

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 both 1) Duo 2-Step Security AND 2) Two Step Authentication. For ESS off-site log in assistance, contact the **PPS IT Service Desk** at 503-916-3375. For more information please visit: <https://www.pps.net/selfservice>.

Instructions

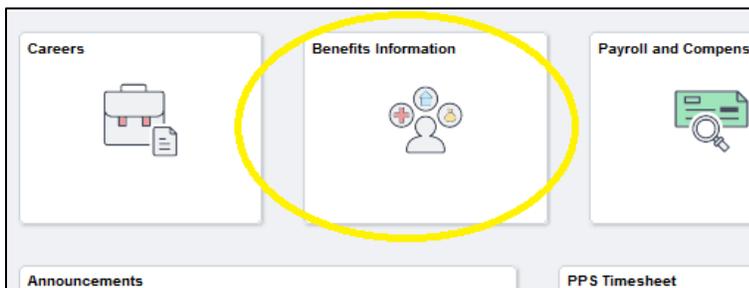
Before you enroll to have PPS 403(b) Plan contribution(s) taken out of your paycheck, you **MUST** do the following:

1. Create a user account with a PPS 403(b) Plan vendor.
 - a. A list of vendors can be found on the Carruth Compliance Consulting (plan administrator) webpage at: http://www.ncompliance.com/guest_employervendors.aspx?EmployerID=40.
2. 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 Carruth Compliance Consulting (plan administrator) webpage at: http://www.ncompliance.com/guest_employervendors.aspx?EmployerID=40.

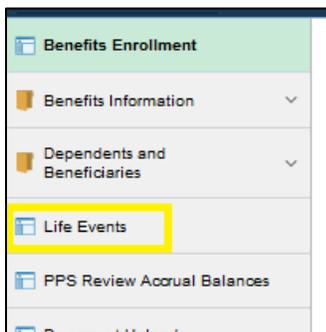
We **cannot** take PPS 403(b) Plan contribution out of your paycheck if the above items have not been completed by you.

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

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



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



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

The screenshot shows a sidebar with a 'View Form 1095-C' button. The main content area has several sections of radio buttons:

- 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

7. In the ***Date Change Will Take Effect** field, enter today's date.
- If you would your contribution to start or stop on the next paycheck, please enter the last day of the previous month. For example, if you want your contribution to start on your February 28, 2022, paycheck, you would enter 01/31/2022 in the ***Date Change Will Take Effect** field.

The dialog box contains the following text:

changes until the next annual open enrollment. If you have any questions about this process or if you are outside of your 31 day window, please contact us immediately by e-mailing benefits@pps.net or calling 503-916-3544.

For 403(b) changes, please use today's date. However, if you want to stop or change your amount as soon as feasible, you can use the last day of the previous month.

For a beneficiary change, please use today's date.

Status Change Date

*Date Change Will Take Effect

OK Cancel

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

The screenshot shows the 'eBenefits' interface for '403(b) Contribution Change'. The left-hand navigation menu includes:

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

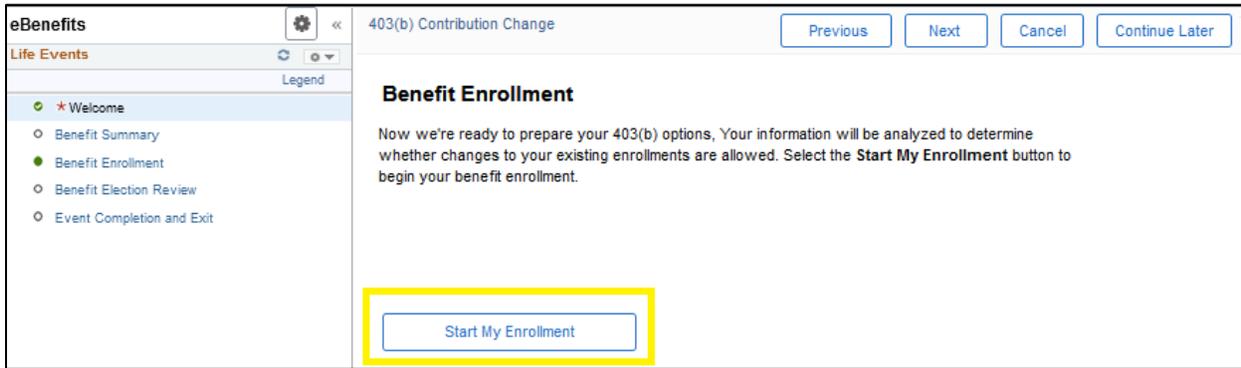
The main content area displays:

