

## Institutional Advisors

# PayeeWeb New User Guide — Using the Pensioner Portal


This quick-reference guide is designed to walk you through setting up your pensioner account in KeyBank's PayeeWeb pensioner portal. You should have received a mailed Login ID letter from KeyBank, followed by a Password letter, and gone through the initial login process.

Visit [key.com/payeeweb](https://key.com/payeeweb). Log in to the portal.


1. Now that you have gone through the initial login process, enter your login ID and your password.

Click the **Login** button.

### Key Access



For assistance call 1-800-539-8458 | [keylink\\_support@keybank.com](mailto:keylink_support@keybank.com)



## Login

Login ID:

Password:

**LOGIN**

[Forgot Password?](#)

If you have forgotten your LoginID, Please call the KeyLink Helpdesk at 1-800-539-8458  
Key Values [Diversity](#). KeyBank is an [Equal Housing Lender](#).  
By accessing and using this website, you agree to the terms and conditions and important legal notices below.  
[User Agreement](#), [Linking Disclaimer](#), [Arbitration Provision](#), [Security](#), and [Privacy Policy](#).  
Copyright © 1998-2016, KeyCorp. All rights reserved.

# PayeeWeb New User Guide — Using the Pensioner Portal

Navigate the main portal dashboard to locate the information you need.

2. This includes:

- **Account Info** – Year-to-date gross amounts, net amounts, and deductions.
- **Check History** – A user-friendly check history record showing payment you have received.
- **Tax Forms** – Access current and previous years' tax forms.

You can also navigate to view your:

- **Address** (and update if authorized by your plan sponsor)
- **Direct deposit information** (and update if authorized by your plan sponsor)
- **Deductions**

The screenshot displays the KeyBank Pensioner Portal dashboard. At the top, the KeyBank logo is on the left, and the user's last login (02/17/2021 10:19 AM) and a greeting (Hello TEST SEPTEMBER!) with links for Contact Us and Sign Out are on the right. Below the header, there's a navigation bar with links for Home, Address, Direct Deposit, and Deductions. On the left side, there's a sidebar menu with links for Account Info, Check History, and Tax Forms. The main content area is divided into three sections: 1. Current Account: DEMO BENEFIT PAYMENT, showing Year to Date Gross Amount (5,700.00), Deductions (767.56), Net Amount (4,932.44), and Payment Frequency (Monthly). 2. Recurring Distributions, showing Installment 1, Next Scheduled Payment (04/01/2021), and Amount (1,378.70), with a More Information button. 3. Check History, showing a table of recent payments with columns for Check Date, Number, Amount, Status, and a View button for each row.

Check Date	Number	Amount	Status	
01/22/2021	9718964	1,378.70	Cleared	<a href="#">View</a>
02/01/2021	9728285	1,378.70	Cleared	<a href="#">View</a>
02/12/2021	9754077	2,175.04	Cleared	<a href="#">View</a>



# PayeeWeb New User Guide — Using the Pensioner Portal

## Recurring Distributions > More Information

3. Accesses more detailed information related to your pension/retirement installment payments, including:
- Active Payment address
  - Frequency of the payments
  - Last Payment and Next Payment
  - When installments started and when they stop
  - Detailed distribution information such as gross income, taxable income, and more.

KeyBank

Last Login: 02/17/2021 10:19 AM

Hello TEST SEPTEMBER! ▾ Contact Us Sign Out

[Home](#) [Address](#) [Direct Deposit](#) [Deductions](#)

Payment Info

Distribution Info

Deductions and Funding

### Recurring Distributions

Payment Information

Active Address	Frequency	Monthly	Tax Type	1099-R
TEST SEPTEMBER 4900 TIEDEMAN BROOKLYN, OH. 44144-2338	Last Payment		Payment Method	Fixed
	Next Payment	04/01/2021	Annuity Type	None
	Installment Started	02/17/2021	Payment Source	Installment
	Installment Stops	12/31/9999		

Distribution Information

Gross Amount	1,600.00	Ordinary Income	1,600.00	Employee Contributions	0.00
Deductions	221.30	Capital Gains	0.00	Other Nontaxable	0.00
Net Amount	1,378.70	Total Taxable	1,600.00	Total Nontaxable	0.00

Funding

REGULAR	1,600.00
---------	----------

Deductions

FEDERAL TAX	150.00
STATE TAX	71.30



# PayeeWeb New User Guide — Using the Pensioner Portal

## Check History

4. Shows a view of all checks or EFTs since you started to receive benefits from your pension plan.  
Select the **View** link to see additional details about an individual check or Electronic Funds Transfer (EFT).

