Employee Self Service (ESS)

For Benefits
Open Enrollment

Instruction Manual

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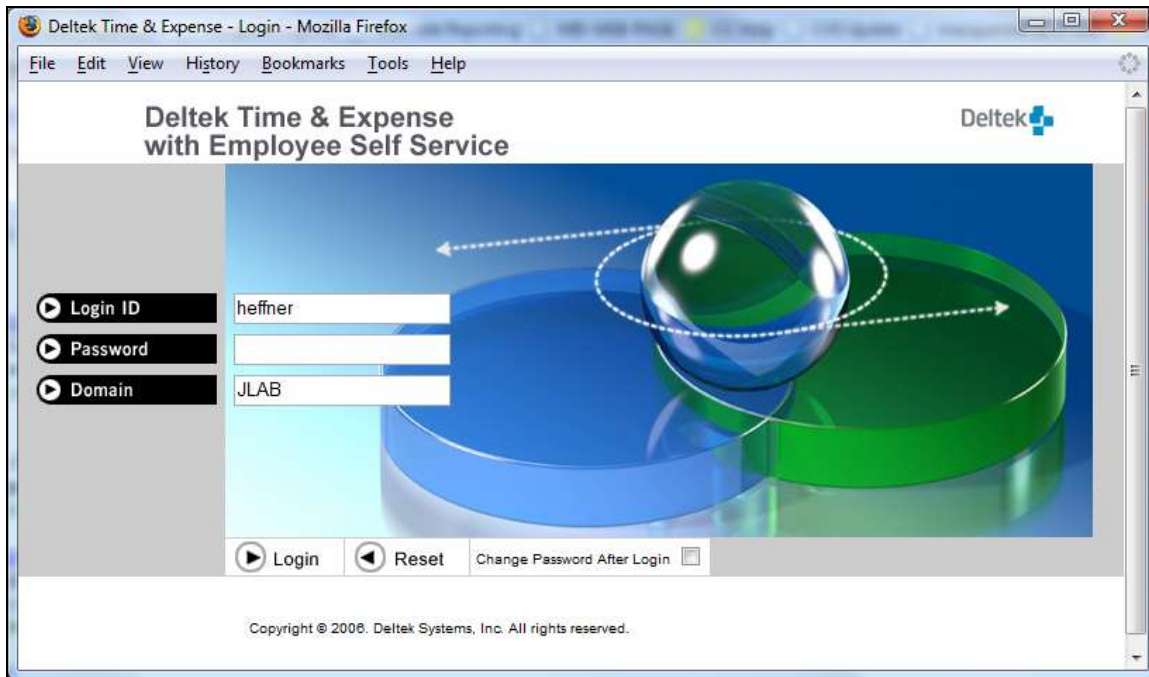02/08/2010

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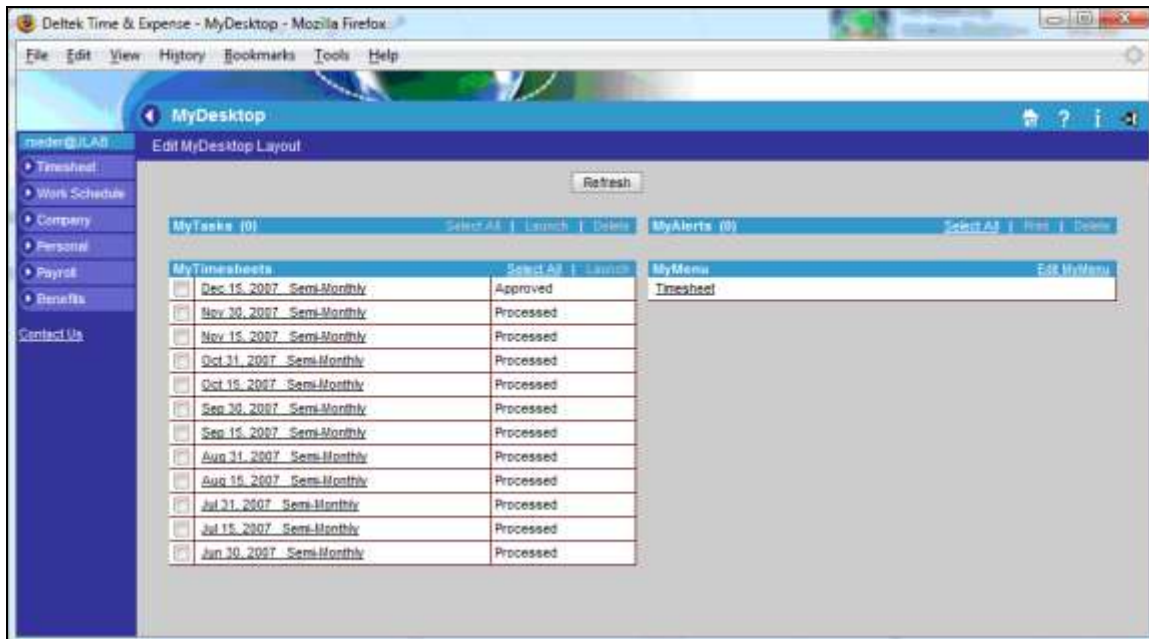Extension 7291
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- URL: misportal.jlab.org/time
- Use your current JLAB user id and password to access your ESS account

