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

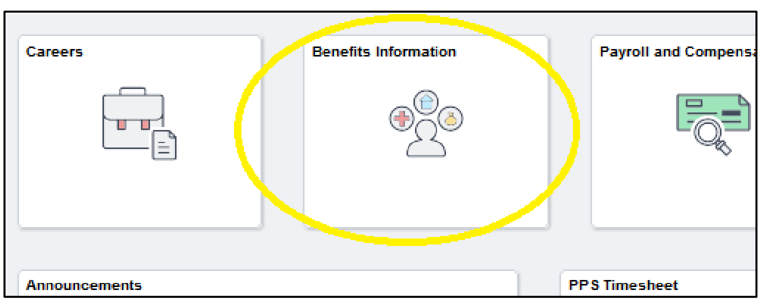
Before you enroll to have PPS 403(b) Plan contribution(s) taken out of your paycheck, you **MUST** do the following:

1. Create a user account with a PPS 403(b) Plan vendor.
    a. A list of vendors can be found at: https://www.pps.net/cms/lib/OR01913224/Centricity/Domain/56/2025%20403b%20announcement%20v3.pdf
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 same document above.

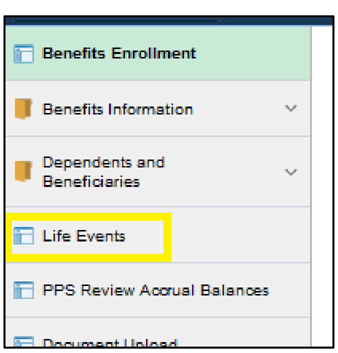
We **cannot** take PPS 403(b) Plan contribution out of your paycheck if the above items have not been completed by you.

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

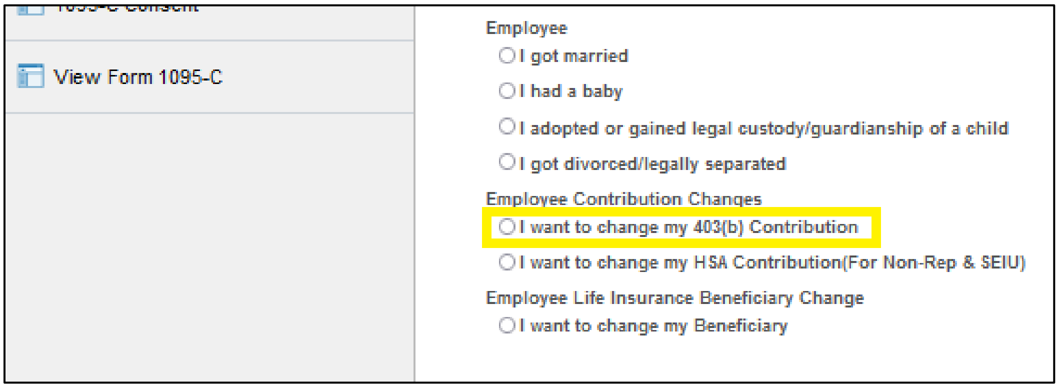
3. Log into your **PeopleSoft Employee Self-Service (ESS) account**: https://selfservice.pps.net/.
4. Click on the **Benefits Information** panel.



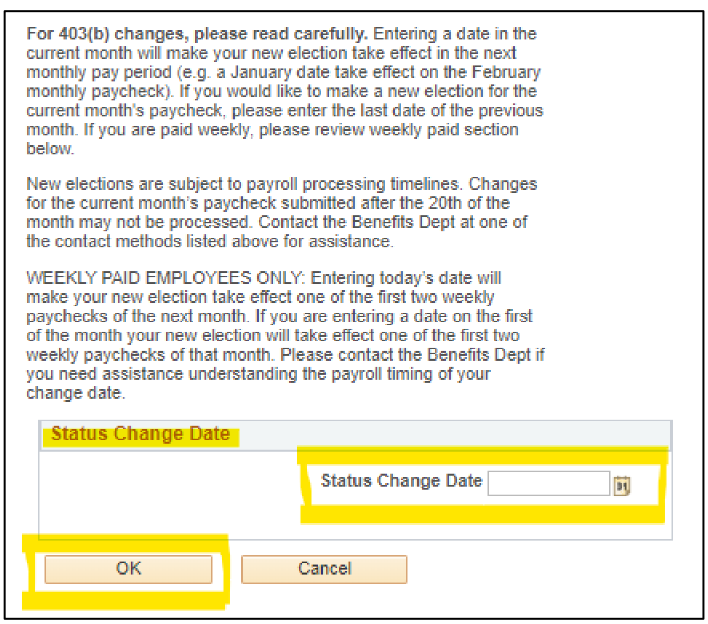
5. On the left-hand side of the screen, click **Life Events**.



