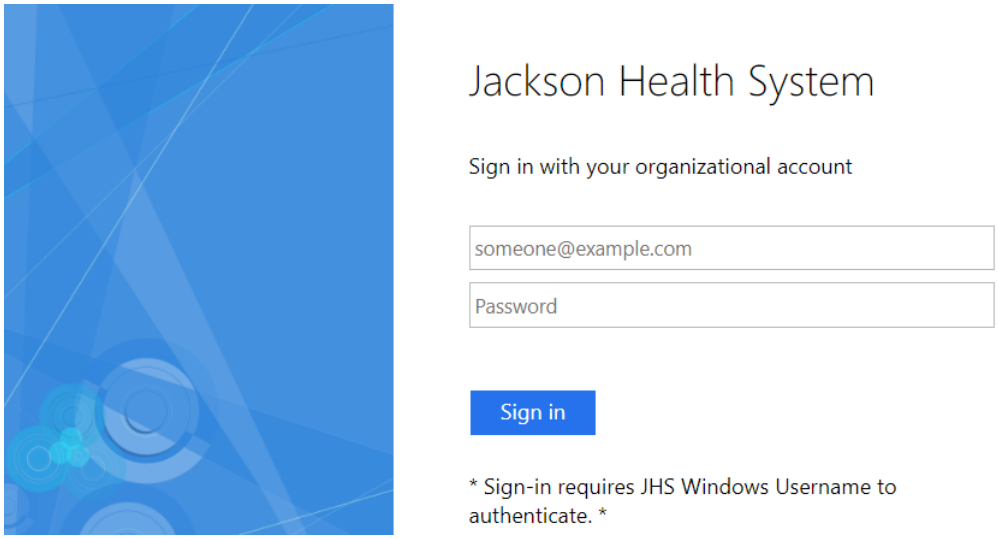
PHT Pension Modeling Tool

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

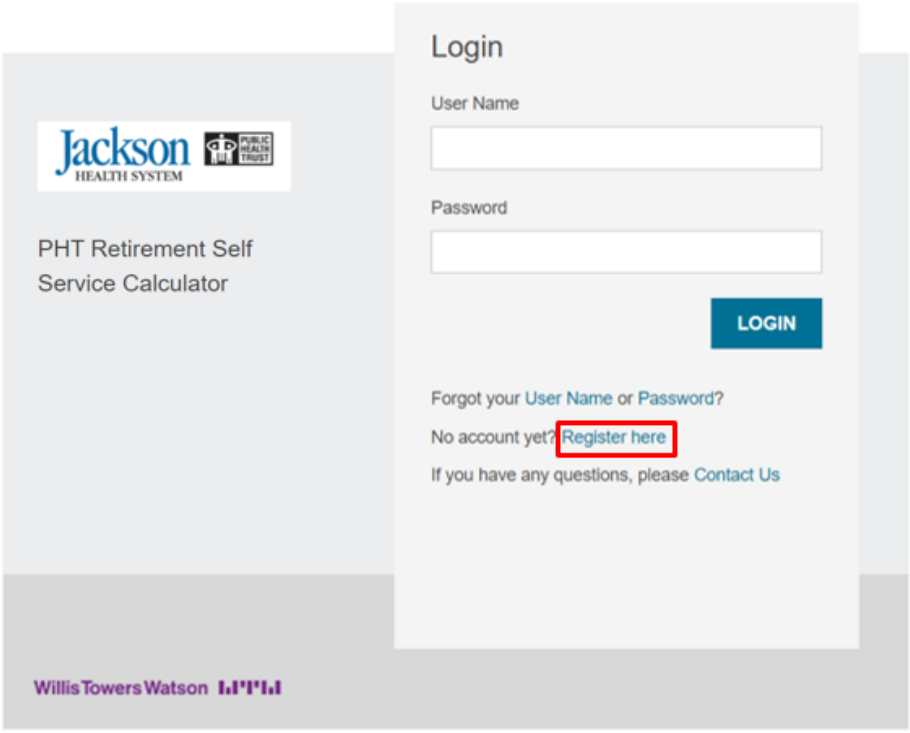


NOTE: Active Members do not need to register for an account to access the tool.

