

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

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



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

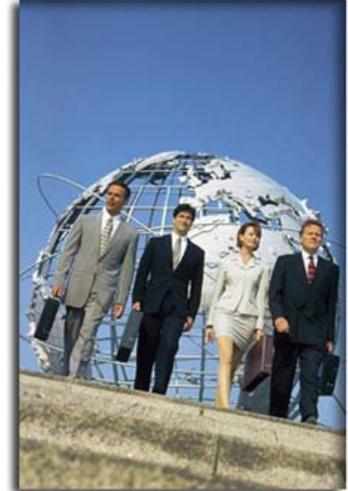
This self-paced course includes interactive elements that contribute to your knowledge acquisition. These elements can include:

- 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.



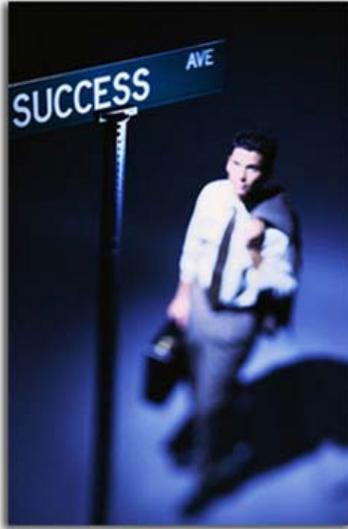
Knowledge Check



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.



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:

Lesson 1: Getting Started

Lesson 2: My Personal Data

Lesson 3: My Benefits

Lesson 4: My Pay

Lesson 5: Finding Help

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.

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.

The screenshot shows the BEACON Portal interface. At the top, it says "Welcome 24/0pm/ 0603" and "Logout". The main header features the BEACON logo and "North Carolina Office of the State Controller". Below the header is a navigation bar with "Home", "My Staff (MSS)", and "My Data (ESS)". A secondary navigation bar includes "Overview", "My Employee Search", "My Working Time", "My Benefits", "My Pay", and "My Personal Data".

Quick Links

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

Welcome to the BEACON Portal

The BEACON portal provides you with the tools you need to better access and manage your state benefits and personal information. Please take time to familiarize yourself with the site. For your convenience, we have added quick links to Employee Self Service features such as time entry, benefits, personal data, pay and employee search. We've also included other relevant external links. If you have any problems while using the site, please call 1-866-NCBEST4U (1-866-622-3784) or (707-0707 if local to Raleigh).

News of Interest

- New to ESS? If so, please take the training course at www.beacon.nc.gov.
- Group 1 agencies go live on January 1, 2008.
- W-2 statements will be available through ESS beginning January 2009.

External links and logos are displayed on the right side of the page:

- www.nc.gov
- www.osp.state.nc.us/ncflex
- www.myncretirement.com
- www.statehealthplan.state.nc.us
- North Carolina Office of the State Controller www.ncosc.net
- www.osp.state.nc.us

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.



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



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

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

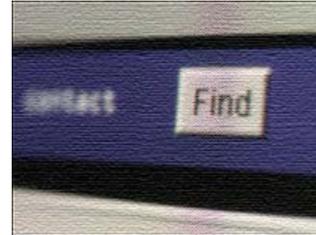
The screenshot shows the 'Overview' page of the Employee Self Service (ESS) system. At the top, there is a 'Welcome' message with a placeholder for the user's name and links for 'Help' and 'Log Off'. Below this is the 'BEACON North Carolina Office of the State Controller' logo and a navigation bar with links for 'Home', 'My Data (ESS)', 'Overview', 'My Employee Search', 'My Working Time', 'My Benefits', 'My Pay', and 'My Personal Data'. The main content area is titled 'Overview' and contains a brief introduction: 'Employee Self-Service applications provide North Carolina State employees with easy access to information and services. This page gives an overview of the entire offering.' Below the introduction are five main sections, each with a small icon and a description: 'My Employee Search' (Search for NC State employees), 'My Working Time' (Record working times, plan leave), 'My Benefits' (Display current plans, enroll in new ones), 'My Pay' (Display pay statements), and 'My Personal Data' (Manage addresses, direct deposit, family members). Each section also includes a 'Quick Links' section with a link to the specific service.

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.

BEACON
North Carolina
Office of the State Controller

Home | My Data (ESS)

Overview | My Employee Search | My Working Time | My Benefits | My Pay | My Personal Data

Overview

Employee Self-Service applications provide North Carolina State employees with easy access to information and services. This page gives an overview of the entire offering.

- My Employee Search**
Search for NC State employees; find basic information about colleagues and their position in the State.
Quick Links: [Who's Who](#)
- My Working Time**
Record your working times, plan your leave, and display your time data.
Quick Links: [Record Working Time](#)
- My Benefits**
Display the plans in which you are currently enrolled; enroll in new benefit plans during the State's annual enrollment periods; access State Health Plan forms.
- My Pay**
Display your pay statement or your total compensation statement.
- My Personal Data**
Manage your addresses, direct deposit, and information about family members and dependents.

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

The screenshot shows the BEACON North Carolina Office of the State Controller interface. At the top left is the logo with the words 'INTEGRITY' and 'CONSISTENCY' above 'BEACON'. Below the logo is the text 'North Carolina Office of the State Controller'. A navigation bar contains 'Home' and 'My Data (ESS)'. Below this is a secondary navigation bar with 'Overview | My Employee Search | My Working Time | My Benefits | My Pay | My Personal Data'. The main content area is titled 'My Employee Search' and features a small icon of a computer monitor. To the right of the icon is the heading 'My Employee Search' and a link 'Who's Who' which is highlighted with a yellow box. Below the link is the text: 'Search for North Carolina employees by name and find basic information about colleagues and their position in the State.' To the right of this content is a large graphic that says 'Welcome to the My Employee Search workset!' in blue and red text.

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.

Who's Who

Please enter the search criteria

[Advanced search](#)

Last name:

First 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.

The screenshot shows a web application interface for searching employees. The main window is titled "Who's Who" and contains a search form. The form has a heading "Please enter the search criteria" and a link for "Advanced search". There are two input fields: "Last name:" and "First name:". The "Last name:" field contains the text "Gr*" and is highlighted with a yellow box. Below the input fields are two buttons: "Search..." and "Exit". To the right of the search form is a "Result List" table with two columns: "Last name" and "First name". The table contains six rows of results, each with a blue underlined link for the last name and the first name.

Last name	First name
GRAAP	MARILYN
GRACIA	VIRGIL
GRACIANI	FREDDIE
GRACIE	MICHEAL
GRAD	SPENCER
GRAEF	CLAUD

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.

