

PeopleSoft Employee Self-Service (ESS) Instructions:

How to Enroll, Change, Stop, or Re-Start Your PPS 403(b) Plan Contribution

IMPORTANT: We encourage you access PeopleSoft Employee Self-Service (ESS) while on-site. To access PeopleSoft Employee Self-Service (ESS) while off-site, you must setup Duo 2-Step Security. For ESS off-site log in assistance, contact the **PPS OTIS Service Desk** at 503-916-3375. For more information please visit: <https://www.pps.net/selfservice>.

Instructions

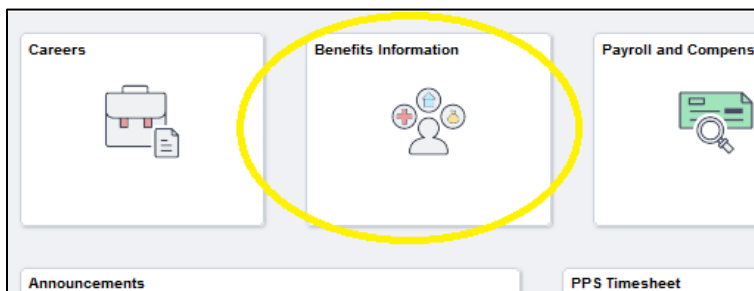
Before you enroll to have PPS 403(b) Plan contribution(s) taken out of your paycheck, you **MUST** do the following:

1. Create a user account with a PPS 403(b) Plan vendor.
2. A list of vendors can be found at:
<https://www.pps.net/cms/lib/OR01913224/Centricity/Domain/56/2025%20403b%20announcement%20v3.pdf>
3. After creating a vendor user account, enroll in the PPS 403(b) Plan with the plan ID# within your vendor user account.
 - a. Plan ID#s can be found on the same document above.

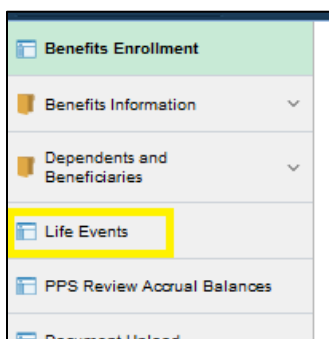
We **cannot** take PPS 403(b) Plan contribution out of your paycheck if the above items have not been completed by you.

NOTE: To avoid any processing issues, we recommend completing the below steps in **one sitting**.

4. Log into your **PeopleSoft Employee Self-Service (ESS)** account: <https://selfservice.pps.net/>.
5. Click on the **Benefits Information** panel.



6. On the left-hand side of the screen, click **Life Events**.



7. Under **Employee Contribution Changes**, select the radio button next to **I want to change my 403(b) Contribution**.

View Form 1095-C

Employee

- ☐ I got married
- ☐ I had a baby
- ☐ I adopted or gained legal custody/guardianship of a child
- ☐ I got divorced/legally separated

Employee Contribution Changes

- ☒ I want to change my 403(b) Contribution
- ☐ I want to change my HSA Contribution(For Non-Rep & SEIU)

Employee Life Insurance Beneficiary Change

- ☐ I want to change my Beneficiary

8. In the **Status Change Date** field, enter your desired date and click OK. Please read carefully below for Status Change Date information:
- Entering a date in the current month will make your new election take effect in the **next monthly pay period** (e.g. a January date take effect on the February monthly paycheck).
 - If you would like to make a new election for the **current month's paycheck**, please enter the last date of the previous month. If you are paid weekly, please review weekly paid section below.
 - New elections are subject to payroll processing timelines. Changes for the current month's paycheck submitted after the 20th of the month may not be processed.
 - WEEKLY PAID EMPLOYEES ONLY: Entering today's date will make your new election take effect one of the first two weekly paychecks of the next month. If you are entering a date on the first of the month your new election will take effect one of the first two weekly paychecks of *that* month.
 - Please contact the Benefits Dept if you need assistance** understanding the payroll timing of your change date: benefits@pps.net or 503-916-646

For 403(b) changes, please read carefully. Entering a date in the current month will make your new election take effect in the next monthly pay period (e.g. a January date take effect on the February monthly paycheck). If you would like to make a new election for the current month's paycheck, please enter the last date of the previous month. If you are paid weekly, please review weekly paid section below.

New elections are subject to payroll processing timelines. Changes for the current month's paycheck submitted after the 20th of the month may not be processed. Contact the Benefits Dept at one of the contact methods listed above for assistance.