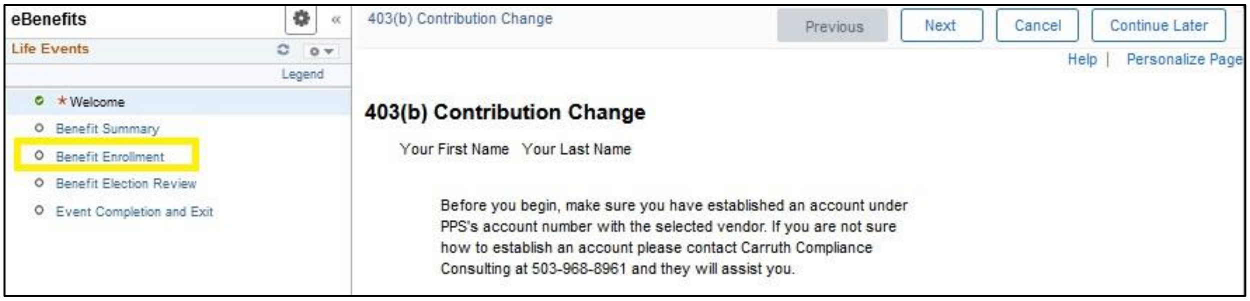
6. Under **Employee Contribution Changes**, select the radio button next to **I want to change my 403(b) Contribution**.



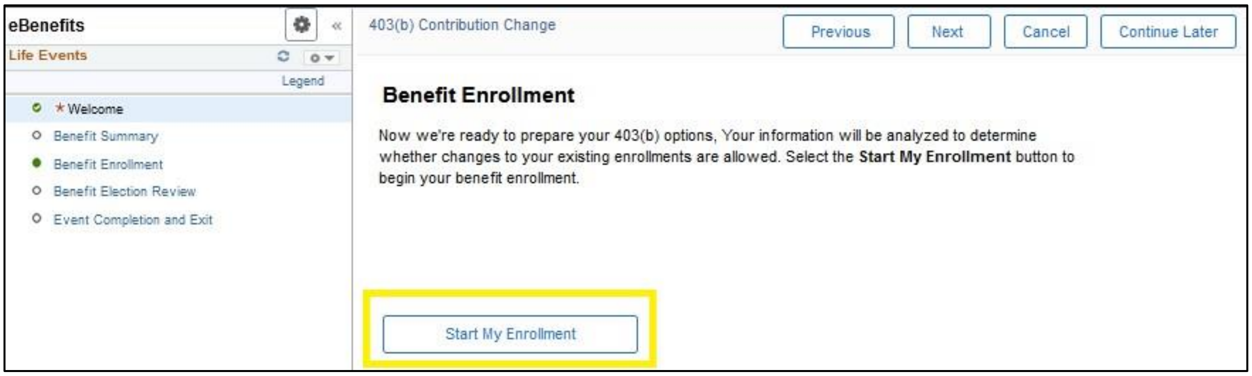
7. In the **Status Change Date** field, enter your desired date and click OK. Please read carefully below for Status Change Date information:
   a. Entering a date in the current month will make your new election take effect in the ***next* monthly pay period** (e.g. a January date take effect on the February monthly paycheck).
      I. 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.
   b. 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.
   c. 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.
   d. **Please contact the Benefits Dept if you need assistance** understanding the payroll timing of your change date: benefits@pps.net or 503-916-646



