BEACON North Carolina Office of the State Controller

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Welcome to the **Employee Self Service Overview** Course

To start the course, click the **Next** button below.

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Employee Self Service Overview

This course provides you with the terms, concepts, knowledge, and skills associated with using the Employee Self Service (ESS) portal, or Website. It consists of five lessons.

Upon completion of this course, you should be able to:

- **Log on** and navigate the ESS portal
- Perform a **My Employee Search** to find State government employees in North Carolina
- Use **My Benefits** to display benefits plans, perform open enrollment, and access State Health plan forms
- Use **My Personal Data to** maintain your address book, bank information, and family member data
- Use **My Pay** to display salary, display total compensation data, print pay stubs, and maintain tax data
- Find resources to help you work with ESS

Course Duration: 2.0 Hours

Before You Begin

This self-paced course includes interactive elements that contribute to your knowledge acquisition. These elements can include:

- Knowledge checks
- Interactive activities

Pages with interactions include a mouse icon to identify an interaction on the page. Instructions appear next to the icon that tell you what action to take.

This course has been optimized for the Internet Explorer (IE) browser and a screen resolution of 1024 by 768. Refer to the BEACON Library for instructions on how to change your monitor settings. For the best learning experience, verify that you are viewing this course in IE 6 or above at 1024 by 768 screen resolution. Additionally, the best way to view this course is in full screen mode. Increase your browser window to full screen size if it is not already by using the F11 key on your keyboard. Press the F11 key again to return to regular view for printing or other standard functions. If your F11 key does not function this way, go to View on the IE tool bar and select Full Screen. To get back to regular view, move your mouse pointer to the top of the screen until the top of the browser window reappears and select the restore icon at the top right of the browser window.

In this section, you should learn more about these interactive elements.

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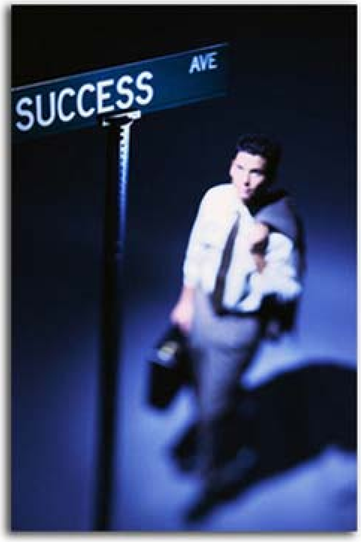
Knowledge Check

The knowledge check screen is a quick quiz that helps reinforce the key points you have just learned.

When you answer a knowledge check question, you receive immediate feedback and the correct answer if you picked the wrong response.

Knowledge checks are not graded or scored; they serve only to provide you with a self-assessment.

One Last Word



It is recommended that you complete the lessons in the order in which they are listed on the menu page because each module builds upon information that has been previously presented.

It is recommended that you plan on taking the training when you will have minimal interruptions and a quiet environment. Often, first thing in the morning or lunchtime are quiet times. Other learners prefer to take the training after hours. You can choose to access the training from your home PC.

You're ready to begin!

The **Employee Self Service Overview** course is divided into the following lessons:

To access a specific lesson, click on its button, otherwise, click the Next button below to begin Lesson 1.

Note: This course does **not** cover the **My Time** feature. A separate online course, ES210 – Time Entry, is available for that topic.

Lesson 1: Getting Started

When you complete the **Getting Started** lesson, you should be able to:

- Log on and access the screens you need in **Employee Self Service** (ESS)
- Use **My Employee Search** to find contact information for State government employees in North Carolina

Employee Self Service (ESS) is part of the BEACON portal. It is where you can perform your own administrative tasks regarding your:

- benefits
- pay
- personal data
- timekeeping

Using ESS, you can also search for employee contact information.

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How do I get to ESS?

To go to ESS, you would **log onto BEACON** portal using your NCID log-on ID and password: **https://mybeacon.nc.gov**

NOTE: When you log in for the first time you will be required to validate your NCID with your Social Security Number and Date of Birth info.

You will not need your log-on information to complete the course, but contact your supervisor if you have not received your NCID and password.

The **BEACON home page** would display.

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You would then click on the **My Data (ESS) tab**.

Note: Your screen might look slightly different, depending upon your work responsibilities.

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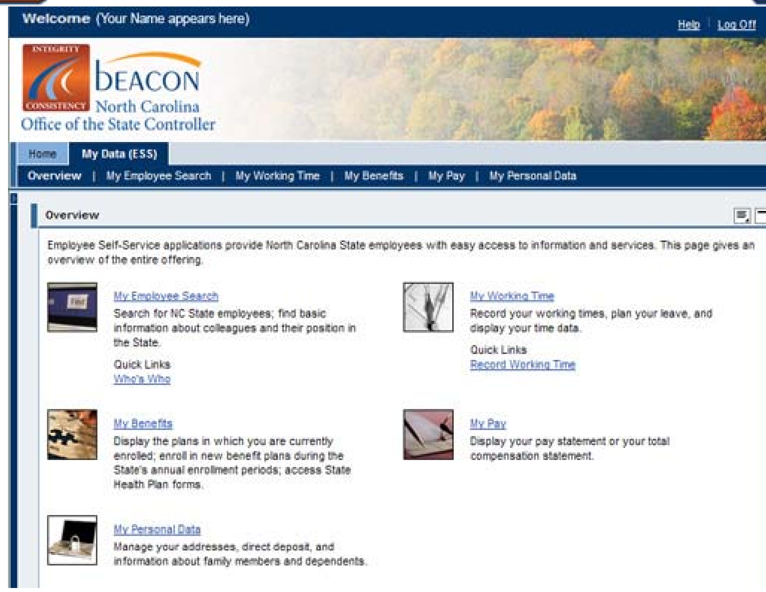
How do I find my information?



The **Overview** page displays.

From here you can navigate to the five ESS sections:

- My Employee Search
- My Benefits
- My Personal Data
- My Working Time
- My Pay

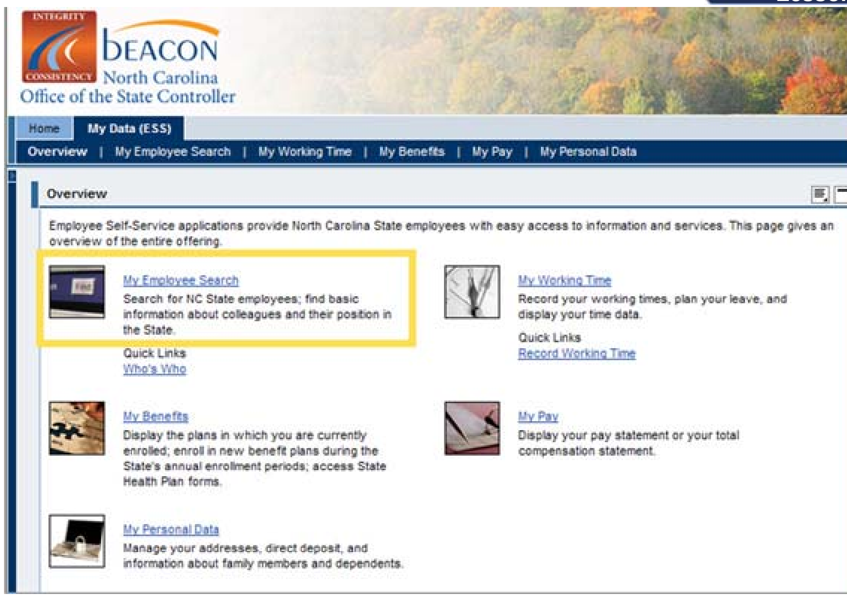
One of the many useful features of ESS is **My Employee Search, Who's Who**.

Using the Who's Who application, you can find an employee's:

- contact information including e-mail address and phone number
- personnel area
- position
- organization unit

No sensitive data, such as pay information, is available through My Employee Search.

To find My Employee Search, on the Overview page, you would click **My Employee Search** highlighted here with a yellow box.



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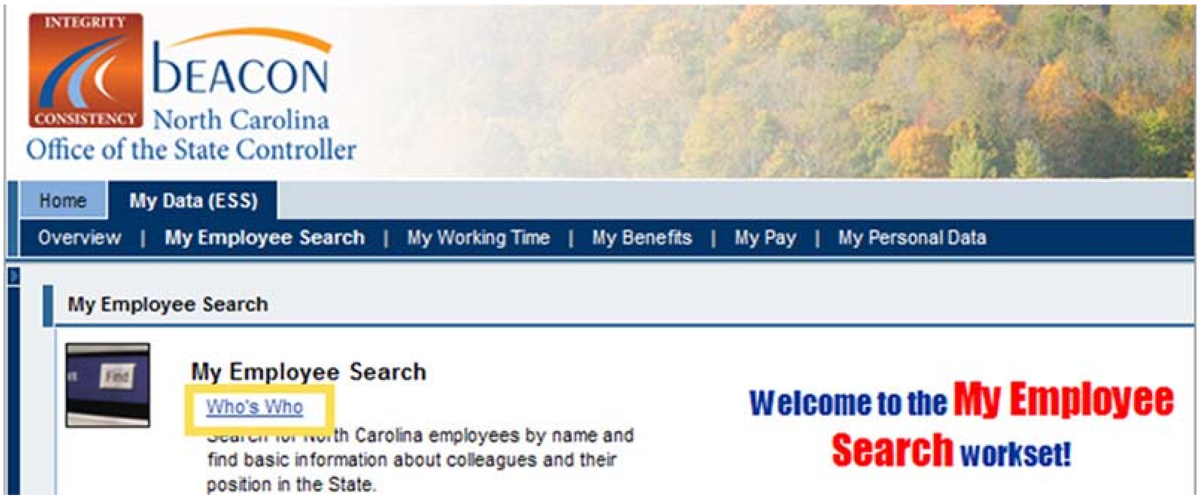
On the **My Employee Search** page, you would then click the **Who's Who** link.



The **Who's Who** page displays.

You would enter a last name or first name and then click **Search**. A **Results List** would display.

When you click a last name in a Result List, an Employee profile page displays, showing the following information:

- telephone number
- e-mail address
- position title
- organizational unit
- name
- personnel area

NOTE: Be sure to enter at least a first name or last name before clicking the Search button. If you forget to do this, the search will take an extended length of time to return the entire listing of state employees. On the next page, you will learn how to search if you are unsure of the spelling of the first or last name.

TIP: If you know only the first few letters of the person's name, you can enter them, along with an **asterisk***.

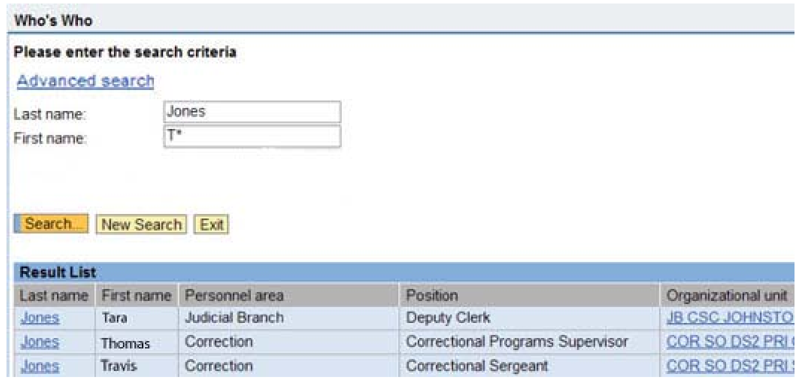
All names that start with those letters will display when you click **Search**.

You can then click on the last name of the employee you are seeking.

As you can see in this expanded view for a Jones search, the Result List also displays a listing of basic information that can be helpful in selecting the correct name including:

- Last name
- First Name
- Personnel area
- Position
- Organizational Unit

For this example, we will click on Thomas Jones as the correct selection.



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The employee's Profile screen displays giving you the following information:

- Telephone number and extension
- E-mail address
- Position
- Organizational Unit
- Last name
- First name
- Middle name
- Personnel area

Employee profile for

Communication

Area code + local access code: 919-924-8484
Extension:
E-mail: TOM.JONES@NCMAIL.NET

Department

Position: Correctional Programs Supervisor
Organizational unit: COR SO DS2 PRI C John CS P PD PS2

Miscellaneous

Last name: Jones
First name: Thomas
Middle name: Robert
Personnel area: 4202

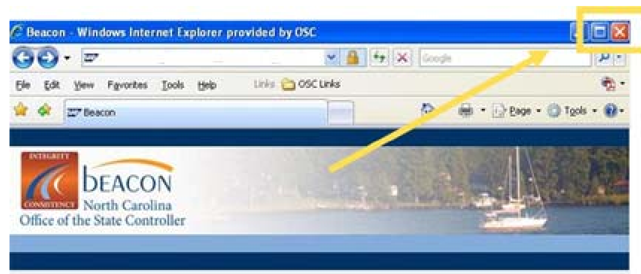
Back to Result List

When you are finished using ESS, it is very important to exit the application by either:

Logging off

- or -

Clicking the **X** to **close the browser window**



True or False

Using My Employee Search, you can find all of the following:

- an employee's personnel area
- position
- organization unit
- pay information
- contact information

☐ True

☐ False

Submit Reset

Using your mouse, select the correct answer, then click the Submit button.

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Employee Self-Service Overview

Knowledge Check

Lesson 1

Assume you are looking for a phone number for an employee, Cornelia Moreno, and you do not know if Cornelia's last name is spelled: Morreno, Morano, or Moreno.

Which of the following would you type in the search box to view a list of all of the employee last names that begin with Mor?

- [ ] Mor*
- [ ] Mor+
- [ ] Mor*
- [ ] Mor=

Submit Reset

Using your mouse, select the correct answer, then click the Submit button.

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You have completed the **Getting Started** lesson. You should have learned how to:

- Log on and go to Employee Self Service (ESS)
- Use My Employee Search to find contact information for State government employees in North Carolina

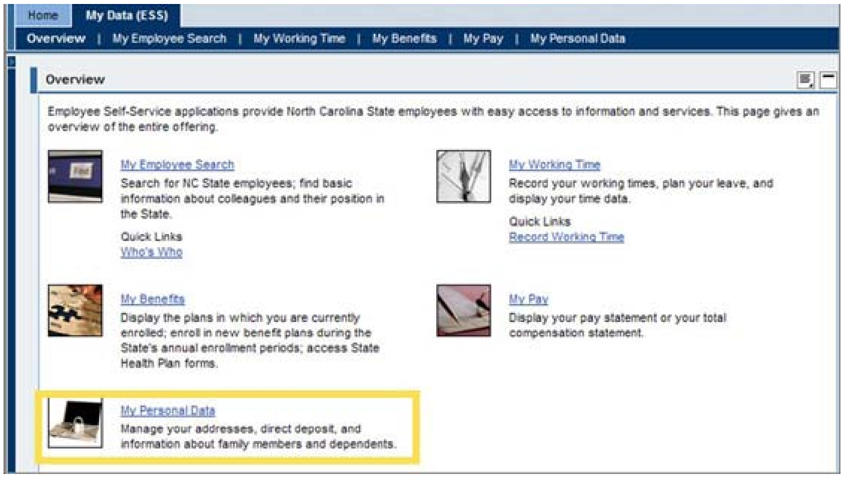
Click the **NEXT** button below to continue to the next lesson**.**

When you complete the **My Personal Data** lesson, you should be able to:

- Go to the **My Personal Data** section of ESS
- Maintain your **addresses**, **bank** information, and **family** member data in ESS
- Maintain your **W4 tax withholding** information

To go to **My Personal Data**, you would click the **My Data (ESS)** tab.

This **Overview** screen appears and you would then click on **My Personal Data,** highlighted in yellow below.



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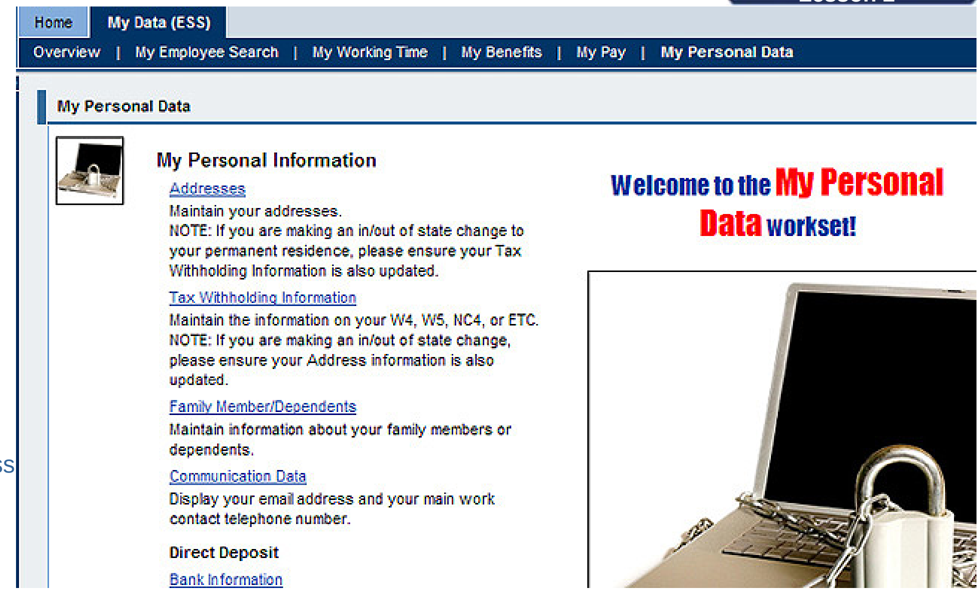
The **My Personal Data** page displays.