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/

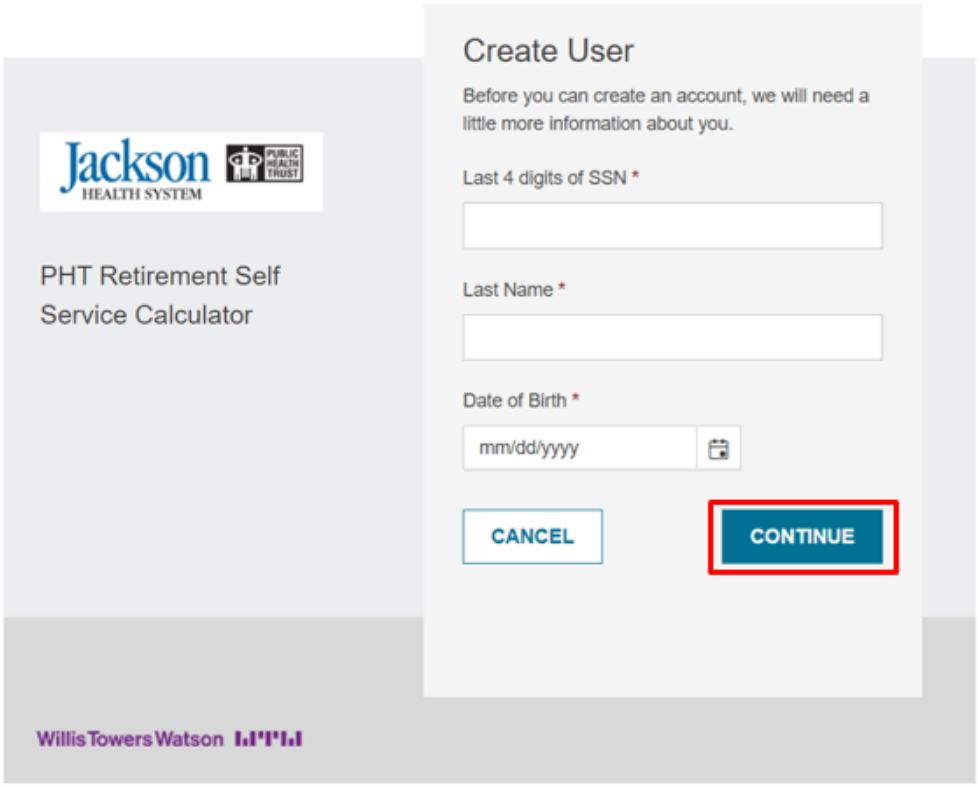
The first time you access the system, you will need to set up your user name and password by clicking on the **Register here** link.



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)

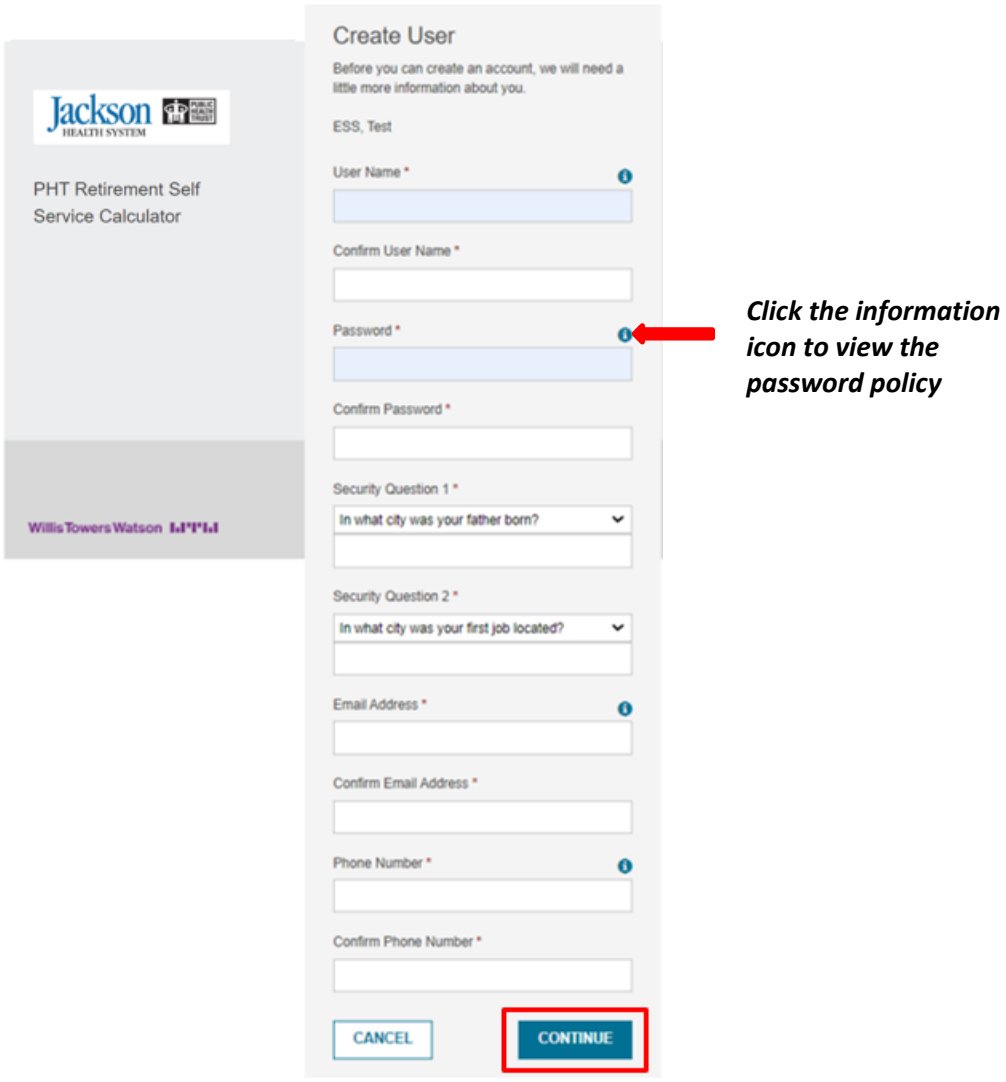
Then, click the **Continue** button.