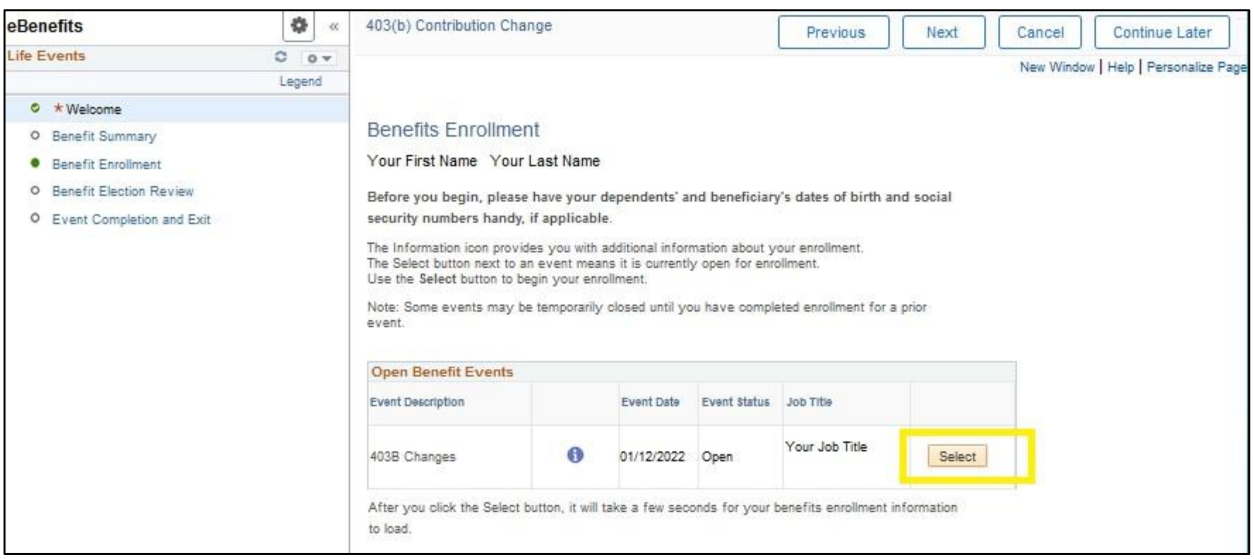
8. You are now on the **403(b) Contribution Change** screen. On the left-hand side, click **Benefit Enrollment**