From this page, you can **maintain your personal information,** such as:

- permanent residence and mailing address
- tax withholding information
- family member and dependent information, including emergency contact information
- home phone number
- bank information

You can also view your work email address and phone number that display when someone uses **My Employee Search** to search for your contact information. More about this later.



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Your personal information is **not** publicly available to everyone.

It is available only to Human Resource staff members who may need it for business purposes.

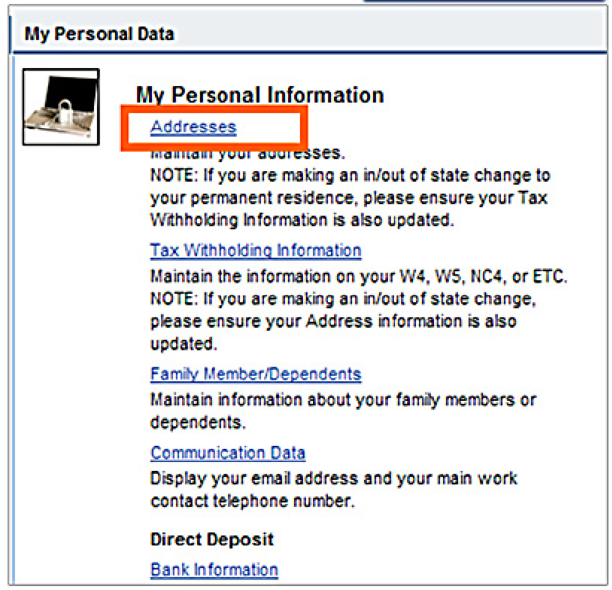
You can change your address using ESS.

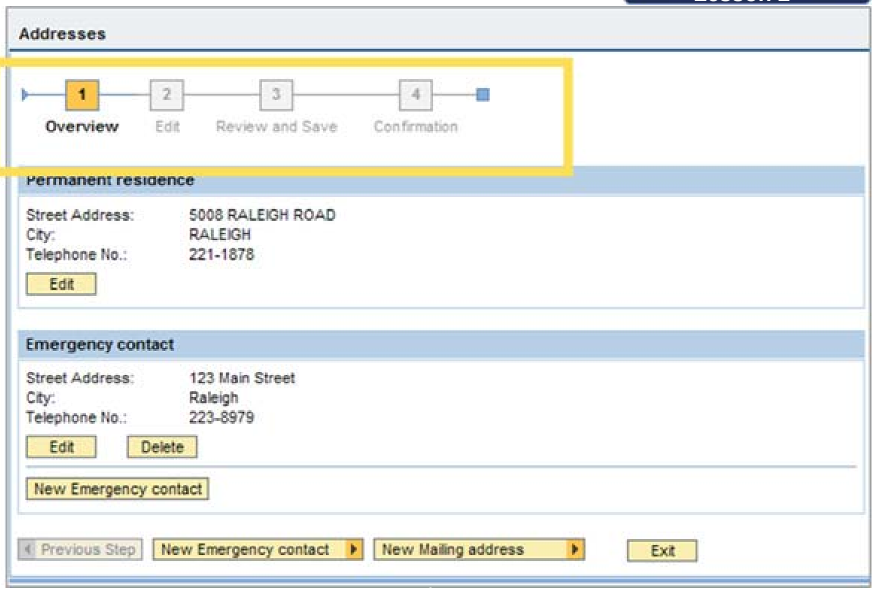
In this exercise, you will change the address of your permanent residence.

Change your address:

- **From:** 5008 Raleigh Road in Raleigh
- **To:** 200 North Blount Street in Raleigh

Click the Addresses link on this screen to see how it will work.

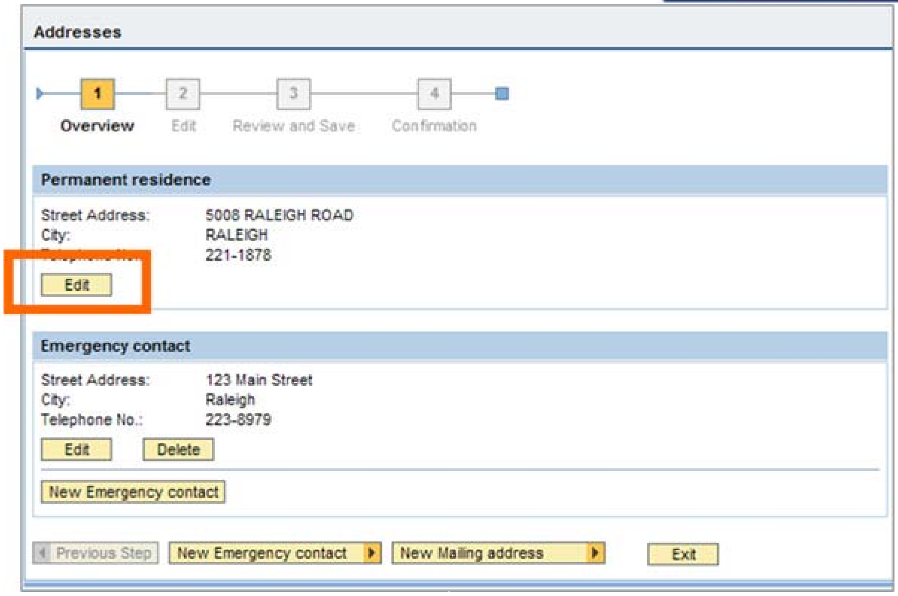


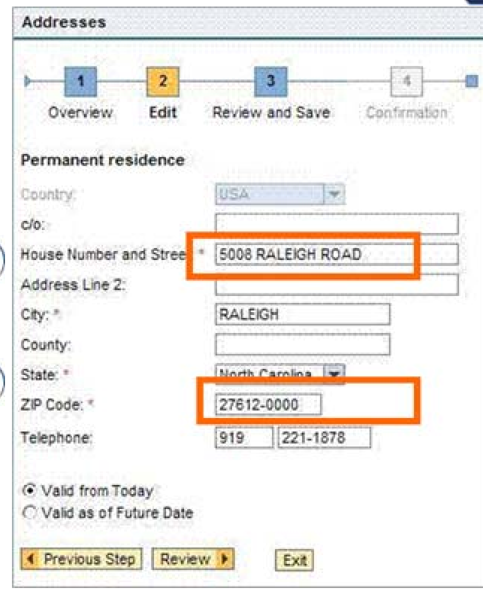


The **Addresses** page displays.

The number chart at the top of the page, shown below, is simply an indication of which step of the process you are in.

In the Permanent Residence section, click Edit.





An **Address Screen** displays.

Notice the **number chart at the top**. You are now in **Step 2, Edit.** You will change the house number and street as well as the zip code.

For the purposes of this training, click in either of the address sections of the screen, and the new address will be added.

On the actual screen, you would need to type in the new address.

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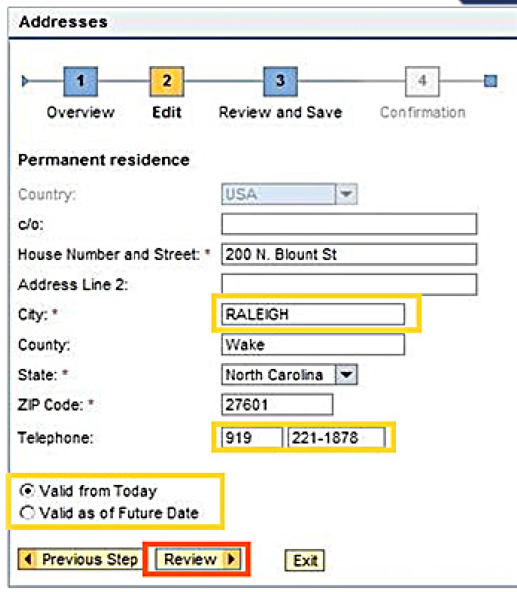
As you can see, a new address was entered.

To save the changes, you'll need to click on Review.

Also notice that you have the option of making the change effective as of a future date by clicking the button next to **Valid as of Future date**.



Click Review now.

REVIEW

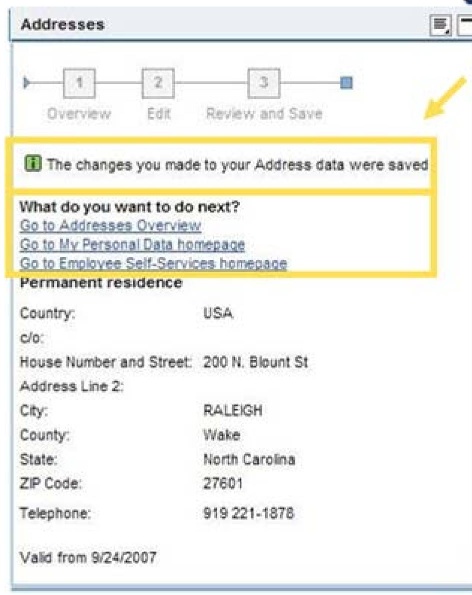
Your **new address displays**, and a **Save button appears** at the bottom.

Note: If you had found an **error** here, you would click on the Previous Step button to go back to the last screen, correct the mistake, and click Review again.

Since this is correct, click the Save button now.

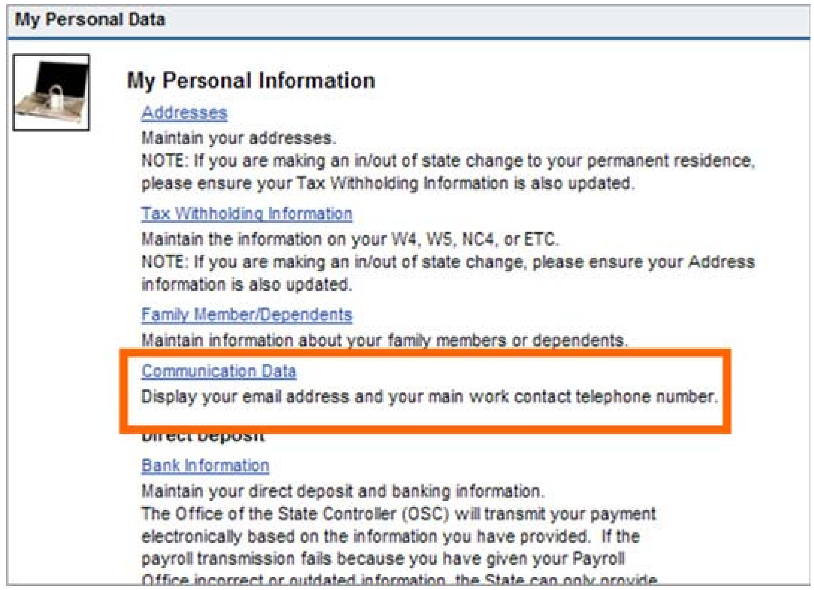
A message displays confirming that your **changes were saved.**

You could then **close the window or go elsewhere** by clicking one of the links under "What do you want to do next?"



Another task you can perform in My Personal Information is to **view** your **email address** and your main **work telephone** number.

Select Communication Data.



Your work phone number, including extension if you have one, and your work e-mail address display if someone searches for you using My Employee Search.

You **cannot** change this information yourself using Employee Self Service.

To **change your work email address**, you would go to:

- **NCID** at https://ncid.nc.gov

To **change your work phone number**, you would:

- Contact your Agency HR person

If you have **questions** about changing your information on this screen, you can contact **BEST Shared Services**:

Raleigh area: (919) 707-0707

Toll free: (866) 622-3784

Display Own Data

Display Own Data

Communication	
Area code + local access code	(919)431-6000
Extension	X6639
E-mail	ALEXANDRA.SMITH@NCOSC.NET

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Employee Self-Service Overview

Knowledge Check

Lesson 1

Which of the following statements is true concerning the Employee Self-Service area of the system?

- [ ] You can change your employee email or work telephone number.
- [ ] You can change your personal home address.
- [ ] Your complete personal information, including pay, is available to all State employees.
- [ ] All of the above.

Submit | Reset

Using your mouse, select the correct answer, then click the Submit button.

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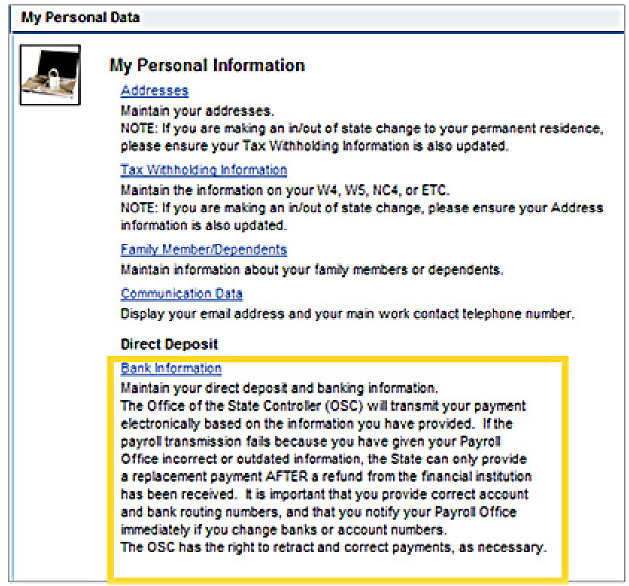
Next, you will find out how to maintain your **banking** information.

As you may remember from introductory information on BEACON, you have **several direct deposit options** for your paycheck.

You may choose to deposit portions of your pay into more than one account.

For direct deposit, you must enter the **correct account number** and bank **routing number**.

If your bank information is **incorrect or outdated**, your **paycheck** could be **delayed** quite some time while the bank and the State handle the reissue pay process.



To maintain your bank information, you would go to **My Personal Data**
and then **Bank Information**.

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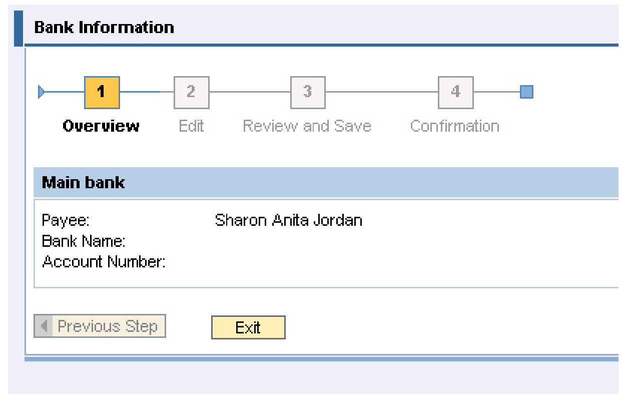
There are a small percentage of employees who receive **pay checks** rather than using direct deposit. If you are one of these employees, your Bank Information screen will look like this one.



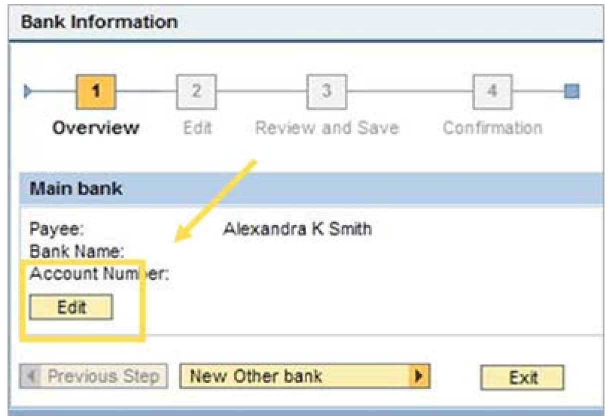
If you want to **begin using direct deposit**, you cannot make any changes to this screen to start your direct deposit. Instead, you must send a form and the required bank verification to your HR office for processing. You can get the **Direct Deposit form** on the **BEST Shared Services** web site at http://www.ncosc.net/BEST.

Note: Employees who are already on direct deposit may not switch back to receiving a pay check but may make changes to their direct deposit information through ESS as described in the next few screens.

For employees on direct deposit, your Bank Information screen will look similar to this one.

The Edit button controls your Main bank on this page.

You would click **Edit** to make changes to the Main bank where your **payroll check** is deposited.