Main Screen

From the Main Screen, click on "Benefits" you can access all areas of Time Collection / ESS by clicking on the left menu items.

Company Data

The Company Data application provides a convenient employee directory, with employee name, title, organization name, organization ID, work telephone and work e-mail, labor location, GLC, GLC description, employee class, full/part time status, and/or manager name display options. Click the Employee Directory link in the menu bar to search the employee directory. Click Company Links to access links and URLs that exist for your company.

Directory
You can use this link to search for JLab staff. Click on the "Directory" link, then type in a name to search for.

Company Links
The links and URLs that appear in the Company Links module depend on the links and groups setup by the administrator. When you select a link title, the URL's start page opens in a separate window. Select the Cancel button to return to the Platform page
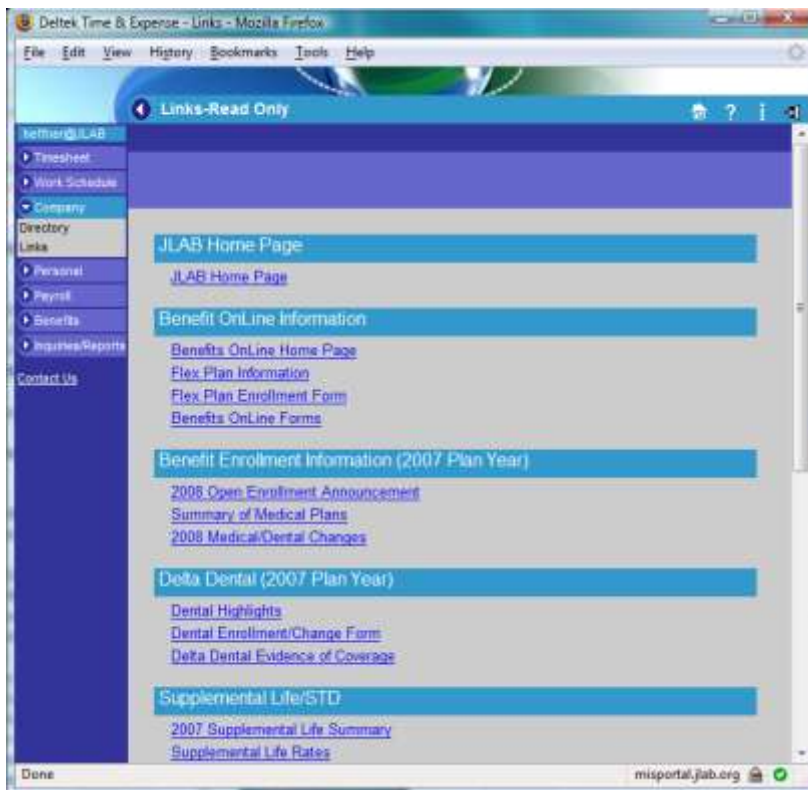
Personal Data

The "Personal" section in ESS enables you to manage changes of personal information, including address and phone data, as well as emergency contacts. You can also view your current leave balance.