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

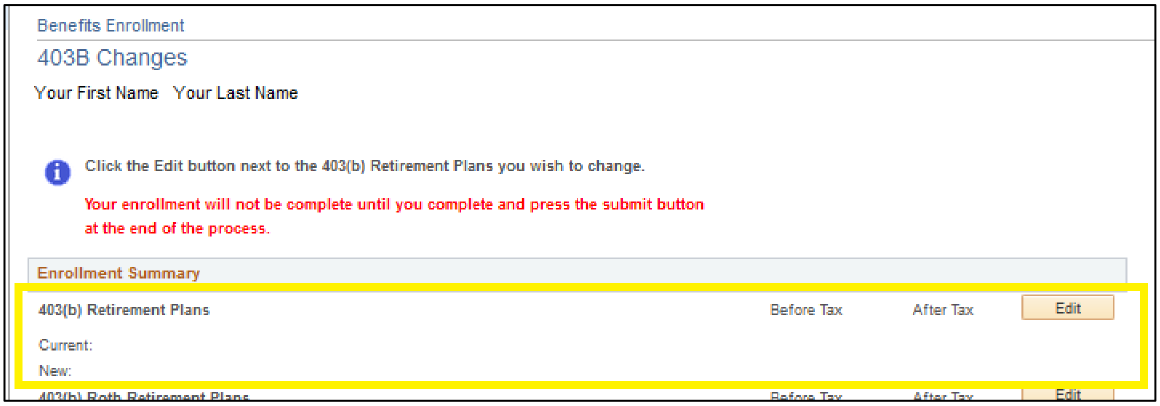


10. Click the **Select** button for the open 403(b) Changes event

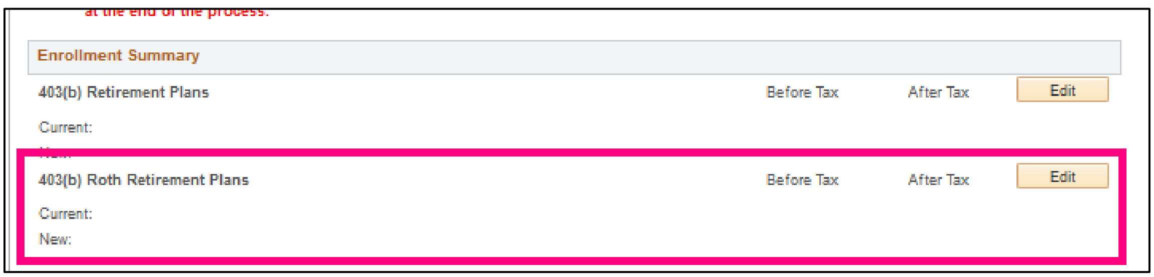


11. You are now on the **403(b) Change** screen. Select what type of 403(b) contribution you would like to make:

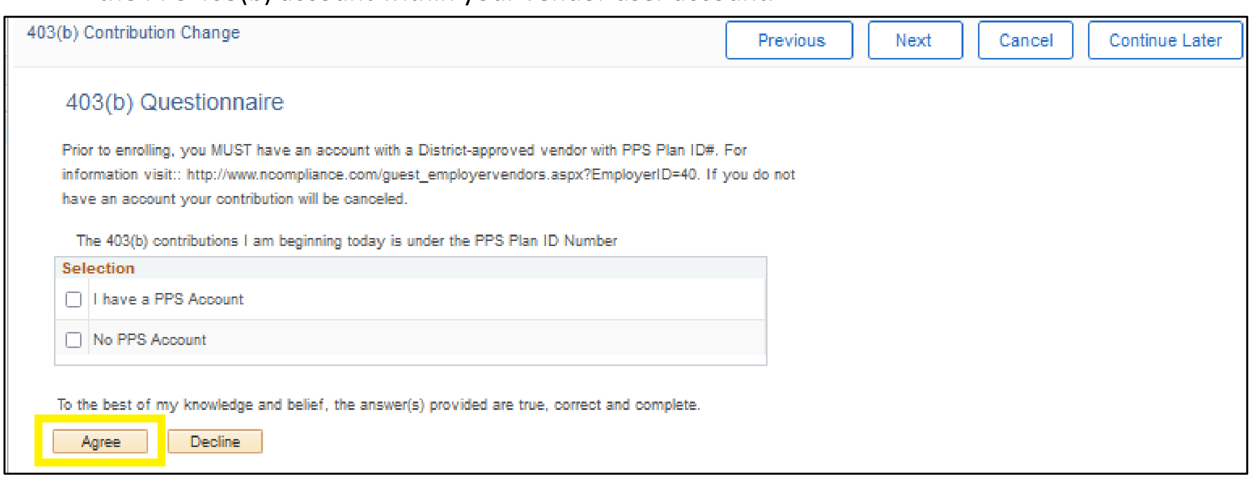
   a. **Pre-Tax (Traditional) Contributions**
   Click the **Edit** button for the **403(b) Retirement Plans** option.



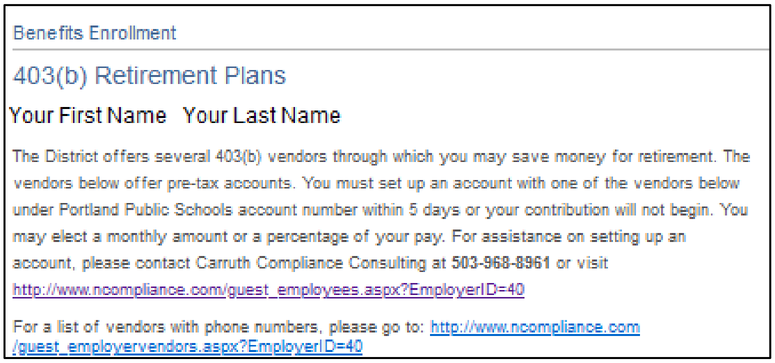
   b. **After-Tax (Roth) Contributions**
   Click the **Edit** button for the **403(b) Roth Retirement Plans**.



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.

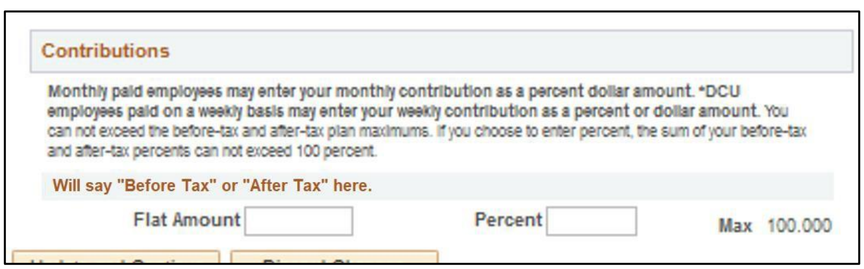


13. You are now on the **403(b) Retirement Plans** screen.

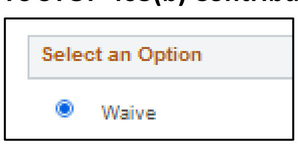


a. **To Start 403(b) Contributions**: Click the radio button next to the vendor you have created a user account with.