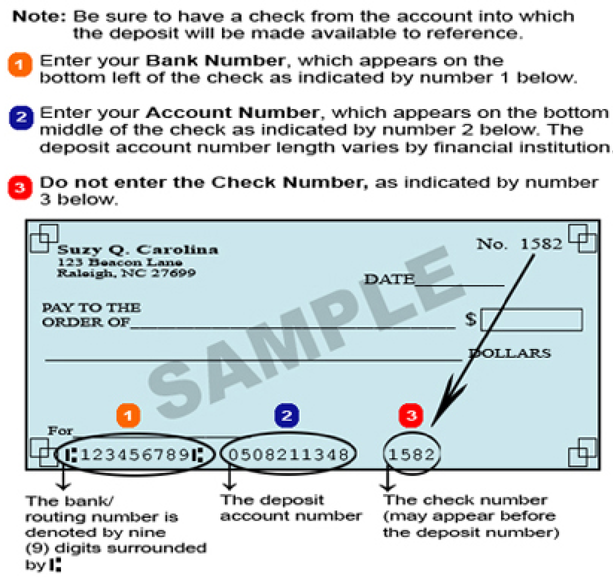


Note: You have the **option of adding up to three other banks** to deposit portions of your paycheck. The **New Other bank button** is for adding additional banks. For example, if you wanted a portion of your paycheck deposited to a savings account at an entirely different bank, you would click the **New Other bank button** to add that bank. This is covered in more detail later in this lesson.

In the next **exercise,** let's say that you have **changed banks** and need to update your **main** direct deposit to a new bank account.

You would need to refer to a printed check from your new account to get the **bank number/routing number** and your **checking account number**.

You can use the instructions and check image on the bank information screen pictured here to locate the numbers on your check.



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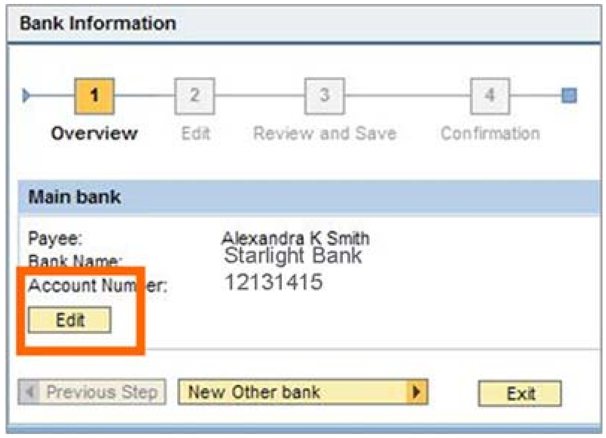
In this **exercise,** you will be changing your direct deposit.

- From:
  Starlight Bank
- To:
  Moonbeam Bank

Click Edit now.



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The **Edit page** displays where you would type in the **new bank number, account number**, and then select **Valid as of Future Date**.

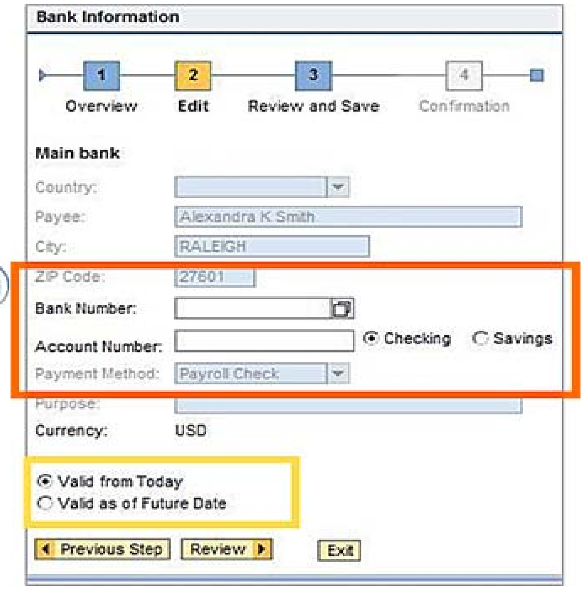
CRITICAL NOTES:

You must make the change to another bank account effective the first day of the pay period that you want your pay to go into the new account. You would generally select the second button, Valid as of Future Date, and enter the first day of the next pay period. Or, if you are actually making the change on the first day of the pay period, you can leave the Valid from Today default button selected. If you are paid monthly, make your change effective the first day of the month. If you are paid biweekly, contact HR to verify the first day of the next pay period or access the Payroll Calendar in Help.

If you make the change on a day after the first day of the pay period and do not click Valid as of Future Date to enter the next pay period begin date, part of your next pay check may go into a closed account. Or if your pay is deposited into more than one account, the dollar amount that goes into your main account may be incorrect, including the possibility of no pay being deposited in your main account.

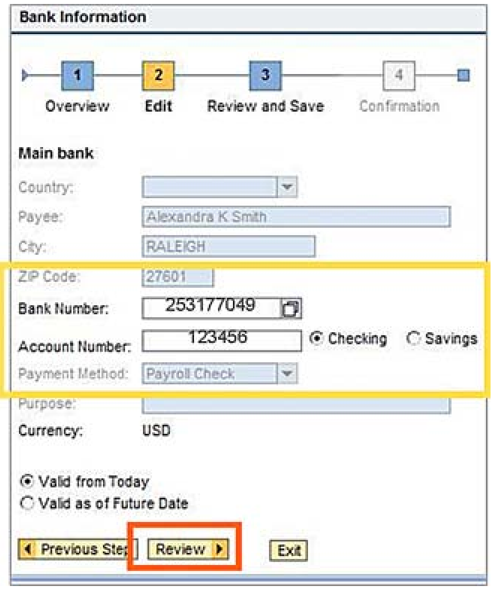
If you are in the process of opening and closing bank accounts, make sure that you keep your current account open until the direct deposit change to the new bank processes. If you are not sure about the date that you should make the change effective, contact BEST Shared Services.

On this screen, click in the Bank Number and Account Number area.



On this screen, you would make sure the numbers you entered on the last screen are correct here by clicking the **Review** button.

In this **example**, the change is being made on the first day of the month for an employee who is paid monthly, so the Valid from Today option is selected.



The numbers are correct, so click Review now.

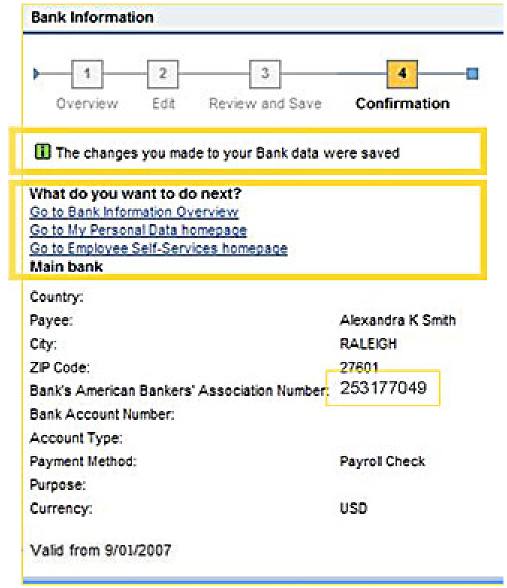
You would then **review the numbers again** to be sure they are correct.

If so, you would click the **Save** button. If not, you would click the **Previous Step** button to go to the last screen and correct the number(s).

The screen is correct, so click Save now.

A **confirmation screen** displays. It tells you that the changes to your bank data were made.

You would then **close the window** or go elsewhere by clicking one of the links found below "**What do you want to do next?**"



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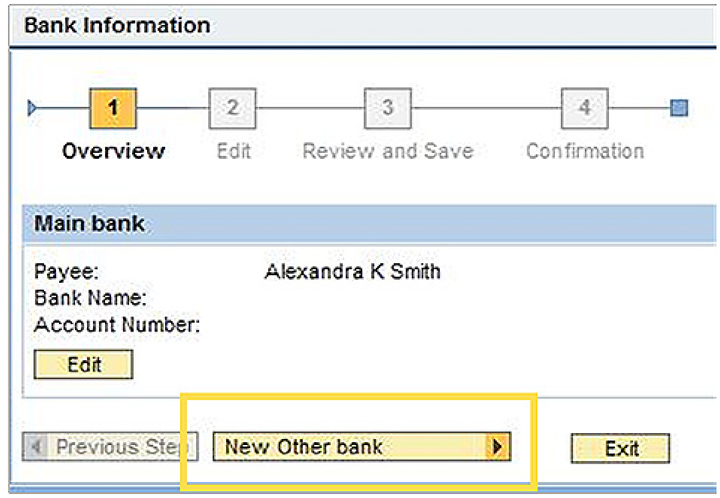
You can add up to **three additional banks** to deposit part of your pay.

The process of adding an additional bank account is similar to that of adding a Main bank account.

To add a bank you would**:**

Select the **Bank Information** link in **Personal Data**.

Then click **New Other Bank**.



When you add one or more additional bank accounts, you must enter the following on the screen to set up the deposit(s) in the new account(s):

- the **percentage** of your paycheck, in Standard Percentage

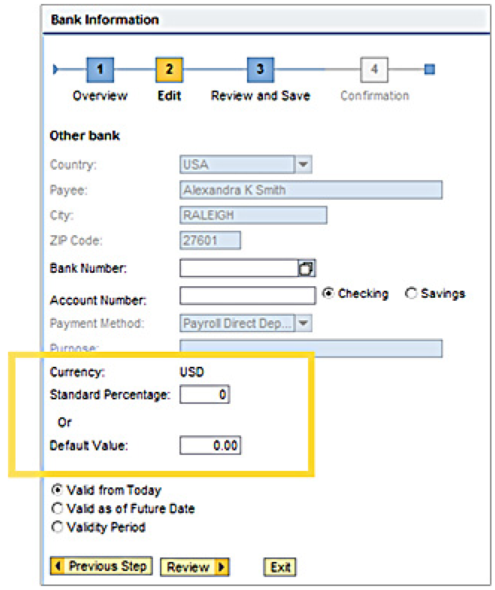
  - **or** -

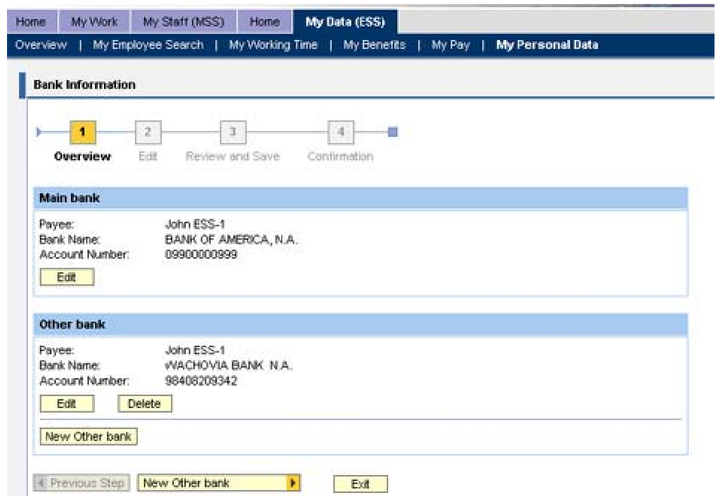
- a **dollar amount,** in Default Value

The remainder will be deposited in your Main direct deposit bank.

Example: If you added three bank accounts and entered 20% for each, totalling 60%, the remaining 40% would be deposited in your Main bank.

NOTE: As described earlier regarding changes to your main deposit account, you must also add other bank accounts **effective the first day of the pay period** that you want a portion of your pay to go into the new account(s). Enter the pay period begin date after selecting **Valid as of Future Date**.





If you added one **Other Bank**, your Bank Information screen would look like this one with your **Main Bank** shown at the top and your **Other Bank**(s) shown below.

On this screen, you could then do the following:

- Edit your **Main Bank** account information
- Edit or delete the **Other Bank** account
- Click the **New Other Bank** button to add another bank account

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Next, you will see how to maintain your **Family Member/Dependent** information.

Before you enroll in benefits plans, you must add your family members and dependents to your personal data because the system pulls your dependent information from **My Personal Data** when you choose beneficiaries in the **My Benefits** area.

To add, delete, or change family and beneficiary **names**, you would go to **My Personal Data** and then click on **Family Member/Dependents**.

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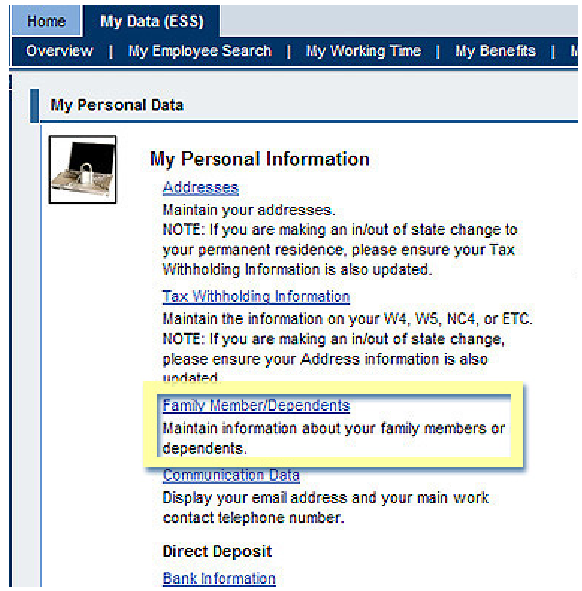
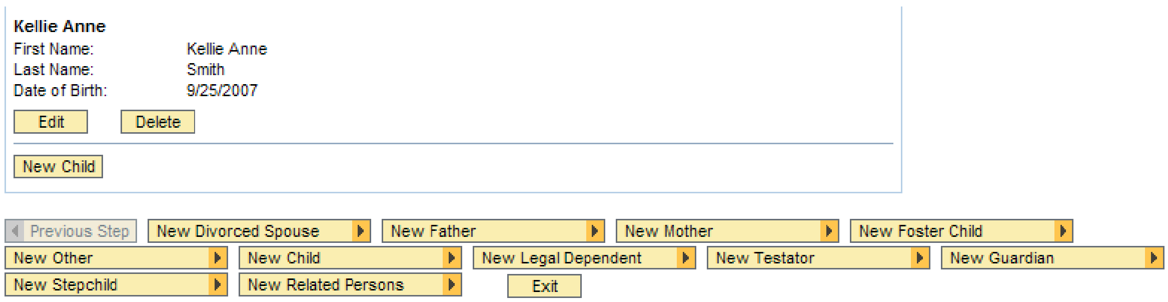


On the **Family Members/Dependents** screen, you would click the appropriate button at the bottom of the screen such as **New Child** and enter the required information.

In this example, Kellie Anne Smith was added as a new child.

You could then make changes to the child's information by clicking on the **Edit** or **Delete** button or you could select one of the other buttons at the bottom of the screen to add other dependents or **Exit** this area.



Next, you will see how to maintain your **W4 tax withholding** information.

In the **next** exercise, you will **practice changing your W4** filing status and number of exemptions.

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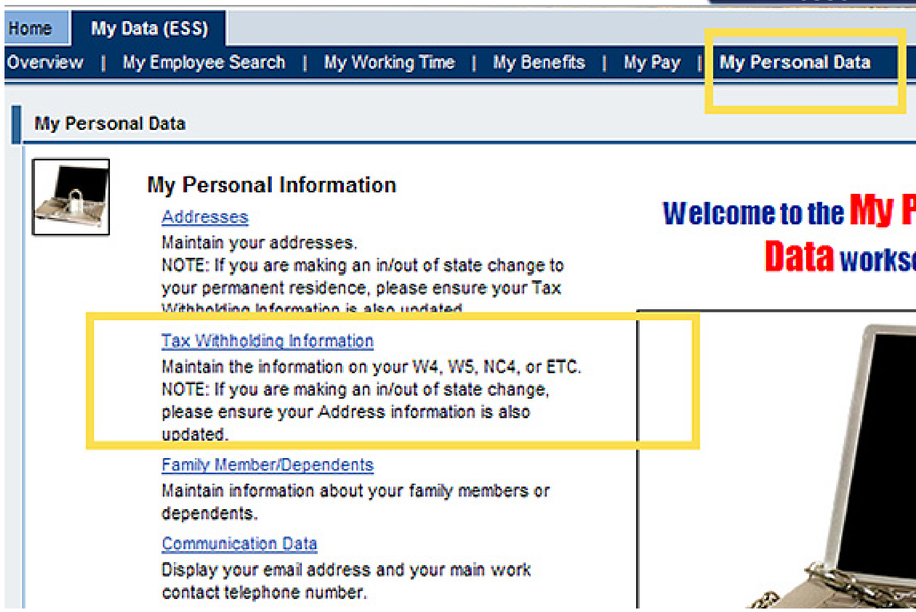
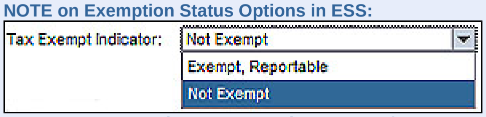
Tax Withholding Information

First, you would go to **My Personal Data** and then click **Tax Withholding Information**.