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

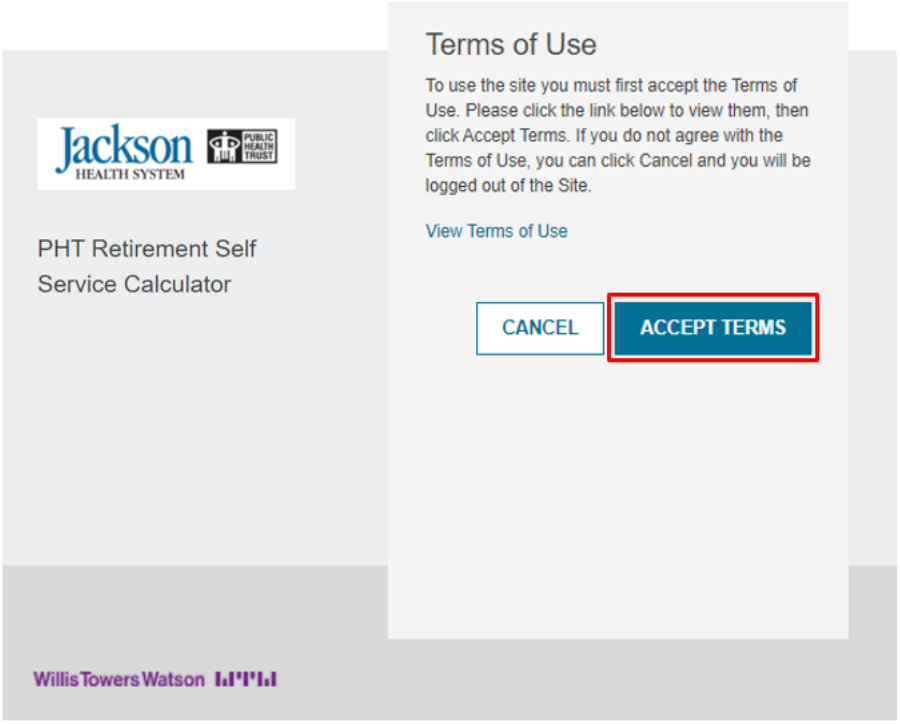
- **User Name:** Enter the user name you would like to use. You may want to consider using First Name.Last Name as an option. **Ex:** If your name is Jane Doe, enter Jane.Doe in the field.
- **Confirm User Name:** Re-enter the user name entered (**Ex:** Jane.Doe).
- **Password and Confirm Password:** 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.

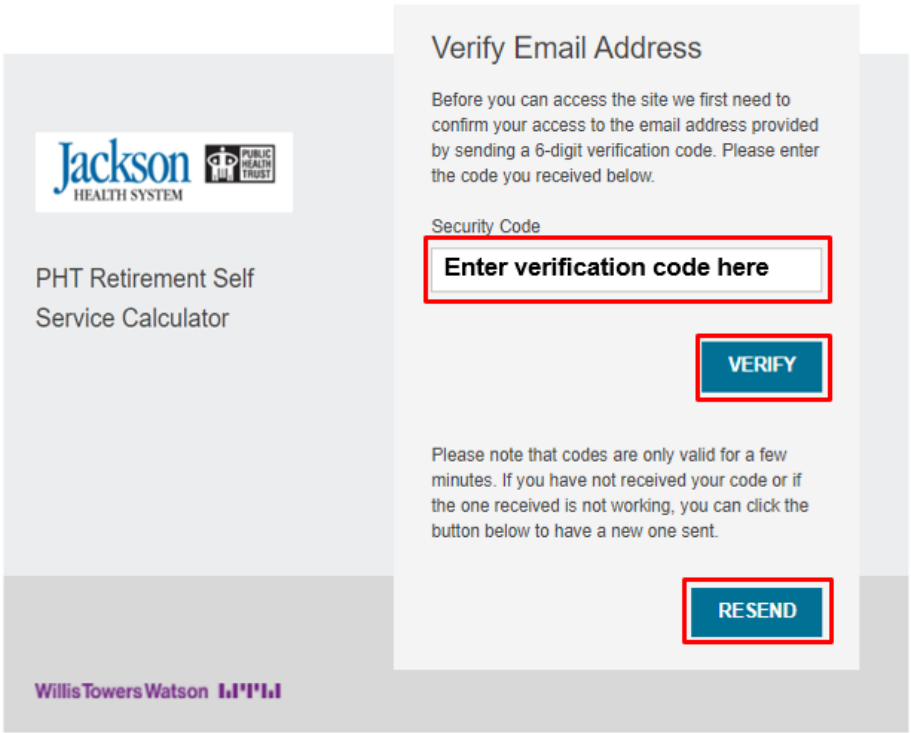


IMPORTANT: Please keep your access information in a secure location and do not share your access with others.