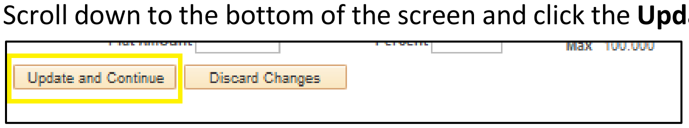
b. **To Change the Amount of Your 403(b) Contribution**: At the bottom of the screen under **Contributions**, change the amount.



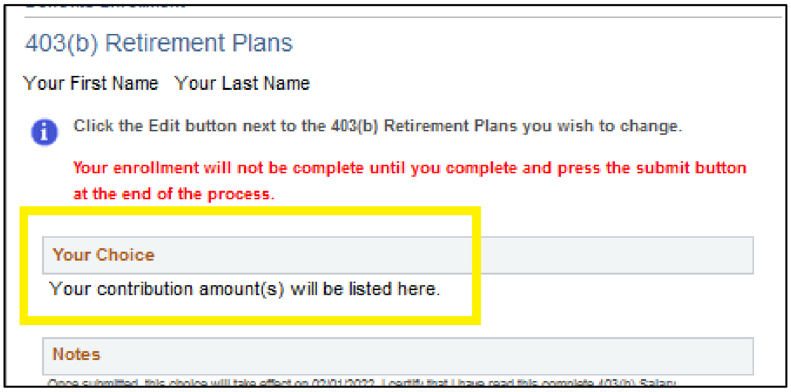
c. **To STOP 403(b) Contributions**: Click the radio button next to **Waive**.



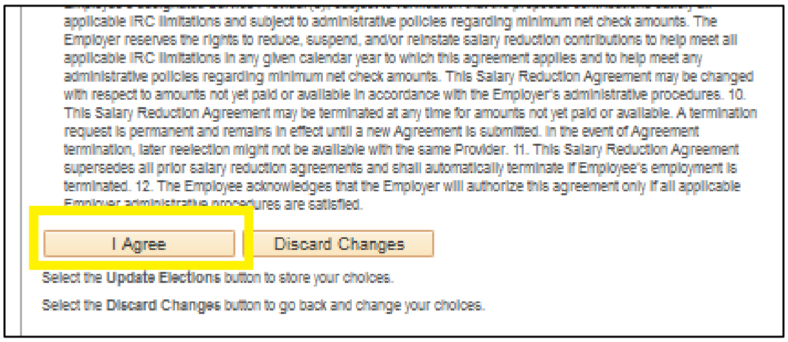
14. Scroll down to the bottom of the screen and click the **Update and Continue** button.



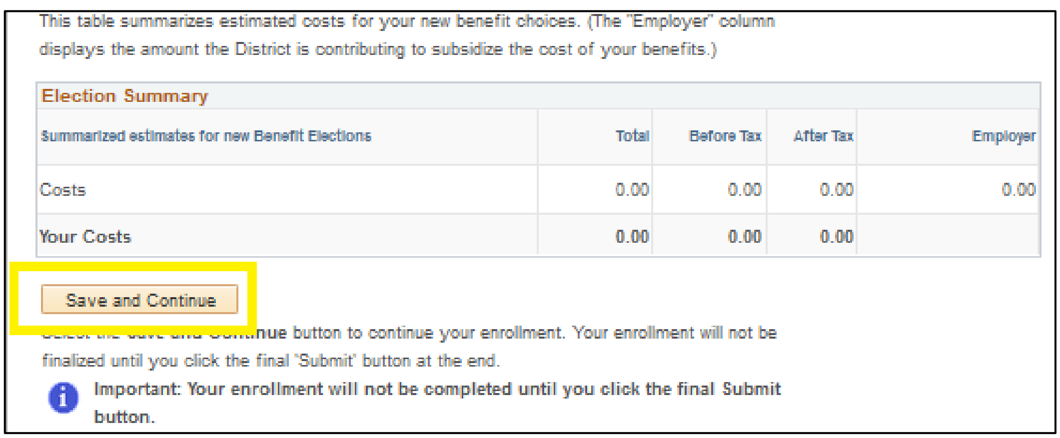
15. On the next page under the **Your Choice** section, you will see the contribution you just entered.



