

Employee Self Service (ESS)

For Benefits
Open Enrollment

Instruction Manual

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Human Resources Points Of Contact

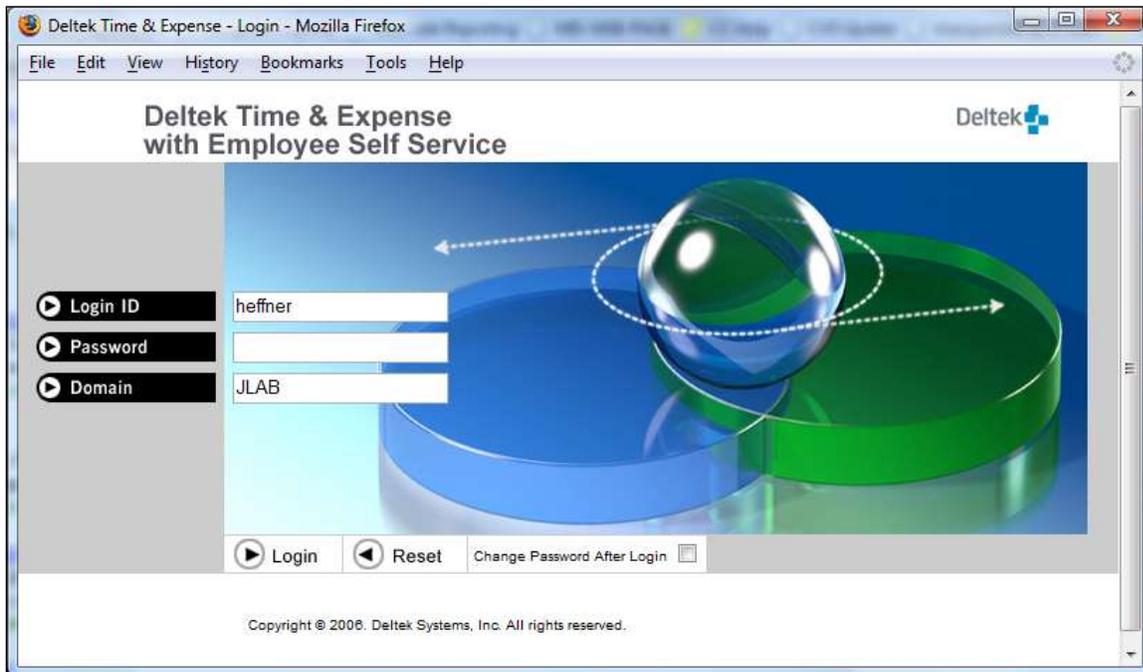
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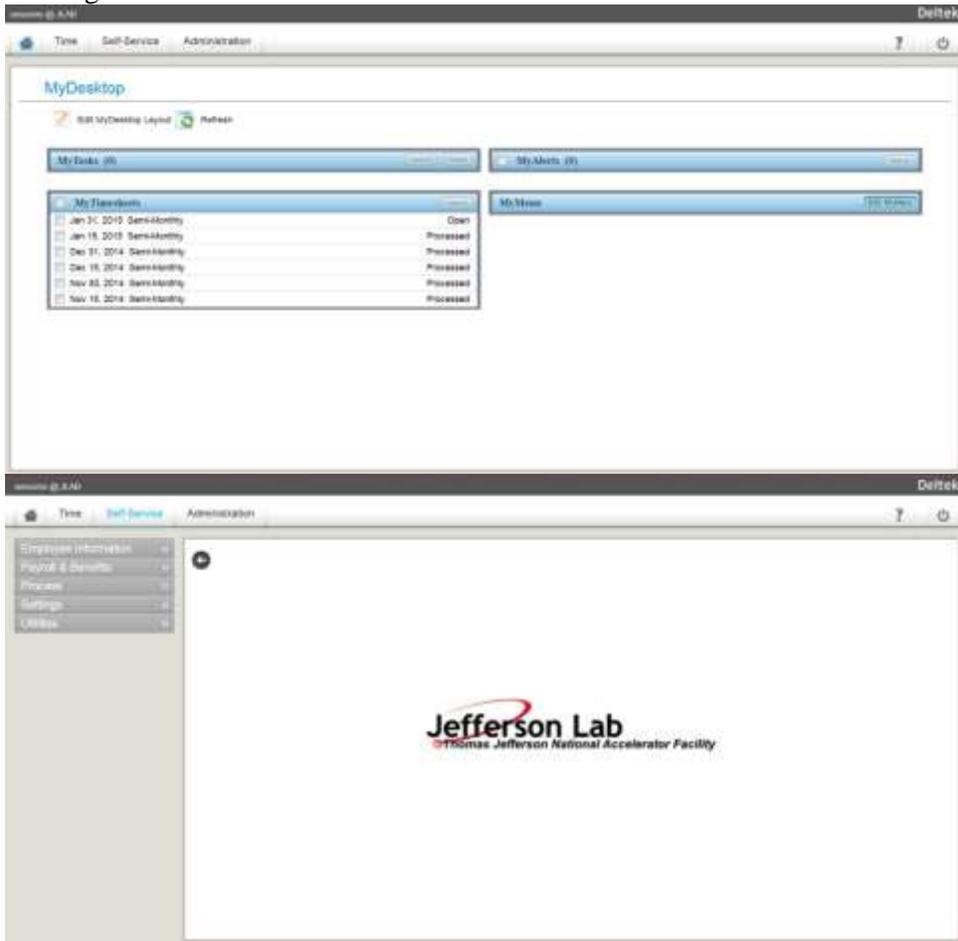
Logging onto ESS

- 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 “Self Service” you can access all areas of Time Collection / ESS by clicking on the left menu items.