NOTE on Exemption Status Options in ESS:



In ESS, you may select an exemption status of NOT EXEMPT or EXEMPT, REPORTABLE. If your exemption status should be EXEMPT, NOT REPORTABLE or EXEMPT, PARTIALLY REPORTABLE, contact BEST Shared Services to process either of these options.

REVIEW

<<BACK

NEXT>>

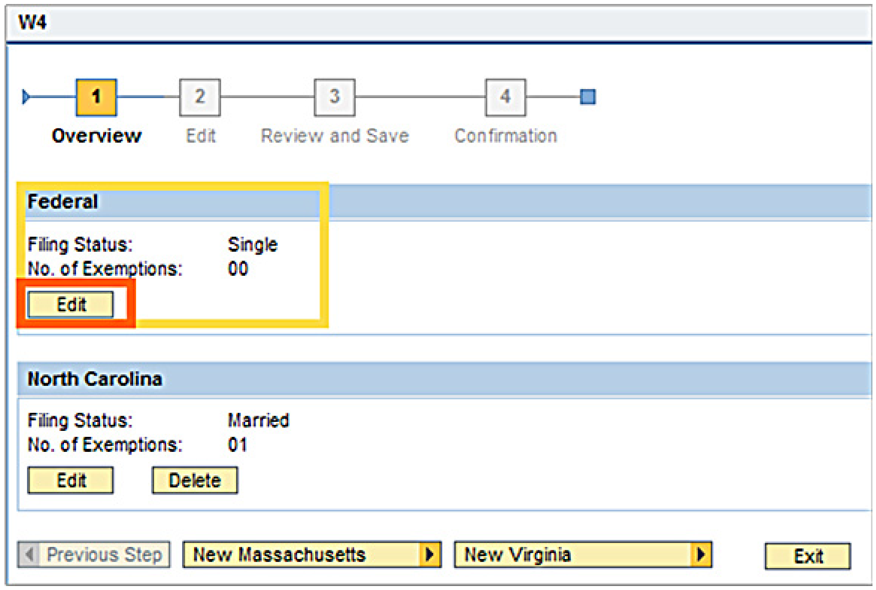
The W-4 screen displays next.

In this **example**, the employee's Federal **Filing Status** is currently Single, and the **number of exemptions** is **zero**.

For this example, you will change it to:

- Filing Status: **Married**
- No. of Exemptions: **01**

Click Edit above.



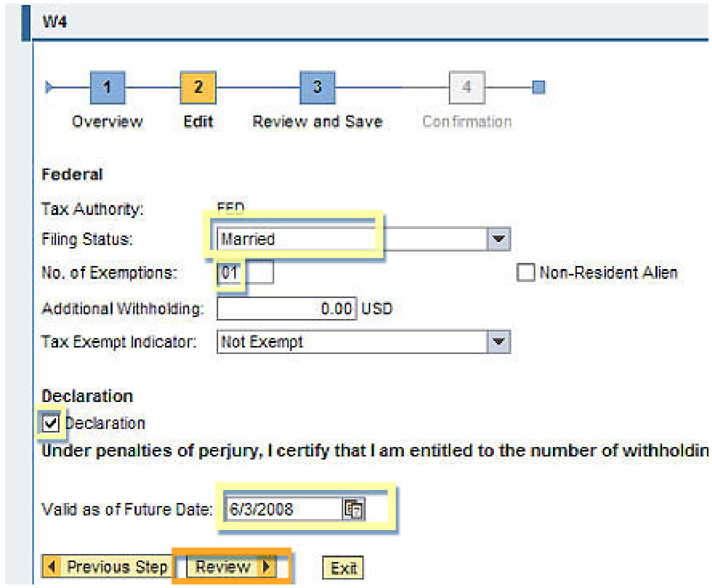
Tax Withholding Information

For the Federal withholding, you would:

- Click the **Filing Status** down arrow and **select Married**
- Change the **number of exemptions** to **01**
- Click the **Declaration** box

For this example, the information has already been entered.

> **NOTE:**
> **The system displays the effective date in the VALID AS OF FUTURE DATE field to allow for a seven-day processing time frame. In this example, we made the change on 5/27/08 so the effective date displays as 6/3/2008. You may also select a later effective date such as the first day of the following month using the calendar icon.**

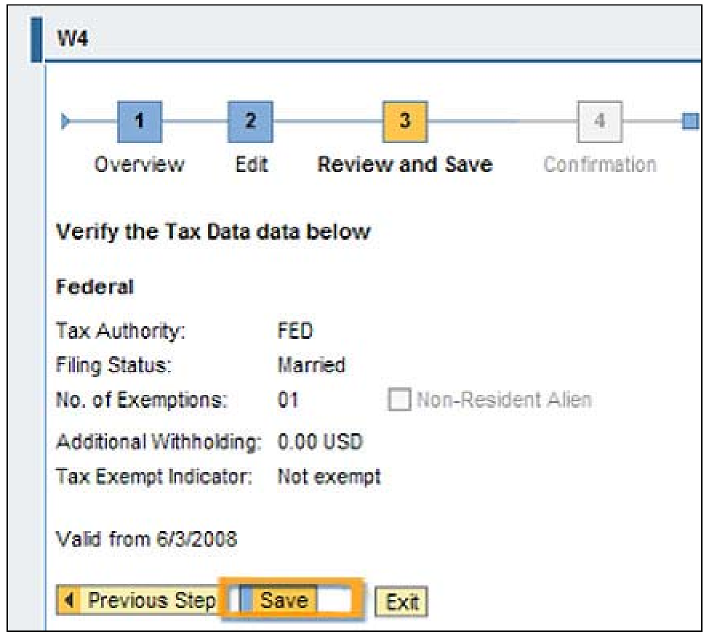


Now click Review, the first step in saving the changes.

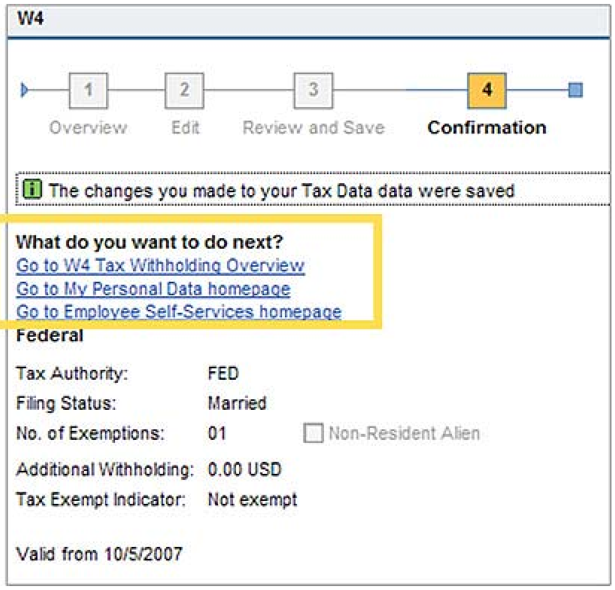
Tax Withholding Information

You would review the information to make sure it is correct.

Now click Save.



A **Confirmation** page would display, and you could choose to go to other areas in Employee Self Service or exit BEACON by closing the window.



BEACON North Carolina Office of the State Controller

Home | Menu | Exit Employee Self-Service Overview

Knowledge Check Lesson 2

To make sure your changes become effective in My Personal Data, it is very important to make sure you follow the process to what stage?

- [ ] Overview
- [ ] Edit
- [ ] Review & Save
- [ ] Confirmation

Submit Reset

Using your mouse, select the correct answer, then click the Submit button.

REVIEW <<BACK NEXT>>

If you have changed banks, where should you go to make changes to your banking information?

- [ ] My Pay
- [ ] My Personal Data

Submit Reset

Using your mouse, select the correct answer, then click the Submit button.

REVIEW <<BACK NEXT>>

You have completed the **My Personal Data** lesson. You should have learned how to:

- Go to the **My Personal Data** section of ESS
- Maintain your **addresses**, **bank** information, and **family** member data in ESS
- Maintain your **W4 tax withholding** information

Click the **NEXT** button below to continue to the next lesson**.**

REVIEW

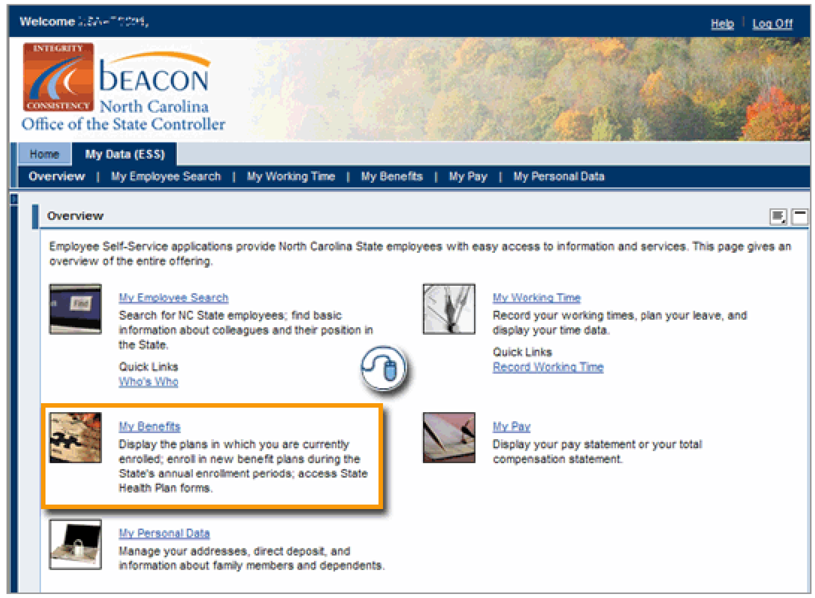
<<BACK NEXT>>

When you complete the **My Benefits** lesson, you should be able to:

- Go to the My Benefits section of ESS
- Display benefits plans
- Make necessary changes in selected benefits plans
- Access State Health Plan and related forms

Access ESS by clicking the **My Data (ESS)** tab, just as you did when performing an employee search.

Then click on **My Benefits** section.

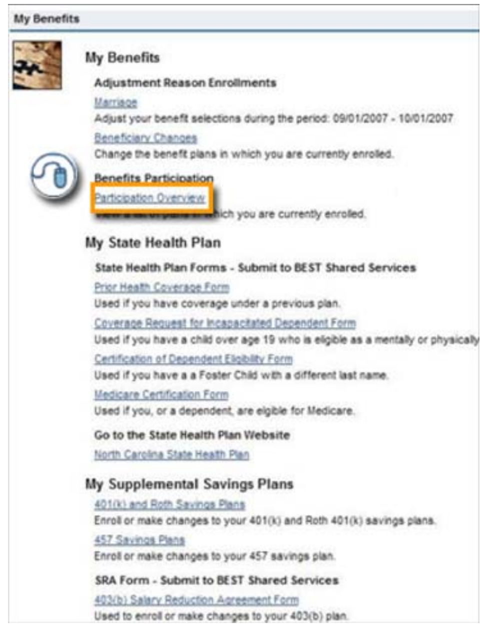


On the Overview page, click My Benefits.

The **My Benefits** page displays.

From this page you can access a variety of links to view benefits data or to make changes to your benefits information.

Under Benefits Participation, click Participation Overview to see the plans in which you are enrolled.



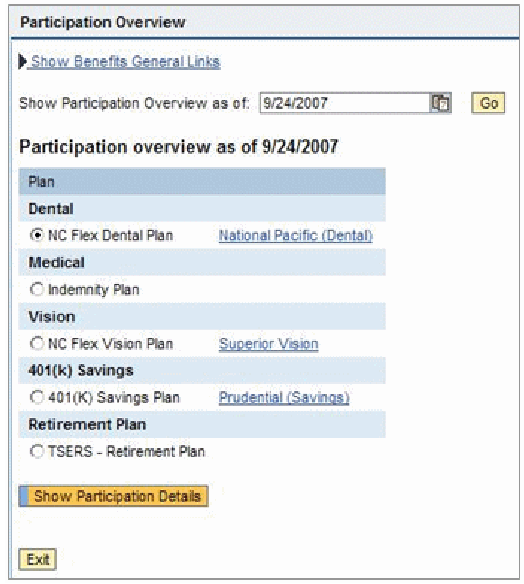
REVIEW

<<BACK

NEXT>>

A list of the Statewide plans that you are currently enrolled in display, similar to the example shown on the right.

The employee for this example is enrolled in all the plans listed, not just the one with the button selected.

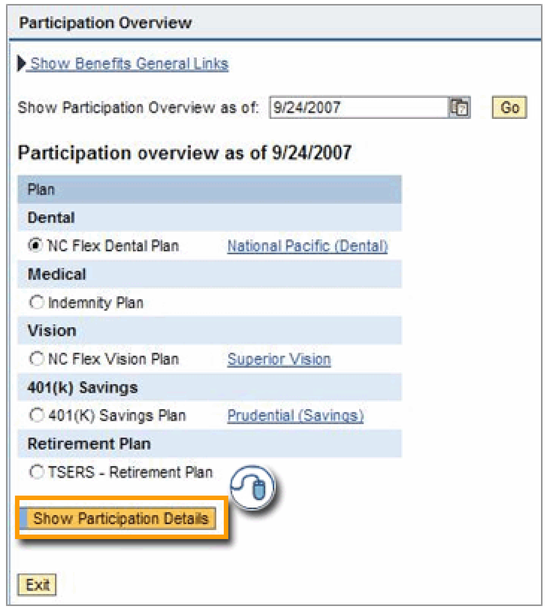


You are now viewing another employee's Participation Overview screen. This is an older version of the screen layout but contains the same basic sections and functions as the current version.

To view details of any plan, you would click the button to the left of the plan and then click the Show Participation Details button.

For this training example:

Select the button next to NC Flex Dental Plan.

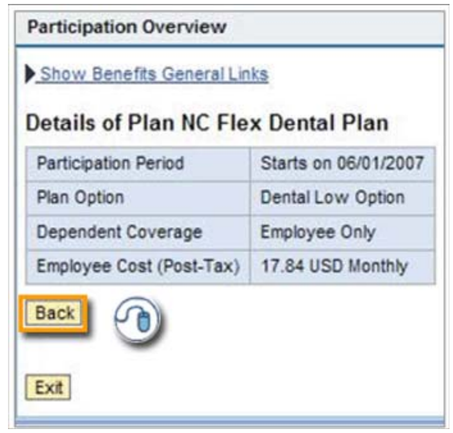


For this training example:

Now click Show Participation Details.

The details display, including enrollment date, plan costs, whether the employee is covered, or if the employee and dependents are covered.

Click the Back button to return to the list of benefits.

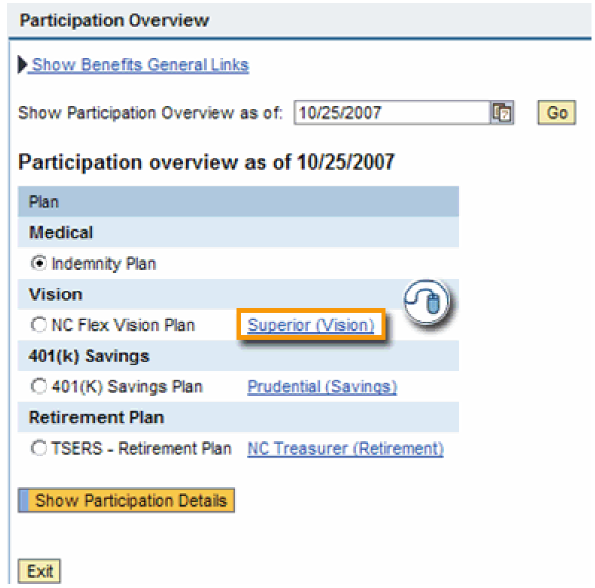


REVIEW

<<BACK

NEXT>>

To learn more about a benefit, click the link beside it.



For this example, click the link next to NC Flex Vision Plan to display the related website.

Using ESS, you can make **changes to your benefits during the following times**:

- When you first become eligible, such as when you are **hired**. You must enroll within 30 days of your hire date or eligibility date.

- During the State-defined **annual enrollment** periods.

