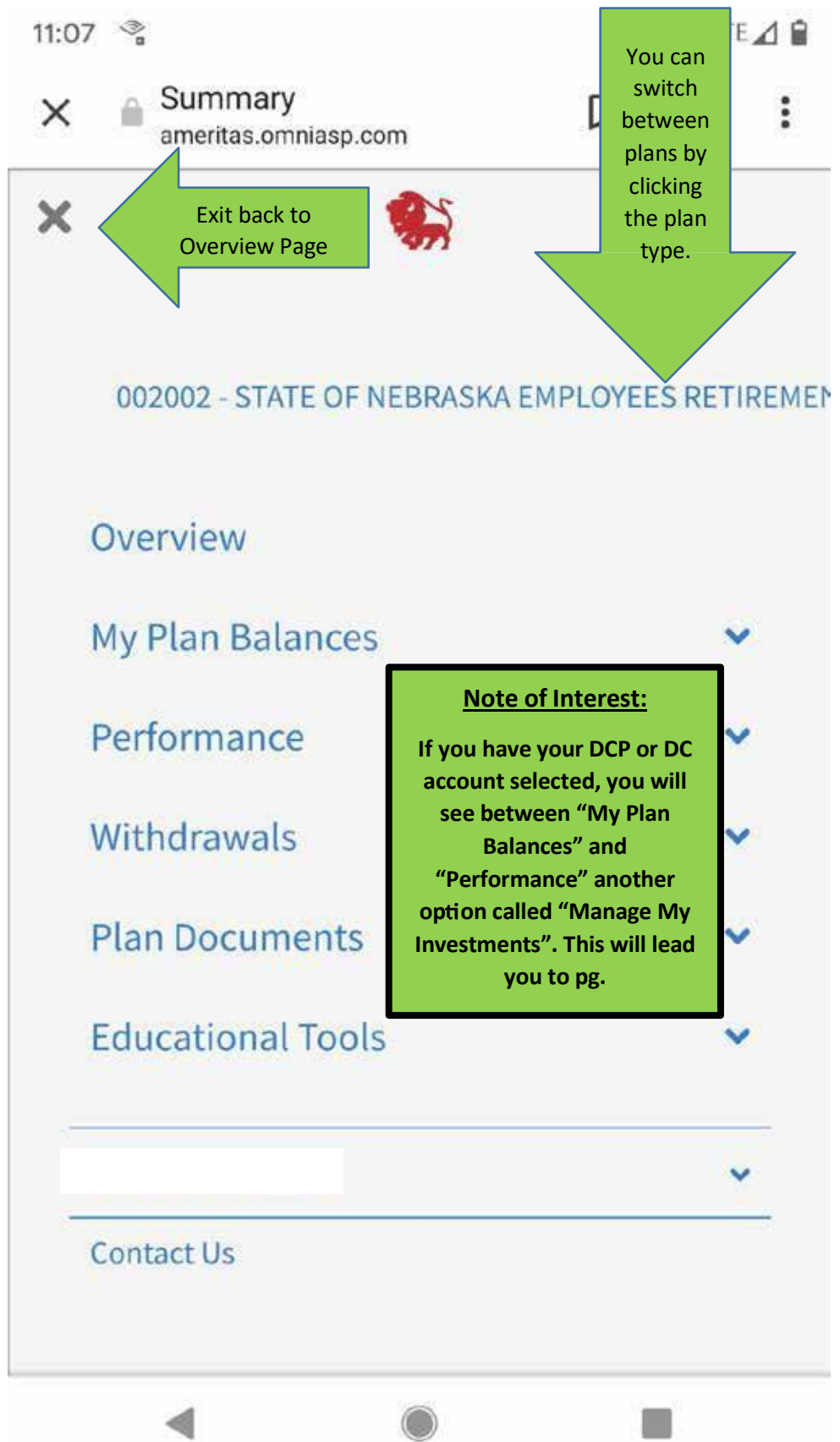
Search alerts :

From :

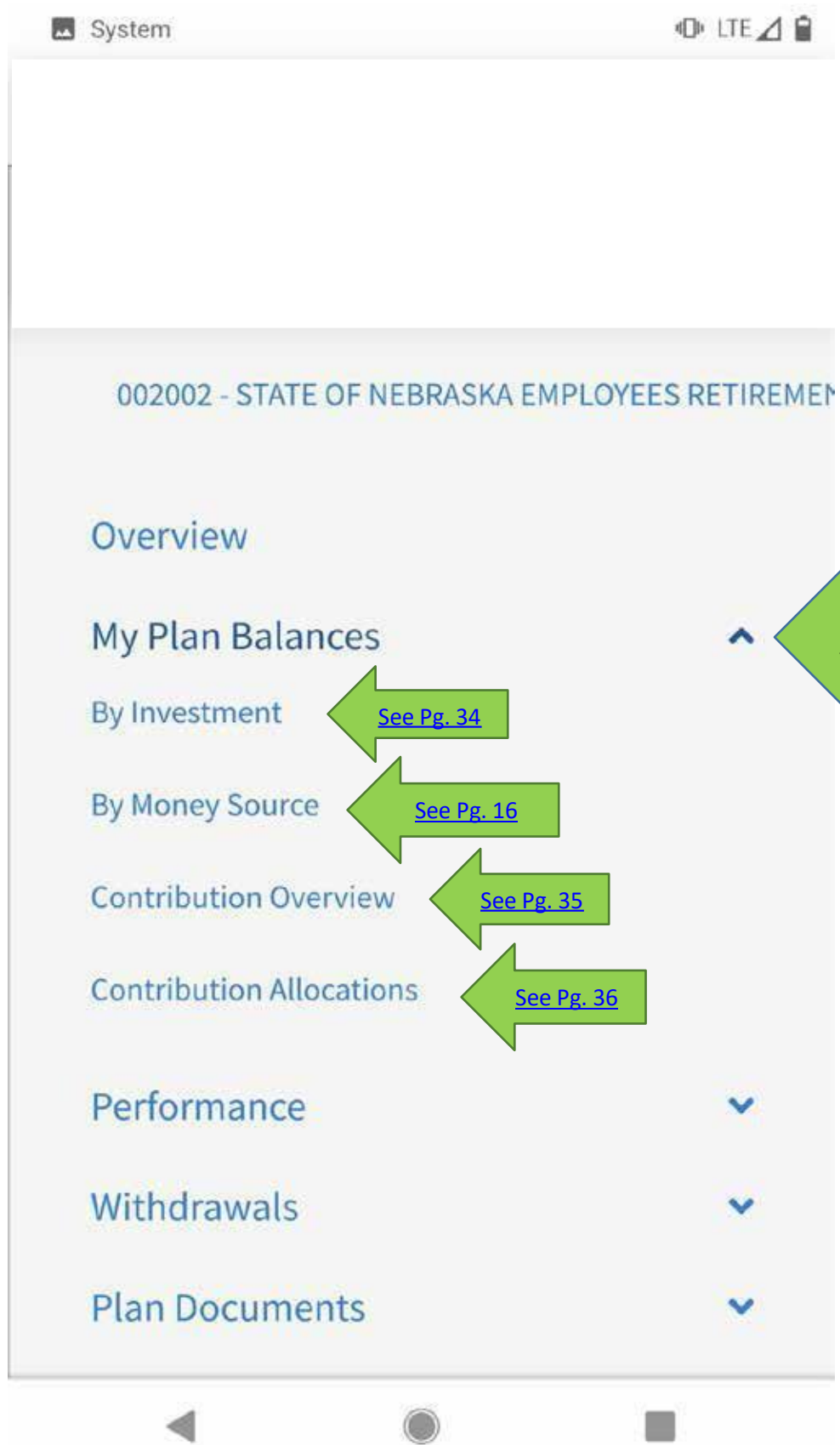
To:

GO Reset

Referring back to [Page 12](#) by selecting the hamburger icon, you will be shown a list of headings to explore.



“My Plan Balances” will allow you to view the balances of your accounts in a variety of ways. The arrows will direct you to each subheading page.

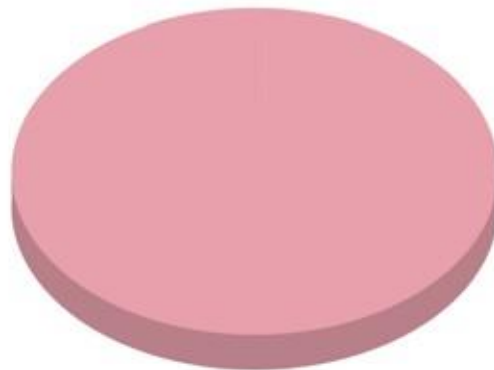


BALANCE BY INVESTMENT

BALANCE BY INVESTMENT

 Print  Download

View balances as of





CASH BALANCE BENEFIT

The Balance By Investment Page will show the balance by each fund

CONTRIBUTION OVERVIEW

 Print

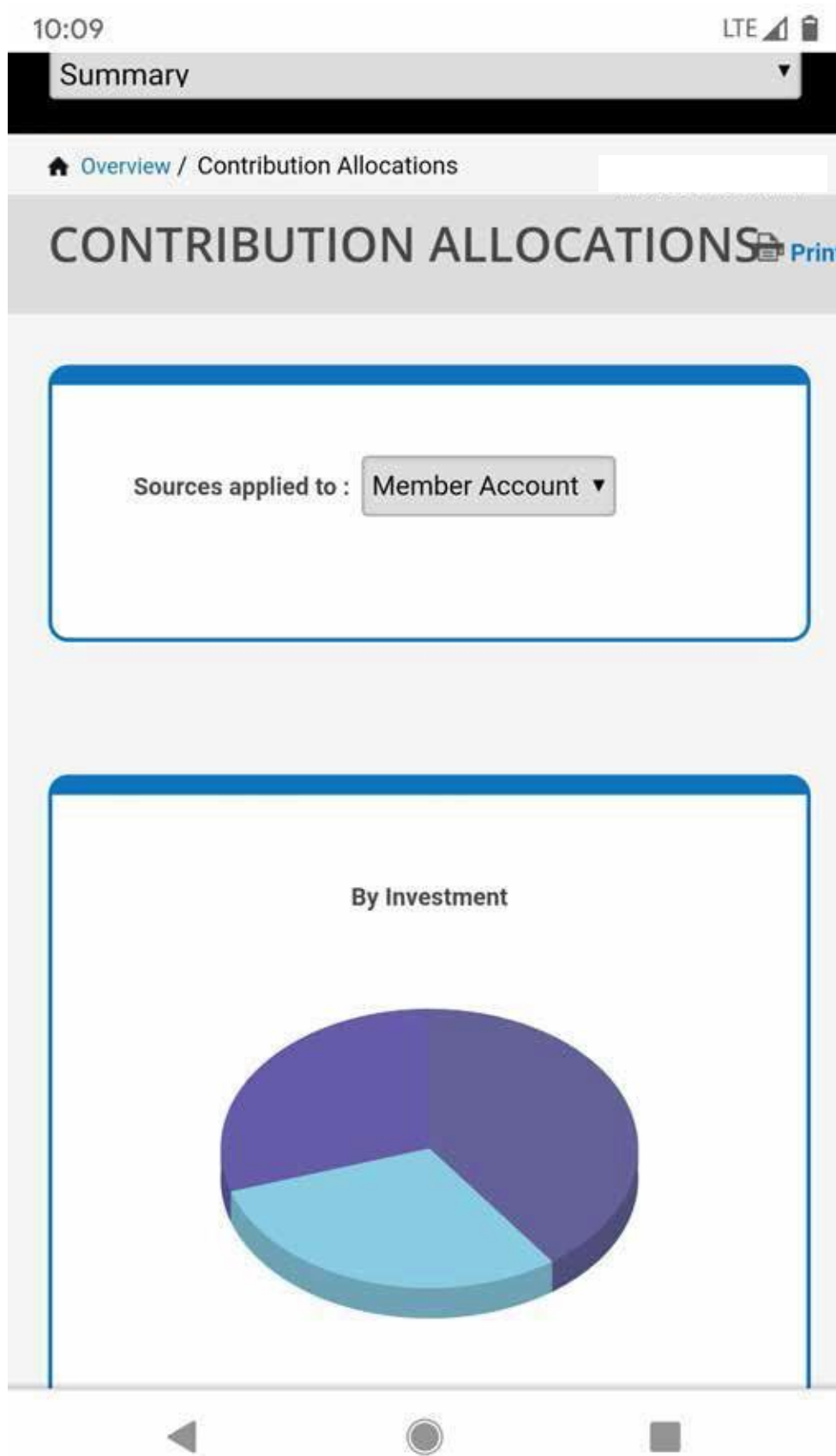
CONTRIBUTION SUMMARY

Contribution summary includes the most recent contributions made within the last 18 months. For more contribution data, please visit the [Activity Summary and History page](#)  [See Pg. 15](#)