WEEKLY PAID EMPLOYEES ONLY: Entering today's date will make your new election take effect one of the first two weekly paychecks of the next month. If you are entering a date on the first of the month your new election will take effect one of the first two weekly paychecks of that month. Please contact the Benefits Dept if you need assistance understanding the payroll timing of your change date.

Status Change Date

Status Change Date

OK Cancel

9. You are now on the **403(b) Contribution Change** screen. On the left-hand side, click **Benefit Enrollment**

eBenefits 403(b) Contribution Change

Life Events

- Welcome
- Benefit Summary
- Benefit Enrollment**
- Benefit Election Review
- Event Completion and Exit

403(b) Contribution Change

Your First Name Your Last Name

Before you begin, make sure you have established an account under PPS's account number with the selected vendor. If you are not sure how to establish an account please contact Carruth Compliance Consulting at 503-968-8961 and they will assist you.

10. You are now on the **Benefit Enrollment** screen. Click the **Start My Enrollment** button.

eBenefits 403(b) Contribution Change

Life Events

- Welcome
- Benefit Summary
- Benefit Enrollment**
- Benefit Election Review
- Event Completion and Exit

Benefit Enrollment

Now we're ready to prepare your 403(b) options, Your information will be analyzed to determine whether changes to your existing enrollments are allowed. Select the **Start My Enrollment** button to begin your benefit enrollment.

Start My Enrollment

11. Click the **Select** button for the open 403(b) Changes event

eBenefits 403(b) Contribution Change

Life Events

- Welcome
- Benefit Summary
- Benefit Enrollment**
- Benefit Election Review
- Event Completion and Exit

Benefits Enrollment

Your First Name Your Last Name

Before you begin, please have your dependents' and beneficiary's dates of birth and social security numbers handy, if applicable.

The Information icon provides you with additional information about your enrollment. The Select button next to an event means it is currently open for enrollment. Use the Select button to begin your enrollment.

Note: Some events may be temporarily closed until you have completed enrollment for a prior event.

Event Description	Event Date	Event Status	Job Title
403B Changes	01/12/2022	Open	Your Job Title

Select

After you click the Select button, it will take a few seconds for your benefits enrollment information to load.

12. You are now on the **403(b) Change** screen. Select what type of 403(b) contribution you would like to make:

a. **Pre-Tax (Traditional) Contributions**

Click the **Edit** button for the **403(b) Retirement Plans** option.

The screenshot shows the 'Benefits Enrollment' page with a sub-header '403B Changes'. Below this, there are fields for 'Your First Name' and 'Your Last Name'. An information icon and text state: 'Click the Edit button next to the 403(b) Retirement Plans you wish to change.' Below this, a red message says: 'Your enrollment will not be complete until you complete and press the submit button at the end of the process.' The 'Enrollment Summary' section contains a table with two rows. The first row, '403(b) Retirement Plans', is highlighted with a yellow border. It has columns for 'Before Tax', 'After Tax', and an 'Edit' button. The second row, '403(b) Roth Retirement Plans', is partially visible below it.

b. **After-Tax (Roth) Contributions**

Click the **Edit** button for the **403(b) Roth Retirement Plans**.

This screenshot is a zoomed-in view of the 'Enrollment Summary' section from the previous image. It shows the table with two rows. The second row, '403(b) Roth Retirement Plans', is highlighted with a pink border. It includes columns for 'Before Tax', 'After Tax', and an 'Edit' button.

13. You are now on the **403(b) Questionnaire** screen. Choose one of the selections listed, then click the **Agree** button.

- a. **I have a PPS Account** - You have opened a user account with a PPS 403(b) Plan vendor and enrolled in the PPS 403(b) Plan within your vendor account.
- b. **No PPS Account** - You have not opened a user account with a PPS 403(b) Plan vendor and/or enrolled in the PPS 403(b) account within your vendor user account.

The screenshot shows the '403(b) Contribution Change' page with a sub-header '403(b) Questionnaire'. At the top right are buttons for 'Previous', 'Next', 'Cancel', and 'Continue Later'. The main text states: 'Prior to enrolling, you MUST have an account with a District-approved vendor with PPS Plan ID#. For information visit:: http://www.nocompliance.com/guest_employervendors.aspx?EmployerID=40. If you do not have an account your contribution will be canceled.' Below this, it says: 'The 403(b) contributions I am beginning today is under the PPS Plan ID Number'. A 'Selection' section contains two radio button options: 'I have a PPS Account' and 'No PPS Account'. At the bottom, a statement reads: 'To the best of my knowledge and belief, the answer(s) provided are true, correct and complete.' Below this statement are two buttons: 'Agree' and 'Decline'. The 'Agree' button is highlighted with a yellow border.

