

# Enroll, Change, or Stop a Deferral for a Plan [ ESS Deferred Compensation ]

**Module:** ESS Portal // **Process:** Through the SAP CityLink Portal, you have the ability to start a new plan, make changes to the deferral amount of an existing plan, or cancel and existing plan.

## Overview

Through the SAP CityLink Portal, you have the ability to start a new plan, make changes to the deferral amount of an existing plan, or cancel an existing plan.

## Questions / Help

In order to access this resource, you must use a City computer, have access to the SAP CityLink Portal and be benefits eligible.

- For questions about your deferred compensation plan and/or eligibility, contact the Bureau of Human Resources (BHR) Deferred Compensation program administrator or visit their website.
- For questions about logging in to the CityLink portal contact the BTS Helpdesk at (503) 823-5199 or [btshelpdesk@portlandoregon.gov](mailto:btshelpdesk@portlandoregon.gov).

## Important Date Information for Enrollment

Adding and changing elections: the deductions will occur on the first paycheck of the following month (if elected on or before the 15th) and the first paycheck of the month after (if elected after the 15th).

For example, if you make an election on October 14th, your changes will occur on your first paycheck received in November. If you make an election on October 20th, the changes will occur on your first paycheck in December.

Cancelling an election: the deferral will stop on the

paycheck for that pay period in which you cancelled your election.

For example, you stop your deferral on November 14. This date falls in the pay period. November 6 – November 19. The paycheck for that pay period will be on November 26, which is where the deferral will be stopped. For additional questions about your dates, please contact BHR's Deferred Comp program administrator.

## Beneficiary Information

In order to designate beneficiaries for your plan or make changes to your existing beneficiaries, you need to also complete the fillable form and send it to the Deferred Comp program administrator at the BHR interoffice or street address on the form. This information will be kept in your deferred compensation file. You can access the form from the Helpful Links section of the Deferred Comp Tab in the CityLink portal, or from the BHR Deferred Comp Forms website.

## Specific Plan Information

Visit the service provider websites for Voya Financial or Advantis Credit Union for additional information. Links to these websites have been provided in the Helpful Links section of the Deferred Comp page. Voya participants will still be required to make fund allocation changes within the Voya website or through a Voya representative.

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## 01

Go to:

<http://www.portlandonline.com/ep>

Log into the website with your employee account. You will be logged into the CityLink Portal. Click on the Employee Programs tab.

There are three sections of this tab, two which relate to Deferred Compensation.

Tab sections:

**“Employee Programs Overview”** provides an overview of your participation program.

**“Deferred Comp Program”** provides the link for starting or changing an existing plan, changing your beneficiaries, and links to the website.

**“TriMet/CTran Enrollment”** provides the options for starting or changing an existing TRIP plan deduction.

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02

Select the **Deferred Comp Enrollment** link from the middle section.

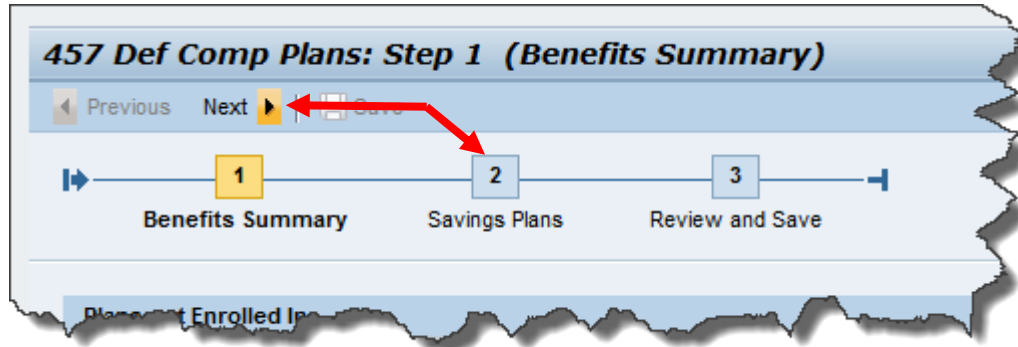
03

After launching the Deferred Comp Enrollment Program, a terms and conditions window is shown. If you accept the terms and conditions, please click **“Accept,”** otherwise click **“Decline.”**

Note: Clicking “Decline” will not allow you to continue the enrollment process.

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| Enroll in Savings Plans |                 |
|-------------------------|-----------------|
| Actions                 | Plan Type       |
|                         | Advantis 457    |
|                         | Advnts Roth 457 |
|                         | Voya Roth 457   |
|                         | Voya 457        |

## 04

The program is set up in three easy steps. The first step shows your current elections, the second step allows you to make changes, and the third step allows you to save those changes.

Click **“Next”** or **“Step 2”** to proceed to the next step.