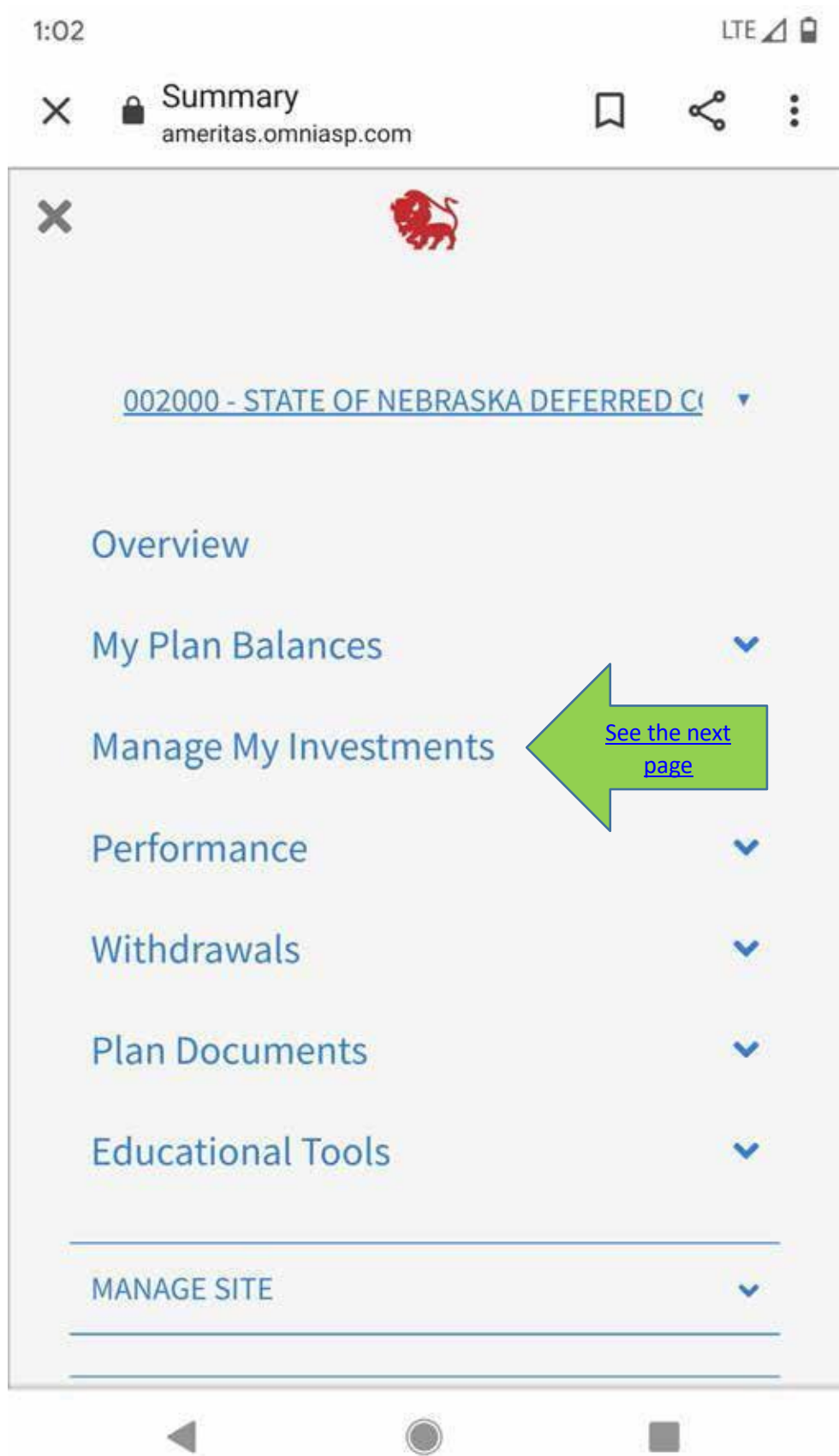
Source	EMPLOYER
Year to Date	\$1,866.39
Last Amount	\$127.81
Last Date	07/29/2020
Source	MEMBER
Year to Date	\$1,196.40
Last Amount	\$81.93
Last Date	07/29/2020

The Contribution Overview page shows your most recent contribution and the contributions YTD.

The Contribution Allocations page will show how you are allocating your future contributions by percentage.



Those with DC and DCP accounts have the option to manage their investments by clicking on “Manage My Investments”



To change future contributions, you can select “Change My Future Contribution Allocations”, or to transfer funds, you can select “Transfer - Fund to Fund”. Rebalances are less common and are described in the summary below each option.

4:47 LTE

MANAGE MY INVESTMENTS

Change My Future Contribution Allocations See Pg. 39-42

This option enables you to change how future contributions to your account will be invested. This does not affect money already invested in your account.

Transfer - Fund to Fund See Pg. 43-47

This option enables you to move/transfer amounts from one specific fund into other funds.

Transfer - Account Rebalance

This option enables you realign your current account balance based on an allocation you select. This is a onetime occurrence and will not affect the investment allocations of your future contributions.

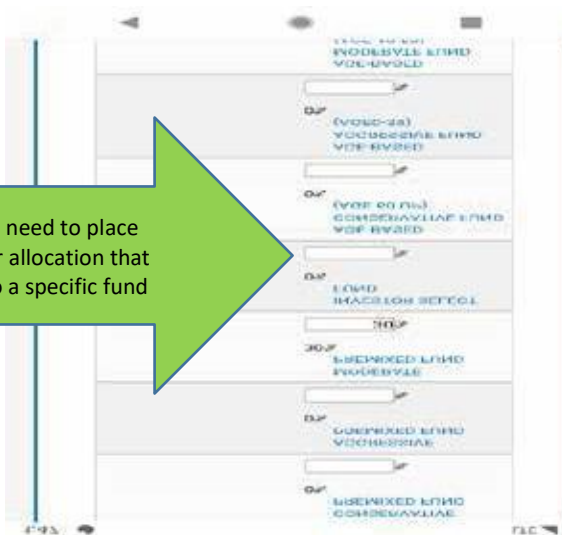
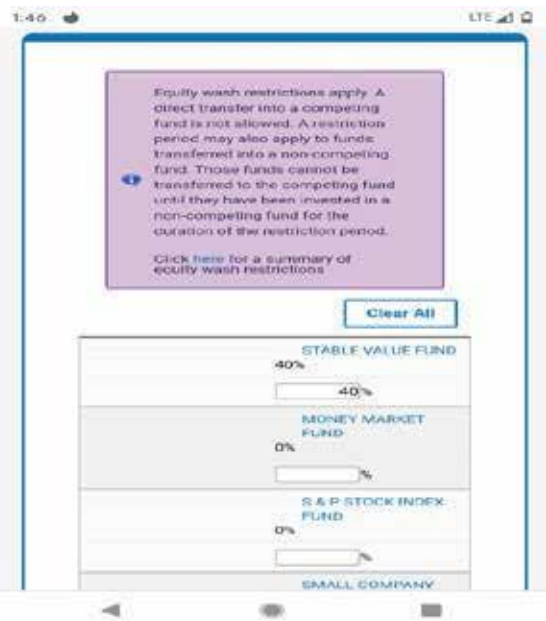
Schedule Automatic Account Rebalance

This option enables you to realign your current account balance and schedule an automatic account rebalance to occur at the end of the selected calendar period.

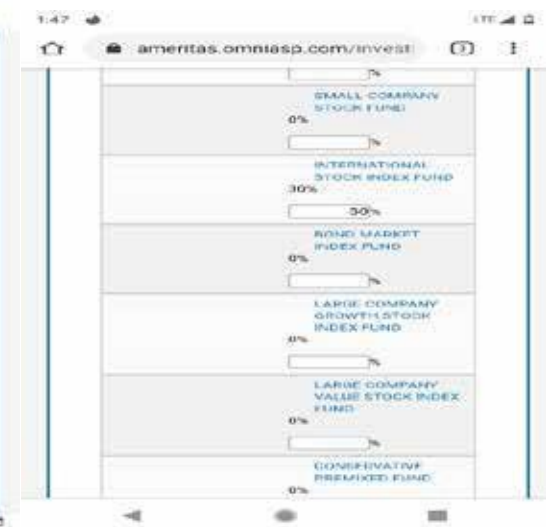
If you have a **pending** transaction, you will need to delete the request in order to create another similar request.

See Pg. 42 or 46 to view pending changes.

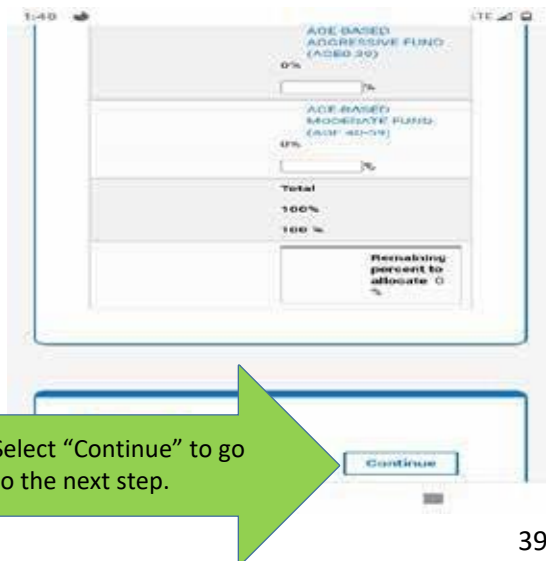
◀ ○ ▶



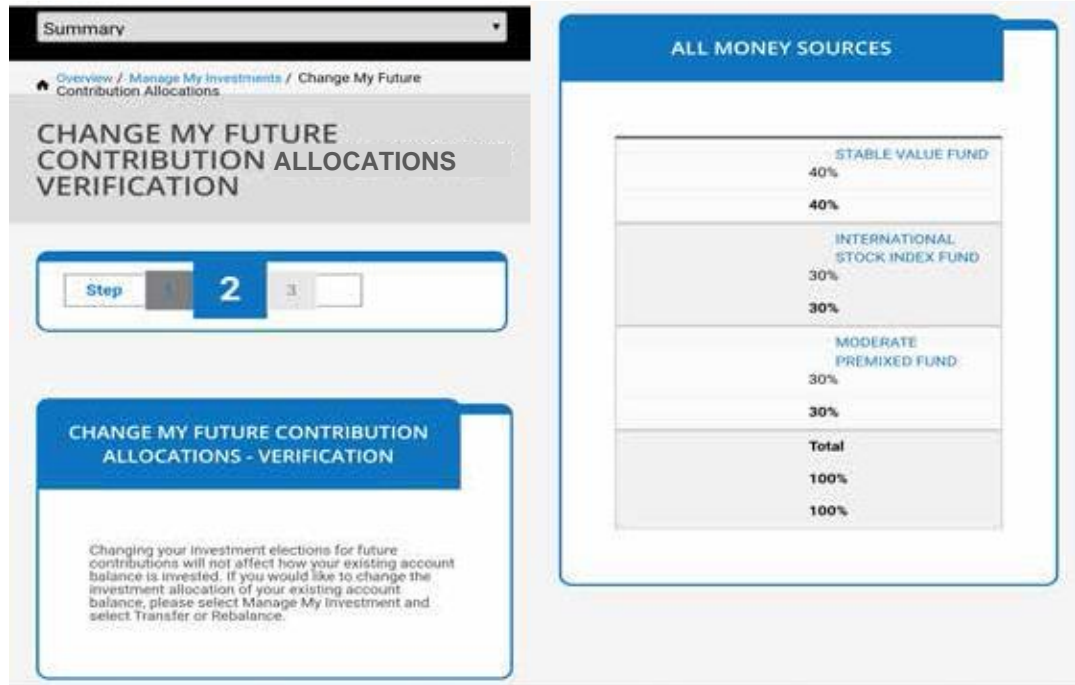
In these boxes you will need to place the percentage of your allocation that you would like to go to a specific fund



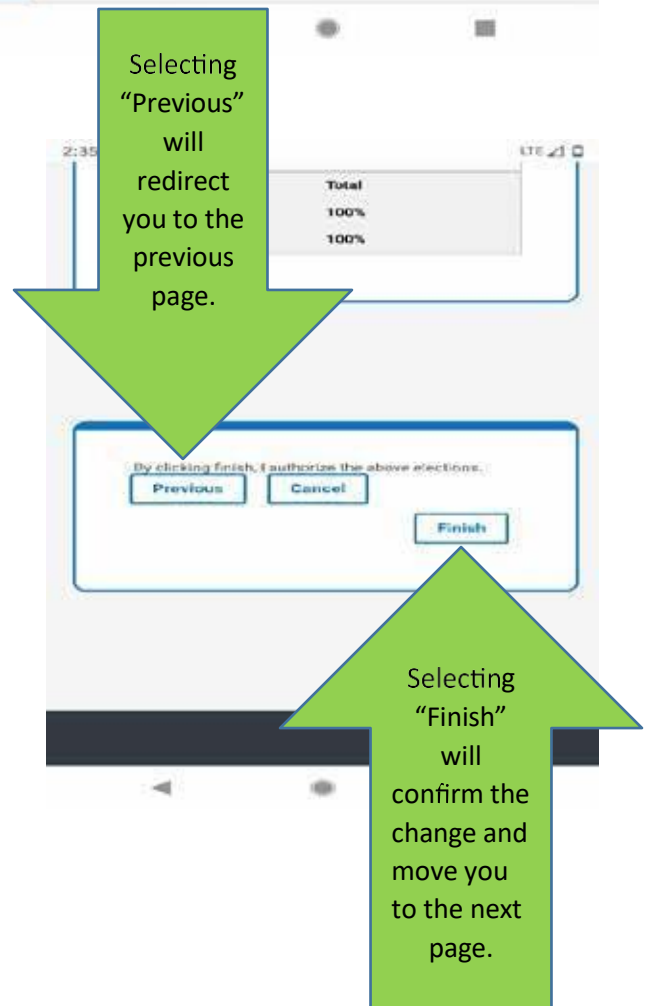
Clicking on “Change My Future Contribution Allocations” will direct you to the first step of allocating your funds. You will have to make sure the allocations equal 100% and then you can select “Continue” to move on to the next step.

