

PHT Pension Modeling Tool

Accessing the Pension Modeling Tool and Logging On for ACTIVE MEMBERS

Access the tool by logging on at: <https://adfs.jhsmiami.org/adfs/ls/idpinitiatedsignon.aspx>



Jackson Health System

Sign in with your organizational account

Sign in

* Sign-in requires JHS Windows Username to authenticate. *

NOTE: Active Members do not need to register for an account to access the tool.

Accessing the Pension Modeling Tool and Logging On for TERMINATED MEMBERS

Access the tool by logging on at: <https://eepoint.towerswatson.com/sites/jhs/ess/>

The first time you access the system, you will need to set up your user name and password by clicking on the **Register here** link.

The screenshot shows the login page for the PHT Retirement Self Service Calculator. On the left, there is a logo for Jackson Health System and the text "PHT Retirement Self Service Calculator". On the right, there is a "Login" section with fields for "User Name" and "Password", a "LOGIN" button, and links for "Forgot your User Name or Password?", "No account yet? Register here" (highlighted with a red box), and "If you have any questions, please Contact Us". At the bottom left, the WillisTowersWatson logo is visible.

You will need to enter the following information to validate your eligibility:

- The last four (4) digits of your Social Security number (SSN)
- Your last name
- Your date of birth (MM/DD/YYYY)

Then, click the **Continue** button.

The screenshot shows a web interface for the Jackson Health System. On the left, there is a logo for Jackson Health System and a title 'PHT Retirement Self Service Calculator'. At the bottom left, the Willis Towers Watson logo is visible. On the right, a 'Create User' modal form is displayed. The form contains the following elements:

- Create User** header
- Introductory text: 'Before you can create an account, we will need a little more information about you.'
- Last 4 digits of SSN *** label and an empty text input field.
- Last Name *** label and an empty text input field.
- Date of Birth *** label, a text input field with the placeholder 'mm/dd/yyyy', and a calendar icon.
- CANCEL** button (white with blue border).
- CONTINUE** button (blue with white text, highlighted with a red border).

Once your eligibility is validated, you will be able to enter the following in the fields provided:

- **User Name:** Enter the user name you would like to use. You may want to consider using First Name.Last Name as an option. **Ex:** If your name is Jane Doe, enter Jane.Doe in the field.
- **Confirm User Name:** Re-enter the user name entered (**Ex:** Jane.Doe).
- **Password and Confirm Password:** Click the help icon to review the criteria needed for your password *before* you create it.
- **Security Questions 1 and 2:** Select a question and provide the correct answer in the field below. The two questions must be different. You will need this information to retrieve your User Name or Password in the future.
- **Email Address and Confirm Email Address:** Enter you preferred email address. This will be used for verification purposes.
- **Phone Number and Confirm Phone Number:** Enter a phone number that can receive calls or text messages from an automated system.

Click the **Continue** button.

The screenshot shows a 'Create User' form with the following fields and labels:

- User Name *** (with an information icon)
- Confirm User Name ***
- Password *** (with an information icon and a red arrow pointing to it from the text 'Click the information icon to view the password policy')
- Confirm Password ***
- Security Question 1 *** (dropdown menu: 'In what city was your father born?')
- Security Question 2 *** (dropdown menu: 'In what city was your first job located?')
- Email Address *** (with an information icon)
- Confirm Email Address ***
- Phone Number *** (with an information icon)
- Confirm Phone Number ***

At the bottom of the form are two buttons: 'CANCEL' and 'CONTINUE' (which is highlighted with a red box).

IMPORTANT: Please keep your access information in a secure location and do not share your access with others.

To be able to use the modeling tool, you must accept the terms of use. Click the **Accept Terms** button to proceed with the account creation process.

The screenshot shows a web interface for the 'PHT Retirement Self Service Calculator'. On the left, there is a sidebar with the 'Jackson HEALTH SYSTEM' logo and the 'PUBLIC HEALTH TRUST' logo. The main content area is titled 'Terms of Use'. It contains the following text: 'To use the site you must first accept the Terms of Use. Please click the link below to view them, then click Accept Terms. If you do not agree with the Terms of Use, you can click Cancel and you will be logged out of the Site.' Below this text is a link that says 'View Terms of Use'. At the bottom of the dialog, there are two buttons: 'CANCEL' and 'ACCEPT TERMS'. The 'ACCEPT TERMS' button is highlighted with a red border. At the bottom of the sidebar, the 'WillisTowersWatson' logo is visible.

Validate the email address you provided earlier by entering the six-digit verification code sent to that email address then click **Verify**. The code will expire in about 5 minutes and you can request for a new code by clicking **Resend**.