## 05

Add a new plan or modify an existing plan.

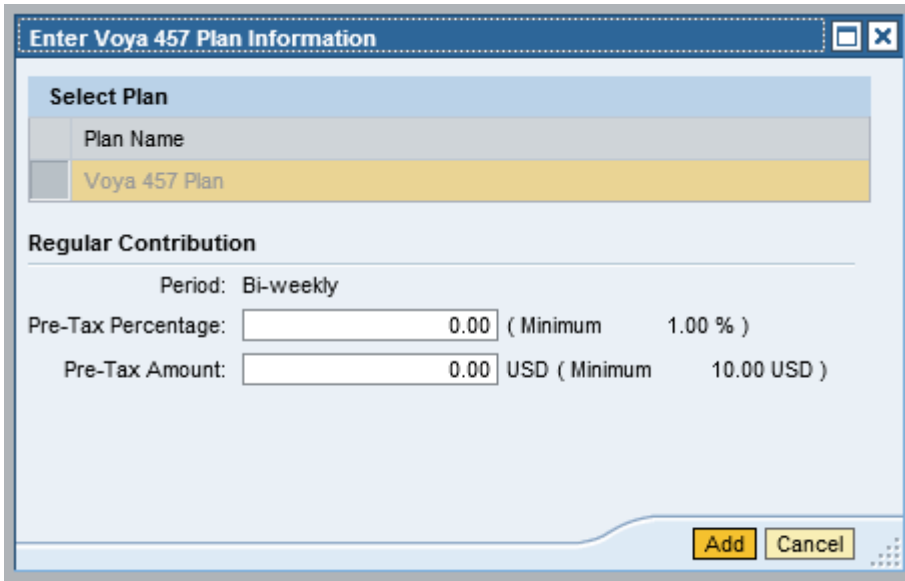
Click the **“Add”** button to enroll in a particular plan.

Click the **“Change”** button to make changes to an existing plan.

Click the **“Cancel”** button to stop participation entirely for that plan.

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**Enter Voya 457 Plan Information**

Select Plan

Plan Name

Voya 457 Plan

Regular Contribution

Period: Bi-weekly

Pre-Tax Percentage:  ( Minimum 1.00 % )

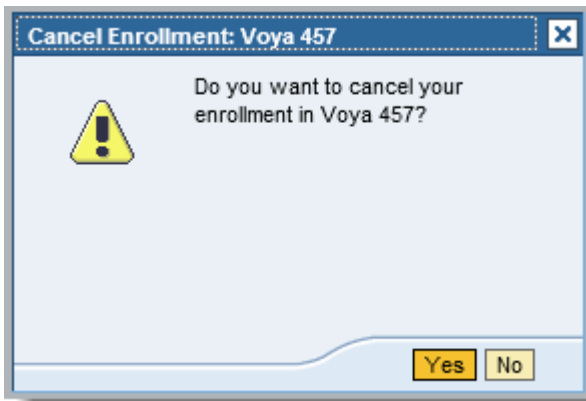
Pre-Tax Amount:  USD ( Minimum 10.00 USD )

Add Cancel

06

On **“Add”** or **“Change”**, a pop-up window will appear and ask for a pre- or post-tax percentage or specific dollar amount. Your available options are to select either a percentage, an amount, or a percentage and an amount. When finished making your elections, click the **“Add”** button.

On **“Cancel,”** a confirmation box will come up asking if you’d like to cancel your enrollment.



**Cancel Enrollment: Voya 457**

Do you want to cancel your enrollment in Voya 457?

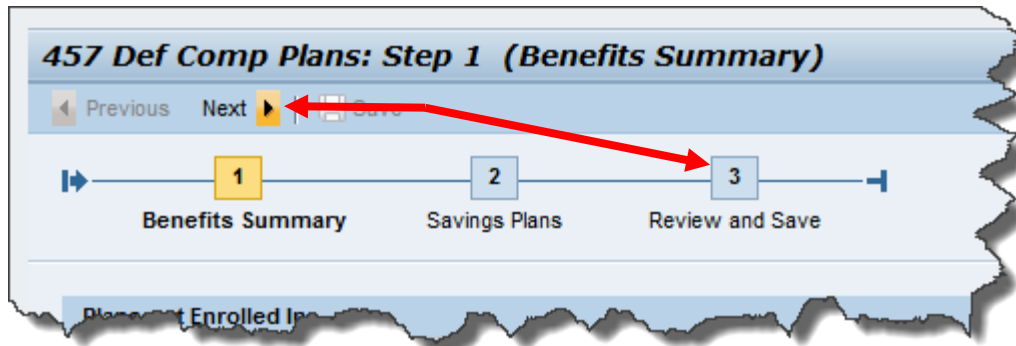
Yes No

Note: Any new plans or changes to existing plans which are entered in the system by the 15<sup>th</sup> of the month will be reflected on your first paycheck received in the following month. For example, if a plan is changed or added on or before October 15<sup>th</sup>, your first paycheck received in November will reflect these changes.