Employee Information

The Employee Information application provides multiple submenus including personal data and a convenient employee directory.

Employee Personal Info

The Employee Personal info 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.



The screenshot shows a web form titled "Employee Personal Information". The form contains the following fields and values:

Last Name	DOE	Middle Name	D
First Name	JANE	Suffix	
Preferred Name			
Social Security Number	652258791		
Hire Date	Mar 1, 2010	Last Review Date	
Service Date		Next Review Date	
Birth Date	Apr 1, 1985	Gender	F
Race	White Alone non-Hispanic		

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 your 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.

Contact Primary ▾

Details

Name * Jonathan Doe

Relationship * SPOUSE

Phone * 804-244-5511

Street 1

Street 2

Street 3

City

State/Province Select ▾

Postal Code

Country United States of America ▾

Company Directory

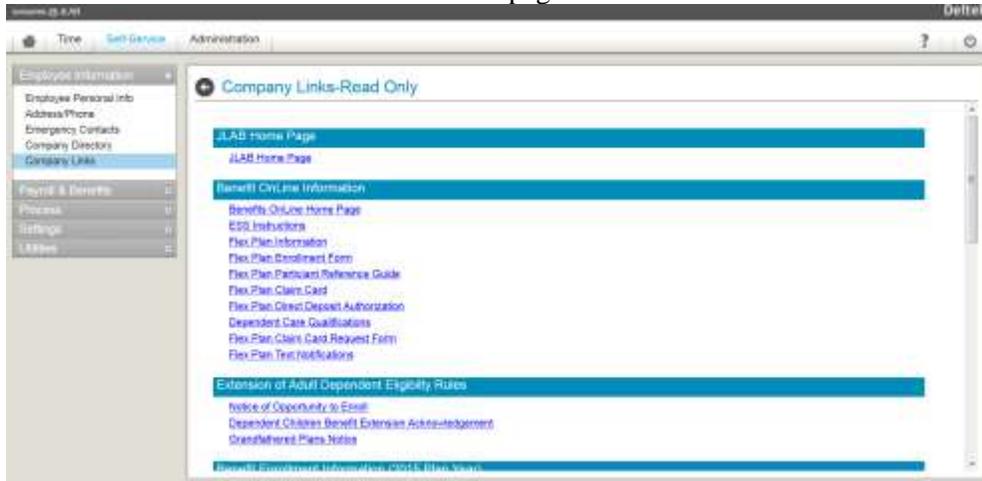
You can use this link to search for JLab staff. Click on the “Company Directory” link, then type in a name to search for.

The screenshot shows a web application interface for the Company Directory. At the top, there is a search bar with the text "Employee Search". Below the search bar are two input fields: "First Name" and "Last Name", followed by an "Exclude" button. Below the search bar is a table with the following columns: "Name", "Org Name", "Org ID", "Work Phone", and "Work Email". The table is currently empty. On the left side of the interface, there is a navigation menu with the following items: "Employee Information", "Employee Personal Info", "Address/Phone", "Emergency Contacts", "Company Directory" (which is highlighted), "Company Links", "Payroll & Benefits", "Phone", "Settings", and "Utilities". The top of the page shows "Home & AAD" and "Delltek".

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



Payroll & Benefits

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

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.

Leave Status

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

Benefits Enrollment

To begin your enrollment process, click on the “Benefits Enrollment” link. This is available only during the Open Enrollment period.

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.

These are the plans and options in effect before the open enrollment process. The amounts shown are the amounts deducted from your paycheck each pay period.

Benefit	Plan	Coverage Level	Current Plan Year Semi-Monthly
Medical Benefits	Keycare 10 Pre-Tax	Family/Fam with Same Sex Dm Pt	271.15
Dental Benefits	Delta Dental Pre-Tax	Family/Fam with Same Sex Dm Pt	15.35
Short Term Disability	Short Term Disability	No Coverage	0.00
Medical FSA		1,200.00	50.00
Total			336.50

[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. the dependent’s information in each field and click the Submit button.

To view or update a Dependent/ Beneficiary, click on the person's name or click on the checkbox beside the person's name. Note: In order to save a Spouse Life Election, your Spouse must be set up here as a Dependent or a Dependent/ Beneficiary.