403(b) Contribution Change

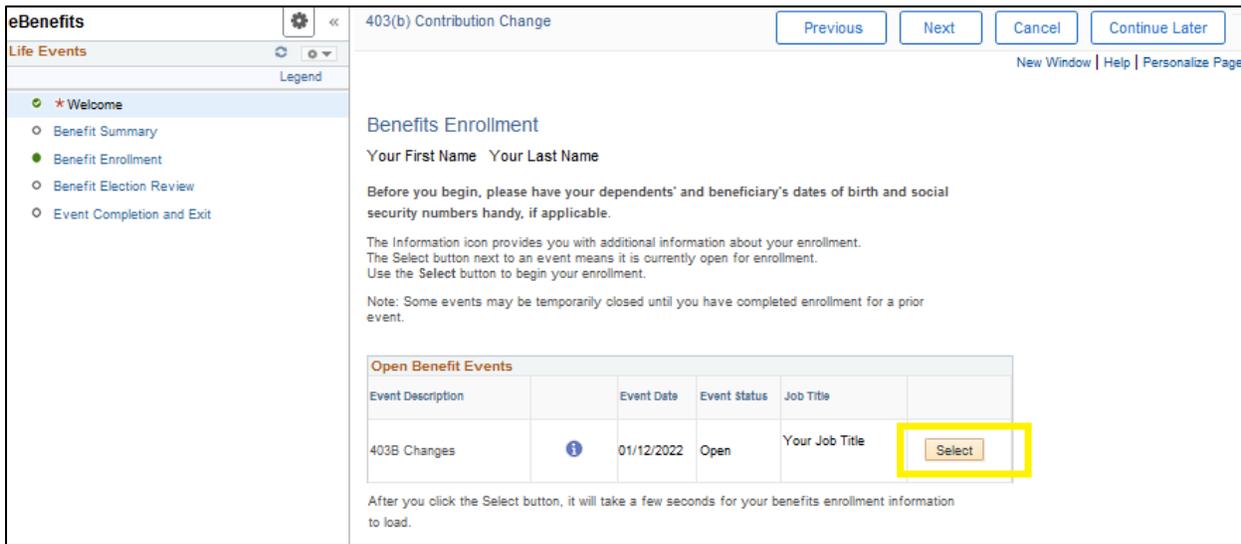
Your First Name Your Last Name

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.

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



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



11. 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 for '403B Changes'. It includes fields for 'Your First Name' and 'Your Last Name'. An information icon indicates that the user should click the 'Edit' button for the 403(b) Retirement Plans they wish to change. A red warning message states: 'Your enrollment will not be complete until you complete and press the submit button at the end of the process.' Below this is an 'Enrollment Summary' table with two rows: '403(b) Retirement Plans' and '403(b) Roth Retirement Plans'. The first row is highlighted with a yellow box and includes columns for 'Before Tax', 'After Tax', and an 'Edit' button.

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

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

This screenshot is similar to the previous one but highlights the '403(b) Roth Retirement Plans' row in the 'Enrollment Summary' table with a pink box. The 'Edit' button for this row is also visible.

12. 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 '403(b) Questionnaire' section. It contains instructions about having a District-approved vendor account. Below the instructions is a 'Selection' section with two radio button options: 'I have a PPS Account' and 'No PPS Account'. At the bottom, there is a statement: '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 box.

13. 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
- AXA Equitable Life Ins Co
- Fidelity Investments
- Foresters Financial (1st Inv)
- Lincoln Financial Group
- Oppenheimer Funds Dist Inc.
- Plan Member Services Inc
- ReliaStar Life Insurance Co
- Security Benefit Life Ins Co
- Variable Annuity Life Ins Co
- VANGUARD GROUP
- Voya Retirement & Annuity(ING)
- Waddell & Reed Inc.