Note: When a plan is cancelled, it will be effective as of that current pay period. The paycheck reflecting that current pay period will not have the deduction.

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| Plans to be Added |            |
|-------------------|------------|
| Plan Type         | Starts On  |
| Advnts Roth 457   | 09/03/2014 |

| Unchanged Plans |            |
|-----------------|------------|
| Plan Type       | Starts On  |
| Advantis 457    | 09/11/2014 |
| Voya 457        | 09/03/2014 |

| Plans not Enrolled In |  |
|-----------------------|--|
| Plan Type             |  |
| Advantis 457          |  |
| Voya Roth 457         |  |
| Voya 457              |  |

## 07

Review your changes.

When finished making elections, click “**Next**” or “**Step 3**” to go to the final save function. None of the changes will take effect unless they are saved. “**Step 3**” will give an overview of the changes made.

Note:

Any new plans will appear in the **Plans to be Added** section;

Any unchanged plans will appear in the **Unchanged Plans** section;

Any plans which changes have been made appear in the **Plans to be Changed** section;

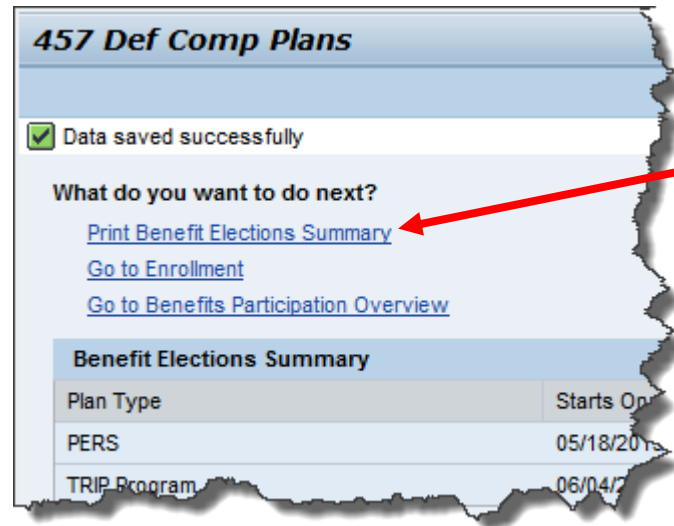
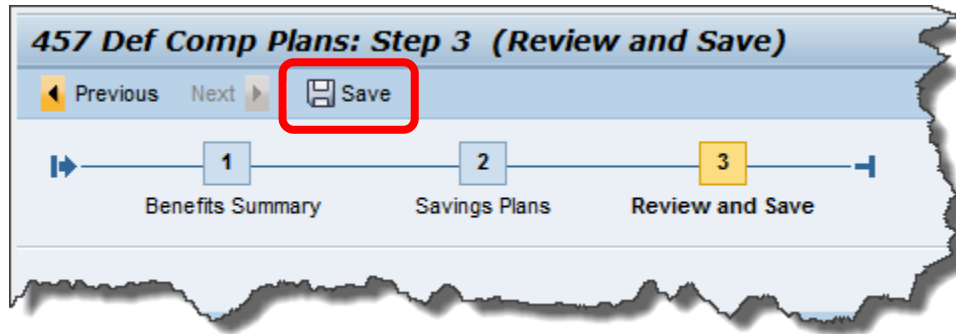
Any plans that have been cancelled will appear in the **Plans to be Removed** section (not shown here);

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08

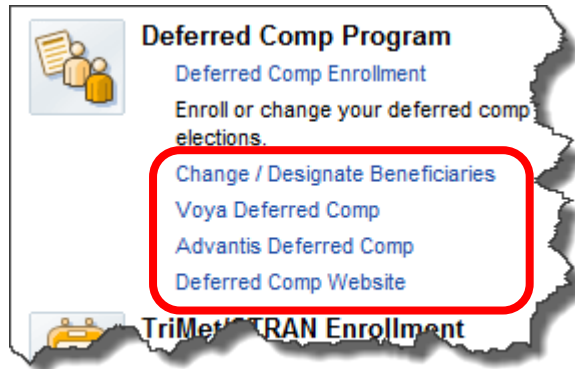
Click **“Save”** to save your changes to the system.



After saving your changes, you can click **“Print Benefits Elections Summary”** to view your current Deferred Comp elections and effective dates. This will launch an Adobe PDF in a new window, which you can then save or print.

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## Additional Information

These links are provided to give access to important plan information, additional forms, the City's deferred compensation website, and how-to materials.