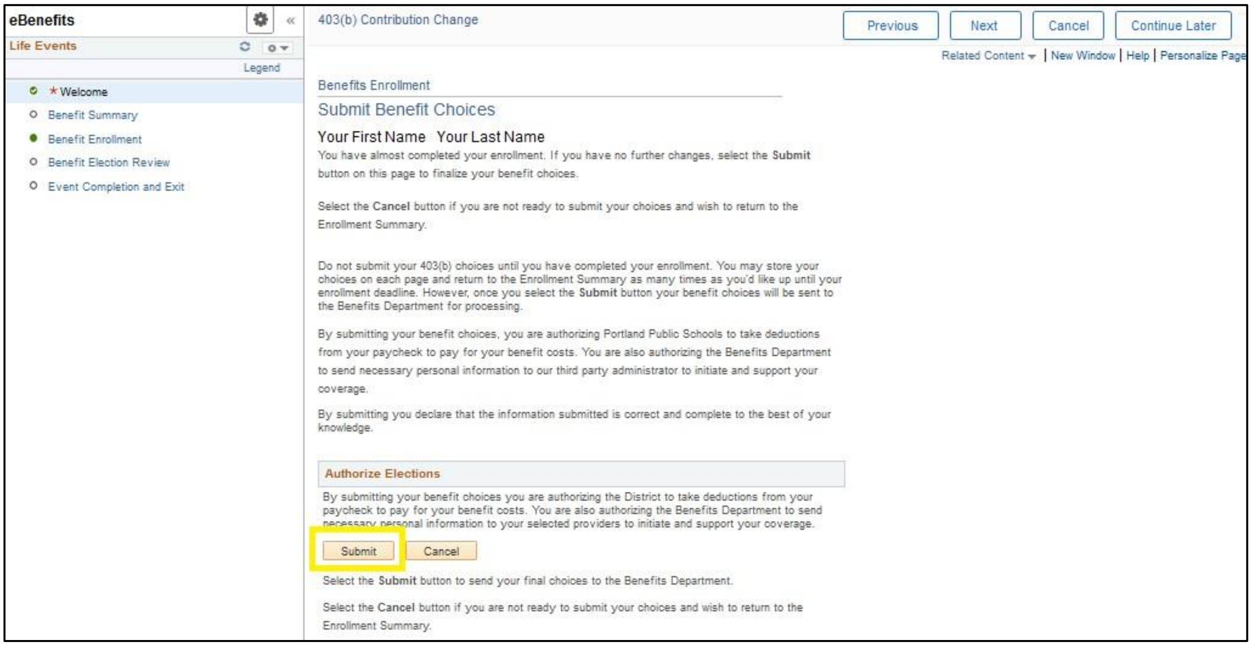
16. Scroll down to the bottom of the screen and click the **I Agree** button.



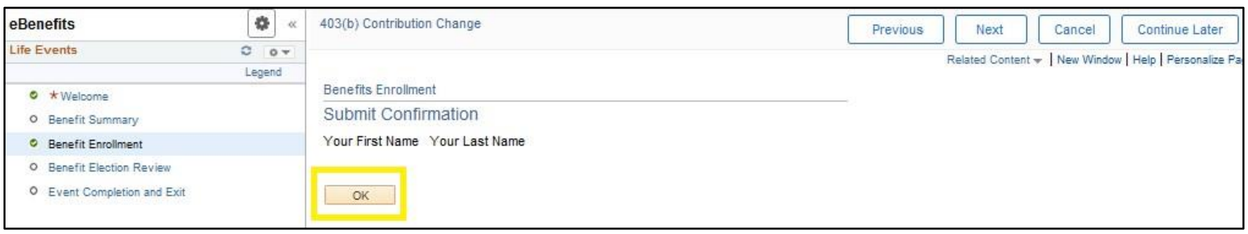
17. You are now back on the **403(b) Change** screen.
    a. If you would like to start, change the amount of your contribution, and/or stop contributions to another PPS 403(b) Plan [pre-tax (traditional) or after-tax (Roth) 403(b)], repeat steps 11 - 16.
    b. If you are done, click the **Save and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