- 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

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

15. 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

16. 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 all 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.

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

- a. 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.
- b. 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.

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

403(b) Contribution Change

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.

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

403(b) Contribution Change

Benefits Enrollment

Submit Confirmation

Your First Name Your Last Name

OK

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

403(b) Contribution Change

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.

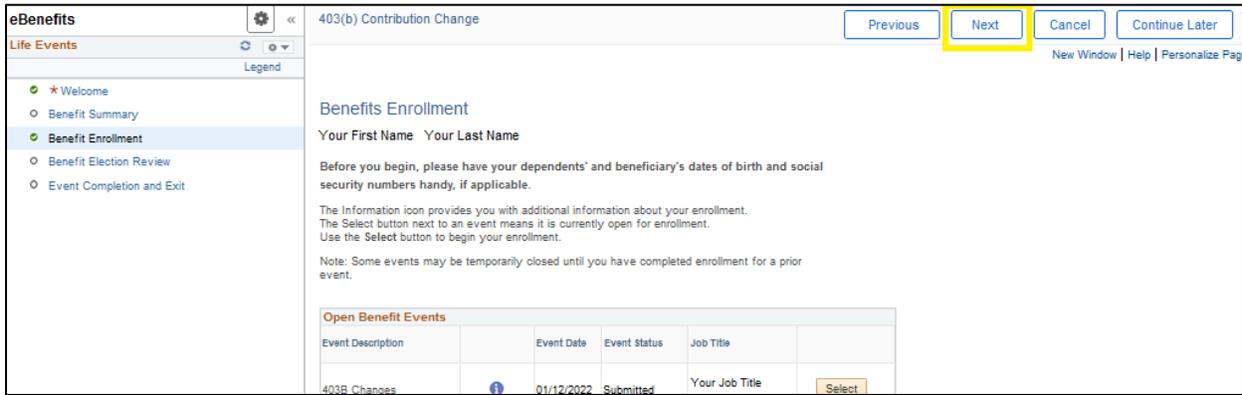
The Information icon provides you with additional information about your enrollment.
The Select button next to an event means it is currently open for enrollment.
Use the Select button to begin your enrollment.

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

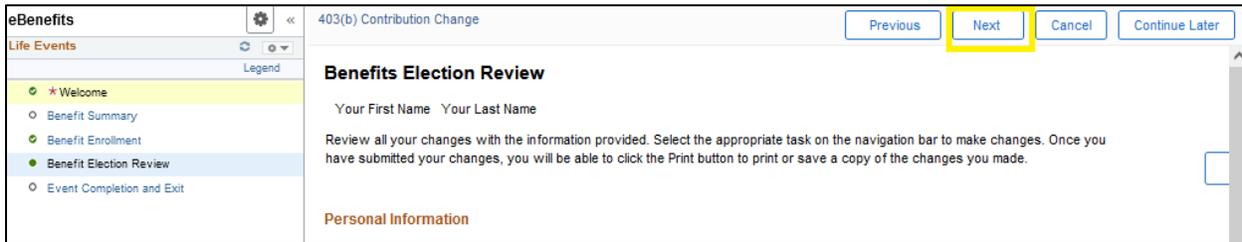
Open Benefit Events				
Event Description	Event Date	Event status	Job Title	
403B Changes	01/12/2022	Submitted	Your Job Title	Select