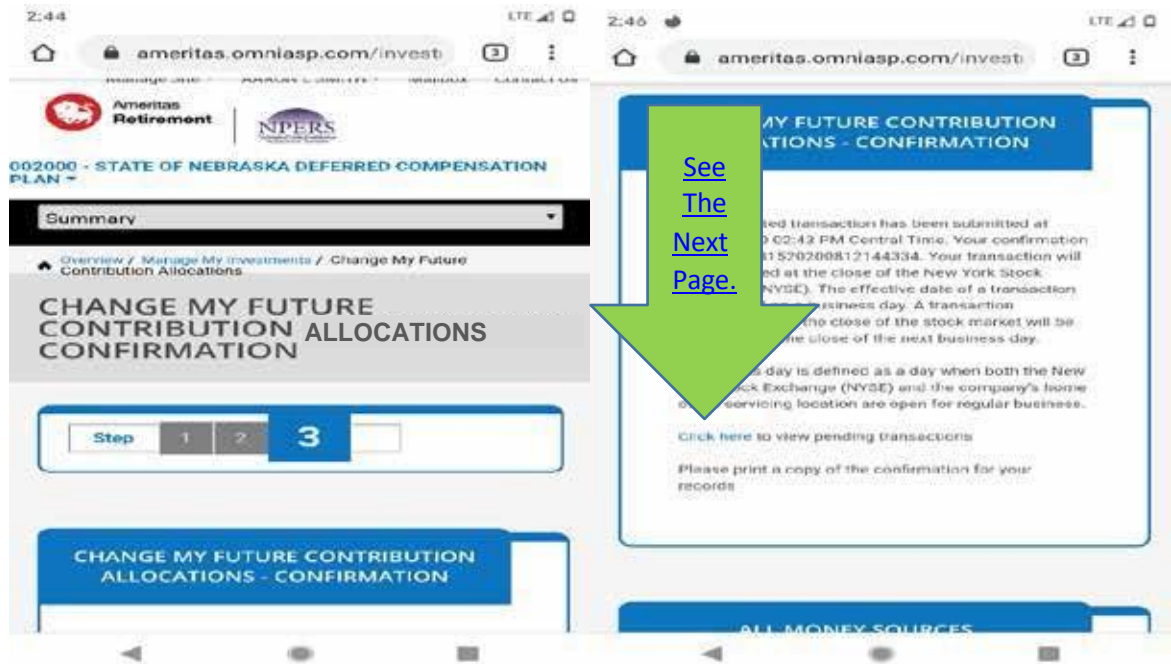


Select “Continue” to go to the next step.

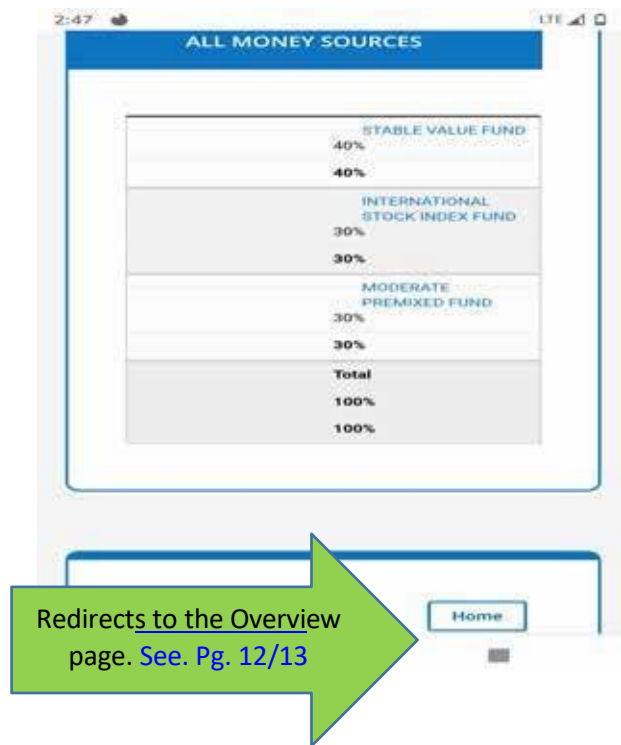


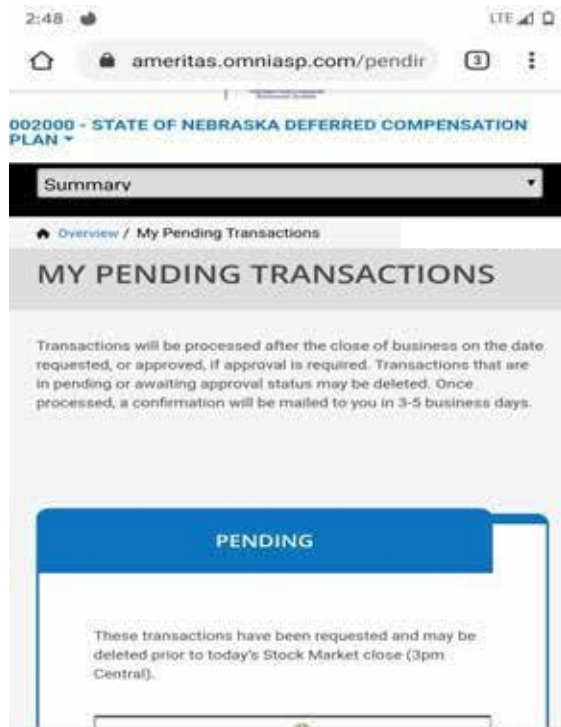
The next step will verify the changes you are making and allow you to either return to the last page to make adjustments by clicking “Previous” or to confirm the change by clicking “Finish”.



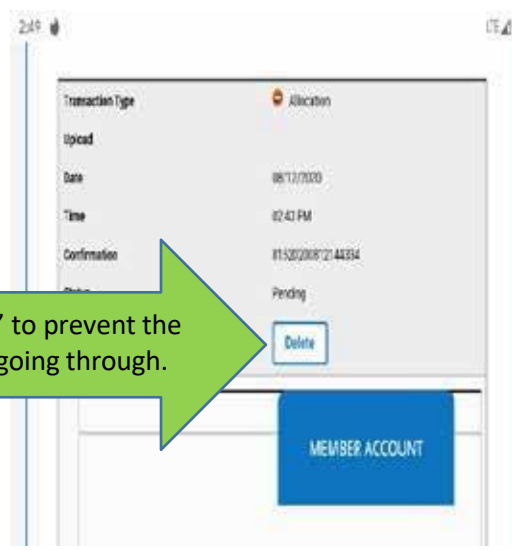


The next step will confirm the changes. To view the pending transaction and receive a confirmation number you can select “Click Here” highlighted in blue. Additionally, you can select “Home” to go back to the overview page.

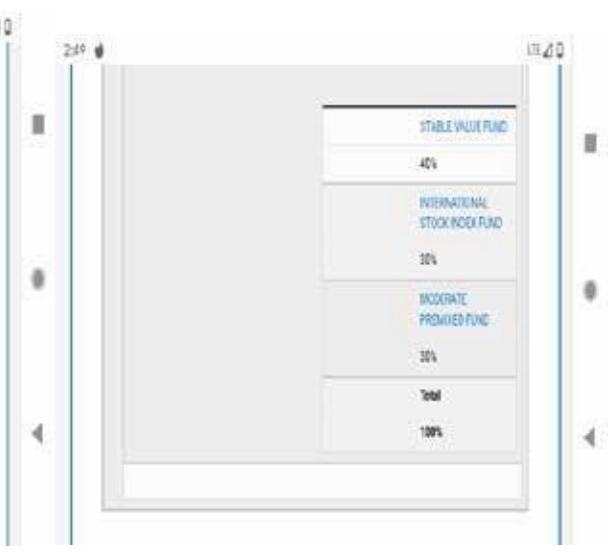




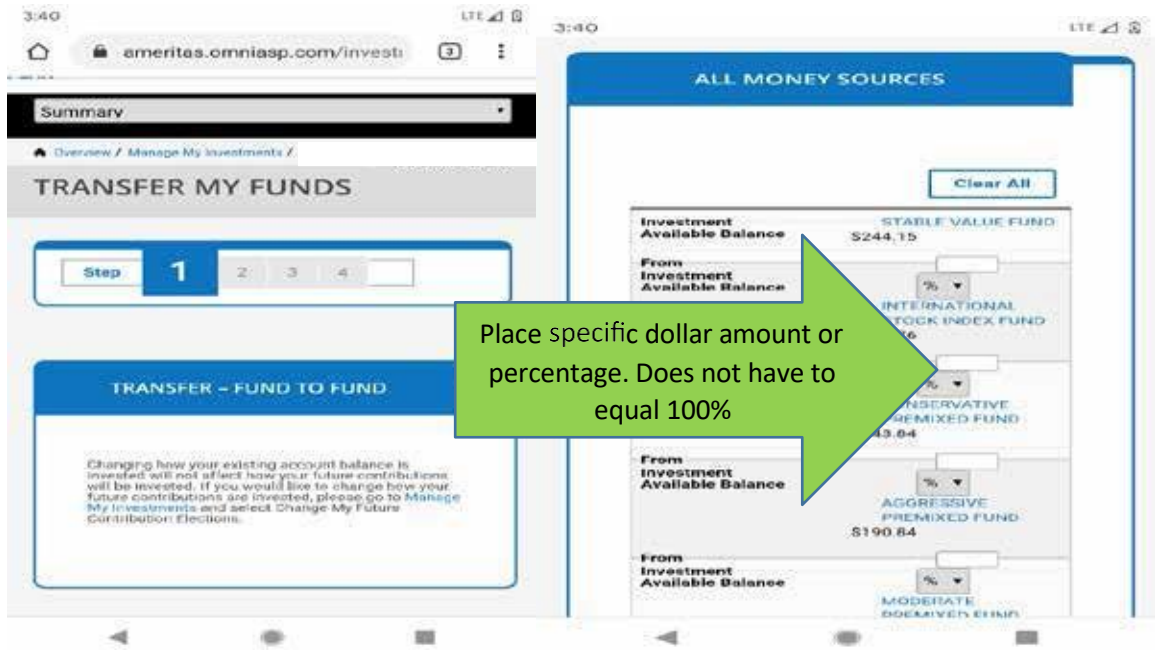
Clicking the green plus sign will expand the transaction type and allow you to see the confirmation number.



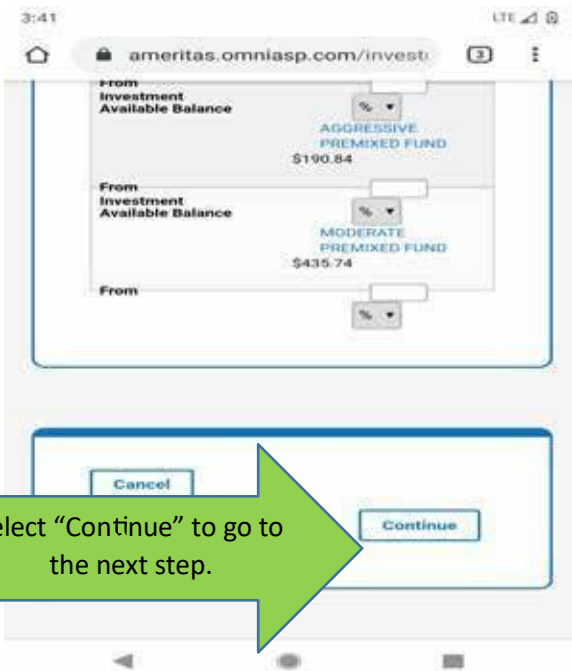
Select "Delete" to prevent the change from going through.