The screenshot shows a web interface for the 'PHT Retirement Self Service Calculator'. On the left, there is a sidebar with the 'Jackson HEALTH SYSTEM' logo and the 'PUBLIC HEALTH TRUST' logo. The main content area is titled 'Verify Email Address'. It contains the following text: 'Before you can access the site we first need to confirm your access to the email address provided by sending a 6-digit verification code. Please enter the code you received below.' Below this text is a label 'Security Code' and a text input field with the placeholder text 'Enter verification code here'. The input field is highlighted with a red border. To the right of the input field is a button labeled 'VERIFY', which is also highlighted with a red border. Below the input field, there is a note: 'Please note that codes are only valid for a few minutes. If you have not received your code or if the one received is not working, you can click the button below to have a new one sent.' At the bottom of the dialog, there is a button labeled 'RESEND', which is highlighted with a red border. At the bottom of the sidebar, the 'WillisTowersWatson' logo is visible.

Validate the email phone number you provided earlier by first selecting how you want to receive the verification code then click **Send**.

Jackson HEALTH SYSTEM **PUBLIC HEALTH TRUST**

PHT Retirement Self Service Calculator

Verify Phone Number

Before you can access the site we first need to confirm your access to the phone number provided by sending a 6-digit verification code to your phone.

The following options are available for receiving your verification code:

- Send a text message to +13880
- Place a call to +13880

Phone Call
Phone Call
Text Message

SEND

Please note that standard wireless carrier message and data rates may apply.

WillisTowersWatson

Enter the six-digit verification code sent to your phone number then click **Verify**. If “Phone Call” was selected in Step 6, you will receive a voice call with the numeric code. If “Text Message” was selected in Step 6, you will receive a text message with the numeric code. The code will expire in about 5 minutes and you can request for a new code by clicking **Resend**.

Jackson HEALTH SYSTEM **PUBLIC HEALTH TRUST**

PHT Retirement Self Service Calculator

Verify Phone Number

Before you can access the site we first need to confirm your access to the phone number provided by sending a 6-digit verification code. Please enter the code you received below.

Security Code

Enter verification code here


VERIFY

Please note that codes are only valid for a few minutes. If you have not received your code or if the one received is not working, you can click the button below to have a new one sent.

RESEND

WillisTowersWatson

Click on the **Continue** button to complete the account creation process and begin using the modeling tool




PHT Retirement Self
Service Calculator

Enhanced Security Complete

Thank you for verifying your email address and phone number. You may now continue to the site.

If you wish to change either your email address or your phone number you may do so at any time via Manage Security under the Profile menu.

CONTINUE

WillisTowersWatson 

Using Pension Self Service Calculator

As soon as your account is created or you log in, you will be taken to the Welcome page (Home page). To navigate around the website, you can click on the Menu options at the top of the page or scroll down to the quick links on the page.

PHT Retirement Self Service Calculator



Welcome, Test User02 (Echo Mode)



Home



My Retirement



Profile

Access your pension information
anywhere!

Get the information you need using your favorite device whether tablet,
phone or personal computer.

How much money do you have after retirement?

The website provides a quick and easy way to model your Jackson Health
System pension benefit under multiple life scenarios.



Ready to start your estimate?

[ESTIMATE MY PENSION](#)

I want to...



Compare My Estimates

See how your pension changes
when comparing different
retirement scenarios.



Update My Personal Information

See and update your address
and contact information.



View My Plan Information

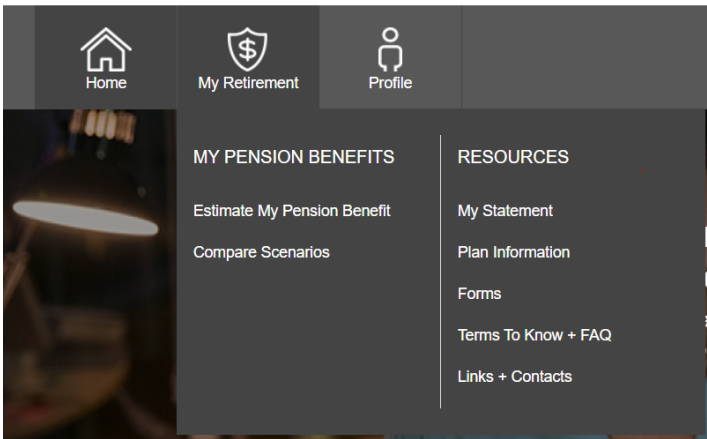
See, download, or print
information for your plan.