Who's Who

Please enter the search criteria

[Advanced search](#)

Last name:

First name:

Result List

Last name	First name	Personnel area	Position	Organizational unit
Jones	Tara	Judicial Branch	Deputy Clerk	JB_CSC_JOHNSTO
Jones	Thomas	Correction	Correctional Programs Supervisor	COR_SO_DS2_PRI
Jones	Travis	Correction	Correctional Sergeant	COR_SO_DS2_PRI

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 PRLC John C.S.P.PD.PS2
Miscellaneous	
Last name:	Jones
First name:	Thomas
Middle name:	Robert
Personnel area:	4202

[Back to Result List](#)

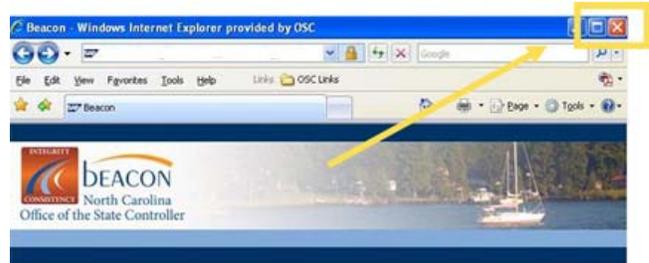
When you are finished using ESS, it is very important to exit the application by either:

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



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



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?



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

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.



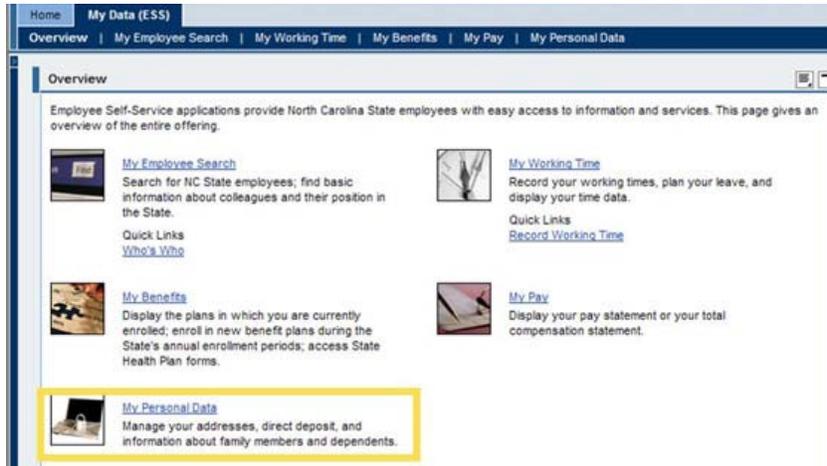
When you complete the **My Personal Data** lesson, you should be able to:

- 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.



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.

The screenshot shows the 'My Personal Data' page within the 'My Data (ESS)' section. The page has a navigation bar with links for Home, Overview, My Employee Search, My Working Time, My Benefits, My Pay, and My Personal Data. The main content area is titled 'My Personal Information' and includes several sections with links and instructions:

- Addresses**: Maintain your addresses. NOTE: If you are making an in/out of state change to your permanent residence, please ensure your Tax Withholding Information is also updated.
- Tax Withholding Information**: Maintain the information on your W4, W5, NC4, or ETC. NOTE: If you are making an in/out of state change, please ensure your Address information is also updated.
- Family Member/Dependents**: Maintain information about your family members or dependents.
- Communication Data**: Display your email address and your main work contact telephone number.
- Direct Deposit**
- Bank Information**

On the right side of the page, there is a large graphic with the text 'Welcome to the My Personal Data workset!' and an image of a laptop with a padlock on the keyboard.



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.



My Personal Data



My Personal Information

[Addresses](#)

Maintain your addresses.

NOTE: If you are making an in/out of state change to your permanent residence, please ensure your Tax Withholding Information is also updated.

[Tax Withholding Information](#)

Maintain the information on your W4, W5, NC4, or ETC. NOTE: If you are making an in/out of state change, please ensure your Address information is also updated.

[Family Member/Dependents](#)

Maintain information about your family members or dependents.

[Communication Data](#)

Display your email address and your main work contact telephone number.

Direct Deposit

[Bank Information](#)

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.



Addresses

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Permanent residence

Street Address: 5008 RALEIGH ROAD
City: RALEIGH
Telephone No.: 221-1878

[Edit](#)

Emergency contact

Street Address: 123 Main Street
City: Raleigh
Telephone No.: 223-8979

[Edit](#) [Delete](#)

[New Emergency contact](#)

[Previous Step](#) [New Emergency contact](#) [New Mailing address](#) [Exit](#)



Addresses

1 2 3 4
Overview Edit Review and Save Confirmation

Permanent residence

Street Address: 5008 RALEIGH ROAD
City: RALEIGH
Telephone No.: 221-1878

Edit

Emergency contact

Street Address: 123 Main Street
City: Raleigh
Telephone No.: 223-8979

Edit **Delete**

New Emergency contact

Previous Step **New Emergency contact** **New Mailing address** **Exit**



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.



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

Addresses

1 Overview 2 **Edit** 3 Review and Save 4 Confirmation

Permanent residence

Country: USA

c/o:

House Number and Street: * 5008 RALEIGH ROAD

Address Line 2:

City: * RALEIGH

County:

State: * North Carolina

ZIP Code: * 27612-0000

Telephone: 919 221-1878

Valid from Today
 Valid as of Future Date

Previous Step Review Exit

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.](#)

Addresses

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Permanent residence

Country: USA

c/o:

House Number and Street: * 200 N. Blount St

Address Line 2:

City: * RALEIGH

County: Wake

State: * North Carolina

ZIP Code: * 27601

Telephone: 919 221-1878

Valid from Today
 Valid as of Future Date

Previous Step Review Exit

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.

Addresses

1 Overview 2 Edit 3 **Review and Save** 4 Confirmation

Verify the Address data below

Permanent residence

Country: USA
c/o:
House Number and Street: 200 N. Blount St
Address Line 2:
City: RALEIGH
County: Wake
State: North Carolina
ZIP Code: 27601
Telephone: 919 221-1878

Valid from 9/25/2007



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?"

Addresses

1 Overview 2 Edit 3 Review and Save

i The changes you made to your Address data were saved

What do you want to do next?
[Go to Addresses Overview](#)
[Go to My Personal Data homepage](#)
[Go to Employee Self-Services homepage](#)

Permanent residence

Country: USA
c/o:
House Number and Street: 200 N. Blount St
Address Line 2:
City: RALEIGH
County: Wake
State: North Carolina
ZIP Code: 27601
Telephone: 919 221-1878

Valid from 9/24/2007

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

 Select Communication Data.



My Personal Data

 **My Personal Information**

[Addresses](#)
Maintain your addresses.
NOTE: If you are making an in/out of state change to your permanent residence, please ensure your Tax Withholding Information is also updated.

[Tax Withholding Information](#)
Maintain the information on your W4, W5, NC4, or ETC.
NOTE: If you are making an in/out of state change, please ensure your Address information is also updated.

[Family Member/Dependents](#)
Maintain information about your family members or dependents.

[Communication Data](#)
Display your email address and your main work contact telephone number.

[Direct Deposit](#)
[Bank Information](#)
Maintain your direct deposit and banking information.
The Office of the State Controller (OSC) will transmit your payment electronically based on the information you have provided. If the payroll transmission fails because you have given your Payroll Office incorrect or outdated information, the State can only provide

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

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.



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



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**.

My Personal Data



My Personal Information

[Addresses](#)

Maintain your addresses.

NOTE: If you are making an in/out of state change to your permanent residence, please ensure your Tax Withholding Information is also updated.

[Tax Withholding Information](#)

Maintain the information on your W4, W5, NC4, or ETC.

NOTE: If you are making an in/out of state change, please ensure your Address information is also updated.