Selecting the "Click Here" in blue will redirect you to view the pending transaction. Additionally, if you want to prevent the change from going through, you can select "Delete".

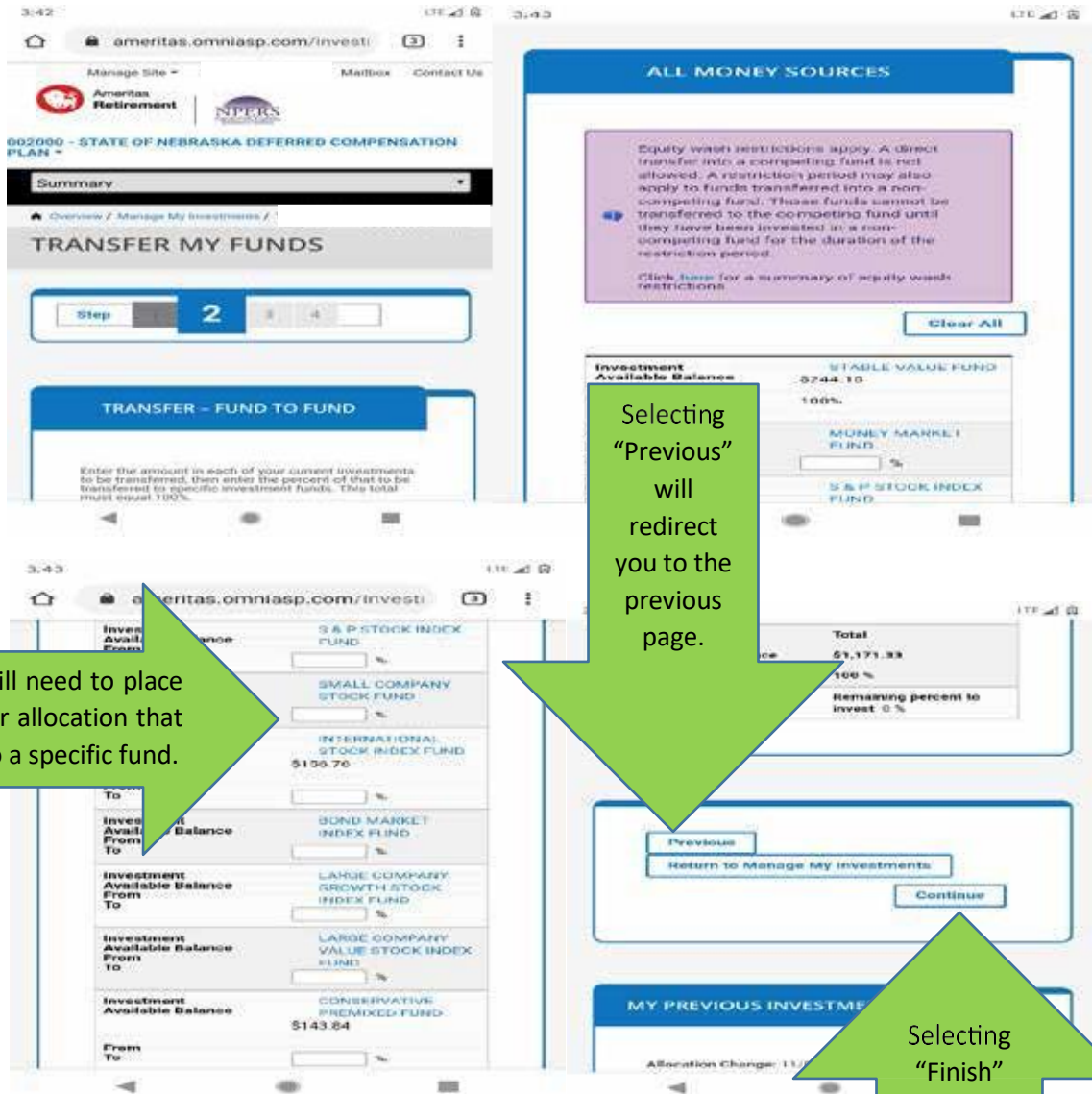


Place specific dollar amount or percentage. Does not have to equal 100%



Select "Continue" to go to the next step.

If you would like to transfer your previously contributed funds you can select "Transfer – Fund to Fund" from the "Manage My Investments" page. In the fund amount section, you can place a specific dollar amount or a percentage. This does not have to equal 100% or the total amount of the fund.

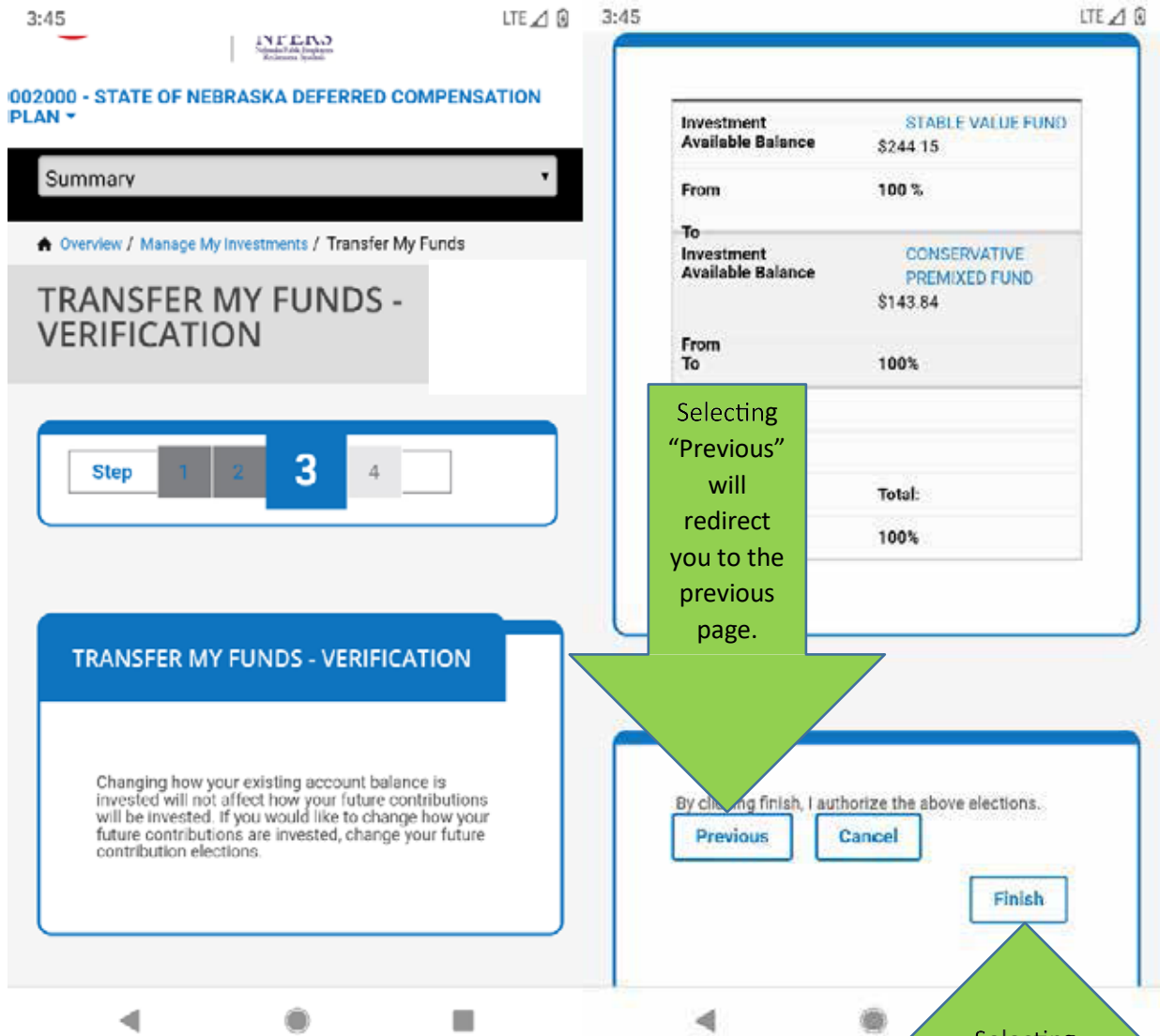


In these boxes you will need to place the percentage of your allocation that you would like to go to a specific fund.

Selecting "Previous" will redirect you to the previous page.

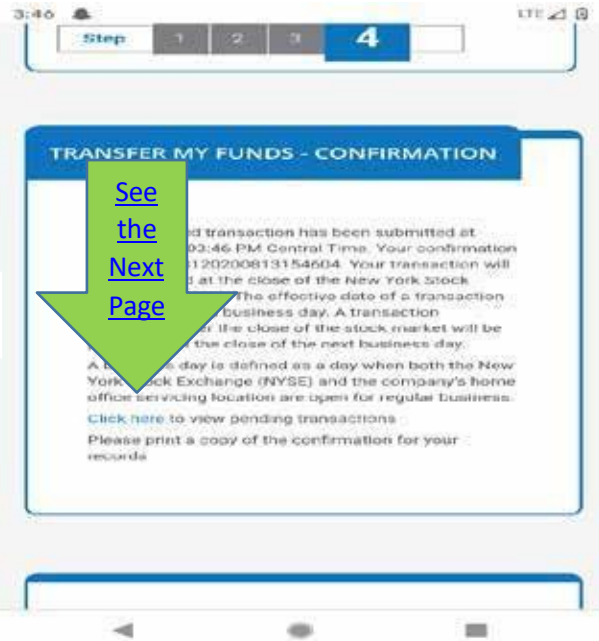
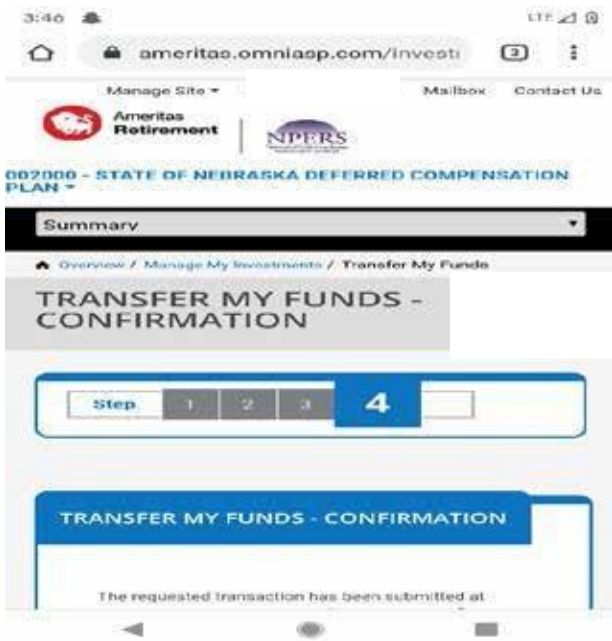
Selecting "Finish" will confirm the change and move you to the next page.

The next page will ask which funds you would like to transfer to. The percentage has to equal 100%. You can select "Previous" to go back if you want to make some adjustments. To proceed to the next step click "Continue".