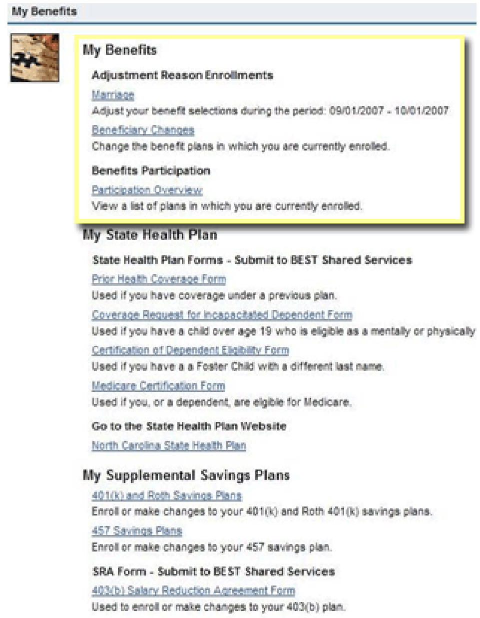
- When you experience a **life-changing event**, such as marriage, divorce, birth of a child, or when a spouse's job changes. You must change your benefits within 30 days of the life event.

If you experience one of the **Life Changing Events**, you **must notify your HR office** before going to this Employee Self Service area to make the changes. The HR representative will enter some information into the system that will activate the links that you need when you go in to make your changes.

After they activate the links, you'll find them on your **My Benefits** page under the **Adjustment Reason Enrollments** heading as shown here.

The links will be **available** to you for **only 30 days:**

- from the **Life Event**
- from your **Hiring Date**
- during an **Annual Open Enrollment** period



The next page provides an overview of the process of changing benefits as a result of a **life event**. Remember, the changes need to be made **within 30 days** of a life event.

In this example, James, an employee who just returned from his honeymoon, wants to change his State Health Plan coverage from single to family medical coverage.

1 **Within 30 days of his marriage date:**

James
a newlywed

- **Contacts Agency HR**
- Provides **documentation** (marriage certificate) to Agency HR

1 **Within 30 days of his marriage date:**

James
a newlywed

- **Contacts Agency HR**
- Provides **documentation** (marriage certificate) to Agency HR

2

Kay
Agency HR

- Verifies documents
- **Creates adjustment reason**

1 **Within 30 days of his marriage date:**

James
a newlywed

- **Contacts Agency HR**
- Provides **documentation** (marriage certificate) to Agency HR

2

Kay
Agency HR

- Verifies documents
- **Creates adjustment reason**

3 **Within 30 days of his marriage date:**

James
a newlywed

- **Uses ESS** to make the appropriate changes to benefits

  OR
- Completes the appropriate **paper** enrollment **forms** and sends them to **BEST Shared Services**

1 **Within 30 days of his marriage date:**

James
a newlywed

- **Contacts Agency HR**
- Provides **documentation** (marriage certificate) to Agency HR

2

Kay
Agency HR

- Verifies documents
- **Creates adjustment reason**

3 **Within 30 days of his marriage date:**

James
a newlywed

- **Uses ESS** to make the appropriate changes to benefits

  OR

- Completes the appropriate **paper** enrollment **forms** and sends them to **BEST Shared Services**

4

Mary, Benefits Administrator

- If an employee does **not** have access to ESS, manually changes the employee's enrollment in benefits plans.

NOTE:

- **Contact** your **HR representative as soon as possible** about the benefits changes you want to make as a result of a life event -- the earlier, the better.
- During **annual enrollment periods**, you must make any necessary changes within the enrollment dates stated on your **My Benefits** page in ESS.

A variety of forms may be required to complete your enrollment.

If you need to complete a form:

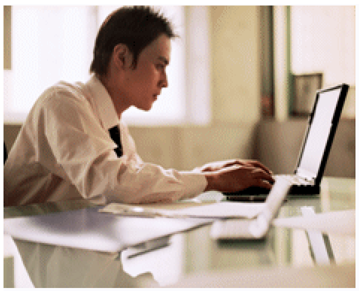
- Print the form
- Manually complete it.
- Submit it to BEST Shared Services or your Benefits Administrator for processing. Contact information for BEST Shared Services is found in Lesson 5, Finding Help, in this course.

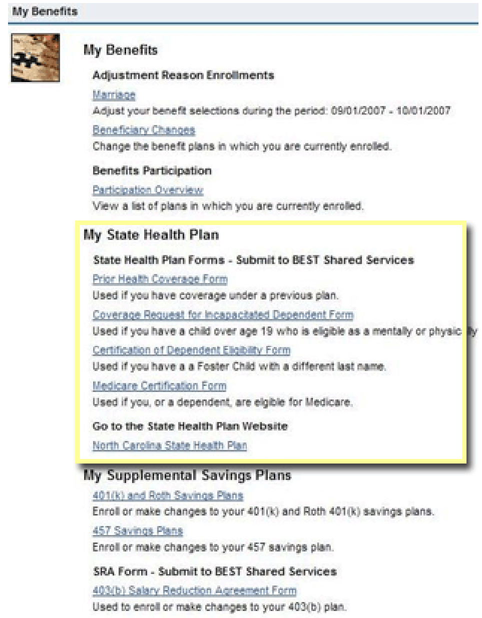
The forms include:

- Prior Health Coverage Form
- Coverage Request for Incapacitated Dependent Form
- Certification of Dependent Eligibility Form
- Medicare Certification Form
- Dental Dependent Certification

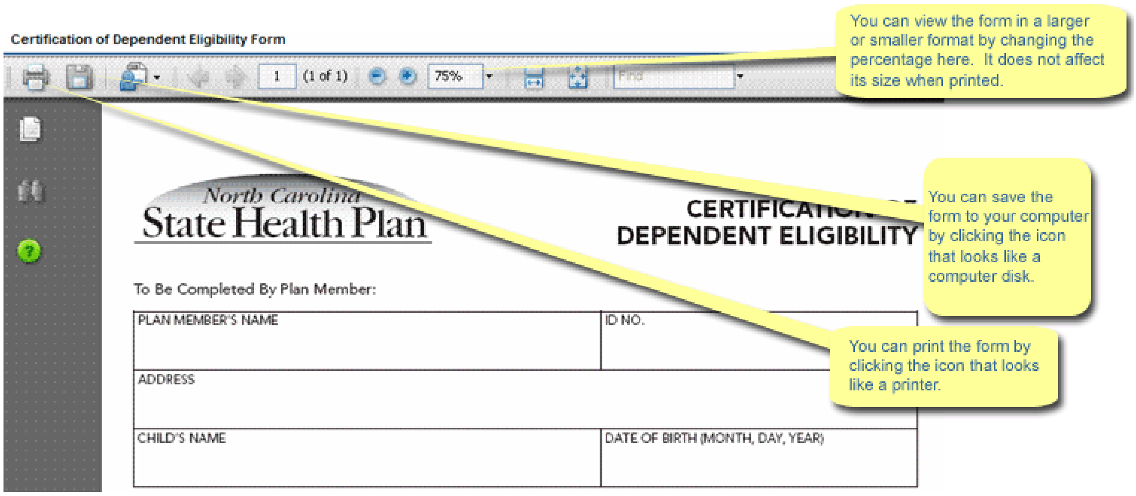
To find the forms, go to the **My Benefits** page.

The State Health Plan Forms are listed under the **My State Health Plan** heading.



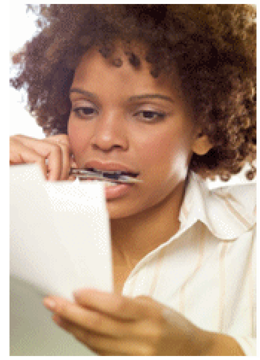


Sample Form

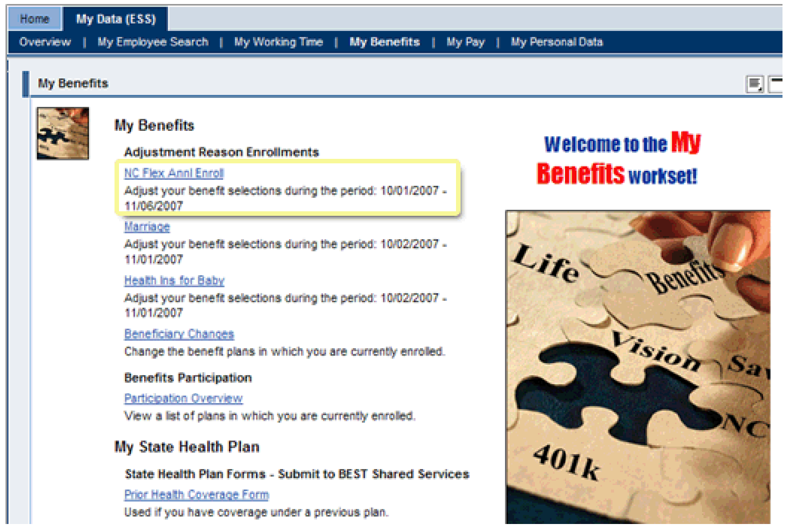

Certification of Dependent Eligibility Form
1
(1 of 1)
75%
North Carolina State Health Plan
CERTIFICATION OF DEPENDENT ELIGIBILITY
To Be Completed By Plan Member:
PLAN MEMBER'S NAME
ID NO.
ADDRESS
CHILD'S NAME
DATE OF BIRTH (MONTH, DAY, YEAR)
You can view the form in a larger or smaller format by changing the percentage here. It does not affect its size when printed.
You can save the form to your computer by clicking the icon that looks like a computer disk.
You can print the form by clicking the icon that looks like a printer.

You will now find out how to **enroll in a benefits plan**.

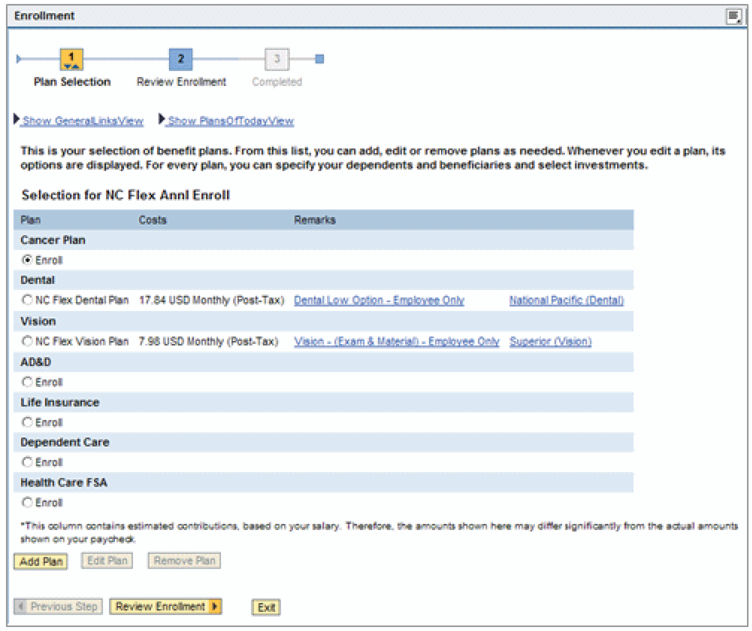
In this example, employee Alexandra Smith decides to take advantage of the life insurance benefit offered.



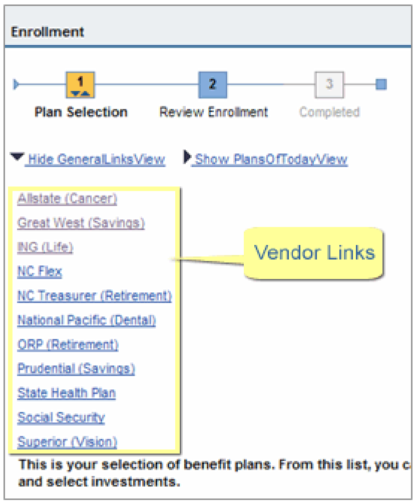
In this example Alexandra is making the change during an **annual enrollment** period, so the **NC Flex Annl Enroll** link displays under the **Adjustment Reason Enrollments** heading in **My Benefits**.

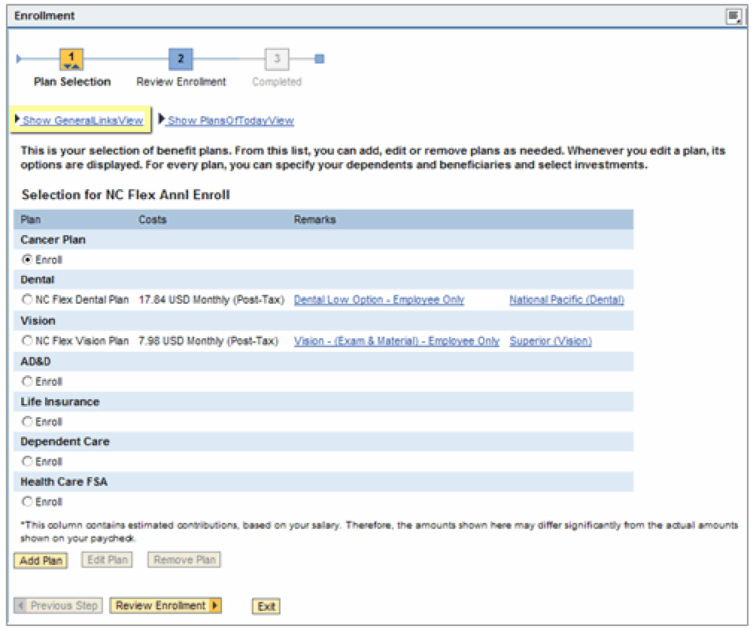


When Alexandra clicks the **NC Flex Annl Enroll** link, the Enrollment screen displays.

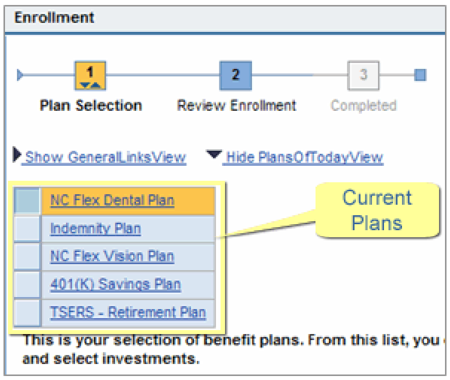


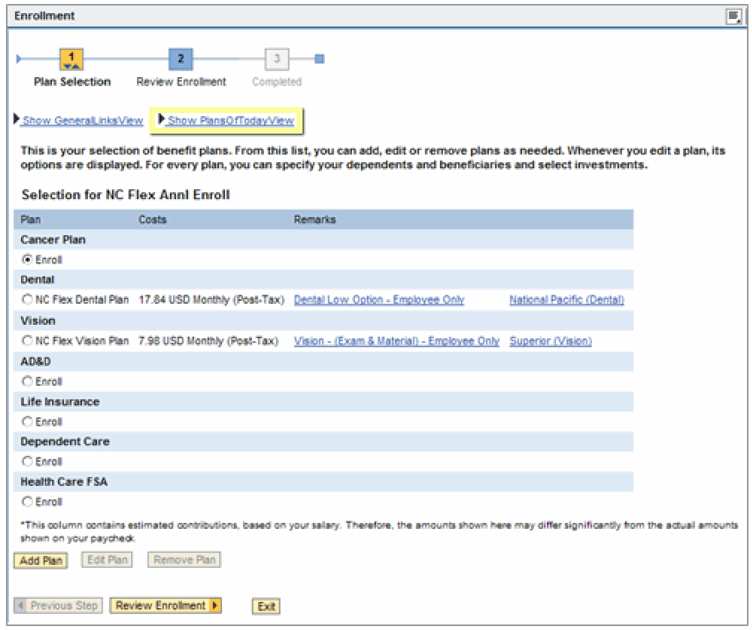
On the Enrollment screen, if she clicks the **Show GeneralLinksView**, a list of benefits-related websites displays, including vendor links.





If Alexandra clicks the **ShowPlansOfTodayView** link, a list of benefits she is currently enrolled in displays.

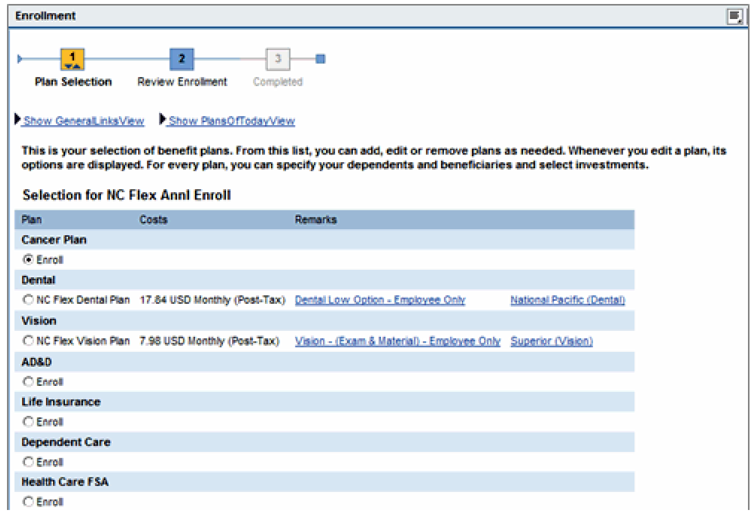


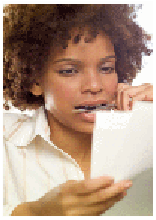


The Enrollment page also shows the following plans:

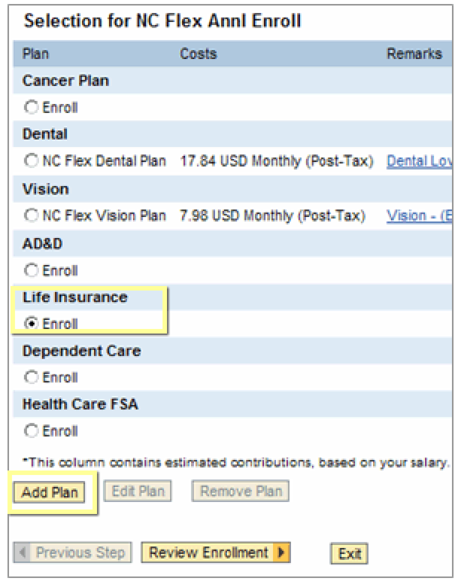
- those that Alexandra **can enroll in** during the open enrollment period.
- those that she is enrolled in and **can now make changes to** during the open enrollment period. Those plans display the monthly costs.