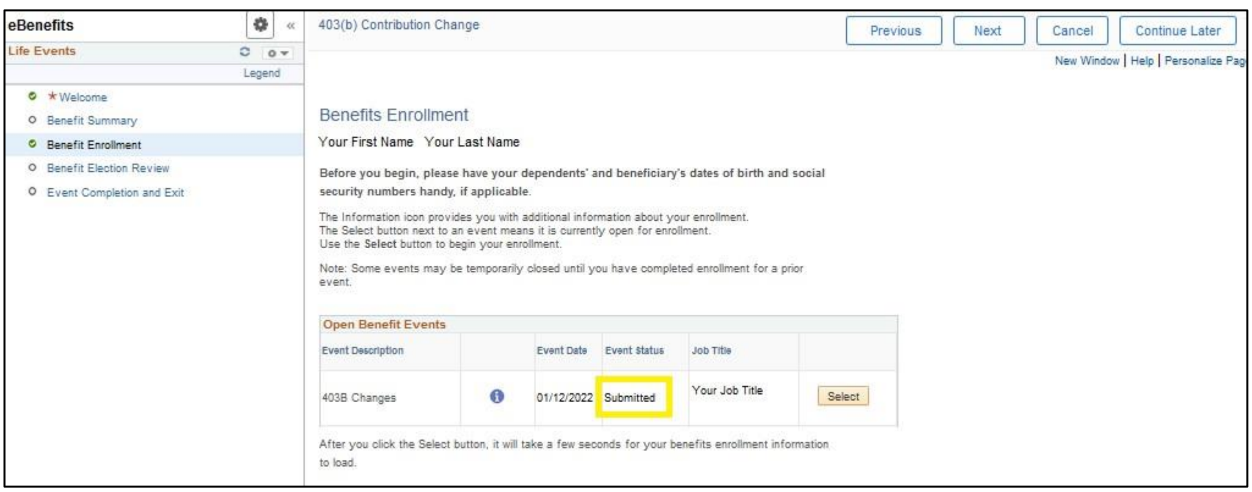
18. You are now on the **Submit Benefit Choices** screen. Click the **Submit** button.



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

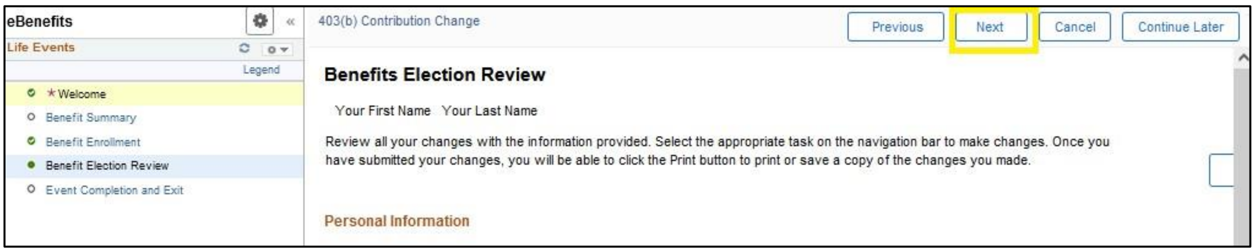


20. You are now back on the **Benefits Enrollment** screen. You will see that your 403(b) Change event now has a status of **Submitted**.