Address/Phone

The Address/Phone module displays your mailing address information. If your mailing address has changed, enter the updated information in the appropriate fields and click the Submit button. You can enter additional address information for home (if different from your mailing address), office, emergency contact, temporary, overseas, or other addresses by clicking on the More Addresses button. The following information displays for your address:

Note: if you mailing address is a PO Box, you must fill in the Home address information with a physical address.

Emergency Contacts

Use the Emergency Contacts module to indicate two points of contact in the case of an emergency. Emergency contacts can be added, updated, and deleted.

To update your emergency contact information:

Under the Personal section, click on "Emergency Contacts". Choose either "Primary or Secondary", then make your changes and then click the "Save" link in the upper left-hand corner of the screen.

Leave Status

Use the "Leave Status" link in the Personal section to view a quick snapshot of your vacation and sick leave balances.

Leave Status	VACATION	SICK
Beginning Balance	329.39	544.00
[+] Year To Date Earned	13.34	8.00
[-] Year To Date Used	12.00	2.00
Current Balance	330.73	550.00

For details on a particular leave, click on the appropriate column heading.

Payroll Data

Use the Payroll applications in Employee Self Service (ESS) to view and/or update information related to your payroll.

Payroll Checks

Use the "Payroll Checks" link to display your paycheck information for recent pay periods. Your earnings, deductions, and taxes are displayed for the pay period you select. The information in the Electronic Paystub module cannot be modified. You can print a copy of a paystub by clicking on the "Print" link in the upper left-hand corner of the screen.

|	
Pay Date	Use the drop-down list to select the pay period to be displayed.
Earnings	Your hourly pay for the current period and year-to-date by pay type.
Deductions	Your statutory and other deductions for the current period and year-to-date.
Summary	Shows the current and year-to-date breakdown for your gross to net payroll.
Direct Deposit Info	If this record is a direct deposit advice, this column displays the direct deposit information for the current period. This section does not appear if the record is a check.
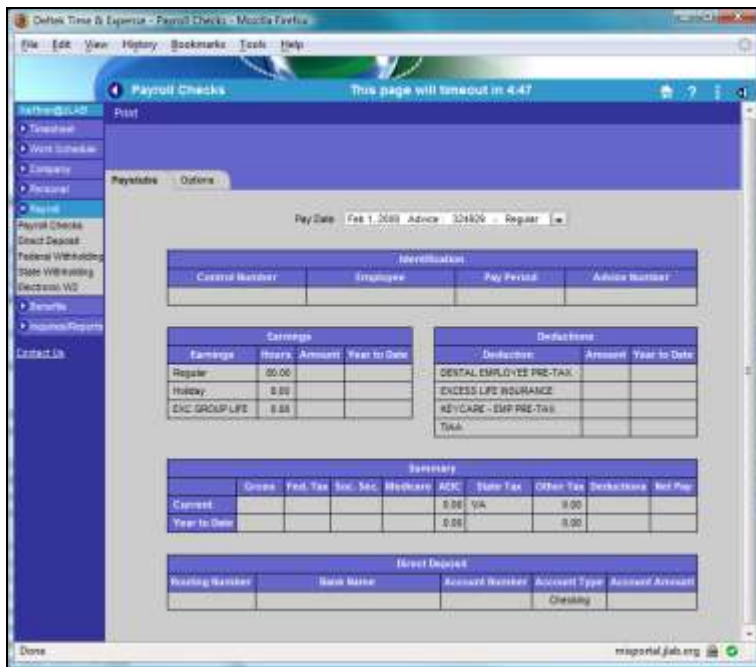
Options

Use the Options tab on this screen module to indicate whether or not you want your paystub mailed to you. If you are receiving direct deposit, you may want to turn off the mailing of paystubs. You can always view and print your paystub through ESS - Electronic Paystub. Click the Yes radio button to receive your direct deposit advices, or No to turn off mailing. Click the Update button to save your changes or Cancel to return to the Platform Page.