[Family Member/Dependents](#)

Maintain information about your family members or dependents.

[Communication Data](#)

Display your email address and your main work contact telephone number.

Direct Deposit

[Bank Information](#)

Maintain your direct deposit and banking information.

The Office of the State Controller (OSC) will transmit your payment electronically based on the information you have provided. If the payroll transmission fails because you have given your Payroll Office incorrect or outdated information, the State can only provide a replacement payment AFTER a refund from the financial institution has been received. It is important that you provide correct account and bank routing numbers, and that you notify your Payroll Office immediately if you change banks or account numbers.

The OSC has the right to retract and correct payments, as necessary.

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.

Bank Information

1 2 3 4

Overview Edit Review and Save Confirmation

Main bank

Payee: Sharon Anita Jordan
Bank Name:
Account Number:

Previous Step Exit

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.

The screenshot shows the 'Bank Information' screen. At the top, there is a progress bar with four steps: 1 (Overview), 2 (Edit), 3 (Review and Save), and 4 (Confirmation). Step 1 is currently selected. Below the progress bar, the 'Main bank' section is highlighted. It contains the following information: Payee: Alexandra K Smith, Bank Name: (blank), and Account Number: (blank). An 'Edit' button is located below the Account Number field. At the bottom of the screen, there are three buttons: 'Previous Step', 'New Other bank', and 'Exit'.

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.

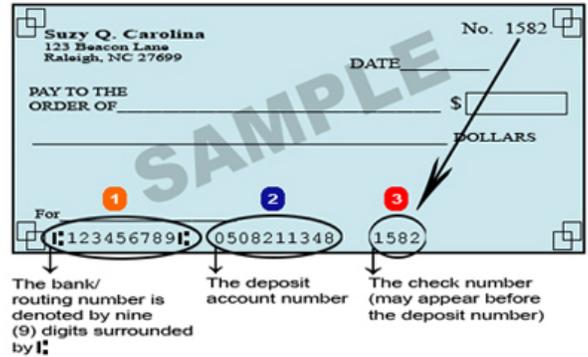
In the next **exercise**, let's say that you have **changed banks** and need to update your **main** direct deposit to a new bank account.

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.

Note: Be sure to have a check from the account into which the deposit will be made available to reference.

- 1 Enter your **Bank Number**, which appears on the bottom left of the check as indicated by number 1 below.
- 2 Enter your **Account Number**, which appears on the bottom middle of the check as indicated by number 2 below. The deposit account number length varies by financial institution.
- 3 **Do not enter the Check Number**, as indicated by number 3 below.



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

- From: Starlight Bank
- To: Moonbeam Bank

 Click Edit now.



Bank Information

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Main bank

Payee: Alexandra K Smith
Bank Name: Starlight Bank
Account Number: 12131415

Edit

Previous Step New Other bank Exit

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.



Bank Information

1 Overview 2 **Edit** 3 Review and Save 4 Confirmation

Main bank

Country: [dropdown]
Payee: [text: Alexandra K Smith]
City: [text: RALEIGH]
ZIP Code: [text: 27601]
Bank Number: [text]
Account Number: [text] Checking Savings
Payment Method: [dropdown: Payroll Check]
Purpose: [text]
Currency: USD

Valid from Today
 Valid as of Future Date

Previous Step Review Exit



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.

Bank Information

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Main bank

Country:

Payee: Alexandra K Smith

City: RALEIGH

ZIP Code: 27601

Bank Number: 253177049

Account Number: 123456 Checking Savings

Payment Method: Payroll Check

Purpose:

Currency: USD

Valid from Today
 Valid as of Future Date

◀ Previous Step **Review** ▶ Exit

 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.

Bank Information

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Verify the Bank data below

Main bank

Country: _____
Payee: Alexandra K Smith
City: RALEIGH
ZIP Code: 27601
Bank's American Bankers' Association Number: 253177049
Bank Account Number: 123456
Account Type: _____
Payment Method: Payroll Check
Purpose: _____
Currency: USD

Valid from 9/01/2007

◀ Previous Step Save Exit



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?"**

Bank Information

1 Overview 2 Edit 3 Review and Save 4 Confirmation

The changes you made to your Bank data were saved

What do you want to do next?
[Go to Bank Information Overview](#)
[Go to My Personal Data homepage](#)
[Go to Employee Self-Services homepage](#)
Main bank

Country:
Payee: Alexandra K Smith
City: RALEIGH
ZIP Code: 27601
Bank's American Bankers' Association Number: 253177049
Bank Account Number:
Account Type:
Payment Method: Payroll Check
Purpose:
Currency: USD
Valid from 9/01/2007

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**.

Bank Information

1 2 3 4
Overview Edit Review and Save Confirmation

Main bank:

Payee: Alexandra K Smith
Bank Name:
Account Number:
Edit

Previous Step **New Other bank** Exit

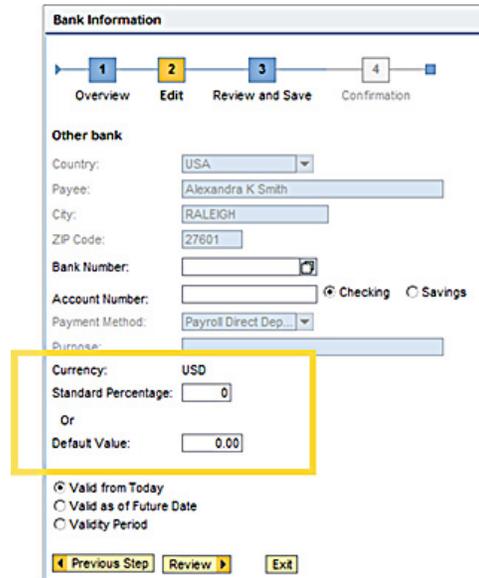
When you add one or more additional bank accounts, you must enter the following on the screen to set up the deposit(s) in the new account(s):

- 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

Home | My Work | My Staff (MSS) | Home | **My Data (ESS)**

Overview | My Employee Search | My Working Time | My Benefits | My Pay | My Personal Data

Bank Information

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Main bank

Payee: John ESS-1
Bank Name: BANK OF AMERICA, N.A.
Account Number: 0990000999

Edit

Other bank

Payee: John ESS-1
Bank Name: WACHOVIA BANK N.A.
Account Number: 98408209342

Edit Delete

New Other bank

Previous Step New Other bank Exit



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**.

Home | My Data (ESS)

Overview | My Employee Search | My Working Time | My Benefits | My Personal Data

My Personal Data

My Personal Information

[Addresses](#)
Maintain your addresses.
NOTE: If you are making an in/out of state change to your permanent residence, please ensure your Tax Withholding Information is also updated.

[Tax Withholding Information](#)
Maintain the information on your W4, W5, NC4, or ETC.
NOTE: If you are making an in/out of state change, please ensure your Address information is also updated.

[Family Member/Dependents](#)
Maintain information about your family members or dependents.

[Communication Data](#)
Display your email address and your main work contact telephone number.

Direct Deposit
[Bank Information](#)

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.

