

# PeopleSoft Employee Self-Service Benefits Enrollment

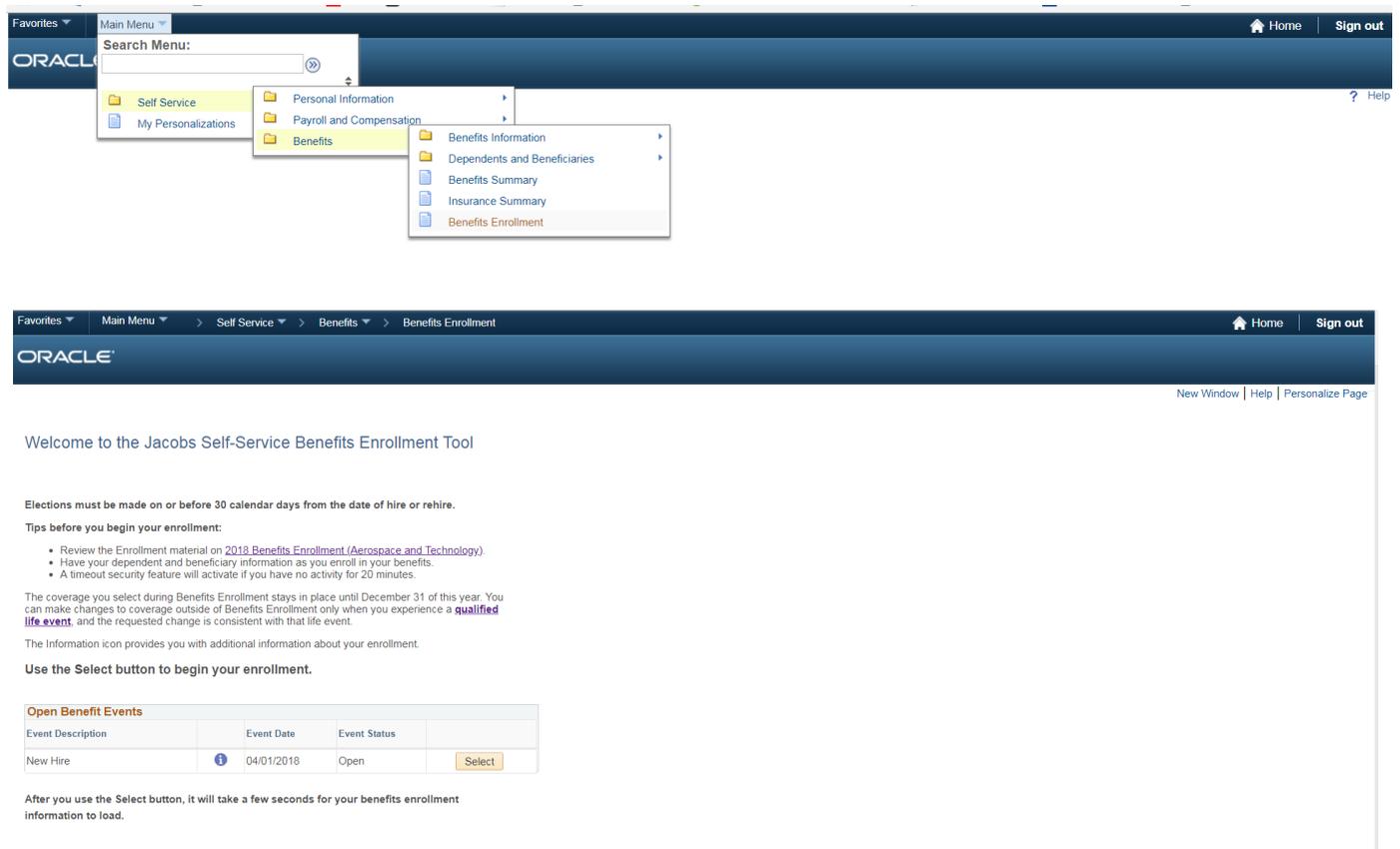
Employee Self Service (ESS) <http://enroll.jacobstechnology.com>