14. You are now on the **403(b) Retirement Plans** screen.

Benefits Enrollment

403(b) Retirement Plans

Your First Name Your Last Name

The District offers several 403(b) vendors through which you may save money for retirement. The vendors below offer pre-tax accounts. You must set up an account with one of the vendors below under Portland Public Schools account number within 5 days or your contribution will not begin. You may elect a monthly amount or a percentage of your pay. For assistance on setting up an account, please contact Carruth Compliance Consulting at 503-968-8961 or visit http://www.ncompliance.com/guest_employees.aspx?EmployerID=40

For a list of vendors with phone numbers, please go to: http://www.ncompliance.com/guest_employervendors.aspx?EmployerID=40

- a. **To Start 403(b) Contributions:** Click the radio button next to the vendor you have created a user account with.

Select an Option

- ☒ Waive
- ☐ American Funds Distributors
- ☐ Ameriprise Financial
- ☐ Equitable (AXA Equitable)
- ☐ Fidelity Investments
- ☐ Penselect/Foresters Financial
- ☐ Lincoln Financial Group
- ☐ Invesco
- ☐ PlanMember Services Corp
- ☐ ReliaStar Life Insurance Co
- ☐ Security Benefit Life Ins Co
- ☐ Corebridge Financial
- ☐ Vanguard Group
- ☐ Voya Retirement & Annuity
- ☐ FTC (formerly Waddell & Reed)

- b. **To Change the Amount of Your 403(b) Contribution:** At the bottom of the screen under **Contributions**, change the amount.

Contributions

Monthly paid employees may enter your monthly contribution as a percent dollar amount. *DCU employees paid on a weekly basis may enter your weekly contribution as a percent or dollar amount. You can not exceed the before-tax and after-tax plan maximums. If you choose to enter percent, the sum of your before-tax and after-tax percents can not exceed 100 percent.

Will say "Before Tax" or "After Tax" here.

Flat Amount Percent Max 100.000

- c. **To STOP 403(b) Contributions:** Click the radio button next to **Waive**.

Select an Option

- ☒ Waive

15. Scroll down to the bottom of the screen and click the **Update and Continue** button.

Flat Amount Percent Max 100.000

Update and Continue Discard Changes

16. On the next page under the **Your Choice** section, you will see the contribution you just entered.

403(b) Retirement Plans

Your First Name Your Last Name

i Click the Edit button next to the 403(b) Retirement Plans you wish to change.

Your enrollment will not be complete until you complete and press the submit button at the end of the process.

Your Choice

Your contribution amount(s) will be listed here.

Notes

Once submitted, this choice will take effect on 02/01/2022. I certify that I have read this complete 403(b) Salary

17. Scroll down to the bottom of the screen and click the **I Agree** button.

applicable IRC limitations and subject to administrative policies regarding minimum net check amounts. The Employer reserves the rights to reduce, suspend, and/or reinstate salary reduction contributions to help meet all applicable IRC limitations in any given calendar year to which this agreement applies and to help meet any administrative policies regarding minimum net check amounts. This Salary Reduction Agreement may be changed with respect to amounts not yet paid or available in accordance with the Employer's administrative procedures. 10. This Salary Reduction Agreement may be terminated at any time for amounts not yet paid or available. A termination request is permanent and remains in effect until a new Agreement is submitted. In the event of Agreement termination, later reelection might not be available with the same Provider. 11. This Salary Reduction Agreement supersedes all prior salary reduction agreements and shall automatically terminate if Employee's employment is terminated. 12. The Employee acknowledges that the Employer will authorize this agreement only if all applicable Employer administrative procedures are satisfied.

I Agree **Discard Changes**

Select the **Update Elections** button to store your choices.

Select the **Discard Changes** button to go back and change your choices.

18. You are now back on the **403(b) Change** screen.

- If you would like to start, change the amount of your contribution, and/or stop contributions to another PPS 403(b) Plan [pre-tax (traditional) or after-tax (Roth) 403(b)], repeat steps 11 - 16.
- If you are done, click the **Save and Continue** button.