Kellie Anne	
First Name:	Kellie Anne
Last Name:	Smith
Date of Birth:	9/25/2007
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
<input type="button" value="New Child"/>	

<input type="button" value="Previous Step"/>	<input type="button" value="New Divorced Spouse"/>	<input type="button" value="New Father"/>	<input type="button" value="New Mother"/>	<input type="button" value="New Foster Child"/>
<input type="button" value="New Other"/>	<input type="button" value="New Child"/>	<input type="button" value="New Legal Dependent"/>	<input type="button" value="New Testator"/>	<input type="button" value="New Guardian"/>
<input type="button" value="New Stepchild"/>	<input type="button" value="New Related Persons"/>	<input type="button" value="Exit"/>		



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.

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

Home | **My Data (ESS)** | Overview | My Employee Search | My Working Time | My Benefits | My Pay | **My Personal Data**

My Personal Data

 **My Personal Information**

[Addresses](#)
Maintain your addresses.
NOTE: If you are making an in/out of state change to your permanent residence, please ensure your Tax Withholding Information is also updated.

[Tax Withholding Information](#)
Maintain the information on your W4, W5, NC4, or ETC.
NOTE: If you are making an in/out of state change, please ensure your Address information is also updated.

[Family Member/Dependents](#)
Maintain information about your family members or dependents.

[Communication Data](#)
Display your email address and your main work contact telephone number.

**Welcome to the My P
Data workse**



NOTE on Exemption Status Options in ESS:

Tax Exempt Indicator:	<input type="text" value="Not Exempt"/>
	<input type="text" value="Exempt, Reportable"/>
	<input type="text" value="Not Exempt"/>

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.

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.



W4

1 2 3 4
Overview Edit Review and Save Confirmation

Federal

Filing Status: Single
No. of Exemptions: 00
Edit

North Carolina

Filing Status: Married
No. of Exemptions: 01
Edit **Delete**

Previous Step New Massachusetts New Virginia Exit

Tax Withholding Information

Lesson 2

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.



W4

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Federal

Tax Authority: FFD

Filing Status: Married

No. of Exemptions: 01 Non-Resident Alien

Additional Withholding: 0.00 USD

Tax Exempt Indicator: Not Exempt

Declaration

Declaration

Under penalties of perjury, I certify that I am entitled to the number of withholdin

Valid as of Future Date: 6/3/2008

Previous Step Review Exit



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

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

 Now click Save.



W4

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Verify the Tax Data data below

Federal

Tax Authority: FED
Filing Status: Married
No. of Exemptions: 01 Non-Resident Alien
Additional Withholding: 0.00 USD
Tax Exempt Indicator: Not exempt

Valid from 6/3/2008



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.

W4

1 Overview 2 Edit 3 Review and Save 4 Confirmation

i The changes you made to your Tax Data data were saved

What do you want to do next?
[Go to W4 Tax Withholding Overview](#)
[Go to My Personal Data homepage](#)
[Go to Employee Self-Services homepage](#)

Federal

Tax Authority: FED
Filing Status: Married
No. of Exemptions: 01 Non-Resident Alien
Additional Withholding: 0.00 USD
Tax Exempt Indicator: Not exempt

Valid from 10/5/2007

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



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



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



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

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.



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.

Welcome [User Name] Help Log Off

INTEGRITY
CONSISTENCY
BEACON
North Carolina
Office of the State Controller

Home My Data (ESS)

Overview | My Employee Search | My Working Time | My Benefits | My Pay | My Personal Data

Overview

Employee Self-Service applications provide North Carolina State employees with easy access to information and services. This page gives an overview of the entire offering.

My Employee Search
Search for NC State employees; find basic information about colleagues and their position in the State.
Quick Links
[Who's Who](#)

My Working Time
Record your working times, plan your leave, and display your time data.
Quick Links
[Record Working Time](#)

My Benefits
Display the plans in which you are currently enrolled; enroll in new benefit plans during the State's annual enrollment periods; access State Health Plan forms.

My Pay
Display your pay statement or your total compensation statement.

My Personal Data
Manage your addresses, direct deposit, and information about family members and dependents.

 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.



My Benefits

My Benefits

Adjustment Reason Enrollments

[Marriage](#)
Adjust your benefit selections during the period: 09/01/2007 - 10/01/2007.

[Beneficiary Changes](#)
Change the benefit plans in which you are currently enrolled.

Benefits Participation

[Participation Overview](#)
View details of the benefit plans in which you are currently enrolled.

My State Health Plan

State Health Plan Forms - Submit to BEST Shared Services

[Prior Health Coverage Form](#)
Used if you have coverage under a previous plan.

[Coverage Request for Incapacitated Dependent Form](#)
Used if you have a child over age 19 who is eligible as a mentally or physically incapacitated dependent.

[Certification of Dependent Eligibility Form](#)
Used if you have a Foster Child with a different last name.

[Medicare Certification Form](#)
Used if you, or a dependent, are eligible for Medicare.

Go to the State Health Plan Website

[North Carolina State Health Plan](#)

My Supplemental Savings Plans

[401\(k\) and Roth Savings Plans](#)
Enroll or make changes to your 401(k) and Roth 401(k) savings plans.

[457 Savings Plans](#)
Enroll or make changes to your 457 savings plan.

SRA Form - Submit to BEST Shared Services

[403\(b\) Salary Reduction Agreement Form](#)
Used to enroll or make changes to your 403(b) plan.

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.

Participation Overview

[Show Benefits General Links](#)

Show Participation Overview as of:

Participation overview as of 9/24/2007

Plan

Dental

NC Flex Dental Plan [National Pacific \(Dental\)](#)

Medical

Indemnity Plan

Vision

NC Flex Vision Plan [Superior Vision](#)

401(k) Savings

401(K) Savings Plan [Prudential \(Savings\)](#)

Retirement Plan

TSERS - Retirement Plan

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.

Participation overview as of 9/24/2007

Plan	
Dental	
<input checked="" type="radio"/> NC Flex Dental Plan	National Pacific (Dental)
Vision	
<input type="radio"/> NC Flex Vision Plan	Superior Vision
401(k) Savings	
<input type="radio"/> 401(K) Savings Plan	Prudential (Savings)
Retirement Plan	
<input type="radio"/> TSERS - Retirement Plan	
Show Participation Details	
Exit	

For this training example:

 Now click Show Participation Details.

Participation Overview

[Show Benefits General Links](#)

Show Participation Overview as of:

Participation overview as of 9/24/2007

Plan

Dental

NC Flex Dental Plan [National Pacific \(Dental\)](#)

Medical

Indemnity Plan

Vision

NC Flex Vision Plan [Superior Vision](#)

401(k) Savings

401(K) Savings Plan [Prudential \(Savings\)](#)

Retirement Plan

TSERS - Retirement Plan 

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.

Participation Overview

[Show Benefits General Links](#)

Details of Plan NC Flex Dental Plan

Participation Period	Starts on 06/01/2007
Plan Option	Dental Low Option
Dependent Coverage	Employee Only
Employee Cost (Post-Tax)	17.84 USD Monthly

[Back](#) 

[Exit](#)

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.