KeyBank

Last Login: 02/17/2021 10:19 AM

Hello TEST SEPTEMBER! Contact Us Sign Out

Home Address Direct Deposit Deductions 352.08 More Information

Payment Frequency Monthly

Account Info

Check History

Tax Forms

Check History

Show 10 records Search:

Check Date	Number	Amount	Status	
01/01/2020	9269463	181.04	Cleared	<a href="#">View</a>
01/01/2021	9690960	181.04	Cleared	<a href="#">View</a>
02/01/2020	9303857	181.04	Cleared	<a href="#">View</a>
02/01/2021	9726204	181.04	Cleared	<a href="#">View</a>
03/01/2020	9338853	181.04	Cleared	<a href="#">View</a>
04/01/2020	9373558	181.04	Cleared	<a href="#">View</a>
05/01/2020	9408131	181.04	Cleared	<a href="#">View</a>
06/01/2020	9442004	181.04	Cleared	<a href="#">View</a>
07/01/2020	9477523	181.04	Cleared	<a href="#">View</a>
08/01/2020	9512928	181.04	Cleared	<a href="#">View</a>

Showing 1 to 10 of 18 records Previous 1 2 Next



# PayeeWeb New User Guide — Using the Pensioner Portal

## Tax Forms

- Shows a view of any tax forms for the current or prior years, typically 1099-R forms. Select the **View** link to open the tax form details screen.

The 1099-R Details screen shows distribution information and financial details, listing individual tax box information, allowing for easy and simple filing.

The **Download 1099-R** button in the upper right corner of the 1099-R Details screen will open a copy of your tax form that you can print or save.

**KeyBank** Last Login: 02/17/2021 10:19 AM Hello TEST SEPTEMBER! Contact Us Sign Out

Home Address Direct Deposit Deductions

**1099-R Details** Download 1099-R

**Distribution Information**

<b>Mailing Address</b>	<b>Tax Year</b>	2020
TEST SEPTEMBER 4900 TIEDEMAN BROOKLYN, OH. 44144-2338	<b>Form Type</b>	1099R
	<b>Account Number</b>	
	<b>Plan Type</b>	Pension
	<b>Distribution Code</b>	7

**Financial Information**

Federal		State	
Box 1, Gross Distribution	2,172.48	Box 15, State	OH
Box 2a, Taxable Amount	2,172.48	Box 14, State Tax Withheld	0.00
Box 3, Capital Gain	0.00	<b>Additional Amounts Reported</b>	
Box 4, Federal Income Tax Withheld	0.00	Box 8, Other	0.00
Box 5, Employee Contribution	0.00		
Box 6, Net Unrealized Appreciation	0.00		
Box 9b, Total Employee Contribution	0.00		

**KeyBank** Last Login: 02/17/2021 10:19 AM Hello TEST SEPTEMBER! Contact Us Sign Out

Home Address Direct Deposit Deductions

Account Info Check History Tax Forms

**Current/Previous Year Tax Forms**

Type	Year	Amount	
1099-R	2019	1,629.36	<a href="#">View</a>
1099-R	2020	2,172.48	<a href="#">View</a>
1099-R	2020	2,172.48	<a href="#">View</a>



# PayeeWeb New User Guide — Using the Pensioner Portal

## Address

- Click **Address** in the top navigation menu to view your current address. If your Plan Sponsor has authorized you to update your address information in PayeeWeb, you will see an **Update** button that opens the screen to enter your new address. Once you have entered your new address, click the **Update** button.

**Note:** If you are moving to another State, you will have to contact **KeyBank's Pensioner Information Line** directly at 1-800-962-2149.