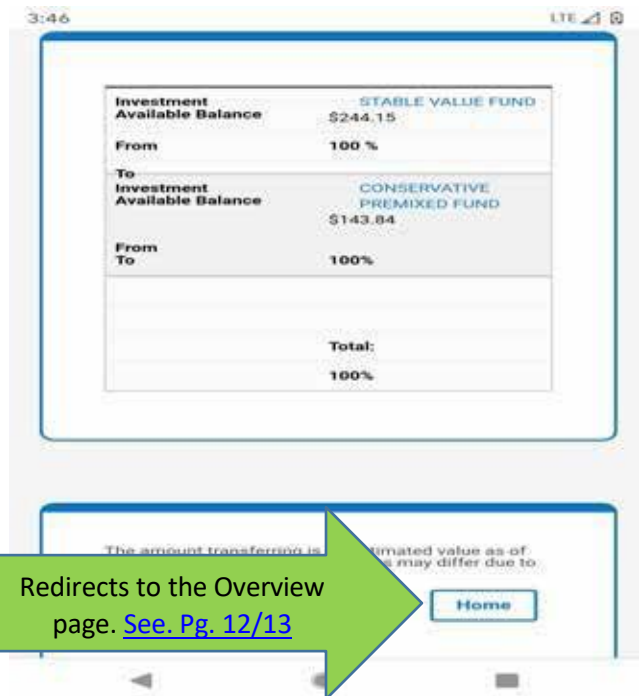


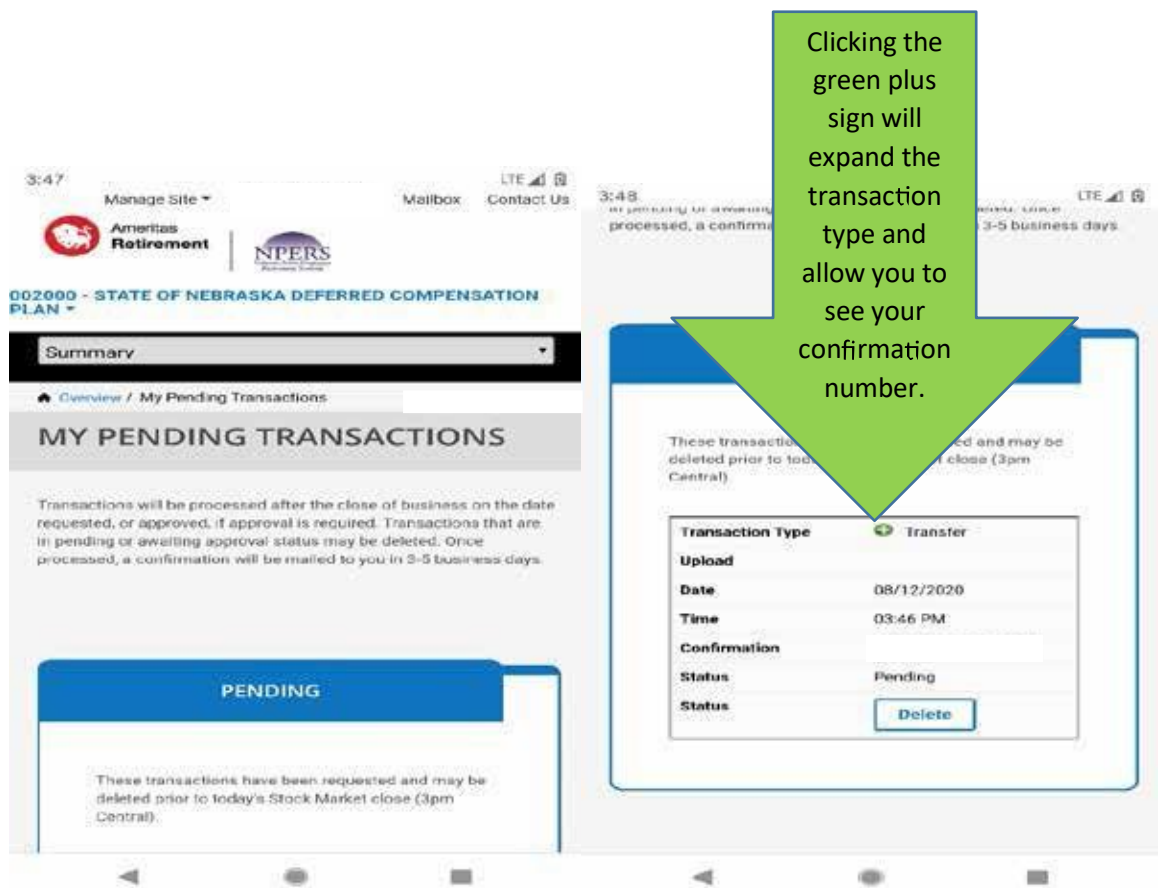
The next step will verify the changes that you are making and will allow you to either return to the last page to make adjustments by clicking “Previous” or to confirm the change by clicking “Finish”.

Selecting “Finish” will confirm the change and move you to the next page.



The next step will confirm the changes. To view the pending transaction and receive a confirmation number you can select “Click Here” highlighted in blue. Additionally, you can select “Home” to go back to the overview page.





Clicking the green plus sign will expand the transaction type and allow you to see your confirmation number.



Select "Delete" to prevent the change from going through.

Selecting the "Click Here" in blue will redirect you to view the pending transaction. Additionally, if you want to prevent the change from going through you can select "Delete".

**“Performance”
will allow you
to select
between
“Investment
Prices” and
“Historical
Performance”.**



Regardless of which plan you have, selecting “Investment Prices” will allow you to see the daily returns of each fund. Those with CB plans have no use of this information and may get confused and start to believe they are invested in the market. Be advised that this information doesn’t pertain to CB plan members.

For more detailed information on each fund you can click on the fund name, and for more information on the returns you can select the highlighted dollar amount in each fund summary.

9:06 LTE

Print Download

View prices as of : 08/07/2020

GO

Click on the investment's name to see a fund fact sheet. Click on the investment's price to see a price history.

See Pg. 50	AGE-BASED AGGRESSIVE FUND (AGE0-39)
	\$.00
	08/07/2020
	\$3.5800
	08/06/2020
	\$3.5751
	↑
	0.14%
	3.97%
	AGE-BASED CONSERVATIVE FUND (AGE 60 UP)
	\$.00
	08/07/2020
	\$2.8303
	08/06/2020

[See Pg. 51](#)

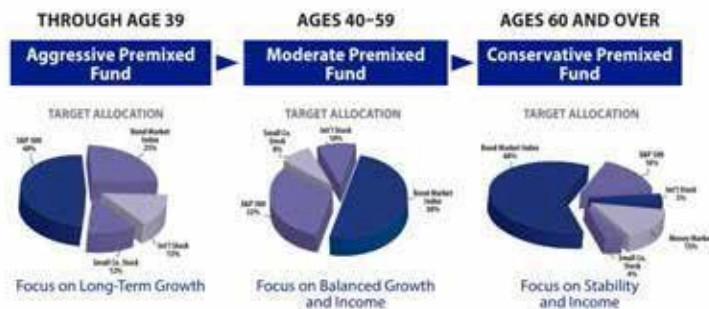


Selecting the name of each fund will bring up a PDF of the fund description. If you would like to view these on your phone you will need PDF viewing capability.

FUND DESCRIPTIONS

AGE-BASED FUND

The Age-Based Fund utilizes the existing Premixed Funds for your investment allocation between stocks, bonds and cash. The premixed funds function together as a "life cycle" fund, which means asset allocations automatically become more conservative as a member gets closer to retirement age.



Members **through age 39** who select this option will first have their assets invested in the **Aggressive Premixed Fund** (see the Aggressive Premixed Fund fact sheet for fund details). The use of the Aggressive Premixed Fund is for members with the longest time before retirement. As members reach age 40 their investment will automatically be changed to the Moderate Premixed Fund.

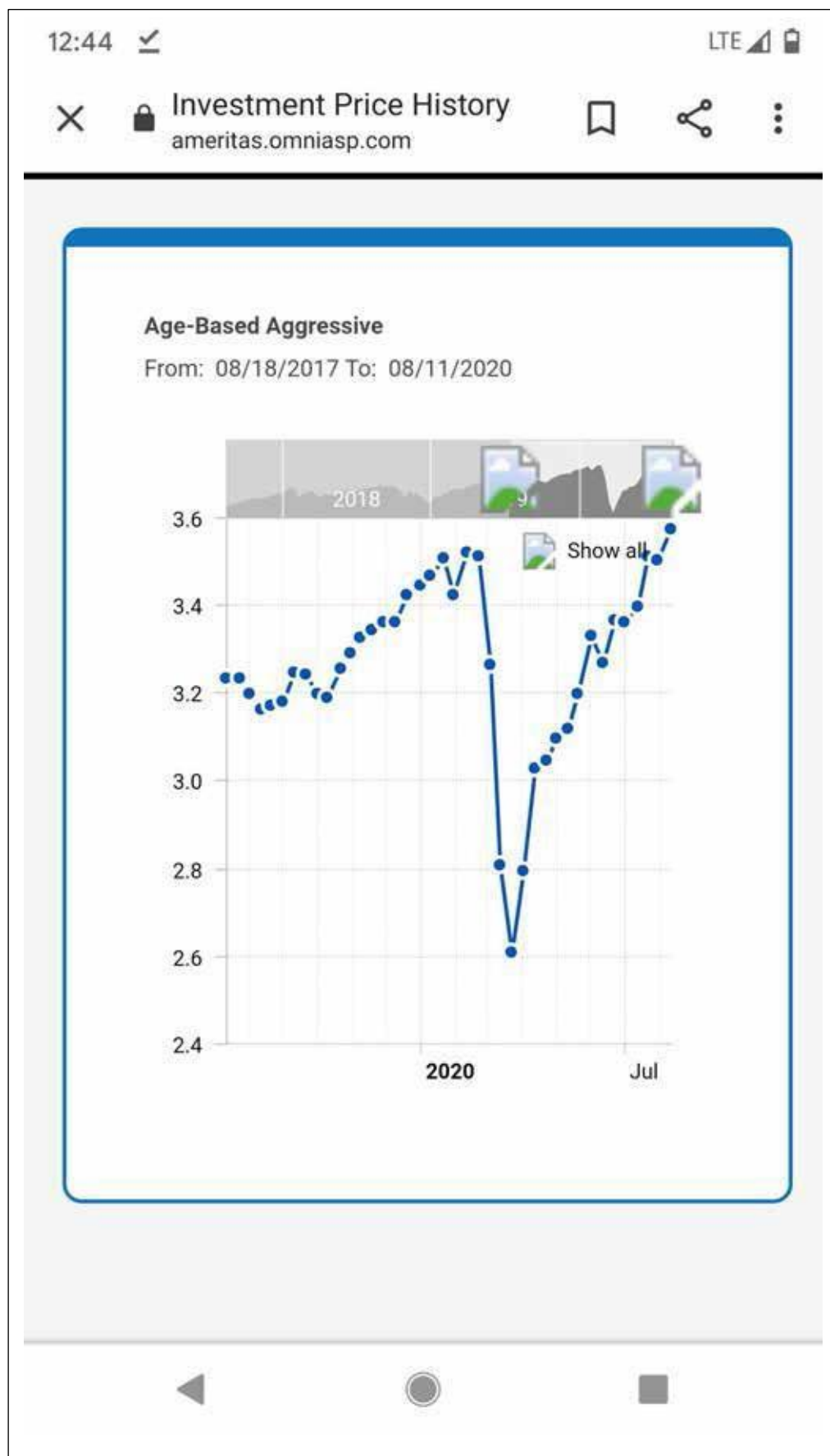
Members at age **40 through 59** who select this option will have their assets invested in the **Moderate Premixed Fund** (see the Moderate Premixed Fund fact sheet for fund details). The use of the Moderate Premixed Fund is for members at a mid-point in their lives and investment horizon. When members become age 60 their investment will be changed to the Conservative Premixed Fund.

Members at age **60 and over** who select this option will have their assets invested in the **Conservative Premixed Fund** (see the Conservative Premixed Fund fact sheet for fund details). The use of the Conservative Premixed Fund is for members as they draw closer to the end of their careers and have a shorter investment horizon.