Participation Overview

[Show Benefits General Links](#)

Show Participation Overview as of:

Participation overview as of 10/25/2007

Plan

Medical

Indemnity Plan

Vision 

NC Flex Vision Plan [Superior \(Vision\)](#)

401(k) Savings

401(K) Savings Plan [Prudential \(Savings\)](#)

Retirement Plan

TSERS - Retirement Plan [NC Treasurer \(Retirement\)](#)

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

My Benefits



My Benefits

Adjustment Reason Enrollments

[Marriage](#)

Adjust your benefit selections during the period: 09/01/2007 - 10/01/2007

[Beneficiary Changes](#)

Change the benefit plans in which you are currently enrolled.

Benefits Participation

[Participation Overview](#)

View a list of plans in which you are currently enrolled.

My State Health Plan

State Health Plan Forms - Submit to BEST Shared Services

[Prior Health Coverage Form](#)

Used if you have coverage under a previous plan.

[Coverage Request for Incapacitated Dependent Form](#)

Used if you have a child over age 19 who is eligible as a mentally or physically

[Certification of Dependent Eligibility Form](#)

Used if you have a Foster Child with a different last name.

[Medicare Certification Form](#)

Used if you, or a dependent, are eligible for Medicare.

Go to the State Health Plan Website

[North Carolina State Health Plan](#)

My Supplemental Savings Plans

[401\(k\) and Roth Savings Plans](#)

Enroll or make changes to your 401(k) and Roth 401(k) savings plans.

[457 Savings Plans](#)

Enroll or make changes to your 457 savings plan.

SRA Form - Submit to BEST Shared Services

[402\(b\) Salary Reduction Agreement Form](#)

Used to enroll or make changes to your 402(b) plan.



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.



My Benefits



My Benefits

Adjustment Reason Enrollments

[Marriage](#)

Adjust your benefit selections during the period: 09/01/2007 - 10/01/2007

[Beneficiary Changes](#)

Change the benefit plans in which you are currently enrolled.

Benefits Participation

[Participation Overview](#)

View a list of plans in which you are currently enrolled.

My State Health Plan

State Health Plan Forms - Submit to BEST Shared Services

[Prior Health Coverage Form](#)

Used if you have coverage under a previous plan.

[Coverage Request for Incapacitated Dependent Form](#)

Used if you have a child over age 19 who is eligible as a mentally or physically

[Certification of Dependent Eligibility Form](#)

Used if you have a Foster Child with a different last name.

[Medicare Certification Form](#)

Used if you, or a dependent, are eligible for Medicare.

Go to the State Health Plan Website

[North Carolina State Health Plan](#)

My Supplemental Savings Plans

[401\(k\) and Roth Savings Plans](#)

Enroll or make changes to your 401(k) and Roth 401(k) savings plans.

[457 Savings Plans](#)

Enroll or make changes to your 457 savings plan.

SRA Form - Submit to BEST Shared Services

[403\(b\) Salary Reduction Agreement Form](#)

Used to enroll or make changes to your 403(b) plan.

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**.

The screenshot shows the 'My Benefits' section of an employee self-service portal. The page has a navigation bar at the top with 'Home' and 'My Data (ESS)'. Below that is a secondary navigation bar with 'Overview', 'My Employee Search', 'My Working Time', 'My Benefits', 'My Pay', and 'My Personal Data'. The main content area is titled 'My Benefits' and includes a small icon of puzzle pieces. Under the heading 'Adjustment Reason Enrollments', there are several links: 'NC Flex Annl Enroll' (highlighted with a yellow box), 'Marriage', 'Health Ins for Baby', and 'Beneficiary Changes'. Each link is followed by a brief description of the enrollment period. Below this is the 'Benefits Participation' section with a 'Participation Overview' link. The 'My State Health Plan' section includes links for 'State Health Plan Forms' and 'Prior Health Coverage Form'. On the right side of the page, there is a graphic with the text 'Welcome to the My Benefits workset!' and an image of puzzle pieces with labels like 'Life', 'Benefits', 'Vision', 'Savings', and '401k'.

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



Enrollment

1 Plan Selection 2 Review Enrollment 3 Completed

[Show GeneralLinkView](#) [Show PlansOfTodayView](#)

This is your selection of benefit plans. From this list, you can add, edit or remove plans as needed. Whenever you edit a plan, its options are displayed. For every plan, you can specify your dependents and beneficiaries and select investments.

Selection for NC Flex Annl Enroll

Plan	Costs	Remarks
Cancer Plan		
<input checked="" type="radio"/> Enroll		
Dental		
<input type="radio"/> NC Flex Dental Plan 17.84 USD Monthly (Post-Tax) Dental Low Option - Employee Only National Pacific (Dental)		
Vision		
<input type="radio"/> NC Flex Vision Plan 7.98 USD Monthly (Post-Tax) Vision - (Exam & Material) - Employee Only Superior (Vision)		
AD&D		
<input type="radio"/> Enroll		
Life Insurance		
<input type="radio"/> Enroll		
Dependent Care		
<input type="radio"/> Enroll		
Health Care FSA		
<input type="radio"/> Enroll		

*This column contains estimated contributions, based on your salary. Therefore, the amounts shown here may differ significantly from the actual amounts shown on your paycheck.

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

The screenshot shows the 'Enrollment' screen with a progress bar at the top indicating three steps: 1. Plan Selection (active), 2. Review Enrollment, and 3. Completed. Below the progress bar are two buttons: 'Hide GeneralLinksView' and 'Show PlansOfTodayView'. A yellow box highlights a list of vendor links, with a yellow callout bubble pointing to it labeled 'Vendor Links'. The list includes: Allstate (Cancer), Great West (Savings), ING (Life), NC Flex, NC Treasurer (Retirement), National Pacific (Dental), ORP (Retirement), Prudential (Savings), State Health Plan, Social Security, and Superior (Vision). Below the list is the text: 'This is your selection of benefit plans. From this list, you can add, edit or remove plans as needed. Whenever you edit a plan, its options are displayed. For every plan, you can specify your dependents and beneficiaries and select investments.'

The screenshot shows the 'Enrollment' screen with a progress bar at the top indicating three steps: 1. Plan Selection (active), 2. Review Enrollment, and 3. Completed. Below the progress bar are two buttons: 'Show GeneralLinksView' and 'Show PlansOfTodayView'. The main content area is titled 'Selection for NC Flex Annl Enroll' and contains a table with columns for Plan, Costs, and Remarks. The table lists several plans, including Cancer Plan, Dental, Vision, AD&D, Life Insurance, Dependent Care, and Health Care FSA. Below the table are buttons for 'Add Plan', 'Edit Plan', and 'Remove Plan'. At the bottom are navigation buttons: 'Previous Step', 'Review Enrollment', and 'Exit'. The text below the table reads: '*This column contains estimated contributions, based on your salary. Therefore, the amounts shown here may differ significantly from the actual amounts shown on your paycheck.'