The screenshot shows the KeyBank Pensioner Portal interface. At the top, the KeyBank logo is on the left, followed by 'Last Login: 02/17/2021 10:19 AM'. On the right, it says 'Hello TEST SEPTEMBER!' with a dropdown arrow, and links for 'Contact Us' and 'Sign Out'. Below this is a navigation bar with 'Home', 'Address' (which is highlighted), 'Direct Deposit', and 'Deductions'. The main content area features a 'Current Address' form. The form has a title 'Current Address' and an 'Update' button. The form fields are: 'Name' (containing 'TEST SEPTEMBER'), 'Address' (containing '4900 TIEDEMAN'), 'City' (containing 'BROOKLYN'), 'State' (containing 'OH'), 'ZIP' (containing '44144-2338'), and 'Country' (empty). At the bottom of the form, it says 'Copyright © 2021 FIS. All Rights Reserved.' The background of the page shows a blurred image of a modern building.



# PayeeWeb New User Guide — Using the Pensioner Portal

## Direct Deposit

- Click **Direct Deposit** in the top navigation menu to view your direct deposit information. If your Plan Sponsor has authorized you to update your direct deposit information in PayeeWeb, you will see a **Stop EFT** button and an **Update** button, which will open the screen so you can enter new direct deposit information. Once you have updated the form field information, click the **Update** button to update your profile.

**Best practice:** Double check the Routing/Transit Number field. If this field is incorrect, it could result in delayed payment.

Routing numbers are validated as part of this process. You will receive an invalid routing number notification if the number entered does not exist.

The screenshot shows the KeyBank PayeeWeb interface. At the top, the KeyBank logo is on the left, and 'Last Login: 02/02/2021 2:55 PM' and 'Hello BARBARA COMFORT!' are on the right. Below the header is a navigation bar with 'Home', 'Address', 'Direct Deposit', and 'Deductions'. The 'Direct Deposit' section is active, displaying a form with the following fields: 'Routing/Transit Number' (041215032), 'Account Number' (\*\*\*\*\*33001), 'Account Type' (Checking), and 'Bank Name' (empty). To the right of the form are two buttons: 'Stop EFT' and 'Update'. Below the form, there is a note: 'If you have questions about using Direct Deposit to receive your distributions, please contact one of our Customer Service Representatives at 1-800-962-2149.' and a copyright notice: 'Copyright © 2021 FIS. All Rights Reserved.'



# PayeeWeb New User Guide — Using the Pensioner Portal

## Deductions

- Click **Deductions** to access federal and state tax withholding, tax filing status, and other deductions associated with your payments.

To update your current elections, contact KeyBank's Pensioner Information Line at **1-800-962-2149**.

**KeyBank** Last Login: 02/17/2021 10:19 AM Hello TEST SEPTEMBER! Contact Us Sign Out

Home Address Direct Deposit **Deductions**

### Deductions

Current Federal Withholding Elections	
Calculation Method	Fed/St Withholding
Federal Filing Status	Married, Joint
Federal Exemptions	2
Additional Withholding Amount	150.00

Current Ohio Withholding Elections	
Calculation Method	Fed/St Withholding
Ohio Filing Status	Married, Joint
Ohio Exemptions	2
Additional Withholding Amount	50.00

To update your current elections, contact one of our Customer Service Representatives at 1-800-962-2149.

Copyright © 2021 FIS. All Rights Reserved.