Enter log in credentials



The image shows the Oracle PeopleSoft login interface. At the top, the Oracle logo and 'PEOPLESOFT' are displayed. Below this, there are three input fields: 'User ID', 'Password', and 'Select a Language' (with 'English' selected). A green 'Sign In' button is positioned below the language dropdown. At the bottom, there is a checkbox for 'Enable Accessibility Mode' and a copyright notice: 'Copyright © 2000, 2014, Oracle and/or its affiliates. All rights reserved.'

Main Menu → Self Service → Benefits → Benefit Enrollment



The screenshot shows the Oracle PeopleSoft navigation menu. The 'Main Menu' is expanded, showing 'Self Service', 'Personal Information', 'Payroll and Compensation', and 'Benefits'. The 'Benefits' menu is further expanded, showing 'Benefits Information', 'Dependents and Beneficiaries', 'Benefits Summary', 'Insurance Summary', and 'Benefits Enrollment'.

Below the navigation menu, the breadcrumb trail reads: Favorites > Main Menu > Self Service > Benefits > Benefits Enrollment. The page title is 'Welcome to the Jacobs Self-Service Benefits Enrollment Tool'.

Elections must be made on or before 30 calendar days from the date of hire or rehire.

**Tips before you begin your enrollment:**

- Review the Enrollment material on [2018 Benefits Enrollment \(Aerospace and Technology\)](#).
- Have your dependent and beneficiary information as you enroll in your benefits.
- A timeout security feature will activate if you have no activity for 20 minutes.

The coverage you select during Benefits Enrollment stays in place until December 31 of this year. You can make changes to coverage outside of Benefits Enrollment only when you experience a **qualified life event**, and the requested change is consistent with that life event.

The Information icon provides you with additional information about your enrollment.

Use the **Select** button to begin your enrollment.

**Open Benefit Events**

Event Description	Event Date	Event Status	
New Hire	04/01/2018	Open	Select

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

➤ The information icon will provide additional details about the enrollment

# PeopleSoft Employee Self-Service Benefits Enrollment

## Benefits Enrollment

### New Hire

As a new hire you must enroll in benefits within **30** days from your date of hire/rehire.

If you do not enroll, you will only receive the company-provided benefits (e.g. basic life, employee assistance program, business travel accident).

**Note: Beneficiary election is necessary for basic life and business travel accident.**

The only time you can change your benefit choices is during Open Enrollment or if you have a qualified family status change.



**Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.**

Enrollment Summary			
<b>Medical</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: <b>Waive</b>	0.00		
<b>Dental</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: <b>Waive</b>			
<b>Vision</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: <b>Waive</b>			
<b>Flex Spending Health - U.S.</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: No Coverage			
<b>Health Savings Account</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: No Coverage			
<b>Limited Purpose FSA</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: No Coverage			
<b>Flex Spending Dependent Care</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: No Coverage			
<b>Integrated Disability Plan</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: No Coverage			
<b>Company-Provided Life</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: <b>1.5X Life: Salary X 1.5</b>			
<b>Supplemental Life</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: No Coverage			
<b>Spousal Life</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: No Coverage			
<b>Dependent Life</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: No Coverage			
<b>AD and D</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: <b>Waive</b>			
<b>Travel Accident</b>	Before Tax	After Tax	<a href="#">Edit</a>
Current: No Coverage			
New: <b>Trv Acct: 5 X Salary</b>			

# PeopleSoft Employee Self-Service Benefits Enrollment

This table summarizes estimated costs for your new benefit choices.

Election Summary			
Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax
Costs	0.00	0.00	0.00
Your Costs	-50.00	-50.00	0.00

Save and Continue

Select the Save and Continue button to send your final choices to the Benefits Department.