Plan	Costs	Remarks
Cancer Plan		
<input checked="" type="radio"/> Enroll		
Dental		
<input type="radio"/> NC Flex Dental Plan	17.84 USD Monthly (Post-Tax)	Dental Low Option - Employee Only National Pacific (Dental)
Vision		
<input type="radio"/> NC Flex Vision Plan	7.98 USD Monthly (Post-Tax)	Vision - (Exam & Material) - Employee Only Superior (Vision)
AD&D		
<input type="radio"/> Enroll		
Life Insurance		
<input type="radio"/> Enroll		
Dependent Care		
<input type="radio"/> Enroll		
Health Care FSA		
<input type="radio"/> Enroll		

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

Enrollment

1 Plan Selection 2 Review Enrollment 3 Completed

[Show General Links View](#) [Hide Plans Of Today View](#)

NC Flex Dental Plan
Indemnity Plan
NC Flex Vision Plan
401(K) Savings Plan
TSFRS - Retirement Plan

Current Plans

This is your selection of benefit plans. From this list, you can add, edit or remove plans as needed. Whenever you edit a plan, its options are displayed. For every plan, you can specify your dependents and beneficiaries and select investments.

Enrollment

1 Plan Selection 2 Review Enrollment 3 Completed

[Show General Links View](#) [Show Plans Of Today View](#)

This is your selection of benefit plans. From this list, you can add, edit or remove plans as needed. Whenever you edit a plan, its options are displayed. For every plan, you can specify your dependents and beneficiaries and select investments.

Selection for NC Flex Annl Enroll

Plan	Costs	Remarks
Cancer Plan		
<input checked="" type="radio"/> Enroll		
Dental		
<input type="radio"/> NC Flex Dental Plan 17.84 USD Monthly (Post-Tax) Dental Low Option - Employee Only National Pacific (Dental)		
Vision		
<input type="radio"/> NC Flex Vision Plan 7.98 USD Monthly (Post-Tax) Vision - (Exam & Material) - Employee Only Superior (Vision)		
AD&D		
<input type="radio"/> Enroll		
Life Insurance		
<input type="radio"/> Enroll		
Dependent Care		
<input type="radio"/> Enroll		
Health Care FSA		
<input type="radio"/> Enroll		

*This column contains estimated contributions, based on your salary. Therefore, the amounts shown here may differ significantly from the actual amounts shown on your paycheck.

[Add Plan](#) [Edit Plan](#) [Remove Plan](#)

[Previous Step](#) [Review Enrollment](#) [Exit](#)

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.

Enrollment

1 **Plan Selection** (Active) | 2 Review Enrollment | 3 Completed

[Show GeneralLinksView](#) | [Show PlansOfTodayView](#)

This is your selection of benefit plans. From this list, you can add, edit or remove plans as needed. Whenever you edit a plan, its options are displayed. For every plan, you can specify your dependents and beneficiaries and select investments.

Selection for NC Flex Annl Enroll

Plan	Costs	Remarks
Cancer Plan		
<input checked="" type="radio"/> Enroll		
Dental		
<input type="radio"/> NC Flex Dental Plan	17.84 USD Monthly (Post-Tax)	Dental Low Option - Employee Only National Pacific (Dental)
Vision		
<input type="radio"/> NC Flex Vision Plan	7.98 USD Monthly (Post-Tax)	Vision - (Exam & Material) - Employee Only Superior (Vision)
AD&D		
<input type="radio"/> Enroll		
Life Insurance		
<input type="radio"/> Enroll		
Dependent Care		
<input type="radio"/> Enroll		
Health Care FSA		
<input type="radio"/> Enroll		



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



Plan	Costs	Remarks
Cancer Plan		
<input type="radio"/> Enroll		
Dental		
<input type="radio"/> NC Flex Dental Plan	17.84 USD Monthly (Post-Tax)	Dental Lov
Vision		
<input type="radio"/> NC Flex Vision Plan	7.98 USD Monthly (Post-Tax)	Vision - (E
AD&D		
<input type="radio"/> Enroll		
Life Insurance		
<input checked="" type="radio"/> Enroll		
Dependent Care		
<input type="radio"/> Enroll		
Health Care FSA		
<input type="radio"/> Enroll		

*This column contains estimated contributions, based on your salary.

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.

Enrollment

1 Plan Selection →
 a **Plan Adjustment** →
 b Select Beneficiaries →
 1 Plan Selection →
 2 Review Enrollment →
 3 Completed

[Show General Links View](#) |
 [Show Plan Type Of Today View](#)

Offer for Life Insurance

NC Flex Life Insurance - choose plan options (starts on 1/1/2008) [ING \(Life\)](#)

Option	Basic Coverage	Additional Units		Total Coverage	Employee Cost (Monthly)*
NC Flex Life Insurance	20,000	0	(0 - 48) x 10,000.00	20,000	7.32

The amounts are in USD.

Pre-Tax Deductions

|

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.

Enrollment

Plan Selection **a** Plan Adjustment **b** Select Beneficiaries Plan Selection Review Enrollment Completed

[Show GeneralLinksView](#) [Show PlanTypeOfTodayView](#)

Offer for Life Insurance

NC Flex Life Insurance - choose plan options (starts on 1/1/2008) [NG \(Life\)](#)

Option	Basic Coverage	Additional Units		Total Coverage	Employee Cost (Monthly)*
NC Flex Life Insurance	20,000	20	(0 - 48) x 10,000.00	220,000	80.52

The amounts are in USD.

Pre-Tax Deductions

Recalculate

Previous Step Select Beneficiaries

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.

The screenshot shows the 'Enrollment' process with a progress bar at the top. The current step is 'Plan Adjustment', which is highlighted with a yellow box. A yellow callout box points to the 'Pre-Tax Deductions' checkbox, which is checked. Below the progress bar, there are links for 'Show GeneralLinksView' and 'Show PlanTypeOfTodayView'. The main section is titled 'Offer for Life Insurance' and contains a table for 'NC Flex Life Insurance - choose plan options (starts on 1/1/2008)'. The table has columns for Option, Basic Coverage, Additional Units, Total Coverage, and Employee Cost (Monthly)*. The row for 'NC Flex Life Insurance' shows a Basic Coverage of 20,000, Additional Units of 20, Total Coverage of 220,000, and Employee Cost of 80.52. Below the table, there is a note 'The amounts are in USD.' and a checked 'Pre-Tax Deductions' checkbox. There are also buttons for 'Recalculate', 'Previous Step', and 'Select Beneficiaries'.

Option	Basic Coverage	Additional Units	Total Coverage	Employee Cost (Monthly)*	
NC Flex Life Insurance	20,000	20	(0 - 48) x 10,000.00	220,000	80.52

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

Enrollment

[Show GeneralLinksView](#) [Show PlanTypeOfTodayView](#)

Offer for Life Insurance

NC Flex Life Insurance - choose plan options (starts on 1/1/2008) [NG \(Life\)](#)

Option	Basic Coverage	Additional Units	Total Coverage	Employee Cost (Monthly)*
NC Flex Life Insurance	20,000	20 (0 - 48) x 10,000.00	220,000	80.52

The amounts are in USD.

Pre-Tax Deductions

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.

Kellie Anne
First Name: Kellie Anne
Last Name: Smith
Date of Birth: 9/25/2007

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

1 Plan Selection a Plan Adjustment b **Select Beneficiaries** 1 Plan Selection 2 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.

Enrollment

1 Plan Selection a Plan Adjustment b **Select Beneficiaries** 1 Plan Selection 2 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	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

 =100 =100

Identify Primary Beneficiaries by entering a percentage in this column.

Identify Contingent Beneficiaries by entering a percentage in this column.

Each column needs to add up to 100.

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

[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**.