This table summarizes estimated costs for your new benefit choices. (The "Employer" column displays the amount the District is contributing to subsidize the cost of your benefits.)

Election Summary				
Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax	Employer
Costs	0.00	0.00	0.00	0.00
Your Costs	0.00	0.00	0.00	

Save and Continue

Select the **Save and Continue** button to continue your enrollment. Your enrollment will not be finalized until you click the final "Submit" button at the end.

i **Important:** Your enrollment will not be completed until you click the final Submit button.

19. You are now on the **Submit Benefit Choices** screen. Click the **Submit** button.

eBenefits 403(b) Contribution Change Previous Next Cancel Continue Later

Life Events Legend

- Welcome
- Benefit Summary
- Benefit Enrollment**
- Benefit Election Review
- Event Completion and Exit

Benefits Enrollment

Submit Benefit Choices

Your First Name Your Last Name

You have almost completed your enrollment. If you have no further changes, select the **Submit** button on this page to finalize your benefit choices.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

Do not submit your 403(b) choices until you have completed your enrollment. You may store your choices on each page and return to the Enrollment Summary as many times as you'd like up until your enrollment deadline. However, once you select the **Submit** button your benefit choices will be sent to the Benefits Department for processing.

By submitting your benefit choices, you are authorizing Portland Public Schools to take deductions from your paycheck to pay for your benefit costs. You are also authorizing the Benefits Department to send necessary personal information to our third party administrator to initiate and support your coverage.

By submitting you declare that the information submitted is correct and complete to the best of your knowledge.

Authorize Elections

By submitting your benefit choices you are authorizing the District to take deductions from your paycheck to pay for your benefit costs. You are also authorizing the Benefits Department to send necessary personal information to your selected providers to initiate and support your coverage.

Submit Cancel

Select the **Submit** button to send your final choices to the Benefits Department.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

20. On the **Submit Confirmation** screen, click the **OK** button.

eBenefits 403(b) Contribution Change Previous Next Cancel Continue Later

Life Events Legend

- Welcome
- Benefit Summary
- Benefit Enrollment**
- Benefit Election Review
- Event Completion and Exit

Benefits Enrollment

Submit Confirmation

Your First Name Your Last Name

OK

21. You are now back on the **Benefits Enrollment** screen. You will see that your 403(b) Change event now has a status of **Submitted**.

eBenefits 403(b) Contribution Change Previous Next Cancel Continue Later

Life Events Legend

- Welcome
- Benefit Summary
- Benefit Enrollment**
- Benefit Election Review
- Event Completion and Exit

Benefits Enrollment

Your First Name Your Last Name

Before you begin, please have your dependents' and beneficiary's dates of birth and social security numbers handy, if applicable.

The Information icon provides you with additional information about your enrollment. The Select button next to an event means it is currently open for enrollment. Use the Select button to begin your enrollment.

Note: Some events may be temporarily closed until you have completed enrollment for a prior event.

Open Benefit Events

Event Description	Event Date	Event Status	Job Title	
403B Changes	01/12/2022	Submitted	Your Job Title	Select

After you click the Select button, it will take a few seconds for your benefits enrollment information to load.

22. In the upper right-hand corner, click the **Next** button.

The screenshot shows the 'eBenefits' interface for a '403(b) Contribution Change'. On the left is a 'Life Events' sidebar with a legend and a list of steps: Welcome, Benefit Summary, Benefit Enrollment (highlighted), Benefit Election Review, and Event Completion and Exit. The main content area is titled 'Benefits Enrollment' and includes instructions for the user. At the bottom, there is a table of 'Open Benefit Events'.

Event Description	Event Date	Event Status	Job Title	
403B Changes	01/12/2022	Submitted	Your Job Title	Select

23. In the upper right-hand corner of the **Benefits Election Review** screen, click the **Next** button.

The screenshot shows the 'Benefits Election Review' screen. The sidebar is the same as in the previous step, but 'Benefit Election Review' is now highlighted. The main content area is titled 'Benefits Election Review' and contains instructions for reviewing changes. The 'Next' button in the top right corner is highlighted with a yellow box.