# PayeeWeb New User Guide — Using the Pensioner Portal

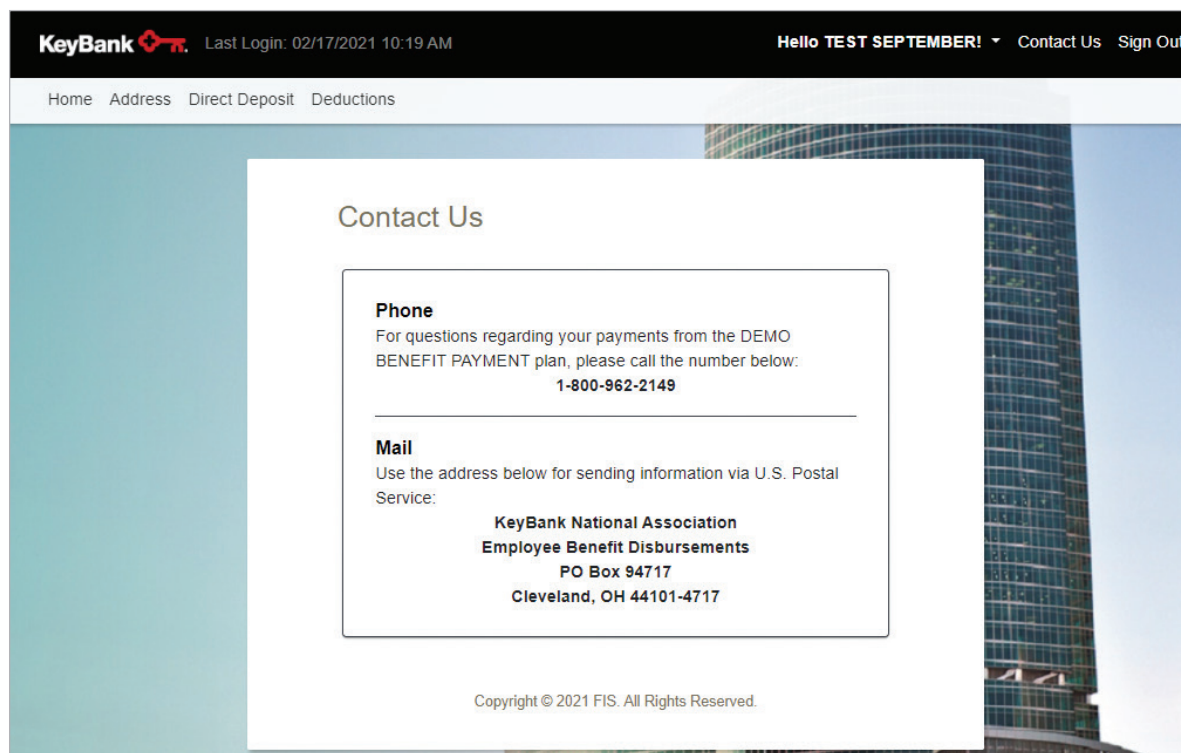
## Contact Us

9. **Contact Us** – Phone and email contacts for additional assistance with navigating and using PayeeWeb.

**Phone** – For questions about your payments, please call 1-800-962-2149.

**Mail** – Use the following address for sending information via the U.S. Postal Service:

KeyBank National Association  
Employee Benefit Disbursements  
P.O. Box 94717  
Cleveland, OH 44101-4717



For more assistance in navigating the PayeeWeb Portal, or for help with accessing or changing your information, [contact the KeyBank Institutional Advisors Customer Service team at 1-800-962-2149.](#)

KeyBank Institutional Advisors collaboratively engages stakeholders to understand their organization's strategic mission, values, and goals. Our advisors are professionals supported by subject matter experts across client disciplines/market segments. Combining our expertise with an understanding of the client, we recommend and implement customized, coordinated financial solutions.





KeyBank Institutional Advisors is the marketing name under which KeyBank National Association (KeyBank) offers investment management and fiduciary services to institutional clients.

KeyBank National Association is the Trustee of the KeyBank Multiple Investment Trust (the "MIT") for Employee Benefit Trusts and the KeyBank EB MaGIC® Fund. The KeyBank EB MaGIC® Fund is sub advised by Mellon Investment Corporation. Advisor receives a fee for their services. An investment in a money market fund is not insured or guaranteed by the FDIC or any other government agency. Although the money market funds seek to preserve the value of your investment at \$1.00 per share, it is possible to lose money by investing in these funds. Banking and trust products are offered by KeyBank. All credit products are subject to collateral and/or credit approval, terms, conditions, and availability and subject to change. When considering gift planning strategies, the donor should always consult with the donor's own legal, tax and financial advisors. KeyBank does not give legal advice.

Banking products and services are provided by KeyBank, Member FDIC. Trust and certain custody and investment management products are provided by KeyBank, a national bank with fiduciary powers. KeyBank is an Equal Housing Lender. All loans provided by KeyBank are subject to underwriting, credit, and collateral approval, in addition to origination or other transaction fees. Financing availability may vary by state. Restrictions may apply NMLS ID 399797.

Investing involves risk, including the potential loss of money invested. Past performance does not guarantee future results. Asset allocation and diversification do not guarantee a profit or protect against loss.

Non-deposit products are:

**NOT FDIC INSURED • NOT BANK GUARANTEED • MAY LOSE VALUE • NOT A DEPOSIT • NOT INSURED BY ANY FEDERAL OR STATE GOVERNMENT AGENCY**