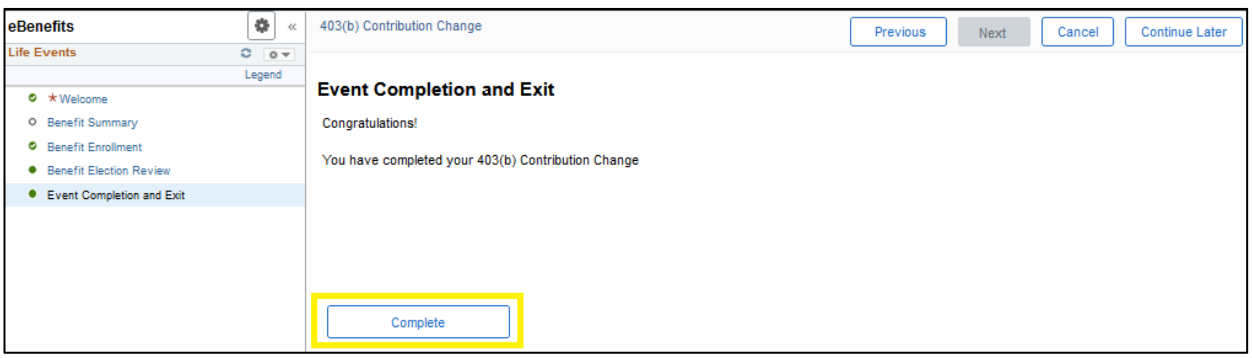


21. In the upper right-hand corner, click the **Next** button.

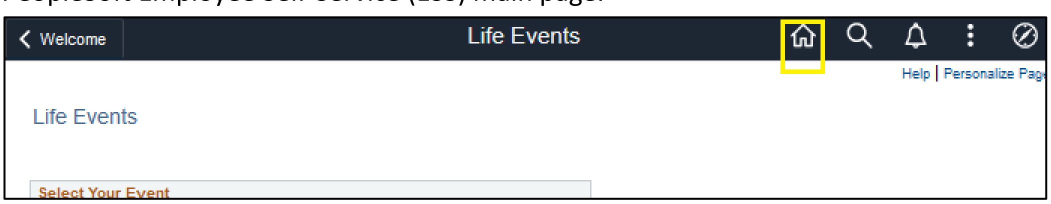
22. In the upper right-hand corner of the **Benefits Election Review** screen, click the **Next** button.



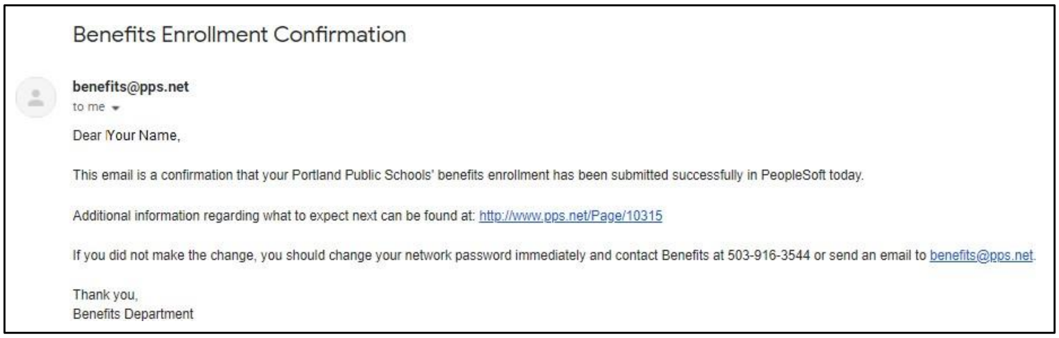
23. On the **Event Completion and Exit** screen, click the **Complete** button.



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.


Benefits Enrollment Confirmation

benefits@pps.net
to me

Dear Your Name,

This email is a confirmation that your Portland Public Schools' benefits enrollment has been submitted successfully in PeopleSoft today.

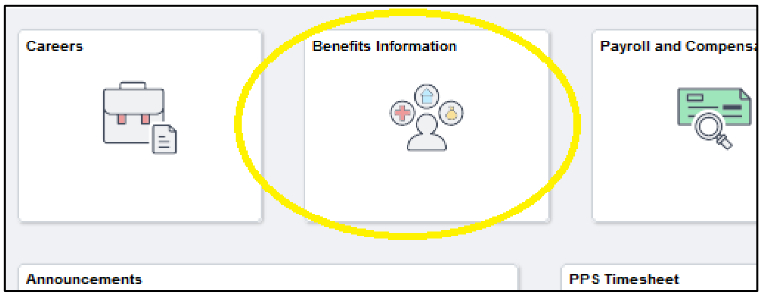
Additional information regarding what to expect next can be found at: http://www.pps.net/Page/10315

If you did not make the change, you should change your network password immediately and contact Benefits at 503-916-3544 or send an email to benefits@pps.net.

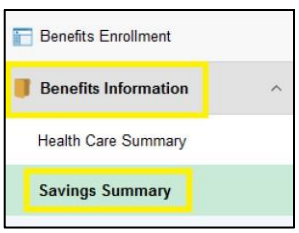
Thank you,
Benefits Department

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) 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-fresh and you will see your 403(b) Summary as of the date you entered.