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

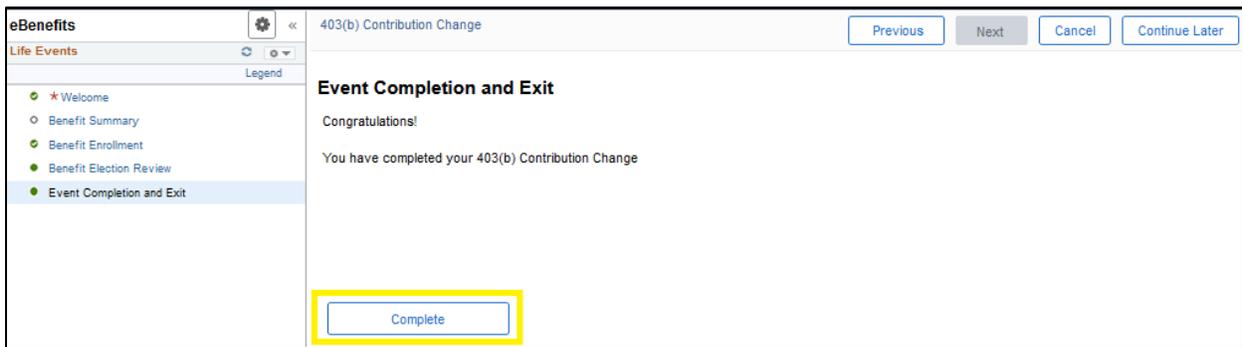
21. In the upper right-hand corner, click the **Next** button.



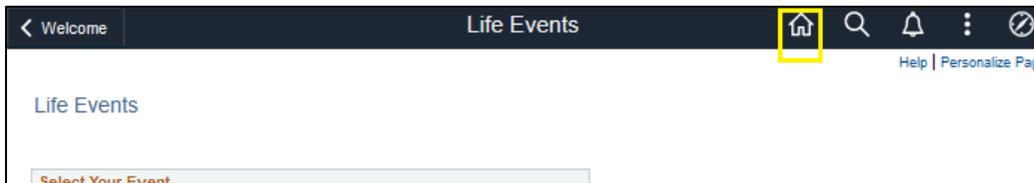
22. In the upper right-hand corner of the **Benefits Election Review** screen, click the **Next** button.



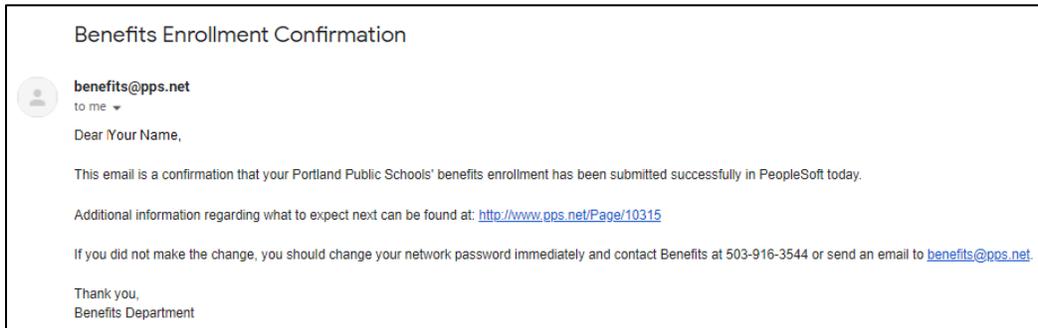
23. On the **Event Completion and Exit** screen, click the **Complete** button.



24. 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.

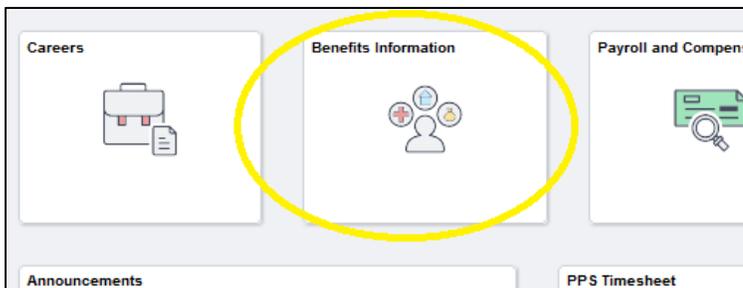


25. **Congratulations, you are done!** You will receive a benefits enrollment confirmation email to your PPS email account in 1-2 business days.

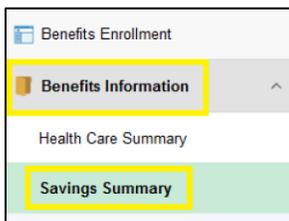


26. Your 403(b) Change event will be processed in the computer system overnight. You may then log back into PeopleSoft Employee Self-Service (ESS) to see your 403(b) change:

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.

