Employee Self Service Guide

Introduction

The PDS Employee Self Service Portal (ESS) is an interactive web based tool allowing you to view and manage critical information about you, your benefits, and your compensation.

The Portal allows you to:

- Review your Paycheck
- Review your current Health and Insurance Benefits
- Review and Update your Paycheck Direct Deposit Designation
- Update your Tax Withholding Allowances (W4)
- Define and Update your Emergency Contacts
- Define and Update your Contact Information
- Elect Your Benefits as a New Employee
- Change Your Benefits based on Life Events (Birth, Marriage, Etc.)
- Elect your Benefits during Annual Enrollment

Depending on your job function and duties additional features may also be available to you.

Security

The web site is protected by 128 Secure Socket Layer Communications and is secured by advanced firewalls to keep unauthorized parties from gaining access to your personal information. Firewalls keep our public web servers separate from the servers that contain your account and personal data, so, they can't be accessed directly from the internet.

We will never send you an email requesting your account number, User Name, PIN, Password or other personal information. We create a unique User Name for each user and require each account to have a strong password, containing letters, numbers and special characters.

Internally, your information is limited by a well established computer system approach called "least privilege access". Our staff is thoroughly trained in our policies and how to enforce them.

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Establishing an Account

An account is established for you automatically by you being employed by PDS Tech, Inc. When your employment record is established an email is sent to the address established during your application process. The email contains your unique User Name and logon procedures. If you have not, or, do not receive this email by your tenth day of employment, you may contact your PDS representative (recruiter) and request it by telephone.

Your default password is the Month (2 digits) and Year (4 digits) of your birthday, followed by the first two letters of your last name. For example, if you are John Doe and were born in January of 1975, your password would be 011975Do.   **Note, the FIRST LETTER of your LASTNAME must be capitalized.**

We *strongly* suggest you change your password after logging in to enhance your personal security. Your password must be at least 8 characters in length and contain a combination of upper and lowercase letters, numbers and special characters (!@#$%^&*).

The email you received will contain a link to the PDS Employee Self Service Portal. The Portal address is http://ess.pdstech.com. Although a link is provided, for your security, we suggest always typing this link address in your browser rather than clicking through the link in an email.

Logging On

Logging onto the Portal is as simple as providing your User Name and Password.


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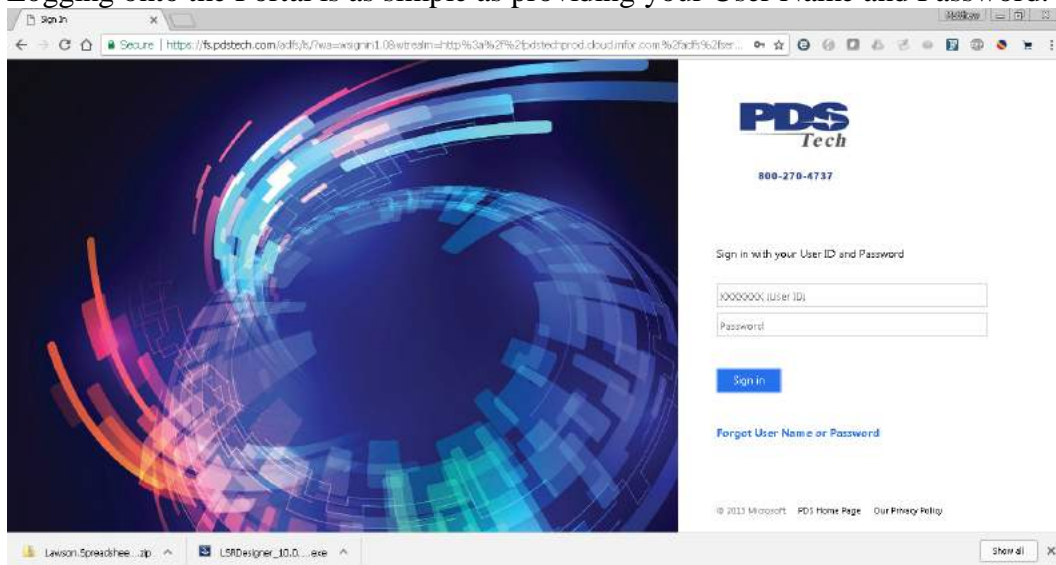
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After logging in you will be presented with a welcome screen