Note: if you choose to "opt out", you will no longer be mailed a paystub.
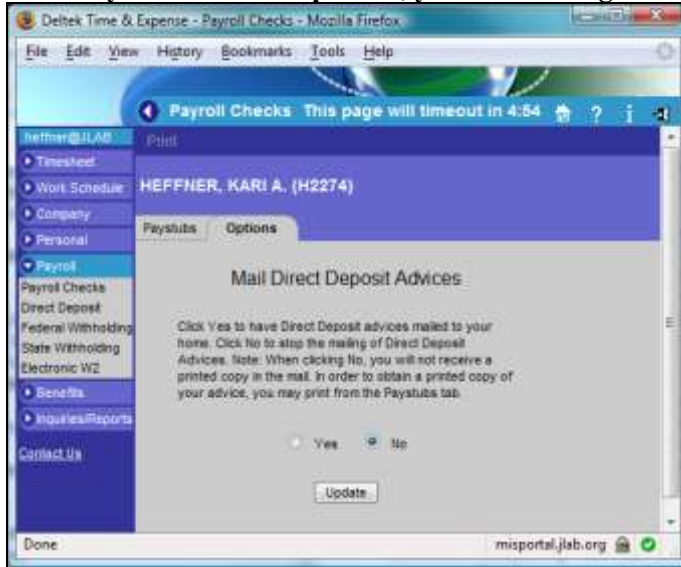
<u>Direct Deposit</u>

Use the Direct Deposit module to view and modify information related to Direct Deposit. Your current account and distribution information displays on the first page of the Direct Deposit module, the Direct Deposit – Summary page. The following information displays for current and/or pending account information:

Priority	The order in which your funds are distributed.
Routing Transit #	The number that uniquely identifies your financial institution.
Financial Institution	The name of your Financial Institution.
Account #	Your bank account number.
Type	The type of bank account.
Method	The method for the distribution of funds in to your account.
Pct/Amount	The percent or amount for this account.
Net Pay	Flag that indicates that any funds not allocated via a percent or amount go to this account.

For more information on Routing Transit # or Account # click on the appropriate column heading.

Current Account Information							
Priority	Routing Transit #	Financial Institution	Account #	Type	Method	Pct/Amount	Net Pay
1				Checking	Percent	100.00	◎

Cancel — Click to return to the Splash screen.

Update — Click to make changes and deletions to existing accounts/amounts only.

Add — Click to add new accounts and change existing and pending accounts. Note: Changes entered here will not be activated until they are tested with your financial institution.

To update your current account information:
Click the Update button to make changes to amounts, methods or deletions on existing accounts only. You cannot enter new accounts in this screen. Enter the updated information in the appropriate fields and click the Save button.

To update your pending account information or add new accounts:
Click the Add button to make changes to existing accounts and/or add new accounts. Changes entered here must be tested with your financial institution before they take effect. Enter your changes and additions and click the Save button.

Federal Withholding

Use the W-4 module to view and modify information on your W-4 tax withholding form. The information currently on your W-4 form displays on the first page of the W-4 module, the W-4 – Summary page. The following information displays:

Federal Withholding Information	
Home Address	
Filing Status (If you wish to change your status to Exempt, see your Payroll Administrator.)	
Total Allowance	0
Additional Withholding	0.00

Allowances Worksheet

Note: Whether you are entitled to claim a certain number of allowances or exemptions from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

To update your information on your W-4 directly:

Update the information on the screen directly. When you are done, click the "Save" link in the upper right hand corner of the screen.

To update your information using the worksheet:

Click the "Allowances Worksheet" button to display the W-4 – Menu page. Select the "Personal Allowances Worksheet" option. Select the checkboxes that pertain to you and enter your total number of dependents and allowances. Click the Use Allowances button when all of the updated information has been entered correctly.

Use this Personal Allowances Worksheet to calculate your Total number of allowances.

1) Select the appropriate conditions

☐ For **yourself**, if no one else claims you as a dependent.

☐ If you are single and have one job; or you are married, have only one job, and your spouse does not work; or your wages from a second job or your spouse's wages (or the total of both) are $1,000 or less.

☐ For your **spouse**, but you may choose to uncheck this box if you are married and have either a working spouse or more than one job. (Leaving this box unchecked may help you avoid having too little tax withheld.)

☐ If you file as **head of household** on your tax return.

☐ If you have at least $1,500 of **child or dependent care expenses** for which you plan to claim a credit.

2) Enter number of dependents (other than your spouse or yourself) you will claim on your tax return

0

3) Child Tax Credit (including additional child tax credit): 0

If your total income will be less than $54,000 ($79,000 if married), enter "2" for each eligible child.