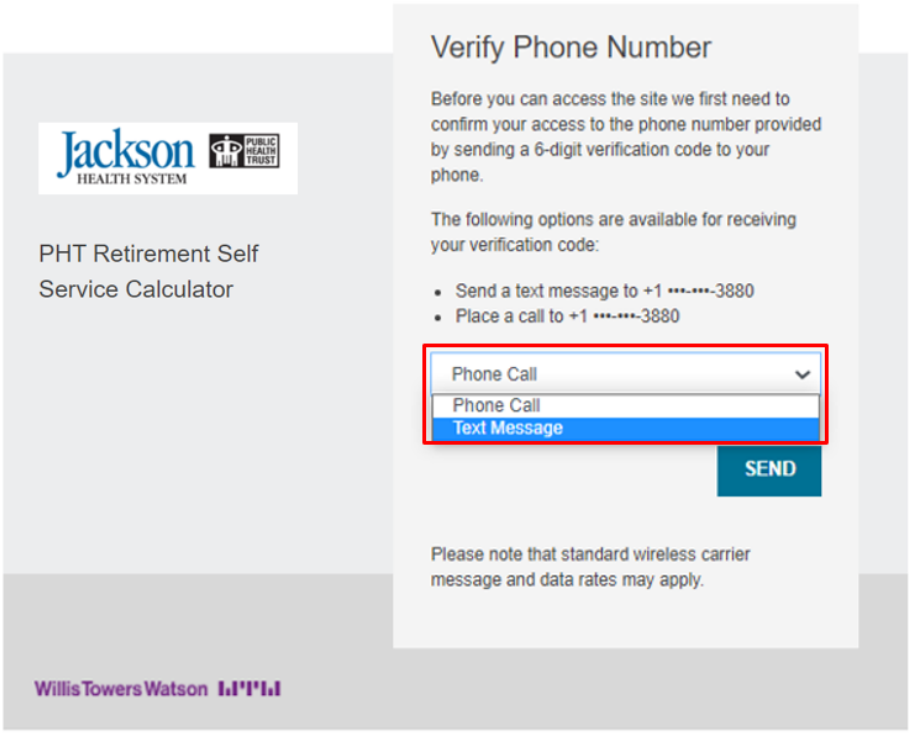
To be able to use the modeling tool, you must accept the terms of use. Click the **Accept Terms** button to proceed with the account creation process.



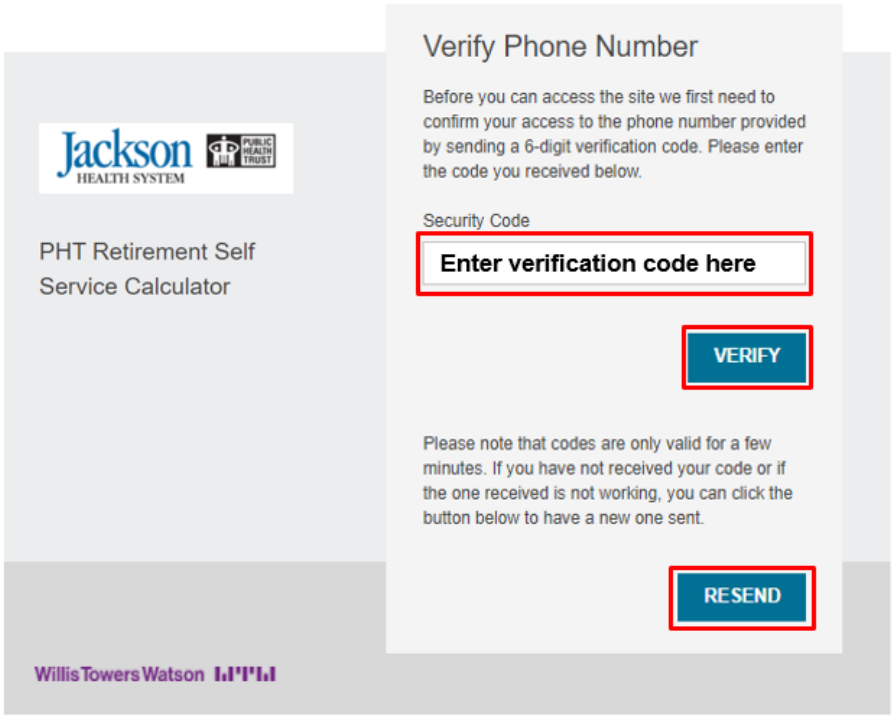
Validate the email address you provided earlier by entering the six-digit verification code sent to that email address then click **Verify.** The code will expire in about 5 minutes and you can request for a new code by clicking **Resend.**