**i** Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Selecting the **Edit** Button on the right side of the benefits page to populate enrollment options available for each plan. Options are based on the primary mailing zip code

Enrollment Summary			
Medical	Before Tax	After Tax	Edit
Current: No Coverage			
New: Waive	0.00		

When enrolling in Medical – the below box will populate

Benefits Certificate

Medical Eligibility-Spous

If your spouse/domestic partner is eligible for medical coverage through his/her employer, and you choose to enroll him/her in the Jacobs medical plan, a surcharge of \$1,040 annually, prorated, will be added to the cost of your medical coverage..

I am enrolling my spouse or domestic partner in a Jacobs medical plan.

**Answer**

Yes

No

Not Applicable

My spouse or domestic partner is eligible for medical coverage through a non-Jacobs employer?

**Answer**

Yes

No

Not Applicable

OK Cancel

- Surcharge only applies to enrollment in medical coverage. It does not
- Surcharge does not apply when the spouse/domestic partner is enrolled in Medicare
- Surcharge does not apply if the spouse/domestic partner does not work

# PeopleSoft Employee Self-Service Benefits Enrollment

Dependents can be added at the bottom of the election options

## Enroll Your Dependents

Use the Add/Review Dependents button to add dependents to your list.

Your dependents must meet the following dependent eligibility requirements when first enrolling for coverage under the Jacobs Health Plans. You are certifying their status when you submit your elections. Upon request, you will be required to submit supporting documents to prove the dependents' eligibility. For more information regarding dependent eligibility criteria, see the relevant [Dependent Eligibility Documentation Requirements](#), summary plan descriptions, insurance contracts, or Policy HR 2829.

## Dependent Beneficiary

Enroll	Name	Relationship
<input type="checkbox"/>		

Add/Review Dependents

ORACLE

## Add/Review Dependent/Beneficiary

The people listed may be eligible for Benefit Coverage. Select a name to view or modify personal information. To add a dependent or beneficiary, select the 'Add a dependent or beneficiary' pushbutton.

**No Dependents on Record**

Add a dependent or beneficiary

[Return to Event Selection](#)

# PeopleSoft Employee Self-Service Benefits Enrollment

Note: Gender, Date of Birth and Social Security Number are required for enrollment

ORACLE

## Dependent/Beneficiary Personal Information

Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Apr 1, 2018.

### Personal Information

*First Name	<input type="text"/>
Middle Name	<input type="text"/>
*Last Name	<input type="text"/>
Date of Birth	<input type="text"/> <input type="button" value="BT"/>
*Gender	<input type="text" value="v"/>
Social Security Number	<input type="text"/>
*Relationship to Employee	<input type="text" value="v"/>

### Status Information

*Student	<input type="text" value="No"/> <input type="text" value="v"/>
*Disabled	<input type="text" value="No"/> <input type="text" value="v"/>
Smoker	<input type="text" value="Non Smoker"/>

### Address and Telephone

Same Address as Employee

Country  
Address

Same Phone as Employee

Phone

Save

[Return to Dependent/Beneficiary Summary](#)

# PeopleSoft Employee Self-Service Benefits Enrollment

Benefits Enrollment

Medical

Comparison Chart

To enroll in medical coverage, you must take action.

- i** Important! Your current coverage is: No Coverage. Coverage for this plan will be waived if you do not make an election.

Your enrollment on this page may affect your choices for the following type(s) of coverage:  
Health Savings Account  
Limited Purpose FSA

Before making your medical election, scroll to the bottom and enter your eligible dependents to cover.