If your total income will be between $54,000 and $84,000 ($79,000 and $119,000 if married), enter "1" for each eligible child, plus "1" **additional** if you have four or more eligible children.

Total Number of Allowances 0

Use Allowances   Cancel

State Withholding

Use the State Withholding module to view and modify information on your state W-4 tax withholding form. The information currently on your state W-4 form displays on the first page of the State Withholding module, the W-4 – Summary page. The following information displays:

Current State Withholding Information	
Home Address	
Withholding State	Virginia
Additional State Information	Website
Filing Status	Single or Married ▼
Total Allowance	0
Additional Withholding	0.00

Electronic W-2

Use the Electronic W-2 module to display your W-2's. Your earnings, deductions, and taxes are displayed for the payroll year and company you select. You cannot modify information in the Electronic W-2. You can print a copy of a W-2 by clicking on the "Click here to view a printable version of this page" link and using your browser's print function.

Benefits

Benefits applications enable you to view and manage select medical, dental and life insurance options. You can update your health plan coverage by adding or removing dependents, designating individuals as life insurance beneficiaries, and by specifying deduction amounts for your pre-tax Flexible Spending Accounts in the upcoming plan year. You will see only the plans and options that apply to you. If you have questions about these plans and options, you can drill down to see more information or contact your Human Resources Team.

Benefits Enrollment
To begin your enrollment process, click on the "Benefits Enrollment" link.

Instructions
The Instructions module is the first step in the Open Enrollment process. Once you've read the instructions on the Instructions page, press Continue to begin the Open Enrollment process. Select Cancel to return to the Platform Page.

Current Elections
Use the Current Elections module to view your current benefit elections before beginning the open enrollment process. As you progress through the open enrollment process, you will see a summary of your current election and coverage information for each respective benefit type.

After you have reviewed your benefits, click Continue to begin the benefits enrollment process or Cancel to return to the Platform page.

Benefit	Plan	Coverage Level	Semi-Monthly
Medical Benefits	KeyCare Pre-Tax	Employee Only	52.65
Dental Benefits	Delta Dental Pre-Tax	Employee Only	5.15
Short Term Disability	Short Term Disability	No Coverage	0.00
		Total	57.80

Exit Benefits Enrollment   < Back   Continue >

Dependents/Beneficiaries

The Dependents/Beneficiaries module provides a list of your active and inactive dependents. Dependents can be added, updated, and deleted during Benefits Enrollment or through a Life Event. Details for each dependent are displayed, and may be updated, by clicking on the hyperlink of the dependent's name.

To add a dependent:

Select the Add button to display the Dependents – Add Page. Enter the dependent's information in each field and click the Submit button.

To update a dependent:

Select the hyperlink of the dependent's name. Enter the updated information in the appropriate fields and click the Submit button.

To view inactive dependents:

Select the View Inactive button to display the Inactive Dependents/Beneficiaries page.

To inactivate a dependent:

Click the Inactivate button to the right of the dependent's information. If you confirm inactivation of a dependent through Benefits Enrollment and the change in dependent information causes a change in benefit eligibility, a new screen will appear, prompting you to reselect your coverage options. If the inactivated dependent was a beneficiary, you will also be prompted to update your beneficiary percentages. Any current benefit coverage and benefit elections for that dependent will be automatically updated.

To activate a dependent:

Select the View Inactive button to display the Inactive Dependents/Beneficiaries page. Click the Activate button to the right of the dependent's information. If you confirm the new dependent through Benefits Enrollment and the change in dependent information causes a change in benefit eligibility, a new screen will appear, prompting you to reselect your coverage options . You will also be able to assign that dependent as a benefit beneficiary.

Medical Benefits

When you are done with your Dependents/Beneficiaries, click on the "Done" button to continue to Medical Benefits. The Medical page displays your current coverage and allows you to enroll in another plan or waive the coverage (if applicable).

To enroll in new coverage:

Select the level of coverage, the desired plan, and the people to be covered on the plan. You can click the link on the plan name to view more information about that plan. Your dependents specified in the Dependents/Beneficiaries module are used to populate the list of dependents here. Select the checkbox to add a dependent to the selected medical plan. If the list of names in this field is not complete, add the missing name(s) in the Dependents/Beneficiaries module.