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



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.**



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

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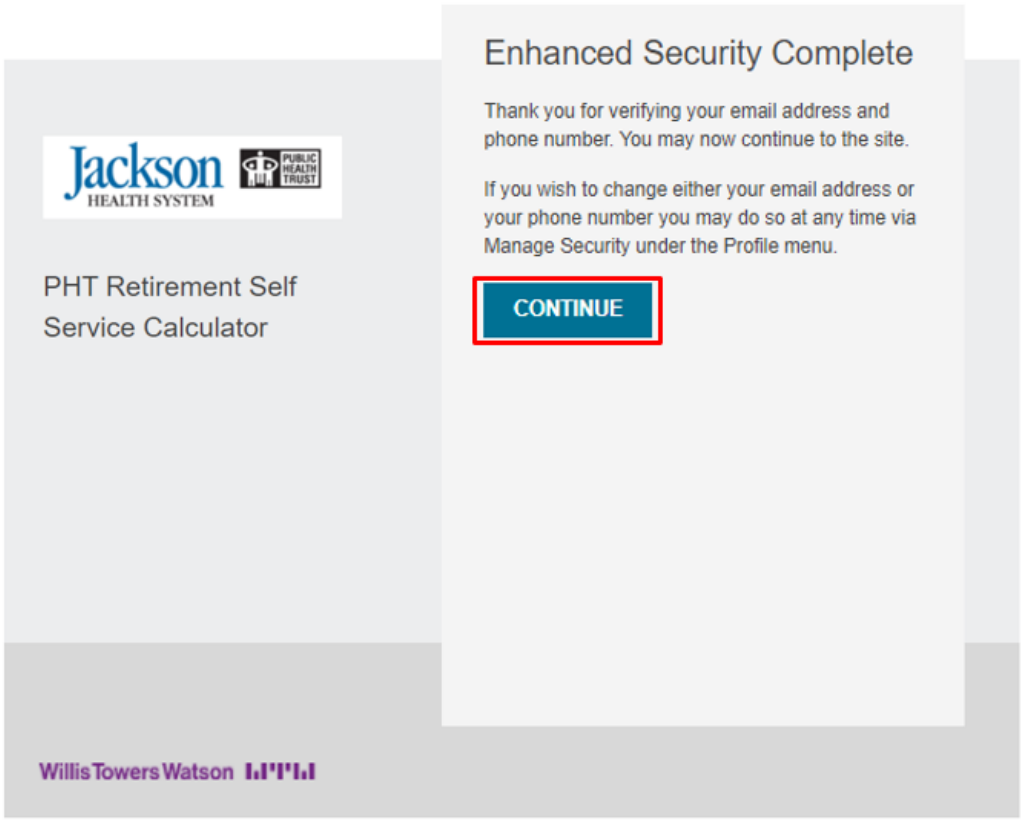
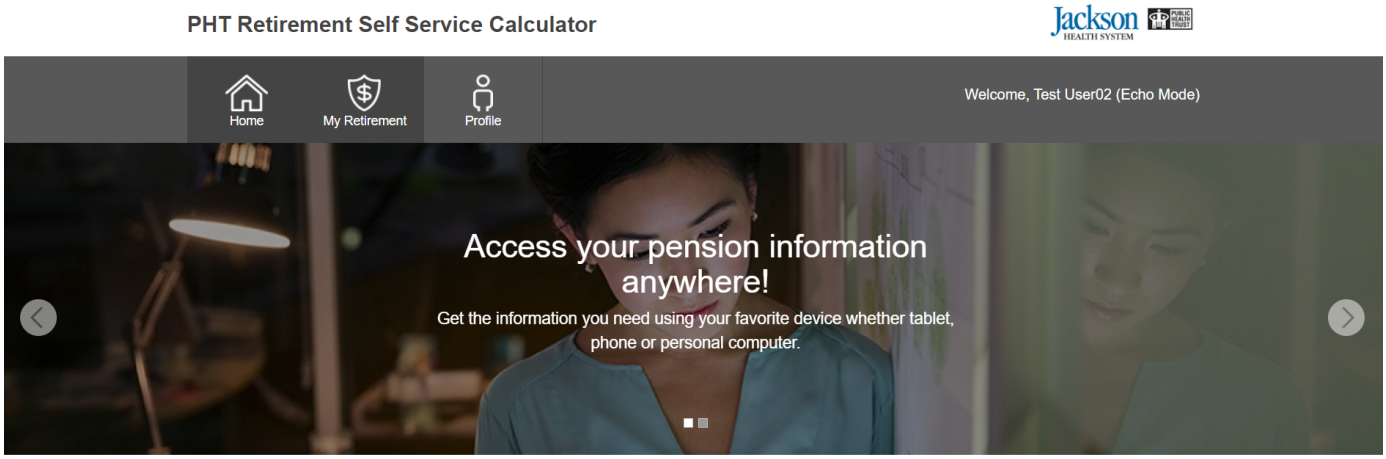
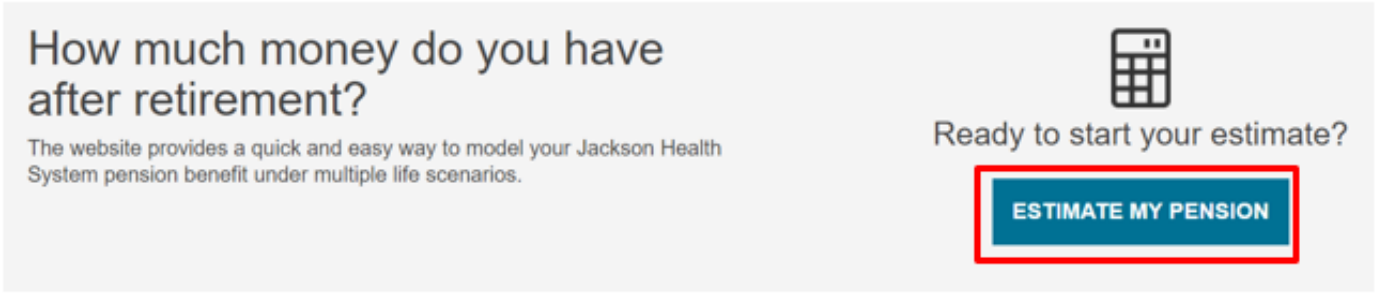
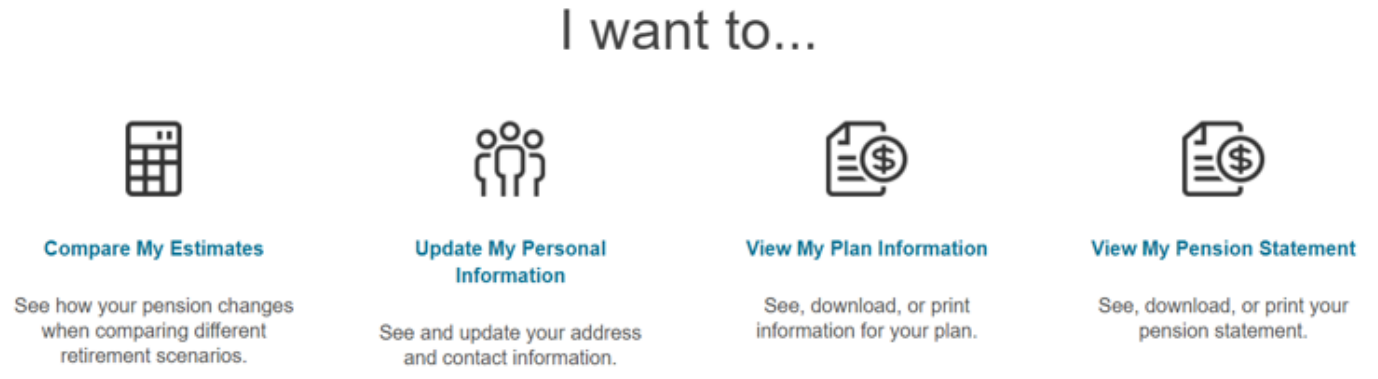