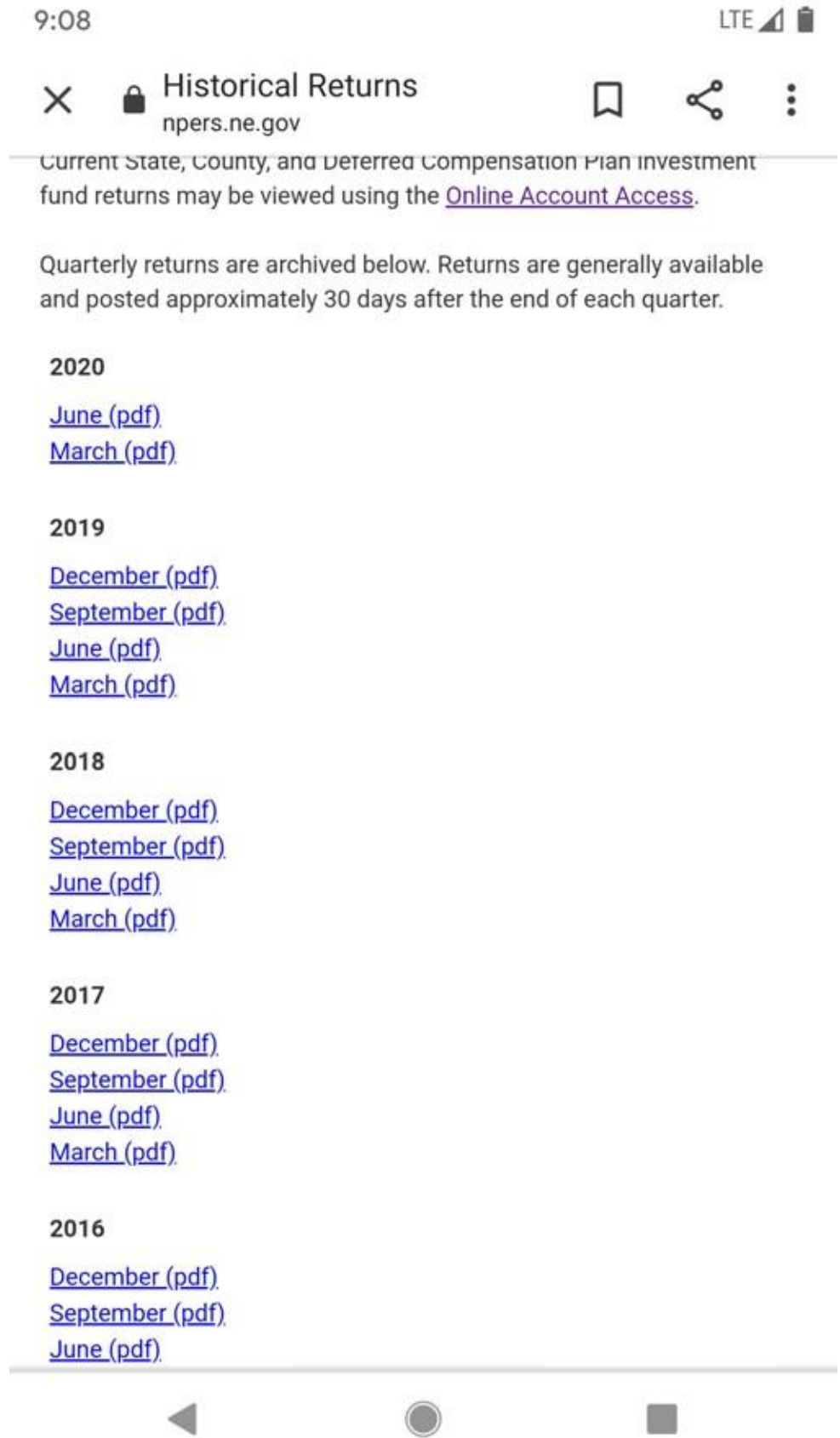
By selecting the Age Based Fund, members have the ease of an automatic shift to more conservative investments and an automatic re-balance of their asset allocation with changes in the markets. Members always retain the option to transfer their account and future contributions into any of the 13 other funds.



By clicking on the highlighted dollar amount you can see a line graph of the fund's performance for the last three years. However, this information has not been verified. See "Historical Performance" for clearer information on the fund's performance.



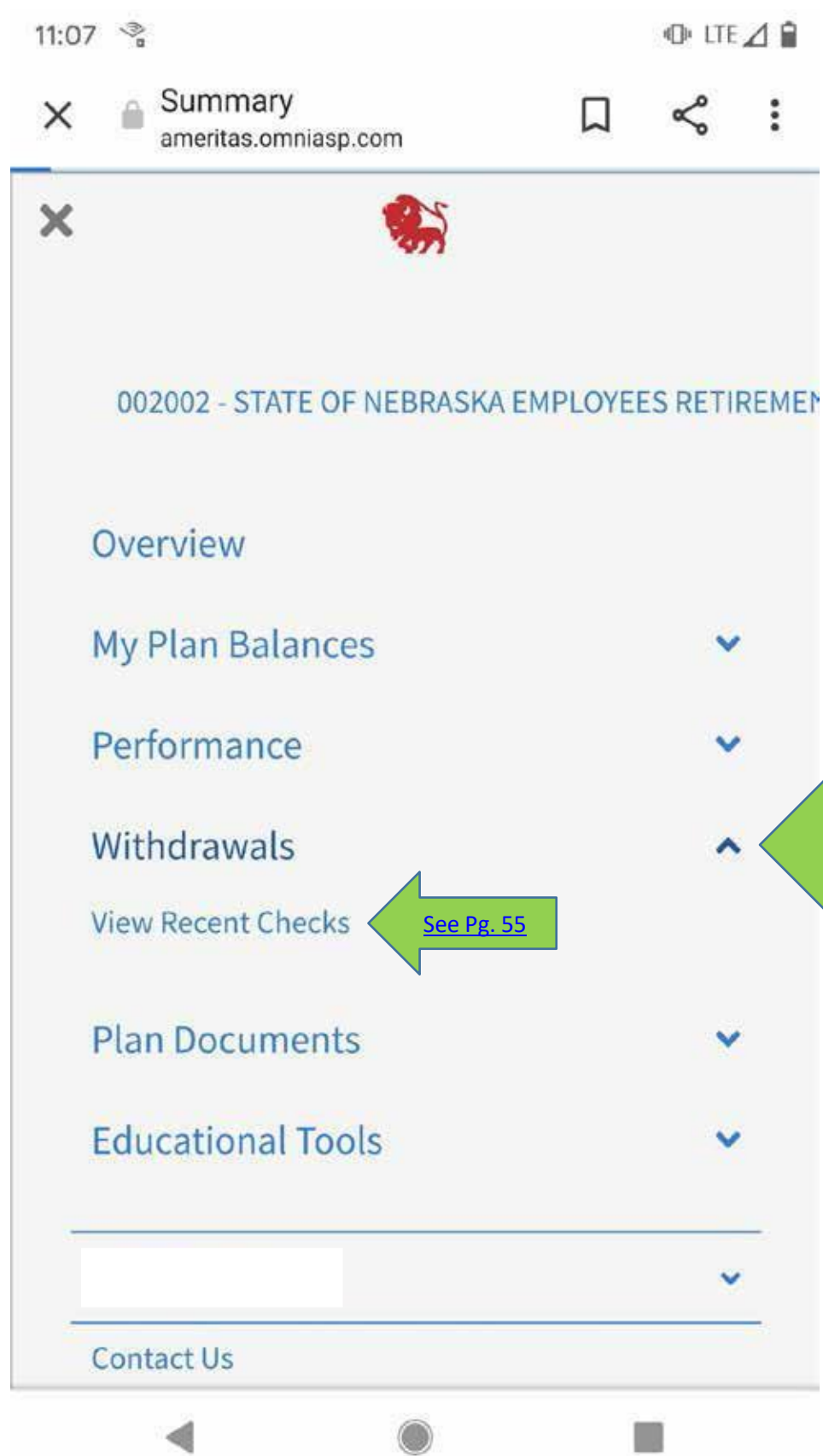
**Clicking on
“Historical
Performance”
will redirect
you to the
NPERs
website
where you
can view the
performance
by quarter
back to the
beginning of
2006.**



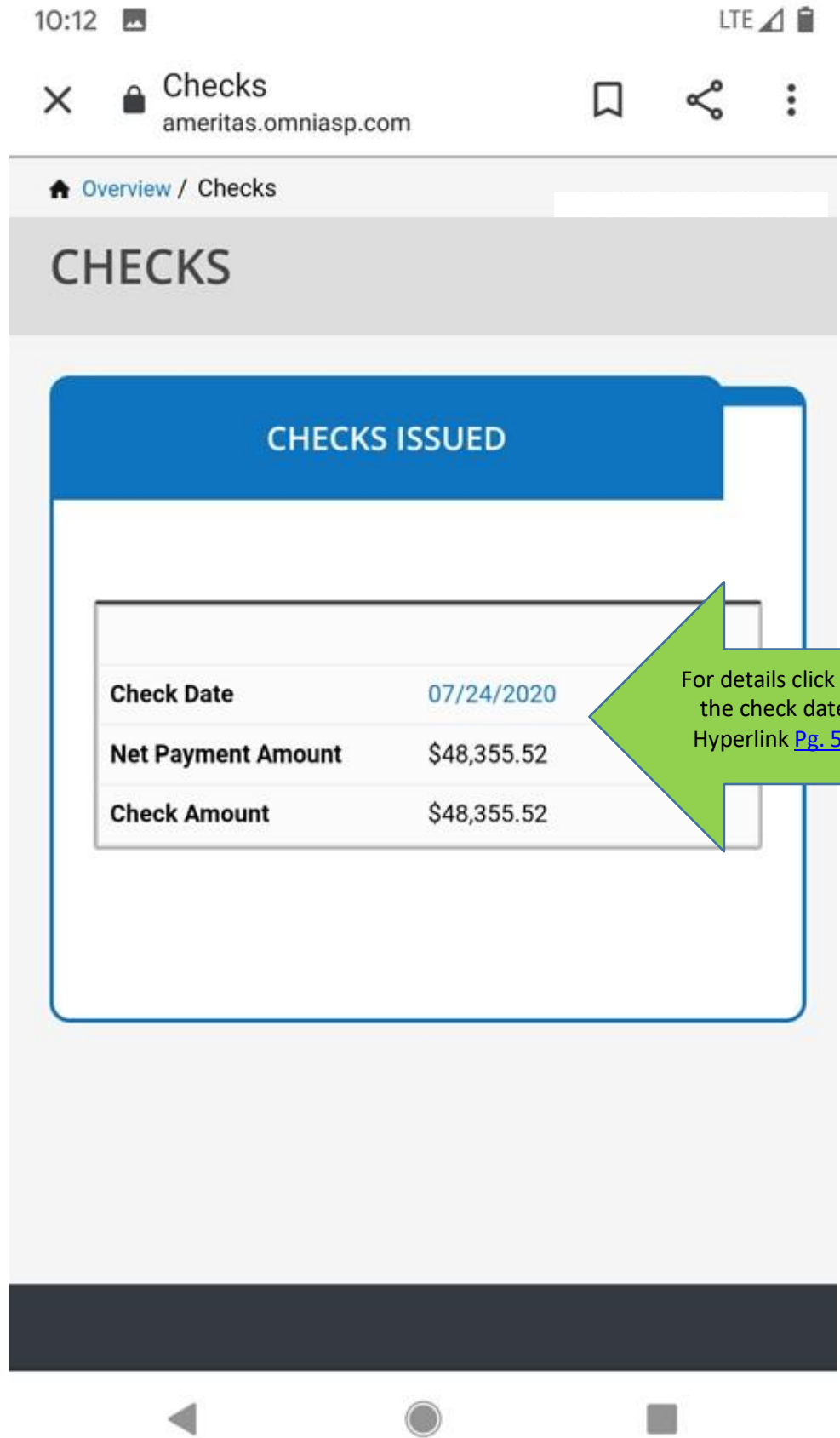
Side Note:
As warned at the beginning of this document, if you use the dropdown menu to view investment prices, you will be redirected to this page that will not show any information.



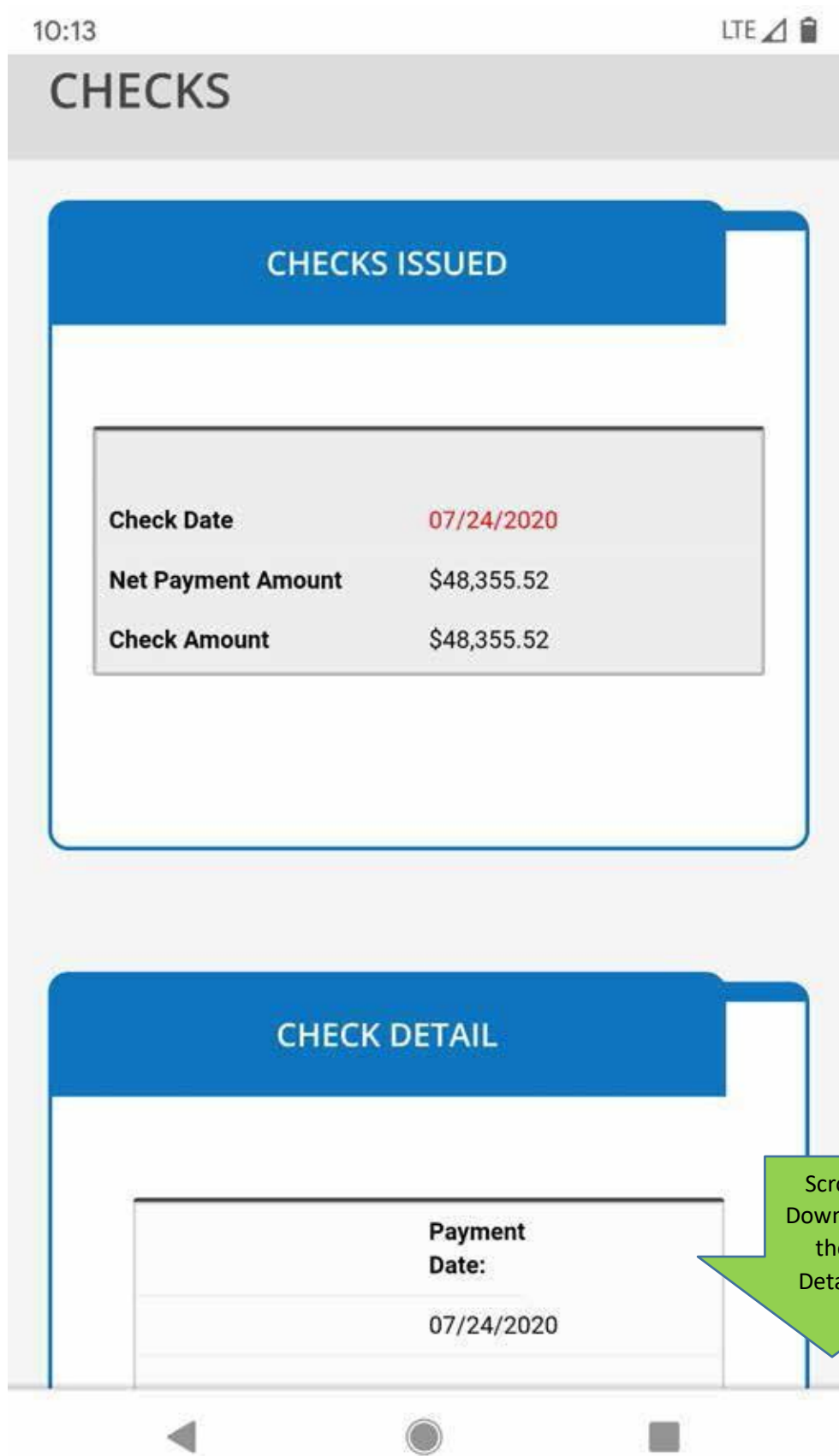
If you click on “Withdrawals” you can view check information for withdrawals sent to you, or rollovers sent to financial institutions.