Note: Alexandra's medical plans are not displayed here because during this enrollment period, she cannot make changes to these plans.





So Alexandra, who wants to enroll in a life insurance plan, clicks the **Enroll button** under Life Insurance and then clicks **Add Plan**.

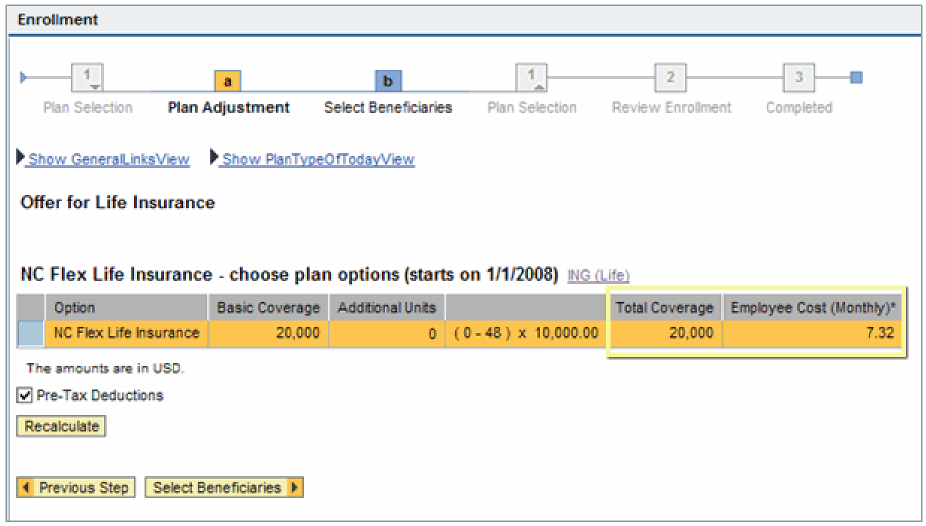


REVIEW
<<BACK
NEXT>>

Details of the plan display. In this example, it shows that she can purchase $20,000 of life insurance for $7.32 per month.

NOTE: As with the other benefits costs listed in ESS, the Employee Cost (Monthly) column contains estimated contributions, and amounts shown here may differ slightly from the actual amounts shown on your paycheck.

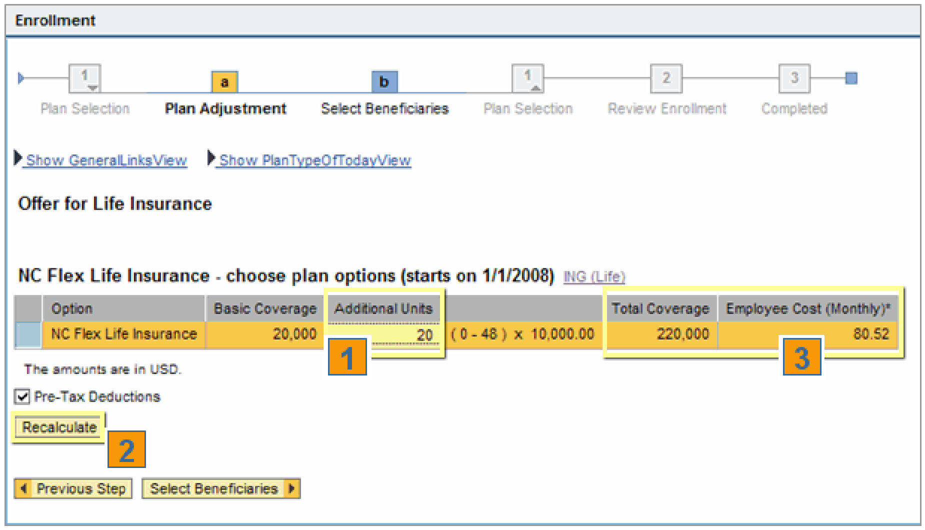
Contact your agency Benefits Administrator if you have questions.



REVIEW
<<BACK
NEXT>>

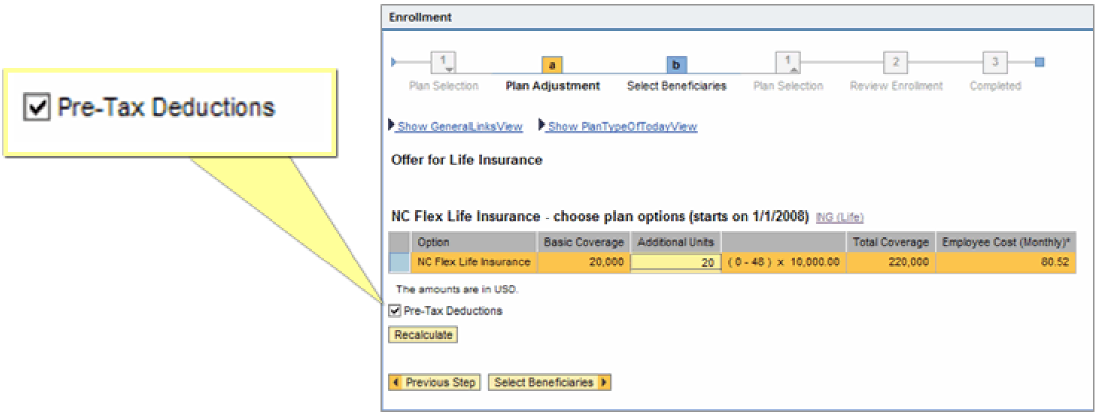
Alexandra wants to purchase more life insurance. To do this, she:

1. Clicks inside the Additional Units space and types the number 20.
2. Clicks the Recalculate button.
3. Reviews her total coverage and new monthly cost in Employee Cost.



She continues to try different numbers until she comes up with coverage that will protect her family at a cost she can afford.

During the enrollment process, a **Pre-Tax Deduction** checkbox displays, already checked. A pre-tax deduction is a deduction to gross wages that reduces taxable wages for the employee. Typically, employees leave it checked. If you have any questions, please contact your Benefits Administrator.

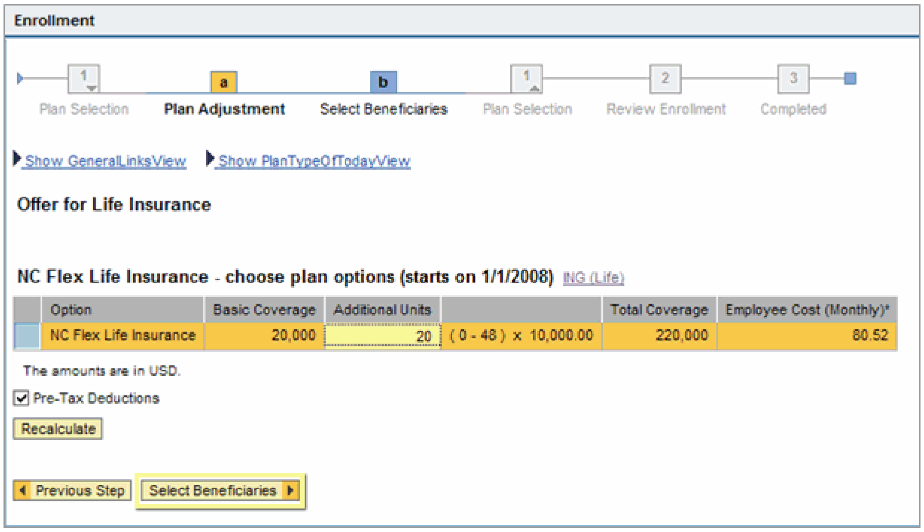


REVIEW

<<BACK

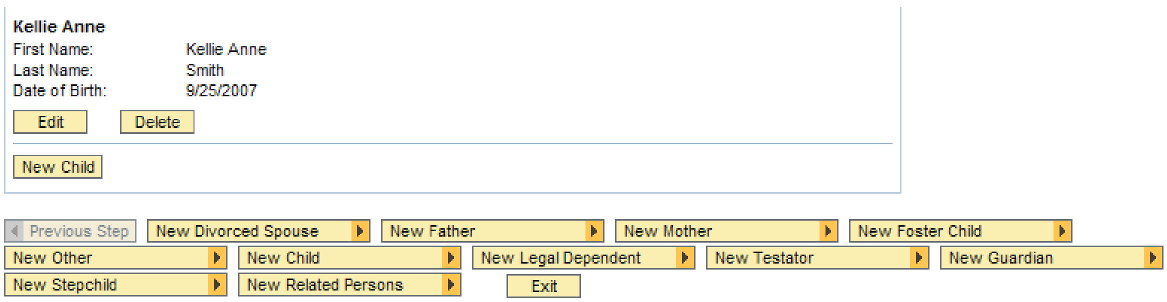
NEXT>>

The next step is to name beneficiaries by clicking **Select Beneficiaries**.



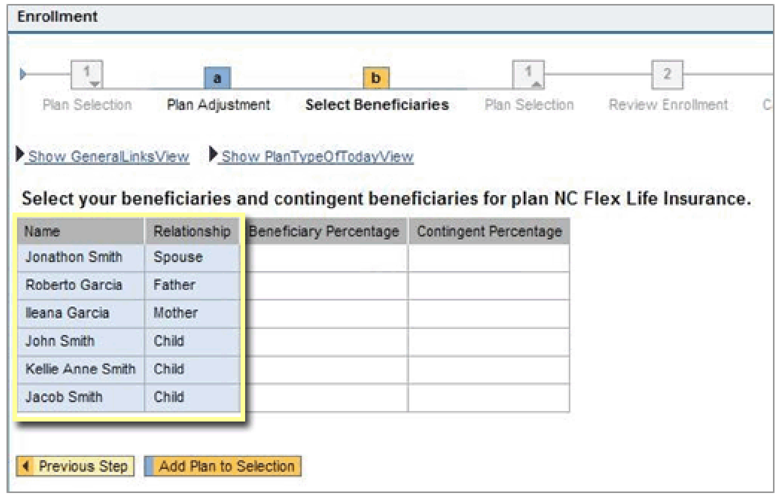
Note: The **Family Members/Dependents screen** pictured below is part of **My Personal Data** that you explored in the last lesson to change an address, bank account, family member data, and tax withholding information. You can use the **Family Member/Dependents link** in **My Personal Data** to enter or change information on your family members, dependents, and emergency contacts.

On this screen, you can see where Alexandra had entered information on her daughter, Kellie Anne, as a dependent.



The names of the employee's **beneficiaries will already be listed** in this form.

The names **originate from** the information she provided in the **My Personal Data** section of ESS.



Enrollment

Plan Selection | Plan Adjustment | Select Beneficiaries | Plan Selection | Review Enrollment

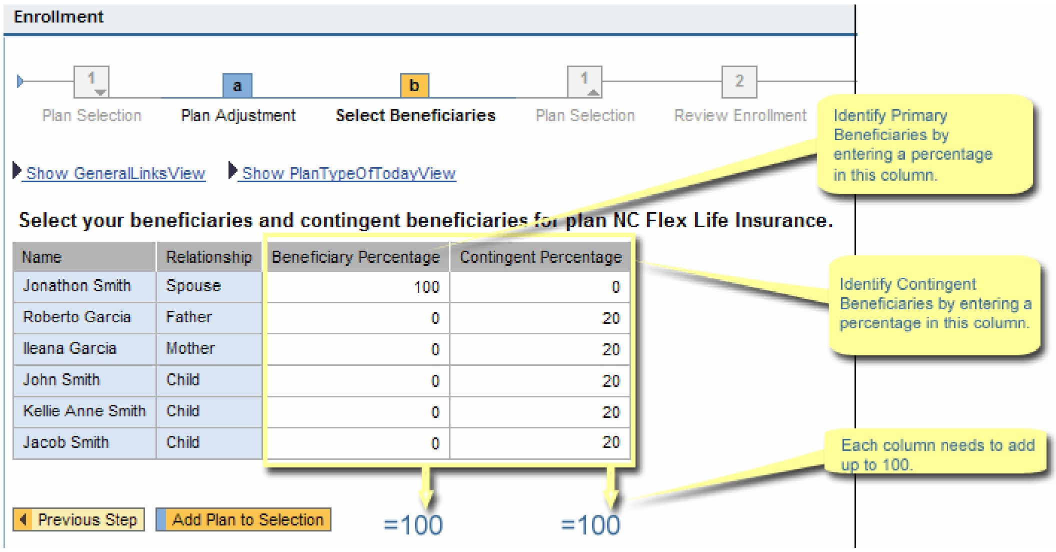
Show GeneralLinksView   Show PlanTypeOfTodayView

Select your beneficiaries and contingent beneficiaries for plan NC Flex Life Insurance.

Name	Relationship	Beneficiary Percentage	Contingent Percentage
Jonathon Smith	Spouse		
Roberto Garcia	Father		
Ileana Garcia	Mother		
John Smith	Child		
Kellie Anne Smith	Child		
Jacob Smith	Child		

Previous Step   Add Plan to Selection

Continuing on the Enrollment screen, Alexandra selects beneficiaries by clicking in the **Beneficiary and Contingent Percentage columns** and **entering the percentage amounts** in the appropriate column.



If **more than one primary beneficiary** is designated, payment will be made in the percentages designated, or in equal shares, to the primary beneficiaries who survive you.

A **contingent beneficiary** is an individual who is entitled to receive the benefits of your insurance policy if the primary beneficiary dies.

If the primary beneficiaries do not survive you, payment will be made in the percentages designated or in equal shares to the contingent beneficiaries who survive you.

Tip: The numbers in each percentage column must add up to 100%.

Alexandra has completed the form so that in the event of her death, her husband Jonathon will receive 100% of the life insurance proceeds.

If Jonathon is not alive at the time of her death, her contingent beneficiaries, her father, her mother, and three children will each receive 20% of the life insurance proceeds.

NOTE: This is only an example of a distribution of proceeds. All families have different needs. If you have questions about beneficiary designations, please contact your HR representative.

Enrollment

1 Plan Selection | a Plan Adjustment | b Select Beneficiaries | 1 Plan Selection | 2 Review Enrollment | C

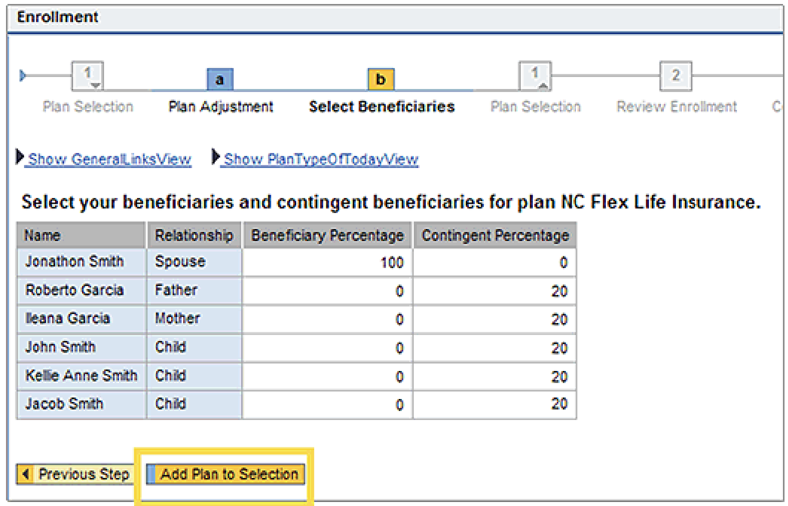
Show GeneralLinksView   Show PlanTypeOfTodayView

Select your beneficiaries and contingent beneficiaries for plan NC Flex Life Insurance.