Using Pension Self Service Calculator

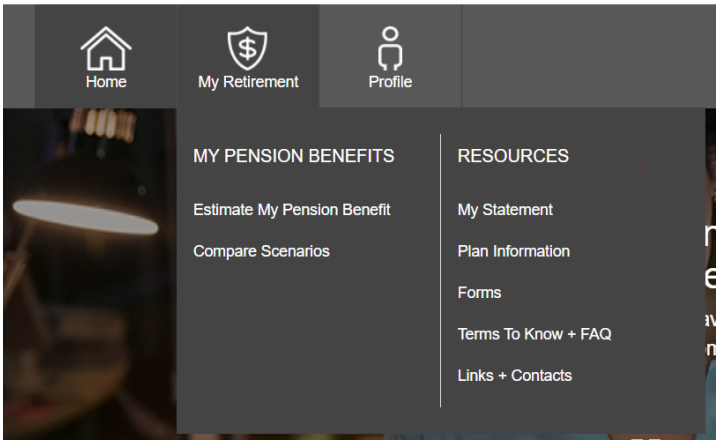
As soon as your account is created or you log in, you will be taken to the Welcome page (Home page). To navigate around the website, you can click on the Menu options at the top of the page or scroll down to the quick links on the page.

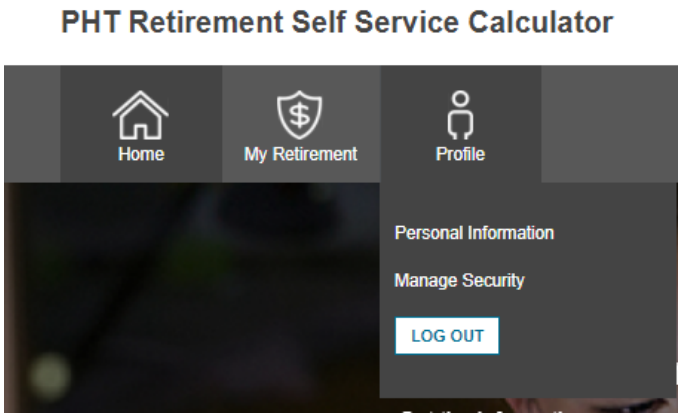






PHT Retirement Self Service Calculator





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.

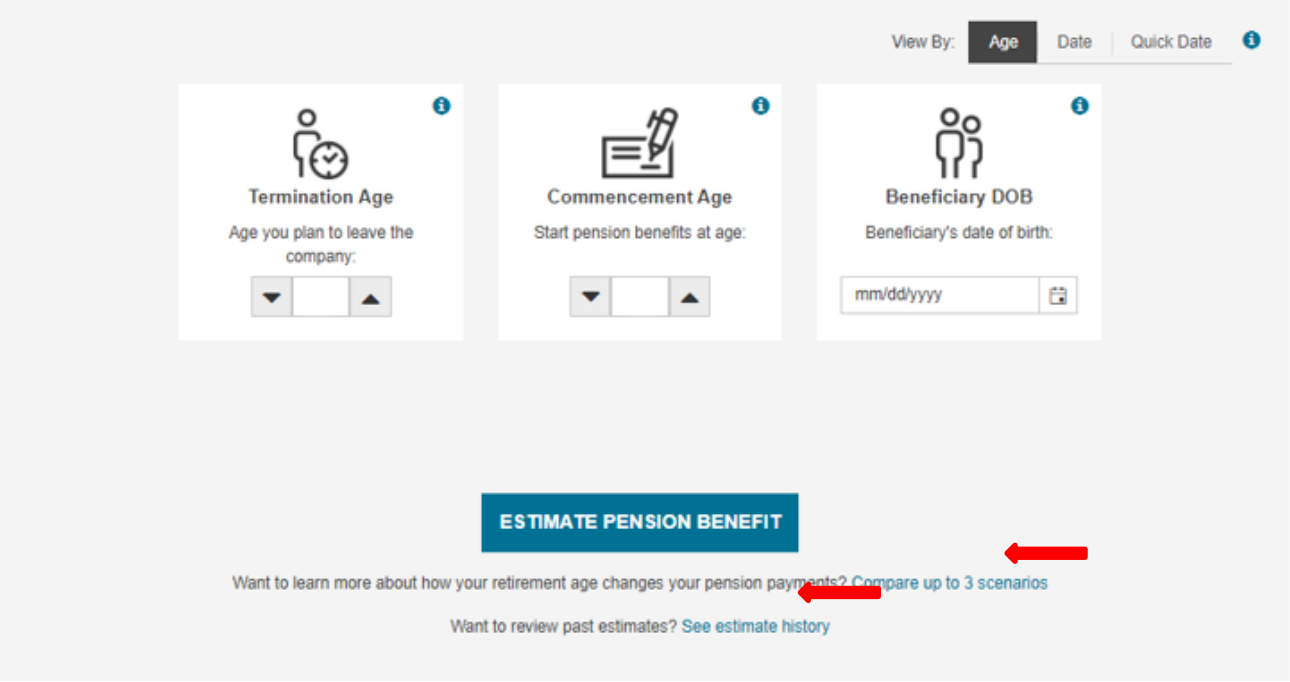
Use the **Personal Information** menu option to view your personal information and update your contact information, if applicable.