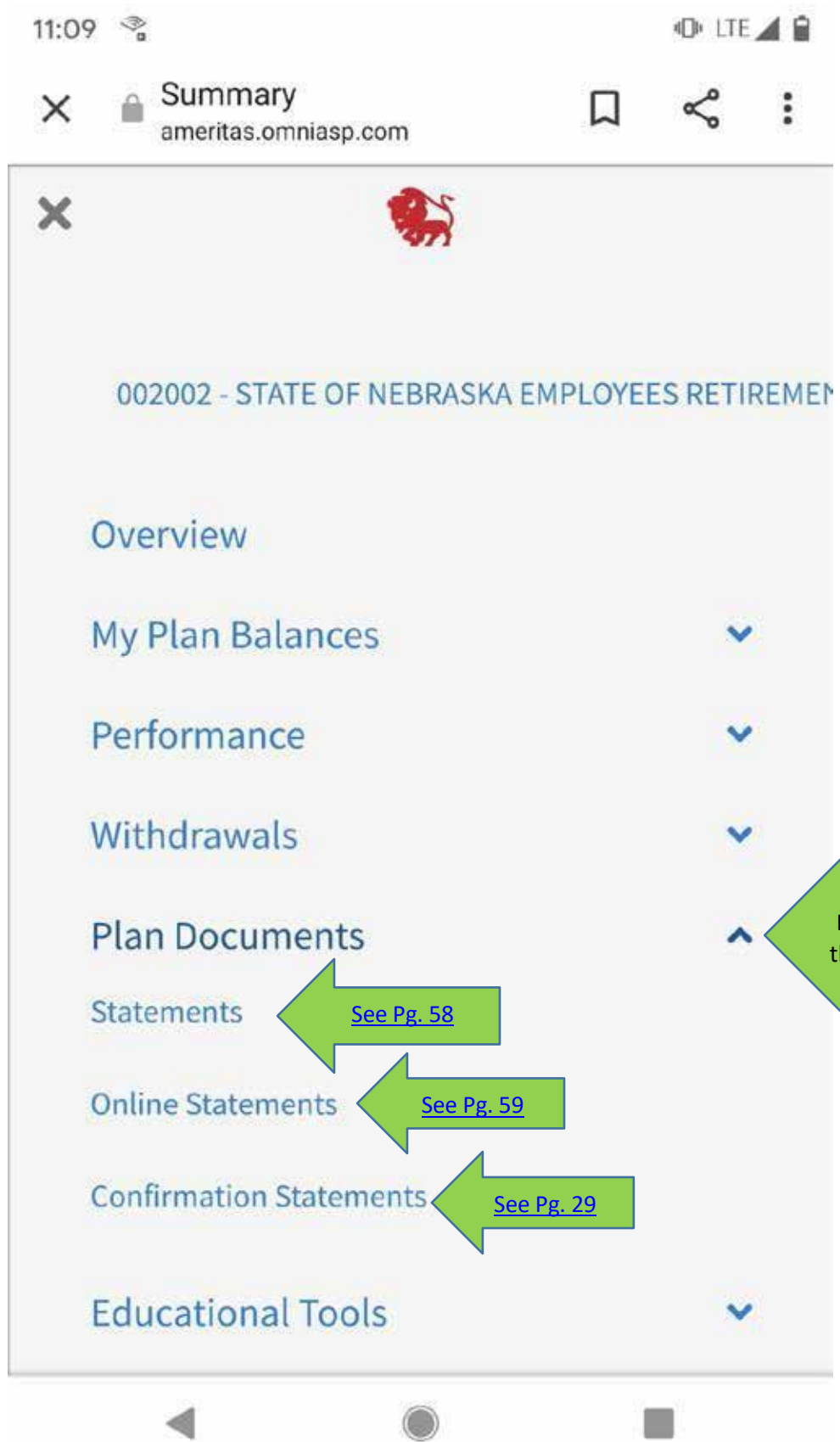
The first page will only give three items of information: check date, net payment amount and check amount (gross amount). Clicking on the highlighted date will give more detailed information.



Once clicking on the highlighted date, the “Check Detail” section will appear and you will have to scroll down to view it. Additional items that can be accessed will be the check number and address where the check was sent.



**Selecting
“Plan
Documents”
will allow
you to view
statement
information
in a variety
of forms.**





Ameritas Retirement



002002 - STATE OF NEBRASKA EMPLOYEES RETIREMENT PLAN

Summary

Overview / Statements

MY STATEMENTS

STATEMENTS

2020

2019

Statement Period	Statement Effective Date
2020-04-01 - 2020-06-30	07-01-2020
2020-01-	01-01-



2020-04-01 - 2020-06-30

07-01-2020

2020-01-

01-01-

Clicking on "Statements" will allow you to view the quarterly statements of the last couple of years.

Selecting “Online Statements” allows you to create an unofficial statement with four different options:

1. Month to Date
2. Quarter to Date
3. Year to Date
4. Specific Dates

You may like this option if you are wanting to get a statement in-between the office quarterly statements.

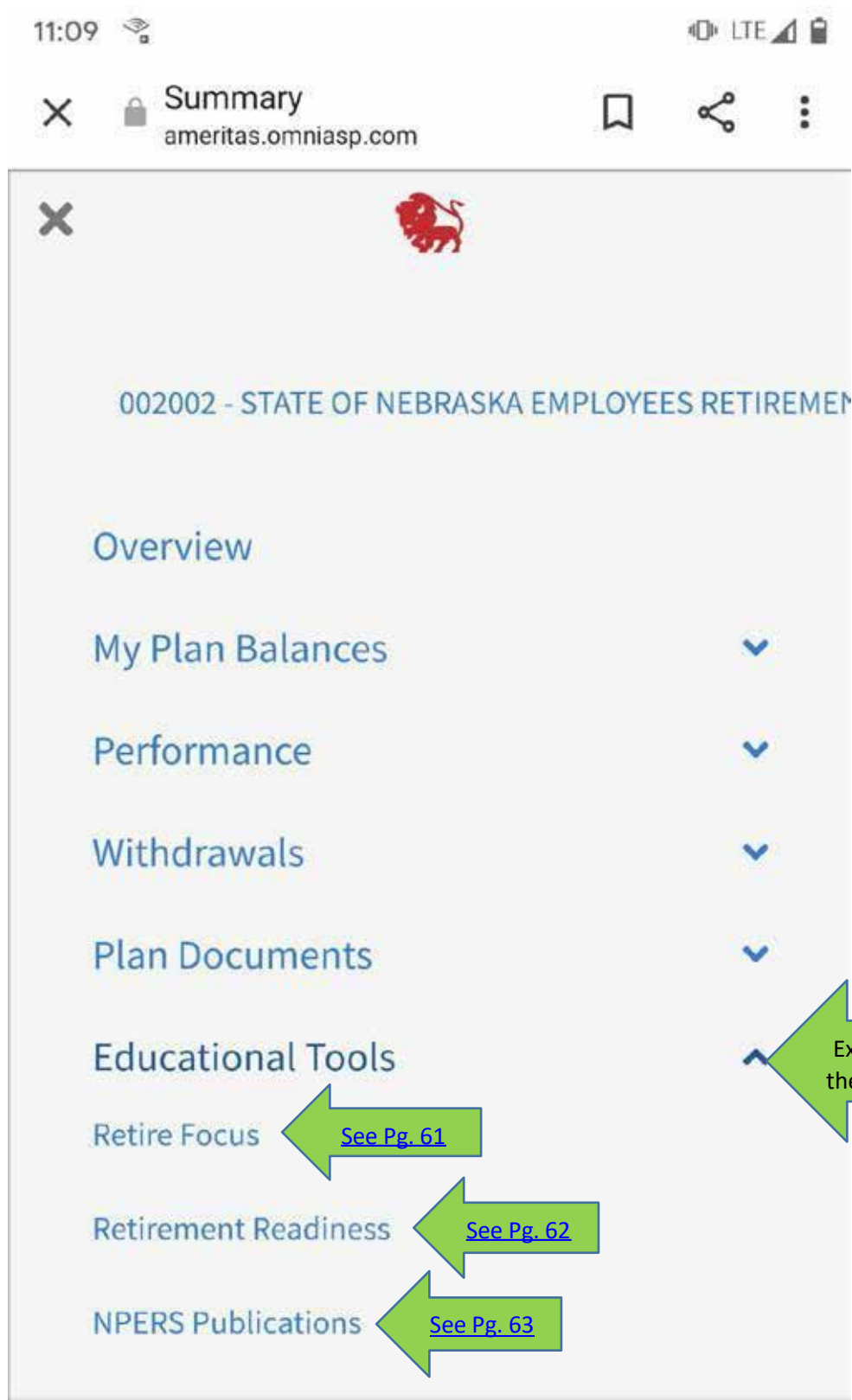
The screenshot shows a mobile browser interface for the 'Online Statement Request' page on ameritas.omniasp.com. The page title is 'ONLINE STATEMENT'. The form contains the following fields and instructions:

- Name :** [Redacted]
- Certificate Number :** [Redacted]
- Participant ID :** [Redacted]
- Instructions:** Enter the date range you would like for your Online Statement. You can request any two year increment, up to ten years from the current date.
- Please Choose the Statement Date Range :** A dropdown menu with the text 'select' and a downward arrow.
- Continue** button

The mobile status bar at the top shows the time 10:13, LTE signal, and battery level. The browser address bar shows the URL and navigation icons. The page header includes a home icon and the text 'Overview / Online Statement Request'.

Selecting “Educational Tools” will allow you to access additional sources to learn more about retirement.

Retire Focus and Retirement Readiness will redirect to outside websites. Retire Focus will send you to a website where you can read more about retirement and view videos. Retirement Readiness will direct you to a page where you can use calculators to see if you are on the right track for retirement. For further information, refer to the help centers on each respective website. However, “NPERS Publications” is our own website that contains many videos on retirement and an archive of our newsletters that provide additional information if needed.



1:10

LTE

RetireFocus > Welcome
rfocus.sharefc.com



Retire
focus

Home Just Starting Out On the Road Nearing the Goal



Just Starting Out

Creating retirement savings takes a lifetime of work. Start here to learn how you could build a strong foundation for your future.

[Learn More](#)

On the Road

The path to success is filled with twists and turns. Thoughtful planning can help you navigate it more effectively. Learn how you could lead the path.

[Learn More](#)

Nearing the Goal

The moment you've prepared for is drawing near, but your financial work continues. As you change your investment focus, here are some things to consider.

[Learn More](#)

This is the home page of Retire focus. Explore this page on your own.