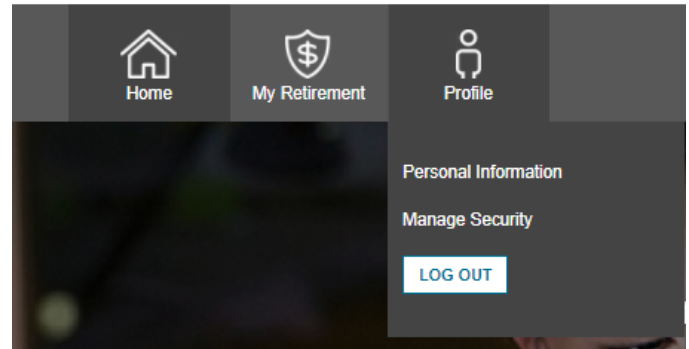
View My Pension Statement

See, download, or print your
pension statement.

PHT Retirement Self Service Calculator



PHT Retirement Self Service Calculator



Use the **Estimate My Pension Benefit** menu option to create a single payout scenarios based on age or retirement date.

Use the **Compare Scenarios** menu option to create different payout scenarios based on age or retirement date.

Use the **My Statement** to view, download and print a copy of your most recent pension statement.

Use the **Plan Information** menu option to view, download and print copies of various plan related documents such as the Summary Plan Description.

Use the **Forms** menu option to view, download and print a copy of the of the retirement application.

Use the **Terms To Know + FAQ** menu option to view, download and print copies of the frequently asked questions for Retiree Medical, Dental, Vision and Life Insurance Plans or the PHT DROP or the Monthly information session schedule.

Use the **Links + Contacts** menu option to access contact information and other external websites.

Use the **Personal Information** menu option to view your personal information and update your contact information, if applicable.

Use the **Manage Security** menu option to change your password and security questions.

Running Your Estimates

To estimate a single scenario pension benefit:

- Click on the **Estimate My Pension** from the Home page or **Estimate My Pension Benefit** from the Retirement menu option
- Select whether you want to enter the assumptions for your estimate by Age or Date .
- If applicable, enter the age or date you plan to leave the company
- Enter date or age you want payments to commence.
- If applicable, enter your beneficiary's date of birth
- Click on Estimate Pension Benefit to generate your estimate results

View By: **Age** | Date | Quick Date ?

Termination Age
Age you plan to leave the company:
[Dropdown] [Input] [Calendar]

Commencement Age
Start pension benefits at age:
[Dropdown] [Input] [Calendar]

Beneficiary DOB
Beneficiary's date of birth:
[mm/dd/yyyy] [Calendar]

ESTIMATE PENSION BENEFIT

Want to learn more about how your retirement age changes your pension payments? [Compare up to 3 scenarios](#)

Want to review past estimates? [See estimate history](#)

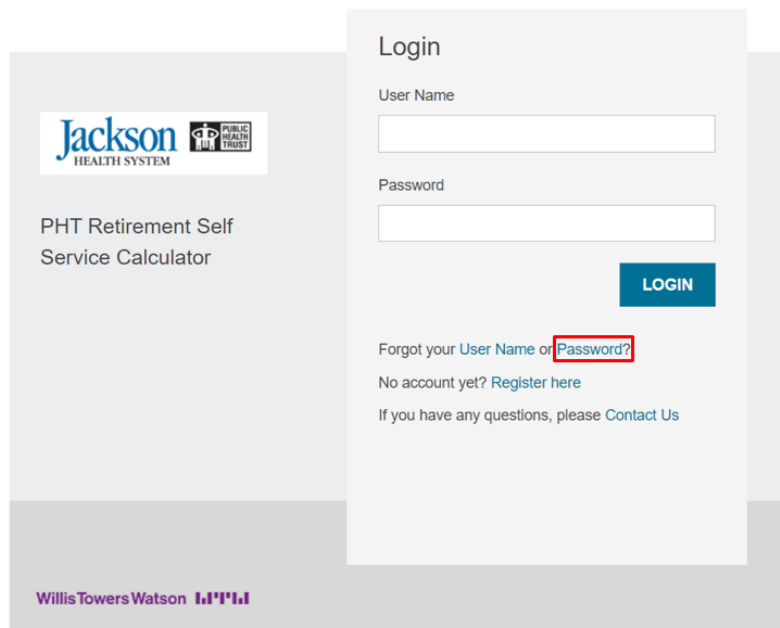
Use the **Compare up to 3 scenarios** link go to the page where you can enter up to three different combinations at one time.


Use the **See estimate history** link to view prior scenarios that you have generated.

IMPORTANT: All results are estimates only and do not represent a guarantee of retirement income.