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



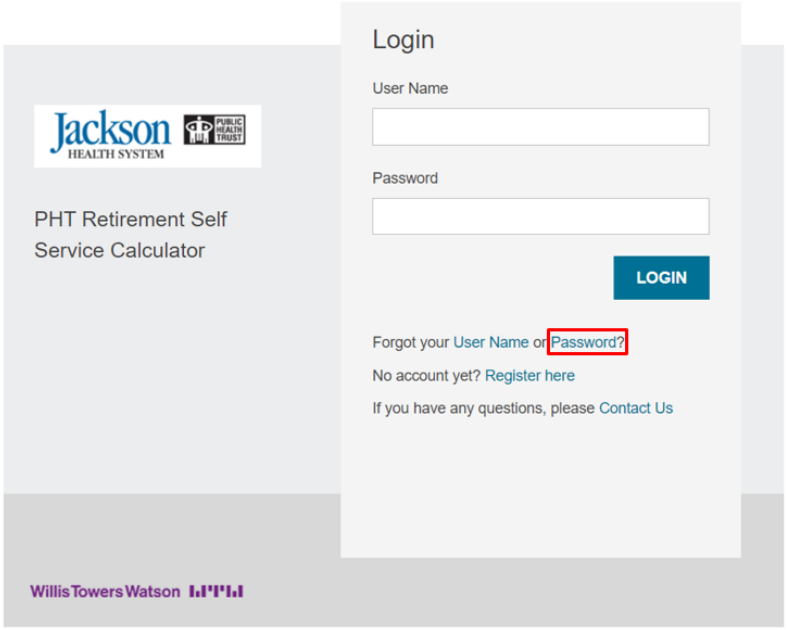
Use the **Compare up to 3 scenarios** link go to the page where you can enter up to three different combinations at one time.

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

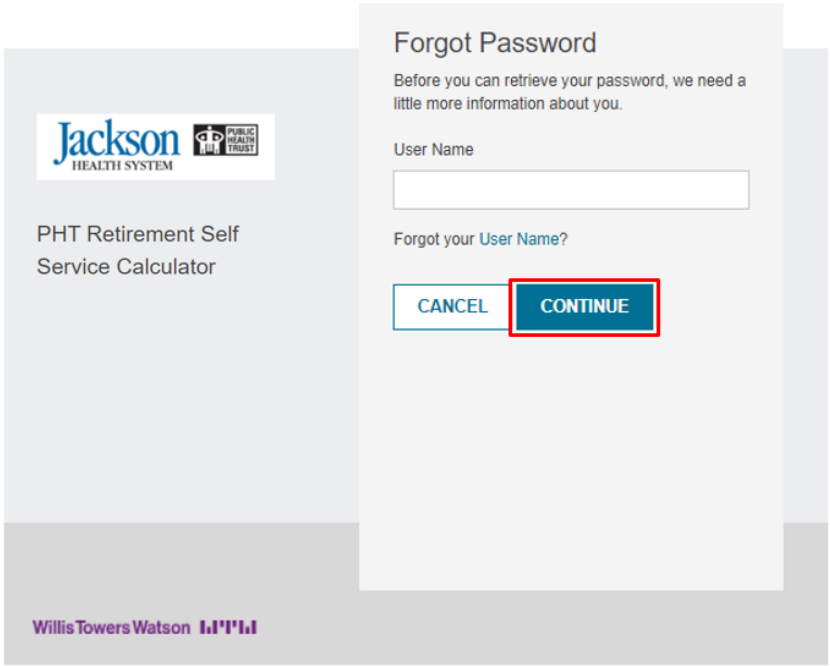
IMPORTANT: All results are estimates only and do not represent a guarantee of retirement income.