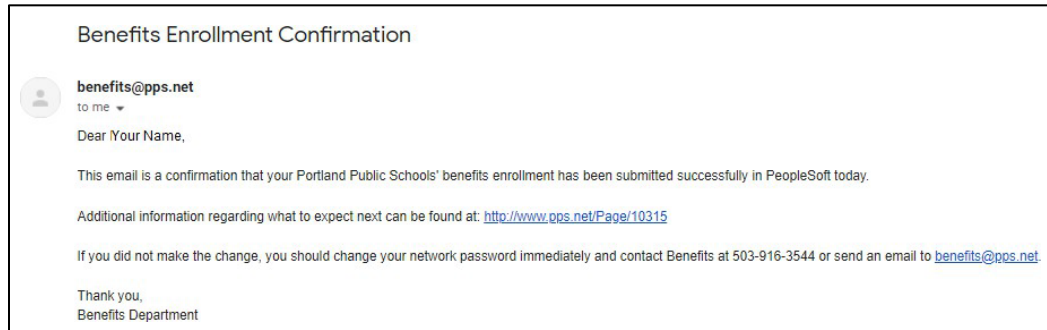
24. On the **Event Completion and Exit** screen, click the **Complete** button.

The screenshot shows the 'Event Completion and Exit' screen. The sidebar now highlights 'Event Completion and Exit'. The main content area displays a congratulatory message: 'Congratulations! You have completed your 403(b) Contribution Change'. At the bottom, a 'Complete' button is highlighted with a yellow box.

25. You are now back at the **Life Events** screen. Click the **Home** icon in the upper right-hand corner to return to the PeopleSoft Employee Self-Service (ESS) main page.

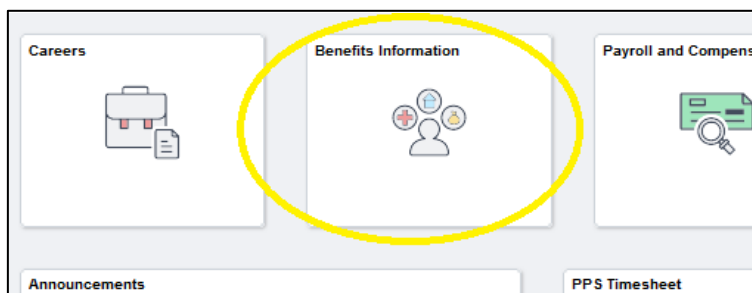
The screenshot shows the 'Life Events' screen. The top navigation bar includes a 'Welcome' button, the 'Life Events' title, and several icons: a Home icon (highlighted with a yellow box), a search icon, a notification bell, and a settings icon. Below the navigation bar, the 'Life Events' title is repeated, and there is a 'Select Your Event' dropdown menu.

26. **Congratulations, you are done!** You will receive a benefits enrollment confirmation email to your PPS email account in 1-2 business days.

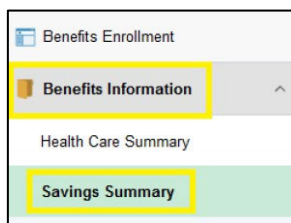


27. Your 403(b) Change event will be processed in the computer system overnight. You may then log back into PeopleSoft Employee Self-Service (ESS) the following day to see your 403(b) change:

- a. Click on the **Benefits Information** panel.



- b. On the left-hand side of the screen, click **Benefit Information**. A drop-down menu will appear. Click **Savings Summary**.



- c. In the date field, enter that date you would like to see your benefits as of then click the **Go** button. The screen will re-refresh and you will see your 403(b) Summary as of the date you entered.

A screenshot of the "Savings Summary" screen in the ESS. The left-hand side shows a navigation menu with "Benefits Information" expanded and "Savings Summary" selected. The main content area is titled "Savings Summary" and includes a date selection field and a "Go" button. Below this is a table titled "Benefits Summary" with columns for "Type of Benefit", "Plan Description", and "Coverage or Participation". The table lists three plans: "403(b) Retirement Plans", "403(b) Roth Retirement Plans", and "403B Second Plan". A note at the top right of the table states: "NOTE: 'Waived' means no contribution." The table content is as follows:

Type of Benefit	Plan Description	Coverage or Participation
403(b) Retirement Plans	Your vendor will be listed here, if applicable.	Your contribution amount or "Waived" will be listed here, if applicable.
403(b) Roth Retirement Plans	Your vendor will be listed here, if applicable.	Your contribution amount or "Waived" will be listed here, if applicable.
403B Second Plan	Your vendor will be listed here, if applicable.	Your contribution amount or "Waived" will be listed here, if applicable.