Resetting or Your Password – TERMINATED VESTED MEMBERS ONLY

To reset your password, click on the **Password** link imbedded in the question Forgot your User Name or Password from the log in page.



Jackson HEALTH SYSTEM 

PHT Retirement Self Service Calculator

WillisTowersWatson 

Login

User Name

Password

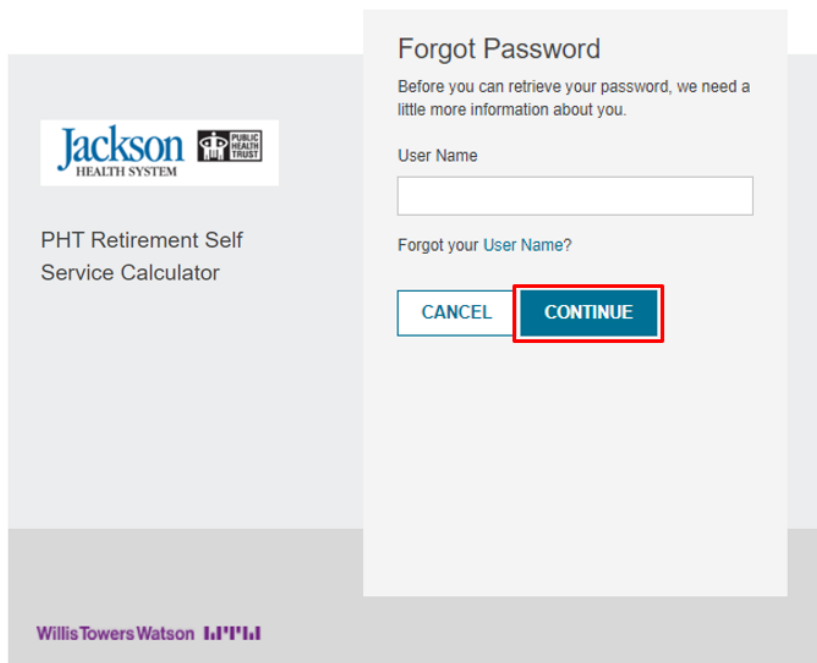
LOGIN


Forgot your User Name or **Password?**

No account yet? [Register here](#)


If you have any questions, please [Contact Us](#)

Enter your User Name then click **Continue**.



Jackson HEALTH SYSTEM 

PHT Retirement Self Service Calculator

WillisTowersWatson 

Forgot Password

Before you can retrieve your password, we need a little more information about you.

User Name

[Forgot your User Name?](#)

CANCEL **CONTINUE**

Enter the answers to the security questions you selected during the account setup and registration process then click **Continue**. If you do not remember the answers to the security questions, you can click on the **Send Email** button to reset your password via email.

Jackson HEALTH SYSTEM

PHT Retirement Self Service Calculator

Forgot Password

In what city was your father born?

In what city was your first job located?

CANCEL **CONTINUE**

Can't remember your security questions? Click the link below to reset your password via email.

SEND EMAIL

WillisTowersWatson

Enter your new password then click **Submit**. Note that if you selected **Send Email** in the step above, you will need to follow the link in the email that you received from eept.donotreply@willistowerswatson.com to get to this step. Remember to click on the information icon next to review the password policy.

Jackson HEALTH SYSTEM

PHT Retirement Self Service Calculator

Change password

Please enter and confirm new password.

Password

Confirm Password

SUBMIT

WillisTowersWatson

Complete the authentication process by:

- Selecting how you would like to receive the verification code.
- Entering the six-digit verification code sent to you via phone or email.
- Checking the box next to **Remember this browser**, if desired.
- Clicking on the **Verify** button.

Note: the code sent will expire in about 5 minutes and a new code can be requested by clicking on the **Resend** button.

The screenshot shows a web interface for the Jackson Health System. On the left, there is a logo for Jackson Health System and a link to the 'PHT Retirement Self Service Calculator'. On the right, a modal window titled 'Verify Code' is displayed. This window contains a text input field for the 'Security Code', a checkbox for 'Remember this browser' with an information icon, a blue 'VERIFY' button, and a 'RESEND' button. Below the buttons, there is a note: 'If you did not receive the code you can try sending it again or choosing a different delivery method by clicking the button below.' The bottom of the page features the WillisTowersWatson logo.

Jackson HEALTH SYSTEM

PHT Retirement Self Service Calculator

Verify Code

Please enter the 6-digit verification code that was sent to you.

Security Code

☐ Remember this browser ⓘ

VERIFY

If you did not receive the code you can try sending it again or choosing a different delivery method by clicking the button below.

RESEND

WillisTowersWatson