Name	Relationship	Beneficiary Percentage	Contingent Percentage
Jonathon Smith	Spouse	100	0
Roberto Garcia	Father	0	20
Ileana Garcia	Mother	0	20
John Smith	Child	0	20
Kellie Anne Smith	Child	0	20
Jacob Smith	Child	0	20

Previous Step   Add Plan to Selection

When Alexandra completes the beneficiary information, she clicks **Add Plan to Selection**.



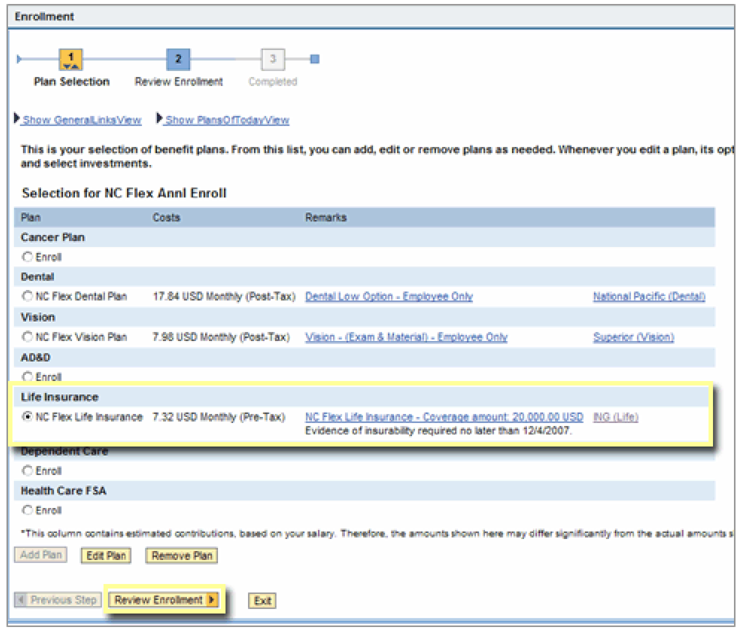
Name	Relationship	Beneficiary Percentage	Contingent Percentage
Jonathon Smith	Spouse	100	0
Roberto Garcia	Father	0	20
Ileana Garcia	Mother	0	20
John Smith	Child	0	20
Kellie Anne Smith	Child	0	20
Jacob Smith	Child	0	20

The first enrollment screen displays again.

This time, it shows the Life Insurance plan that was added.

However, Alexandra has **not yet completed** the process for adding the Life Insurance plan.

She **must click Review Enrollment** to continue the change process.

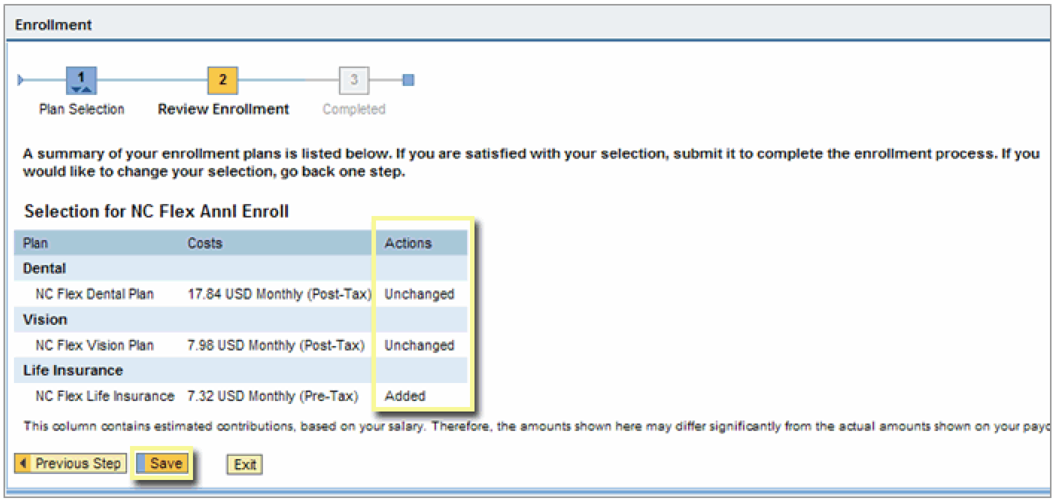


REVIEW

<<BACK

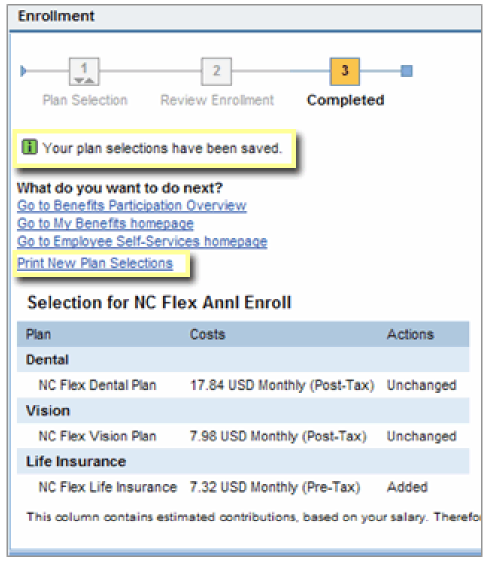
NEXT>>

In Step 2, Review Enrollment, she needs to review the benefit plans. Note the **Actions column** showing the status of the plans. She is satisfied with them, so she clicks **Save**.



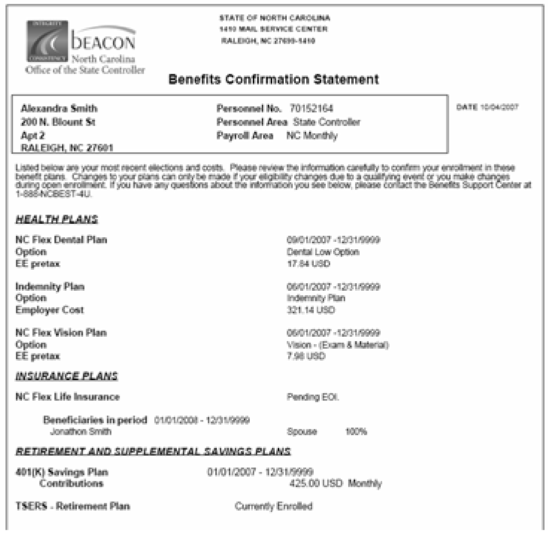
The Step 3, Completed, page **displays the plan selections** that were saved.

To display or print the new plan confirmation statement, click the link: **Print New Plan Selections**.



When you click the **Print New Plan** Selections link, a **Benefits Confirmation Statement** displays.

If the system gives you an opportunity to print a copy for your records, you should do so.



STATE OF NORTH CAROLINA
1410 MAIL SERVICE CENTER
RALEIGH, NC 27699-1410

BEACON North Carolina Office of the State Controller

Benefits Confirmation Statement

Alexandra Smith	**Personnel No.** 70152164
200 N. Blount St	**Personnel Area** State Controller
Apt 2	**Payroll Area** NC Monthly
RALEIGH, NC 27601	

DATE 10/04/2007

Listed below are your most recent elections and costs. Please review the information carefully to confirm your enrollment in these benefit plans. Changes to your plans can only be made if your eligibility changes due to a qualifying event or you make changes during open enrollment. If you have any questions about the information you see below, please contact the Benefits Support Center at 1-888-NCBEST-4U.

HEALTH PLANS

NC Flex Dental Plan	09/01/2007 -12/31/9999
Option	Dental Low Option
EE pretax	17.84 USD
Indemnity Plan	06/01/2007 -12/31/9999
Option	Indemnity Plan
Employer Cost	321.14 USD
NC Flex Vision Plan	06/01/2007 -12/31/9999
Option	Vision - (Exam & Material)
EE pretax	7.98 USD

INSURANCE PLANS

NC Flex Life Insurance Pending EOI.

Beneficiaries in period 01/01/2008 - 12/31/9999
Jonathon Smith Spouse 100%

RETIREMENT AND SUPPLEMENTAL SAVINGS PLANS

401(K) Savings Plan 01/01/2007 - 12/31/9999
Contributions 425.00 USD Monthly

TSERS - Retirement Plan Currently Enrolled

View Larger Image

After viewing form, click X to close form window & return to this page.

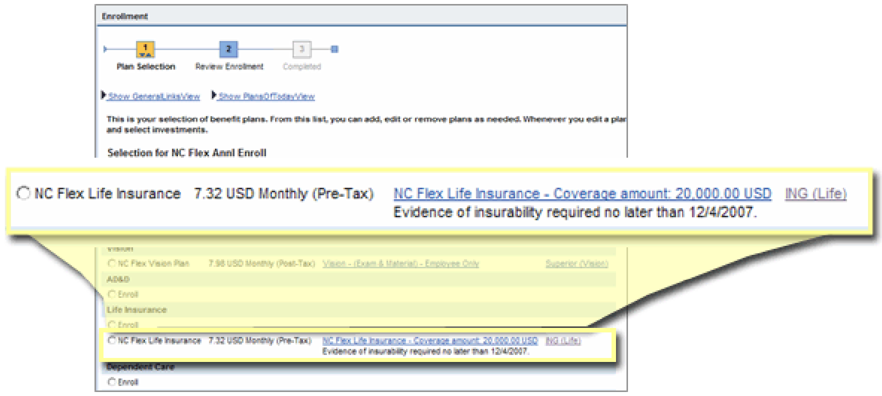
REVIEW

<<BACK

NEXT>>

When Alexandra exited out of the system and returned, she viewed her benefits list again and noticed a note below the coverage amount that said, **Evidence of Insurability (EOI)** required no later than 12/4/2007.

If you see such a note, you need to click on the link to the insurance company (ING Life in this example) and you will be redirected to the insurance company's EOI form. Complete the vendor's medical questions. It is important to note that **your enrollment may be suspended until you complete the EOI questions**.



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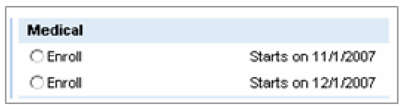
Notes regarding Medical Plan selection:

- **Employees are not automatically enrolled in a medical plan.**
  If you want to enroll in a medical plan, you must select a plan during the enrollment process. Employees are not automatically enrolled, regardless of cost or coverage.
- **Pick a date.**
  During the enrollment process, you will need to choose from two start dates. You should be sure there is no uninsured time between any previous coverage and your new coverage.



True or False

You need to add a new family member under **Family Member/Dependents** in **My Personal Data** in ESS **before** you can add the family member as a beneficiary in **My Benefits**.

☐ True

☐ False

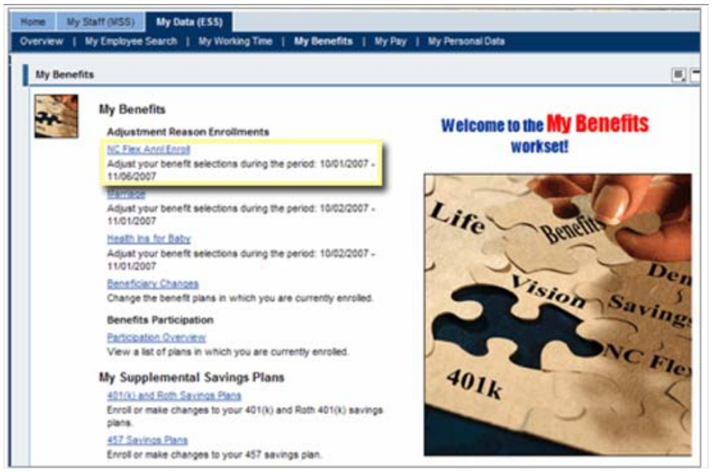
Submit Reset

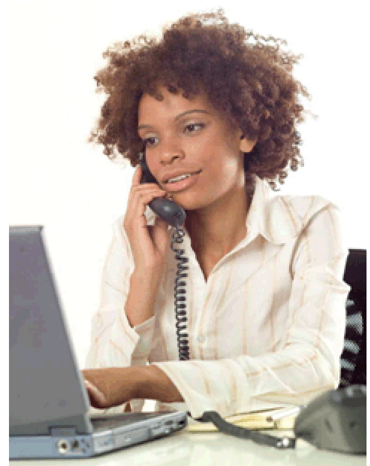
Using your mouse, select the correct answer, then click the Submit button.

Next, you will find out how to **terminate a benefits plan**.

During an annual enrollment period, Alexandra decided to terminate her employee dental plan because her husband is adding her to his plan.

Alexandra selects the **My Data (ESS)** tab and then **My Benefits**.
She then selects the **NC Flex Annl Enroll** link.

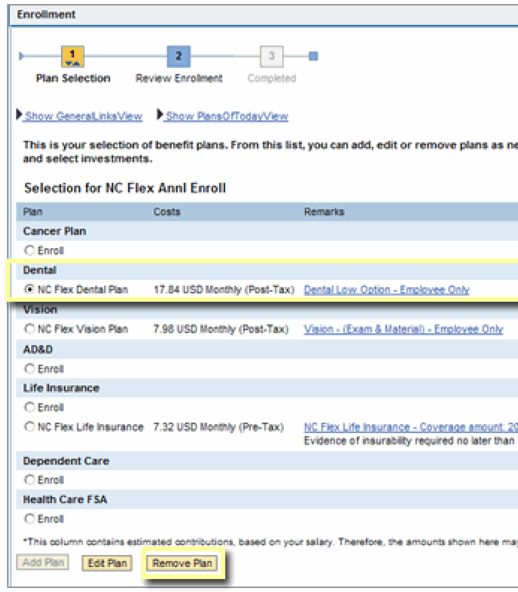




On the Enrollment screen, Step 1, Plan Selection, she selects the **button beside the NC Flex Dental Plan**.

Two buttons **Edit Plan** and **Remove Plan** display at the bottom of the page.

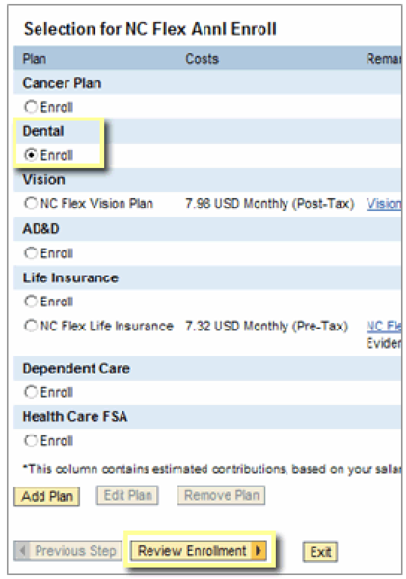
Alexandra clicks the **Remove Plan** button.



The plan is no longer displayed as a current enrollment.

However, Alexandra has **not yet completed** the task of **removing the dental plan**.

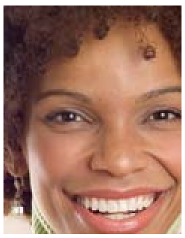
Next, she must next click **Review Enrollment**.

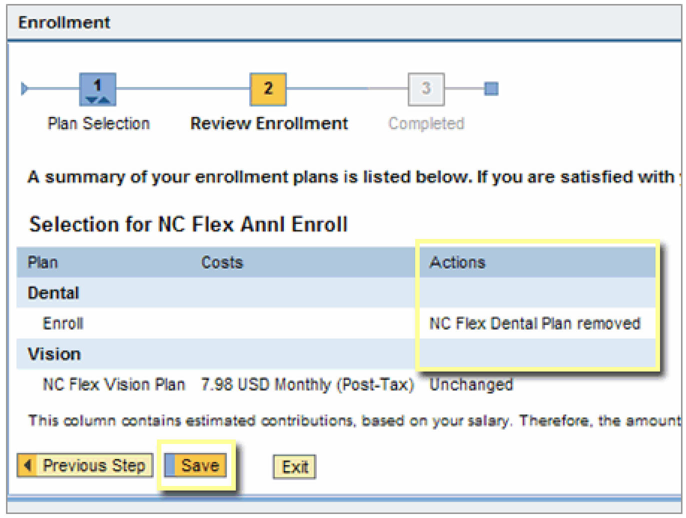


The **Review Enrollment** page displays.

Alexandra notes that the **Actions column** indicates the dental plan was removed.

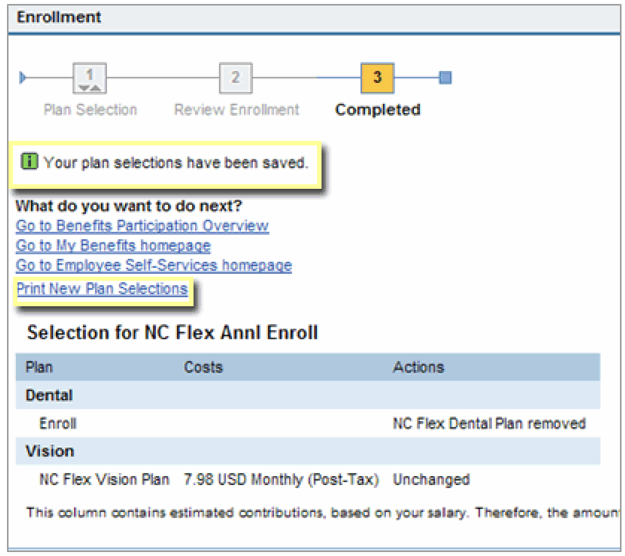
However, she knows she must **click Save** to continue the update process.