Enrollment

1 Plan Selection a Plan Adjustment b **Select Beneficiaries** 1 Plan Selection 2 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	100	0
Roberto Garcia	Father	0	20
Ileana Garcia	Mother	0	20
John Smith	Child	0	20
Kelle Anne Smith	Child	0	20
Jacob Smith	Child	0	20

◀ Previous Step **Add Plan to Selection**

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.

Enrollment

1 Plan Selection 2 Review Enrollment 3 Completed

[Show GeneralLinksView](#) [Show PlansOffTodayView](#)

This is your selection of benefit plans. From this list, you can add, edit or remove plans as needed. Whenever you edit a plan, its options and select investments.

Selection for NC Flex Annl Enroll

Plan	Costs	Remarks
Cancer Plan		
<input type="radio"/> Enroll		
Dental		
<input type="radio"/> NC Flex Dental Plan	17.84 USD Monthly (Post-Tax)	Dental Low Option - Employee Only National Pacific (Dental)
Vision		
<input type="radio"/> NC Flex Vision Plan	7.98 USD Monthly (Post-Tax)	Vision - (Exam & Material) - Employee Only Superior (Vision)
AD&D		
<input type="radio"/> Enroll		
Life Insurance		
<input checked="" type="radio"/> NC Flex Life Insurance	7.32 USD Monthly (Pre-Tax)	NC Flex Life Insurance - Coverage amount 20,000.00 USD (Life) Evidence of insurability required no later than 12/4/2007.
Dependent Care		
<input type="radio"/> Enroll		
Health Care FSA		
<input type="radio"/> Enroll		

*This column contains estimated contributions, based on your salary. Therefore, the amounts shown here may differ significantly from the actual amounts.

[Add Plan](#) [Edit Plan](#) [Remove Plan](#)

[Previous Step](#) [Review Enrollment](#) [Exit](#)

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**.

Enrollment

1 Plan Selection 2 Review Enrollment 3 Completed

A summary of your enrollment plans is listed below. If you are satisfied with your selection, submit it to complete the enrollment process. If you would like to change your selection, go back one step.

Selection for NC Flex Annl Enroll

Plan	Costs	Actions
Dental		
NC Flex Dental Plan	17.84 USD Monthly (Post-Tax)	Unchanged
Vision		
NC Flex Vision Plan	7.98 USD Monthly (Post-Tax)	Unchanged
Life Insurance		
NC Flex Life Insurance	7.32 USD Monthly (Pre-Tax)	Added

This column contains estimated contributions, based on your salary. Therefore, the amounts shown here may differ significantly from the actual amounts shown on your pay

Previous Step **Save** Exit

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**.

Enrollment

1
Plan Selection

2
Review Enrollment

3
Completed

i Your plan selections have been saved.

What do you want to do next?

[Go to Benefits Participation Overview](#)
[Go to My Benefits homepage](#)
[Go to Employee Self-Services homepage](#)
[Print New Plan Selections](#)

Selection for NC Flex Annl Enroll

Plan	Costs	Actions
Dental		
NC Flex Dental Plan	17.84 USD Monthly (Post-Tax)	Unchanged
Vision		
NC Flex Vision Plan	7.98 USD Monthly (Post-Tax)	Unchanged
Life Insurance		
NC Flex Life Insurance	7.32 USD Monthly (Pre-Tax)	Added

This column contains estimated contributions, based on your salary. Therefo

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 27699-1419		DATE: 10/04/2007
Benefits Confirmation Statement		
Alexandra Smith 200 N. Blount St Apt 2 RALEIGH, NC 27601	Personnel No. 70152164 Personnel Area State Controller Payroll Area NC Monthly	
<small>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.</small>		
HEALTH PLANS		
NC Flex Dental Plan Option EE pretax	09/01/2007 - 12/31/9999 Dental Low Option 17.84 USD	
Indemnity Plan Option Employer Cost	06/01/2007 - 12/31/9999 Indemnity Plan 321.14 USD	
NC Flex Vision Plan Option EE pretax	06/01/2007 - 12/31/9999 Vision - (Exam & Material) 7.98 USD	
INSURANCE PLANS		
NC Flex Life Insurance	Pending EOI.	
Beneficiaries in period Jonathan Smith	01/01/2008 - 12/31/9999 Spouse 100%	
RETIREMENT AND SUPPLEMENTAL SAVINGS PLANS		
401(K) Savings Plan Contributions	01/01/2007 - 12/31/9999 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.

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.**

The screenshot shows the 'Enrollment' process with a progress bar indicating three steps: 1. Plan Selection, 2. Review Enrollment, and 3. Completed. Below the progress bar, there are links for 'Show Generalists View' and 'Show Plans/Options View'. A message states: 'This is your selection of benefit plans. From this list, you can add, edit or remove plans as needed. Whenever you edit a plan and select investments.' The main section is titled 'Selection for NC Flex Annl Enroll' and lists several insurance options. A yellow callout box highlights the following entry: 'NC Flex Life Insurance 7.32 USD Monthly (Pre-Tax) NC Flex Life Insurance - Coverage amount: 20,000.00 USD ING (Life) Evidence of insurability required no later than 12/4/2007.' Below this, there are sections for 'AD&D' and 'Life Insurance', each with an 'Enroll' option. A 'Dependence Care' section is also visible at the bottom.

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.

Medical	
<input type="radio"/> Enroll	Starts on 11/1/2007
<input type="radio"/> Enroll	Starts on 12/1/2007

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



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

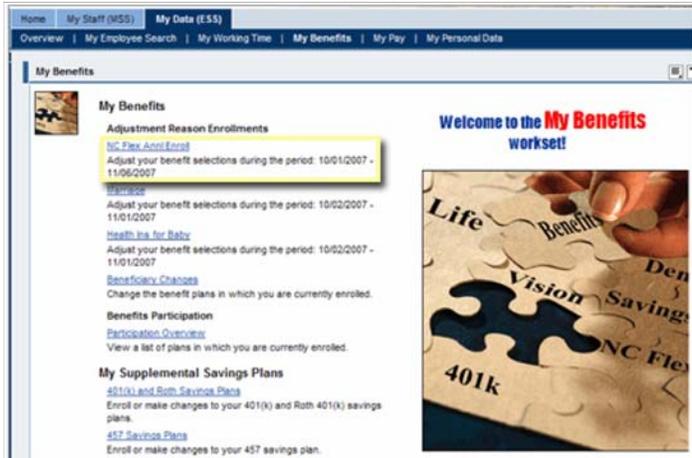


Next, you will find out how to **terminate a benefits plan**.

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 Annul 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.



Enrollment

1 Plan Selection | 2 Review Enrollment | 3 Completed

[Show General Links View](#) | [Show Plans Off Today View](#)

This is your selection of benefit plans. From this list, you can add, edit or remove plans as needed and select investments.