## Select an Option

Here Are Your Available Options With Your Costs:

0

Select one of the following plans:

- HDHP-A \$2000/\$4000

Coverage Level	Your Costs	Tax Class
Employee Only	\$58.50	Before-Tax
Employee + Spouse	\$128.92	Before-Tax
Employee + Child(ren)	\$89.92	Before-Tax
Family	\$153.84	Before-Tax
Employee + Domestic Partner	\$128.92	Before and After Tax
Emp + Child + Domestic Partner	\$153.84	Before and After Tax
Emp + Dom Partner + Dom Child	\$153.84	Before and After Tax

- HDHP-B-\$1350/\$2700

Coverage Level	Your Costs	Tax Class
Employee Only	\$76.92	Before-Tax
Employee + Spouse	\$169.00	Before-Tax
Employee + Child(ren)	\$124.59	Before-Tax
Family	\$206.92	Before-Tax
Employee + Domestic Partner	\$169.01	Before and After Tax
Emp + Child + Domestic Partner	\$206.92	Before and After Tax
Emp + Dom Partner + Dom Child	\$206.92	Before and After Tax

- Tricare Supplement

Coverage Level	Your Costs	Tax Class
Employee Only	\$33.75	Before-Tax
EE + One	\$66.25	Before-Tax
EE + Dependent(s)	\$89.25	Before-Tax

- Waive

[Update and Continue](#)

[Discard Changes](#)

Select the **Update and Continue** button to store your choice until you are ready to submit your final enrollment on the Enrollment Summary.

Select the **Discard Changes** button to ignore all entries made on this page and return to the Enrollment Summary.

Annual goal amount should be entered for the following

- Flexible Spending Account (FSA)
- Limited Purpose FSA
- Dependent Care (FSA)
- Health Saving Account (HSA)

# PeopleSoft Employee Self-Service Benefits Enrollment

'Submit' will finalize benefit elections

The screenshot shows the 'Submit Benefit Choices' page in the Oracle PeopleSoft system. The breadcrumb trail is: Favorites > Main Menu > Self Service > Benefits > Benefits Enrollment. The page title is 'Benefits Enrollment' and the sub-title is 'Submit Benefit Choices'. The main content area contains instructions: 'You have almost completed your enrollment. If you have no further changes, select the **Submit** button on this page to finalize your benefit choices.' It also includes a section titled 'Authorize Elections' with a 'Submit' button and a 'Cancel' button. The Oracle logo is visible in the top left, and 'Home' and 'Sign out' links are in the top right.

Once the enrollment has been submitted, elections can be viewed at any time via ESS

Main Menu → Self Service → Benefits → Benefit Summary

The screenshot shows the Oracle PeopleSoft navigation menu. The breadcrumb trail is: Favorites > Main Menu > Self Service > Benefits > Benefits Summary. The 'Main Menu' dropdown is open, showing 'Self Service' and 'My Personalizations'. The 'Self Service' dropdown is open, showing 'Personal Information', 'Payroll and Compensation', and 'Benefits'. The 'Benefits' dropdown is open, showing 'Benefits Information', 'Dependents and Beneficiaries', 'Benefits Summary', 'Insurance Summary', and 'Benefits Enrollment'. The Oracle logo is visible in the top left, and 'Home' and 'Sign out' links are in the top right.

The screenshot shows the 'Benefits Summary' page in the Oracle PeopleSoft system. The breadcrumb trail is: Favorites > Main Menu > Self Service > Benefits > Benefits Summary. The page title is 'Benefits Summary'. Below the title, there is a text input field for a date, currently showing '03/23/2018', and a 'Go' button. Below this, there is a message: 'You have no benefit enrollments as of the date entered.' and a link: 'Enroll in Benefits'. The Oracle logo is visible in the top left, and 'Home' and 'Sign out' links are in the top right.

If benefits do not display, select calendar to enter effective date of benefit followed by 'Go'

The screenshot shows the 'Benefits Summary' page in the Oracle PeopleSoft system. The breadcrumb trail is: Favorites > Main Menu > Self Service > Benefits > Benefits Summary. The page title is 'Benefits Summary'. Below the title, there is a text input field for a date, currently showing '03/23/2018', and a 'Go' button. Below this, there is a message: 'You have no benefit enrollments as of the date entered.' and a link: 'Enroll in Benefits'. A calendar popup is open, showing the month of March 2018. The calendar has a grid with days of the week (S, M, T, W, T, F, S) and dates from 1 to 31. The current date is highlighted as 23. The Oracle logo is visible in the top left, and 'Home' and 'Sign out' links are in the top right.