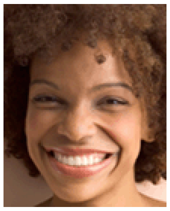


The **Completed** page confirms the plan selections were saved.

Alexandra clicks **Print New Plan Selections**.



Her new **Benefits Confirmation Statement** displays. She **prints a copy** for her records.



BEACON North Carolina Office of the State Controller

STATE OF NORTH CAROLINA
1410 MAIL SERVICE CENTER
RALEIGH, NC 27699-1410

Benefits Confirmation Statement

Alexandra Smith	Personnel No. 70152164	DATE 10/06/2007
200 N. Blount St	Personnel Area State Controller	
Apt 2	Payroll Area NC Monthly	
RALEIGH, NC 27601		

Listed below are your most recent elections and costs. Please review the information carefully to confirm your enrollment in these benefit plans. Changes to your plans can only be made if your eligibility changes due to a qualifying event or you make changes during open enrollment. If you have any questions about the information you see below, please contact the Benefits Support Center at 1-888-NCBEST-4U.

HEALTH PLANS

Indemnity Plan	06/01/2007 -12/31/9999
Option	Indemnity Plan
Employer Cost	321.14 USD
NC Flex Vision Plan	06/01/2007 -12/31/9999
Option	Vision - (Exam & Material)
EE pretax	7.98 USD

INSURANCE PLANS

NC Flex Life Insurance   Pending EOI.

Beneficiaries in period 01/01/2006 - 12/31/9999
Jonathon Smith   Spouse   100%

RETIREMENT AND SUPPLEMENTAL SAVINGS PLANS

401(K) Savings Plan   01/01/2007 - 12/31/9999
Contributions   425.00 USD Monthly

TSERS - Retirement Plan   Currently Enrolled

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Knowledge Check

True or False

If the system gives you the option of printing a confirmation of your change in benefits for your personal records, you should do so.

- [ ] True
- [ ] False

Submit Reset

Using your mouse, select the correct answer, then click the Submit button.

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You have now completed Lesson 3, My Benefits.
You should have learned how to:

- Go to the My Benefits section of ESS
- Display benefits plans
- Make necessary benefit plan changes during annual enrollment periods
- Access State Health Plan forms

Click the **NEXT** button below to continue to the next lesson.

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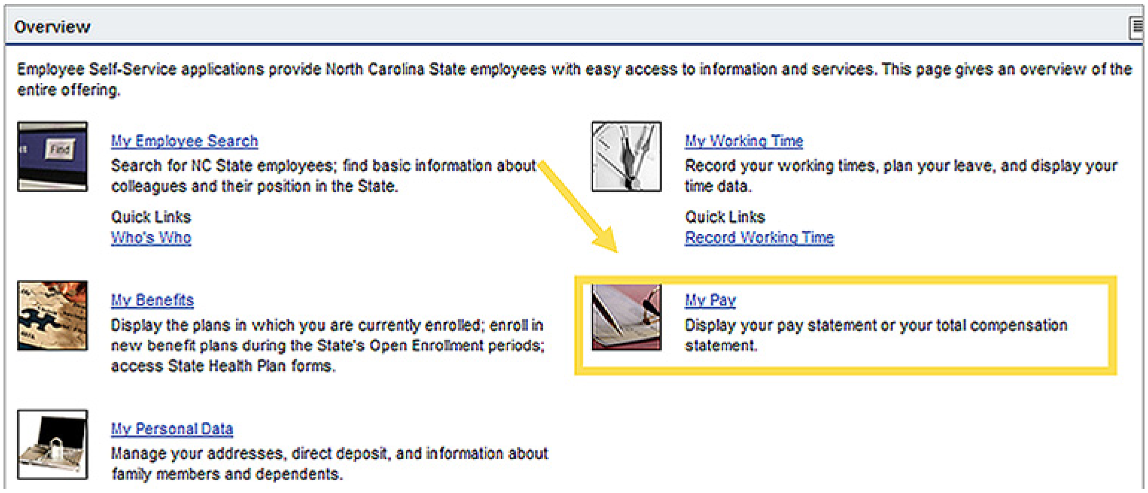
Lesson 4: My Pay

When you complete the **My Pay** lesson, you should be able to:

- Display your salary information
- Display total compensation data
- Print your pay stub

To go to **My Pay**, you would click the **My Data (ESS)** tab.

Then you would click the **My Pay** link.



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From this page, you can view your **Pay Statements** and your **Total Compensation Statements** that include total salary information plus the value, in employer costs, of your benefit plans.

To view your pay statements, you would select **Pay Statement.**

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To **print** your statement, you would click on the **printer icon** at the top of the screen.

Pay Period: 09/01/2007 through 09/30/2007
Check Date: 09/28/2007

Name: EMILEE ORGAIN
Organization: 0701-State Treasurer

Personnel No: 70223240

	Earnings		Deductions		Taxes		Net Pay
Current:	2,096.75	-	135.81	-	212.64	=	1,748.30
YTD:	18,870.75	-	1,222.27	-	3,793.78	=	13,854.70

Deductions	Current	YTD
# Parking DOA PT	10.00	90.00
# TSERS EE	125.81	1,132.27
Total Deductions	135.81	1,222.27

Earnings	Hours	Current	YTD
Regular Salary		2,096.75	18,870.75
Total Earnings		2,096.75	18,870.75

Tax Authority	Tax Type	Status	EXMT	AddlAmt	Cur Tax	YTD Tax	Cur Txbl Earn	YTD Txbl Earn
Federal	Withholding					1,495.05	1,960.94	17,648.48
Federal	Social Security				129.38	1,164.41	2,086.75	18,780.75
Federal	Medicare				30.26	272.32	2,086.75	18,780.75
North Carolina	Withholding	Married	04		53.00	862.00	1,960.94	17,648.48
Total Taxes					212.64	3,793.78		

Sample Pay Statement

Payment	Account	Type	Amount
WACHOVIA BANK N.A.	908084*	Checking	1,748.30

Leave Balances as of 10/25/2007

Vacation	54.81	Hours
Sick	56.00	Hours
Holiday	8.00-	Hours
Comp Time	0.00	Hours
Community Service	24.00	Hours

BEACON North Carolina Office of the State Controller

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Employee Self-Service Overview

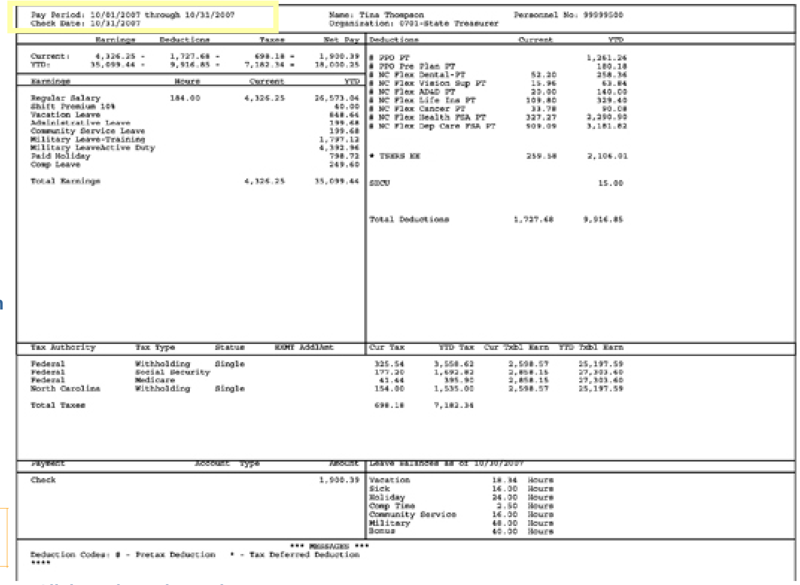
Pay Statements

Lesson 4

The BEACON system will generate pay statements that will look different from the pay statements you have been receiving. Information you can expect to see on the new pay statement includes:

- **Pay Period Beginning and End Dates**
- **Employee Identification Number**
- **Regular Salary**
- **Pre-tax Deductions: deductions that reduce some or all of your taxable earnings as defined by the IRS and individual state laws**
- **Post-tax Deductions: voluntary deductions that have no effect on your taxable earnings**
- **Individualized W4 Withholding Information**
- **Taxes**
- **Net Pay**
- **Accumulated Leave Balances**
- **Important Messages**

Click an item in the list to see it on the statement.



Pay Period: 10/01/2007 through 10/31/2007
Check Date: 10/31/2007

Name: Tina Thompson Personnel No: 99099000
Organization: 0701-State Treasurer

	Earnings	Deductions	Taxes	Net Pay
Current:	4,326.25 -	1,727.68 -	698.18 =	1,900.39
YTD:	35,099.44 -	9,916.85 -	7,182.34 =	18,000.25

Earnings	Hours	Current	YTD
Regular Salary	184.00	4,326.25	26,573.04
Shift Premium 10%			40.00
Vacation Leave			848.44
Administrative Leave			199.48
Community Service Leave			199.68
Military Leave-Training			1,797.12
Military LeaveActive Duty			4,392.96
Paid Holiday			798.72
Comp Leave			249.60
Total Earnings		4,326.25	35,099.44

Deductions	Current	YTD
# PPO PT		1,261.26
# PPO Pre Plan PT		180.18
# NC Flex Dental-PT	52.30	258.36
# NC Flex Vision Sup PT	15.96	63.84
# NC Flex AD&D PT	23.00	140.00
# NC Flex Life Ins PT	109.80	329.40
# NC Flex Cancer PT	33.78	90.08
# NC Flex Health FSA PT	327.27	2,290.90
# NC Flex Dep Care FSA PT	909.09	3,181.82
* TSERS EE	259.58	2,106.01
SECU		15.00
Total Deductions	1,727.68	9,916.85

Tax Authority	Tax Type	Status	EXMT AddlAmt	Cur Tax	YTD Tax	Cur Txbl Earn	YTD Txbl Earn
Federal	Withholding	Single		325.54	3,558.62	2,598.57	25,197.59
Federal	Social Security			177.20	1,692.82	2,858.15	27,303.40
Federal	Medicare			41.44	395.90	2,858.15	27,303.40
North Carolina	Withholding	Single		154.00	1,535.00	2,598.57	25,197.59
Total Taxes				698.18	7,182.34		

Payment	Account	Type	Amount
Check			1,900.39

Leave Balances as of 10/30/2007		
Vacation	18.34	Hours
Sick	16.00	Hours
Holiday	24.00	Hours
Comp Time	2.50	Hours
Community Service	16.00	Hours
Military	48.00	Hours
Bonus	40.00	Hours

*** MESSAGES ***
Deduction Codes: # - Pretax Deduction * - Tax Deferred Deduction
****

Click to view a larger image

REVIEW

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To view **past pay statements**, you would simply click the **Previous** and **Next** arrows as shown.

NOTE: If you are viewing previous pay statements, the leave quotas do not default back to the quota amounts at the time of the statement. Leave balances are always current.

True or False

You can change your benefits deductions by clicking My Pay and then Pay Statement in Employee Self Service (ESS).

- [ ] True
- [ ] False

Submit Reset

REVIEW <<BACK NEXT>>

You have completed the **My Pay** lesson. You should have learned how to:

- Display your salary information
- Display total compensation data
- Print your pay stub

Click the **NEXT** button below to continue to the next lesson.

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When you complete the **Finding Help** lesson, you should be able to:

- Find the support you need in using Employee Self Service

Lesson 5: Finding Help

If you need help using Employee Self Service (ESS) in BEACON, feel free to use these resources:

For general ESS questions and questions about **benefits and pay**, contact your local agency HR benefits representative.

For questions about the **how to use ESS**, contact **BEST** * Shared Services:

- Phone, Raleigh Area: 919-707-0707
- Phone, Statewide: 866-NCBEST4U (866-622-3784)
- E-mail: best@ncosc.net
- Web Site: http://www.ncosc.net/BEST

Also: BEACON University http://www.beacon.nc.gov, Click “Training.” **Job Aids**: http://help.mybeacon.nc.gov/beaconhelp

Tip: Print this page so that you have the information easily available should you ever need it.

***BEST** stands for BEACON Enterprise Support Team

You have now completed the **Finding Help** lesson. You should have learned how to:

- Find the support you need in using Employee Self Service

You have **completed** the **Employee Self Service Overview** course.

You should have learned how to:

- Log on and navigate ESS
- Perform a My Employee Search to find State of NC State employees
- Use My Benefits to display benefits plans, perform annual enrollment, and access State Health plan forms
- Use My Personal Data to maintain your address, bank information, and family member data
- Use My Pay to display salary, display total compensation data, print pay stubs, and maintain tax data
- Find resources to help you answer your ESS-related questions.

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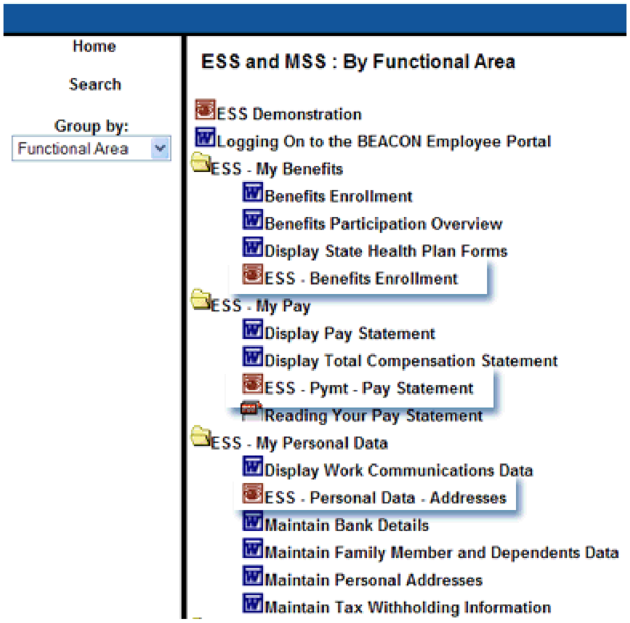
Simulations

Use the following simulations to practice using ESS to monitor your Leave Quotas and record your Working Time. Click the link below to access and launch the simulations in a new window. When you have finished the simulations, close the browser window to return to this screen.

Go to the **ESS and MSS** folder in **BEACON Help** at **http://help.mybeacon.nc.gov/beaconhelp/TOC4.html**

Then, click on the following, as illustrated on the screen on the right:

- ESS My Benefits
  - ESS - Benefits Enrollment
    This is used when an event occurs that makes the employee eligible to enroll or change their benefits plan.
- ESS - My Pay
  - ESS - Pymt - Pay Statement
    Employees can use this service to display their current or past pay statements. The pay statements are displayed in Adobe PDF format and can be printed or saved as a PDF document.
- ESS - My Personal Data
  - ESS - Personal Data - Addresses
    ESS enables employees to perform their own administrative tasks in support of life and work events.



Select **Demonstration** to watch a process being performed or **Interactive** to practice the process yourself.

Note: The Resite Simulation Player is required to view the supplemental simulations. If you cannot view the simulations, you can download the player directly by clicking the link below. You may need assistance from your IT support group to install the file.

Resite Simulation Player

Congratulations!

You have completed the Employee Self Service Overview course.

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EXIT

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Employee Self Service Overview

After completing the course, you may use this menu to go directly to any topics you would like to review. To return to this menu, click the REVIEW button at the bottom of any course screen. If you have not yet completed the full course, click the BACK button below to return to the course.

Note: Set your Screen Resolution to 1024 X 768 and use Full Screen View. [Instructions]

Lesson 1: Getting Started

GO Introduction	GO Logging In	GO Employee Search	GO Logging Off

Lesson 2: My Personal Data

GO Accessing My Personal Data	GO Overview of Functions
GO Changing Your Address	GO Changing Your Work Email & Phone
GO Maintaining or Changing Bank Info	GO Adding Additional Banks
GO Maintaining Family & Dependent Info	GO Changing Your Tax Withholding

Lesson 3: My Benefits

GO Accessing My Benefits Section	GO Checking Your Enrollments
GO Making Changes to Your Plans	GO Life Event Change Example
GO Completing Health Plan Forms	GO Adding a Benefit Plan
GO Purchasing Life Insurance	GO Selecting Beneficiaries
GO Medical Plan Dates and Coverage	GO Terminating a Benefit Plan

Lesson 4: My Pay

GO Accessing My Pay Section	GO Pay or Total Compensation Options	GO Understanding Your Pay Statement	GO Accessing Past Statements

Lesson 5: Finding Help

GO Resources

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