[Add Dependents/Beneficiaries](#) [Edit Dependents/Beneficiaries](#)

Active Dependents/Beneficiaries						
	Name	Relationship	SSN / Government ID	Gender	Date of Birth / Agreement	Type
<input type="checkbox"/>	Donald A. Duck	Son	555-12-3456	Male	Jul 23, 2002	Dependent & Beneficiary Inactivate
<input type="checkbox"/>	Mickey J. Mouse	Husband	897-22-5633	Male	Dec 25, 1979	Dependent & Beneficiary Inactivate
<input type="checkbox"/>	Minnie B. Mouse	Daughter	789-12-3456	Female	Nov 21, 2005	Dependent & Beneficiary Inactivate

By clicking the “Done” button, you will move forward to the next screen.

[Exit Benefits Enrollment](#) [< Back](#) [Done >](#)

To add a dependent:

Select the Add button to display the Dependents – Add Page. Enter

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).

Plan Start Date: Mar 1, 2015
Plan End Date: Feb 28, 2016

Medical Benefits

Current Coverage

Medical Plan	Coverage Level	Semi-Monthly Premium
Keycare 10 Pre-Tax	Family/Fam with Same Sex Dm Pt	271.18

Enroll in New Coverage

Medical Plan	Empl + Spouse/Same Sex Dm Pt	Employee Child	Employee Only	Family/Fam with Same Sex Dm Pt	No Coverage
Healthkeepers 18 POS Post-Tax	192.75	127.15	88.70	243.25	
Healthkeepers 18 POS Pre-Tax	192.75	127.15	88.70	243.25	
Keycare 10 Post-Tax	200.00	167.85	108.55	296.00	
Keycare 10 Pre-Tax	206.95	157.05	108.65	296.90	
Optima Post-Tax	158.80	109.80	75.60	207.00	
Optima Pre-Tax	158.80	109.80	75.60	207.00	
Waived Health					0.00

* Premiums are Semi-Monthly *

Dependent Information

Covered?	Dependent	Relationship
<input checked="" type="checkbox"/>	Donald A. Duck	Son
<input checked="" type="checkbox"/>	Mickey J. Mouse	Husband
<input checked="" type="checkbox"/>	Minnie B. Mouse	Daughter

To activate/inactivate dependent coverage, click on checkbox above.

Covered dependents are indicated by a check mark.
To add or remove a dependent from coverage click on the checkbox next to the dependent.

Exit Benefits Enrollment < Back Come Back Later > Save >

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).

Current Coverage

Dental Plan	Coverage Level	Base Monthly Premium
Delta Dental Pro-Tel	Family Plan with Same-Sex (30.00)	15.00

Enroll in New Coverage

Dental Plan	Single + Spouse/Same-Sex (30.00)	Employee Only	Employee Only	Family Plan with Same-Sex (30.00)	No Coverage
Delta Dental Pro-Tel	0.00	0.00	5.75	15.00	
Delta Dental Pro-Tel	0.00	0.00	5.75	15.00	
Waived Dental					0.00

Dependents Information

Covered?	Dependent	Relationship
<input checked="" type="checkbox"/>	Robert A. Clark	Spouse
<input checked="" type="checkbox"/>	Murray J. Shuler	Spouse
<input checked="" type="checkbox"/>	Morgan H. Shuler	Daughter

Covered dependents are indicated by a check mark. To add or remove a dependent from coverage click on the checkbox next to the dependent.
More information is available on the Company Company Links Section of ESS.

Buttons: [Dental Benefits Enrollment](#) | [Back](#) | [Come Back Later](#) | [Save](#)

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	1,200.00	0.00
Semi-Monthly	50.00	0.00

[FSA Worksheet](#)

You may enter a New Annual Contribution amount up to 2500.00

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

[Exit Benefits Enrollment](#) [< Back](#) [Come Back Later >](#) [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

[FSA Worksheet](#)

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.

[Exit Benefits Enrollment](#) [< Back](#) [Come Back Later >](#) [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. You will also receive an email confirmation of your Open Enrollment selections. 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.

Direct Deposit

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.

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 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	Your address is missing or incomplete. Please update your address.
Filing Status (If you wish to change your status to Exempt, see your Payroll Administrator.)	Married
Total Allowance	4
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.

Please note that the Additional Withholding is the additional amount, if any, you want withheld from each paycheck

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 1,500 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 1,800 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

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

If your total income will be less than 65,000 (95,000 if married), enter "2" for each eligible child; then less "1" if you have three to six eligible children or less "2" if you have seven or more eligible children.

If your total income will be between 65,000 and 84,000 (95,000 and 119,000 if married), enter "1" for each eligible child

Total Number of Allowances

[Use Allowances](#) [Cancel](#)

Please note that the Additional Withholding is the additional amount, if any, you want withheld from each paycheck

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:

[Home Withholding State](#) [Other Withholding State\(s\)](#)

Current State Withholding Information	
Home Address	Your address is missing or incomplete. Please update your address.
Withholding State	Virginia
Additional State Information	Website
Filing Status	Single or Married ▾
Total Allowance	4
Additional Withholding	0.00

Please note that the Additional Withholding is the additional amount, if any, you want withheld from each paycheck

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.