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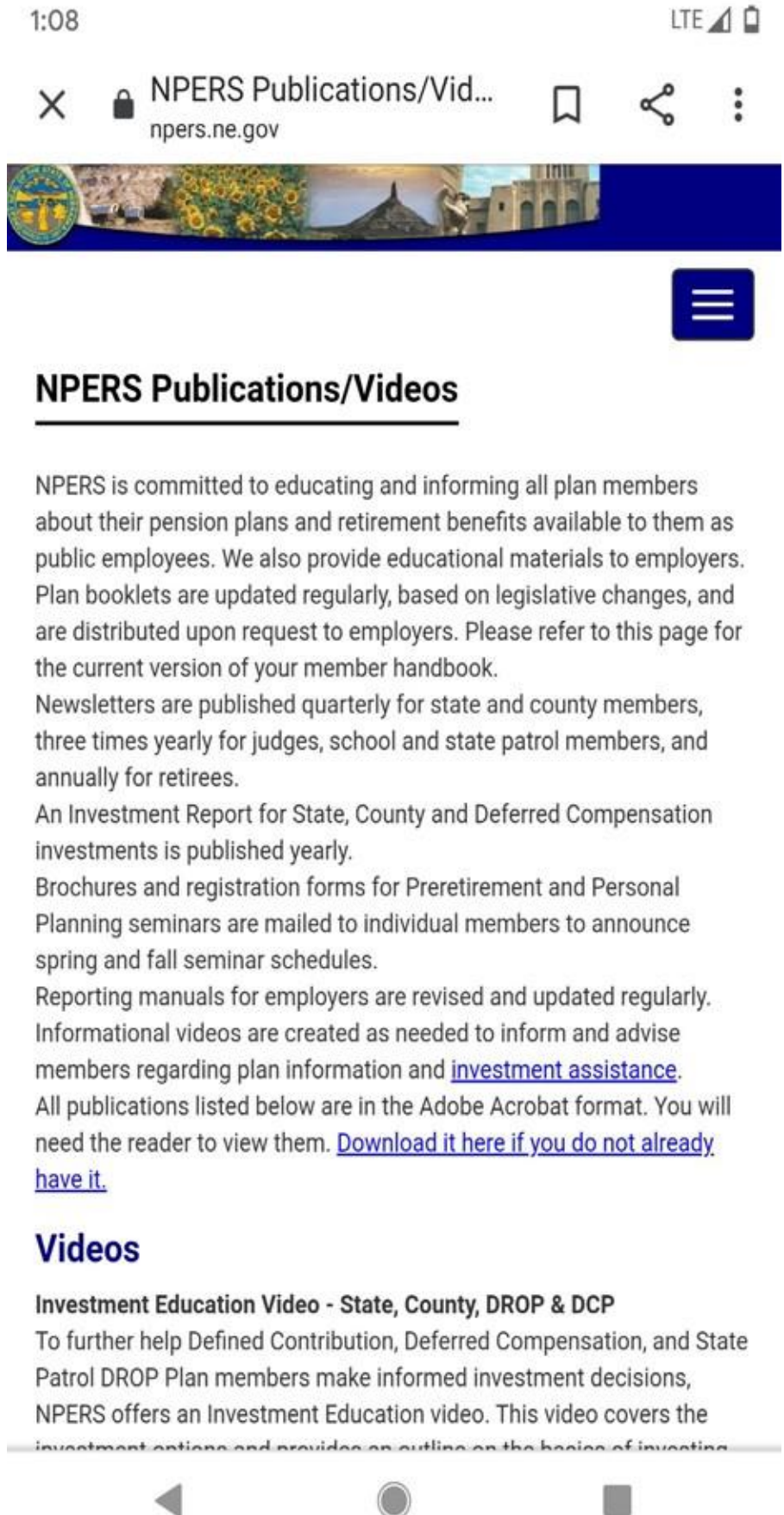
SS&C is not an affiliate of Ameritas Life Insurance Corp.

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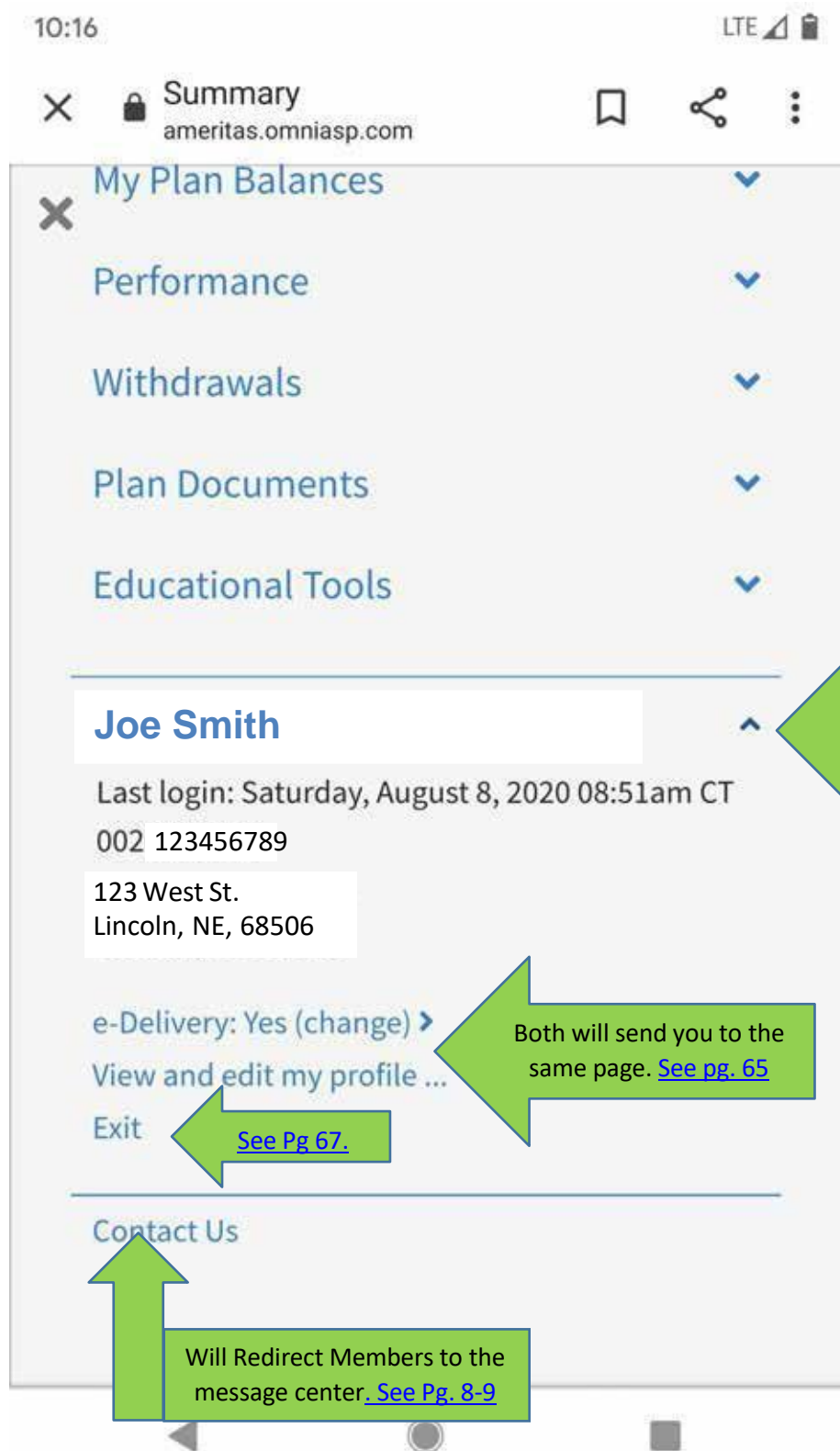
This is the home page of “Retirement Readiness”. It contains a few pages of information and three different calculators to help you plan for retirement.



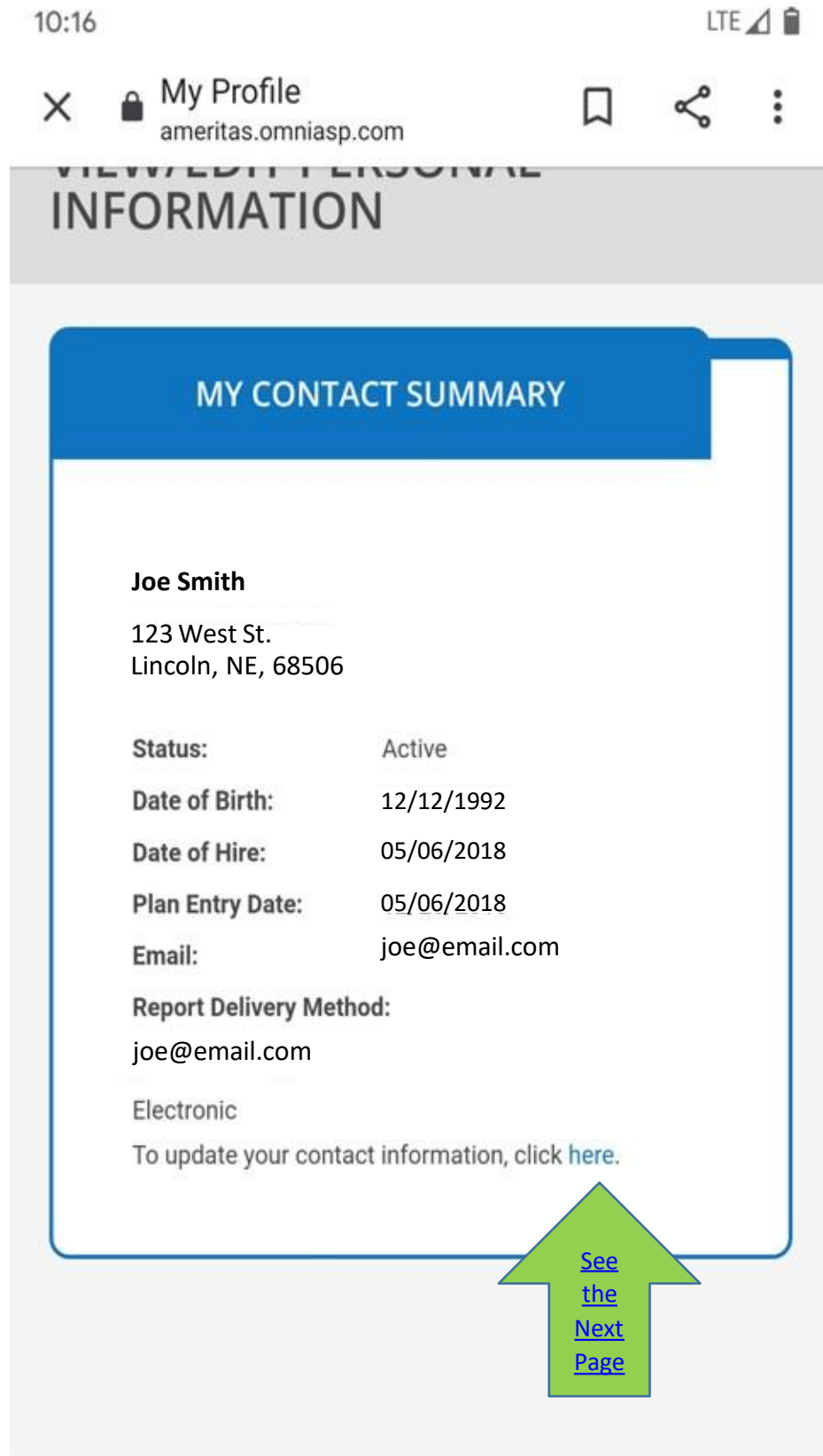
Selecting “NPERS Publications” redirects you to the NPERS website. This page contains our newsletters back to 1998, misc. reports, annual investment reports, member handbooks, legislative reports, GASB reports, actuarial reports, and videos to help educate you.





If you expand the dropdown menu for your name, you can log off the website and view your contact information.






Clicking either “e-Delivery: Yes (Change)” or “View and edit my profile” will both direct you to the “My Contact Summary” page. You can view your address, email address, and whether you are receiving paper or electronic statements. By clicking the blue “here” you can change your email address and either elect for electronic or paper statements.



This is the page where you can change your email and statement delivery preference. You'll change it here, confirm it on the next page, and submit it on the last page.

10:16 LTE  

Update Contact
ameritas.omniasp.com   

Step

1

2

3

CHANGE MY EMAIL ADDRESS

Email :

Confirm Email :

Deliver confirmations, statements, disclosures and notices electronically.
If you elect to receive paper, you will be charged a quarterly mailing fee of \$0.50 to cover costs associated with the delivery of paper statements. This fee is waived for participants who have requested

Checking this box will cause electronic statements to be sent. However, if the box is left unchecked paper statements will be sent.

Clicking “Exit” will take you to the log off verification page. If you want to log back into your account, you can select “Log in to Retirement Service Center” and it will redirect you back to the login page [see pg. 1](#).