# PeopleSoft Employee Self-Service Benefits Enrollment



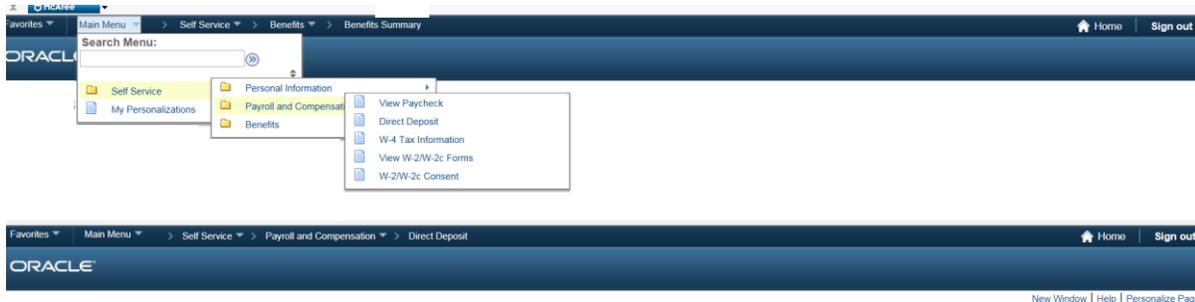
## Benefits Summary

To view your benefits as of another date, enter the date and select Go.

04/01/2018

Type of Benefit	Plan Description	Coverage or Participation
Medical	HDHP-B-\$1350/\$2700	Employee + Spouse
Dental		Waived
Vision		Waived
Company-Provided Life	1.5X Basic Life	Salary X 1.5
Supplemental Life	Supplemental Life	
AD and D	Empl & Family - 50K or Greater	
Spousal Life	Spouse Life	
Employee Assistance Program	EAP--EE Assistance Program	
Travel Accident	Travel Accident	\$ X Salary
Short-Term Disability	Jacobs IDP	60% of Salary
401(k)	SvT 100% 1 - 2% & 50% 3 - 8%	6% Before Tax
Personal	PTO:0/120,5/160,10/180 &15/200	
Health Savings Account	HSA - UHC Choice Plus HDHP-B	! Pledge

ESS is also the location to update Direct Deposit information



## Direct Deposit

Review, add or update your direct deposit information.

Direct Deposit Details						
Account Type	Routing Number	Account Number	Deposit Type	Amount or Deposit Percent Order	Edit	Remove
Checking			Amount	\$300.00 1		
Checking			Balance of Net Pay	999		

Pay Statement Print Option

And to update W-4 withholdings

W-4 Tax Information

Jacobs Technology Inc. Social Security Number: 275767700

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your wages based on marital status and the number of allowances claimed on the form. You may also specify that an additional state amount be withheld. Use the second form to update your tax situation changes and you choose to have more or less tax withheld.

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may not be required to send a copy of this form to the IRS.

Home Address

W-4 Tax Date

Enter total number of Allowances you are claiming: 3

Enter Additional Amount, if any, you want withheld from each paycheck: \$

Indicate Marital Status:  Single  Married

Check here and select Single status if married but withholding at single rate. Note: If married, but legally separated, or divorce is noncontested status, select 'Single' status.

Check here if your last name differs from that shown on your social security card. You must call 1-800-772-1213 for a new card.

Claim Exemption

I claim exemption from withholding for the year: 2015 and I certify that I meet BOTH of the following conditions for exemption:

- Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.
- This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

Check this box if you meet both conditions to claim exempt status.

Under penalty of perjury, I declare that I have examined the certificate and to the best of my knowledge and belief, it is true, correct, and complete.