Resetting or Your Password – TERMINATED VESTED MEMBERS ONLY

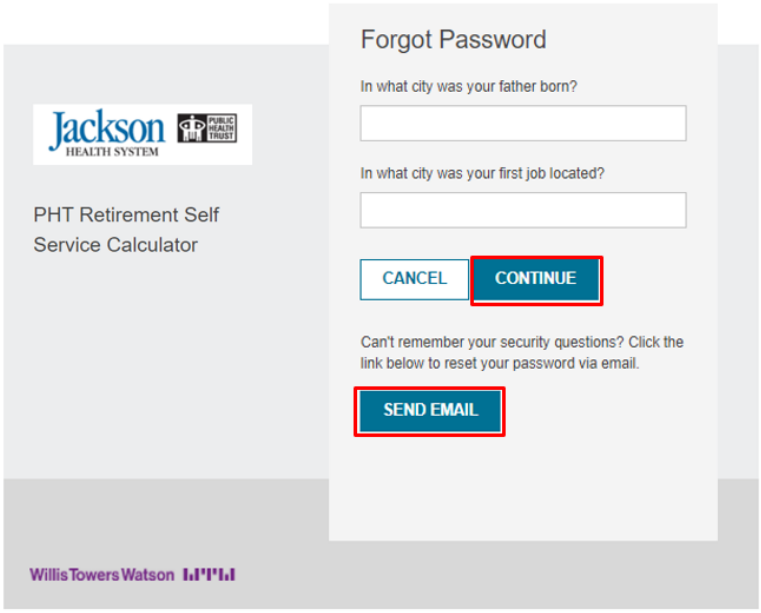
To reset your password, click on the **Password** link imbedded in the question Forgot your User Name or Password from the log in page.



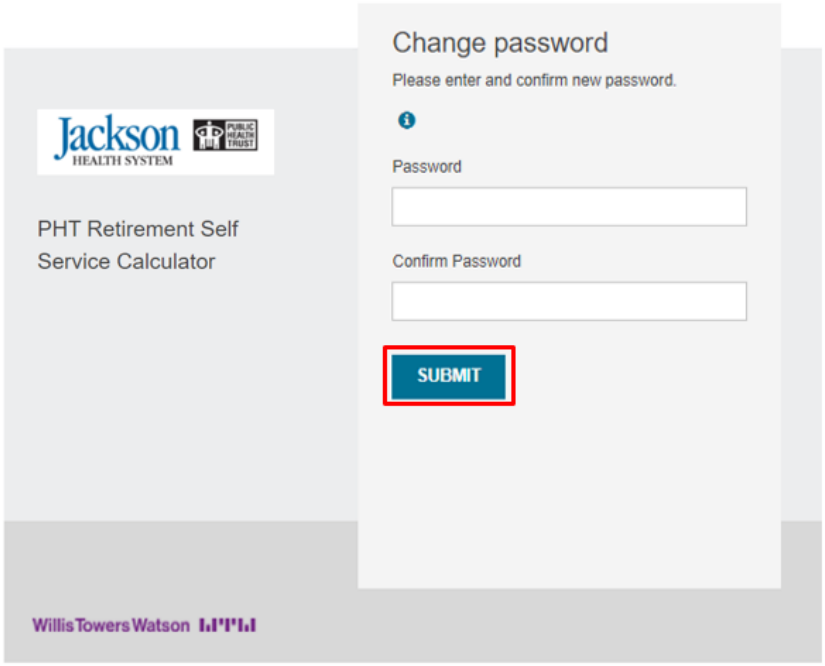
Enter your User Name then click **Continue**.



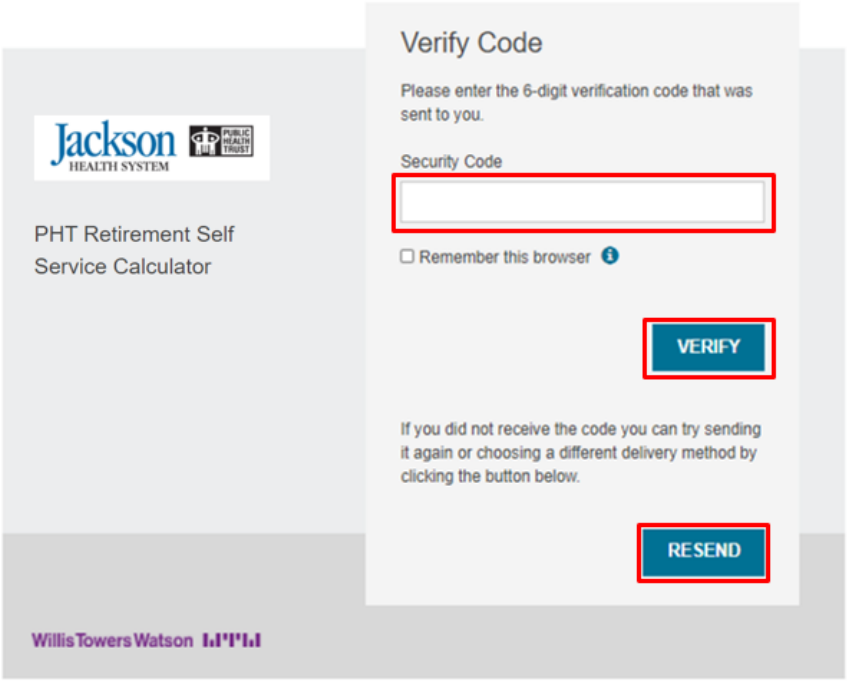
Enter the answers to the security questions you selected during the account setup and registration process then click **Continue**. If you do not remember the answers to the security questions, you can click on the **Send Email** button to reset your password via email.



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 eepoint.donotreply@willistowerswatson.com to get to this step. Remember to click on the information icon next to review the password policy.



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 nest 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.