The enrollment will take effect when you click the Confirm button on the Summary page.

Click Save to save the benefit election and continue to the next benefit (first time through enrollment) or the Summary page (in change mode).

Click Come Back Later to skip the benefit and continue to the next benefit (first time through enrollment).

Click Cancel to return to the Summary page (in change mode).

Dental Benefits

Use the Dental module to enroll in dental coverage. The Dental page displays your current coverage and allows you to enroll in another plan or waive the coverage (if applicable).

Short Term Disability

Use the Short Term Disability module to enroll in short term disability insurance coverage. The Short Term Disability page displays your current coverage and allows you to waive the coverage (if applicable).

To enroll in new coverage:

Select the desired coverage level and plan from the drop-down list in the New Coverage Column. The enrollment will take effect when you click the Confirm button on the Summary page. Click Save to save the benefit election and continue to the next benefit (first time through enrollment) or the Summary page (in change mode). Click Come Back Later to skip the benefit and continue to the next benefit (first time through enrollment). Click Cancel to return to the Summary page (in change mode

Medical Care FSA

Use the Medical Care FSA module to specify your annual contribution to your Medical Care Flexible Spending Account (FSA). The current contribution displays in the Current Coverage column.

Medical FSA		
Contribution	**Current**	**New**
Annual Contribution	0.00	0.00
Semi-Monthly	0.00	0.00

You may enter a New Annual Contribution amount up to 5000.00

Note: If you do not wish to participate in the Medical FSA plan, you must enter 0.00 in the box. Semi-Monthly box.

[Exit Benefits Enrollment]　[< Back]　[Save >]

To enroll in new coverage:

To change the amount of your contribution, enter the desired annual or per pay period amount in the appropriate field. Once you enter an amount, the other field will calculate automatically. The annual amount cannot exceed the amount listed at the bottom of the page. The enrollment will take effect when you click the Confirm button on the Summary page.

Click Save to save the benefit election and continue to the next benefit (for first time through enrollment) or the Summary page (in change mode).

Click Come Back Later to skip the benefit and continue to the next benefit (for first time through enrollment). Click Cancel to return to the Summary page (in change mode).

Dependent Care FSA

Use the Dependent Care FSA module to specify your annual contribution to your Dependent Care Flexible Spending Account (FSA). The current contribution displays in the Current Coverage column.

Dependent Care FSA		
Contribution	**Current**	**New**
Annual Contribution	0.00	0.00
Semi-Monthly	0.00	0.00

You may enter a New Annual Contribution amount up to 5000.00

Note: If you do not wish to participate in the Dependent Care FSA plan, you must enter 0.00 in the box. Semi-Monthly box.

[Exit Benefits Enrollment]　[< Back]　[Save >]

Designate Beneficiaries

Use the Designate Beneficiaries screen to view and update your Beneficiary designation. Your current and new benefits (the ones elected at Open Enrollment) are displayed in this screen.

Note:

The totals for your Primary and Contingent beneficiaries for each plan must equal 100%. For example: you have two primary beneficiaries that each receive 50%, and you have three contingent beneficiaries. The three contingent beneficiaries must also total 100%.

Click Save to save the benefit election and continue to the next benefit (for first time through enrollment) or the Summary page (in change mode).

Summary

The Summary module is the last step in the Open Enrollment process. It is very important that you carefully review the summary of elections you have made during the open enrollment process. The Saved column indicates the benefits for which an election has been saved. You can view additional information about each plan by clicking on the links (if available) in the Plan name column. You cannot confirm your elections until you've saved an election for every benefit type. Once you are sure that all the elections are correct, click the Confirm button. The Confirmed column will indicate that your benefit elections have been confirmed. You can make changes to these elections as long as the enrollment period is still open. If you make a change, you will need to re-confirm the elections using the same process.

Note:

When you press the confirm button in the Open Enrollment application, the system will return you to previous page you were on, the Summary ESS Screen. Be sure to print out a copy of your Open Enrollment selections from the Summary screen. Once you have cycled through the Open Enrollment process once, you must select "Benefits Enrollment "from the Main screen, then you will start at the Summary page. If you choose to navigate through other pages in the Open Enrollment application, you must access them by the quick links located on the Left.