Selection for NC Flex Annu Enroll

Plan	Costs	Remarks
Cancer Plan		
<input type="radio"/> Enroll		
Dental		
<input checked="" type="radio"/> NC Flex Dental Plan	17.84 USD Monthly (Post-Tax)	Dental Low Option - Employee Only
Vision		
<input type="radio"/> NC Flex Vision Plan	7.96 USD Monthly (Post-Tax)	Vision - (Exam & Material) - Employee Only
AD&D		
<input type="radio"/> Enroll		
Life Insurance		
<input type="radio"/> Enroll		
<input type="radio"/> NC Flex Life Insurance	7.32 USD Monthly (Pre-Tax)	NC Flex Life Insurance - Coverage amount: 20,000 Evidence of insurability required no later than 12/31/2011
Dependent Care		
<input type="radio"/> Enroll		
Health Care FSA		
<input type="radio"/> Enroll		

*This column contains estimated contributions, based on your salary. Therefore, the amounts shown here may vary.

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**.

Plan	Costs	Remarks
Cancer Plan		
<input type="radio"/>		
Dental		
<input checked="" type="radio"/>		
Vision		
<input type="radio"/>	NC Flex Vision Plan 7.98 USD Monthly (Post-Tax)	Vision
AD&D		
<input type="radio"/>		
Life Insurance		
<input type="radio"/>		
<input type="radio"/>	NC Flex Life Insurance 7.32 USD Monthly (Pre-Tax)	NC Flex Eviden
Dependent Care		
<input type="radio"/>		
Health Care FSA		
<input type="radio"/>		

*This column contains estimated contributions based on your salary

[Add Plan](#) [Edit Plan](#) [Remove Plan](#)

[Previous Step](#) [Review Enrollment](#) [Exit](#)

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.



Enrollment

1 Plan Selection 2 Review Enrollment 3 Completed

A summary of your enrollment plans is listed below. If you are satisfied with

Selection for NC Flex Annl Enroll

Plan	Costs	Actions
Dental		
Enroll		NC Flex Dental Plan removed
Vision		
NC Flex Vision Plan	7.98 USD Monthly (Post-Tax)	Unchanged

This column contains estimated contributions, based on your salary. Therefore, the amount

Previous Step Save Exit

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

Alexandra clicks **Print New Plan Selections**.

Enrollment

1 Plan Selection 2 Review Enrollment 3 **Completed**

! Your plan selections have been saved.

What do you want to do next?
[Go to Benefits Participation Overview](#)
[Go to My Benefits homepage](#)
[Go to Employee Self-Services homepage](#)
[Print New Plan Selections](#)

Selection for NC Flex Annl Enroll

Plan	Costs	Actions
Dental		
Enroll		NC Flex Dental Plan removed
Vision		
NC Flex Vision Plan	7.98 USD Monthly (Post-Tax)	Unchanged

This column contains estimated contributions, based on your salary. Therefore, the amount

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



		STATE OF NORTH CAROLINA 1410 MAIL SERVICE CENTER RALEIGH, NC 27699-1410
Benefits Confirmation Statement		
Alexandra Smith 200 N. Blount St Apt 2 RALEIGH, NC 27601		Personnel No. 70152164 Personnel Area State Controller Payroll Area NC Monthly DATE 10/05/2007
<small>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.</small>		
HEALTH PLANS		
Indemnity Plan	09/01/2007 - 12/31/9999	
Option	Indemnity Plan	
Employer Cost		321.14 USD
NC Flex Vision Plan	09/01/2007 - 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	
Jonathan 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

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.



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

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.

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.

Overview

Employee Self-Service applications provide North Carolina State employees with easy access to information and services. This page gives an overview of the entire offering.

 <p>My Employee Search Search for NC State employees; find basic information about colleagues and their position in the State.</p> <p>Quick Links Who's Who</p>	 <p>My Working Time Record your working times, plan your leave, and display your time data.</p> <p>Quick Links Record Working Time</p>
 <p>My Benefits Display the plans in which you are currently enrolled; enroll in new benefit plans during the State's Open Enrollment periods; access State Health Plan forms.</p>	 <p>My Pay Display your pay statement or your total compensation statement.</p>
 <p>My Personal Data Manage your addresses, direct deposit, and information about family members and dependents.</p>	

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.

The screenshot shows the 'My Pay' section of the Employee Self Service Overview page. It includes a navigation bar with 'Home' and 'My Data (ESS)'. Below the navigation bar, there are links for 'Overview', 'My Employee Search', 'My Working Time', 'My Benefits', 'My Pay', and 'My Personal Data'. The 'My Pay' section is highlighted, and it contains a 'My Pay Information' sub-section with a small icon of a document and pen. Under 'My Pay Information', there are two links: 'Pay Statement' (with the text 'View your pay statement(s).') and 'Total Compensation Statement' (with the text 'View your latest total compensation statement.'). To the right of this section, there is a welcome message: 'Welcome to the My Pay workset!'.

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

This is a close-up screenshot of the 'My Pay Information' section. It features a small icon of a document and pen. The 'My Pay Information' title is followed by two links: 'Pay Statement' (with the text 'View your pay statement(s).') and 'Total Compensation Statement' (with the text 'View your latest total compensation statement.'). The 'Pay Statement' link and its associated text are highlighted with a yellow rectangular box.

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		Name: EMILEE ORGAIN		Personnel No: 70223240			
Check Date: 09/28/2007		Organization: 0701-State Treasurer					
Earnings	Deductions	Taxes	Net Pay	Deductions	Current	YTD	
Current: 2,096.75 -	135.81 -	212.64 -	1,748.30	# Parking DOA PT	10.00	90.00	
YTD: 18,870.75 -	1,222.27 -	3,793.78 -	13,854.70	# TSERS EE	125.81	1,132.27	
Earnings	Hours	Current	YTD	Total Deductions	135.81	1,222.27	
Regular Salary		2,096.75	18,870.75				
Total Earnings		2,096.75	18,870.75				
Tax Authority	Tax Type	Status	EXMT AdtlAmt	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	Leave Balances as of 10/25/2007			
WACHOVIA BANK N.A.	908084*	Checking	1,748.30	Vacation	54.81	Hours	
				Sick	56.00	Hours	
				Holiday	8.00	Hours	
				Comp Time	0.00	Hours	
				Community Service	24.00	Hours	

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.

The screenshot shows a web interface titled "Paycheck Inquiry Service". Below the title bar, there is a "Show Overview" link. At the bottom of the interface, there are three buttons: "Previous Salary Statement" with a left-pointing arrow, "Next Salary Statement" with a right-pointing arrow, and "Exit". The "Previous" and "Next" buttons are highlighted with yellow boxes.

True or False

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



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.



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

- Find the support you need in using Employee Self Service



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.



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](#)

Home

Search

Group by:
Functional Area

ESS and MSS : By Functional Area

- ESS Demonstration
- Logging On to the BEACON Employee Portal
- ESS - My Benefits
 - Benefits Enrollment
 - Benefits Participation Overview
 - Display State Health Plan Forms
 - ESS - Benefits Enrollment
- ESS - My Pay
 - Display Pay Statement
 - Display Total Compensation Statement
 - ESS - Pymt - Pay Statement
 - Reading Your Pay Statement
- ESS - My Personal Data
 - Display Work Communications Data
 - ESS - Personal Data - Addresses
 - Maintain Bank Details
 - Maintain Family Member and Dependents Data
 - Maintain Personal Addresses
 - Maintain Tax Withholding Information

Congratulations!



You have completed the [Employee Self Service Overview](#) course.

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](#)

[<<BACK](#)