The screen is divided into two sections. The <u>bookmark menu</u> allows you to select the service of interest to you in the portal.   The <u>bottom panel</u> is where information is entered, changed or displayed. Clicking on any of the menu options will either take you to a specific topic, or, bring up a sub menu of topics or actions.
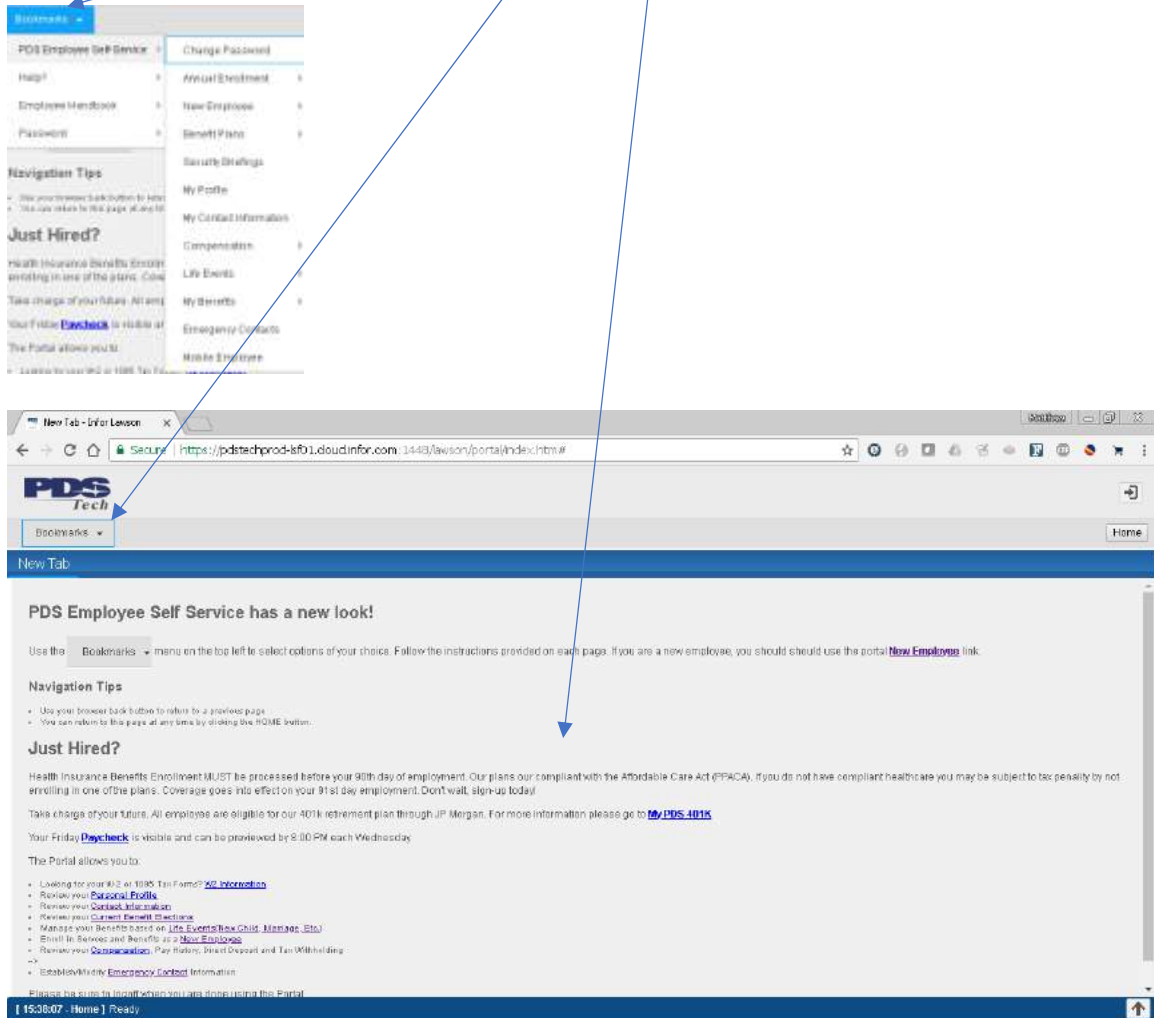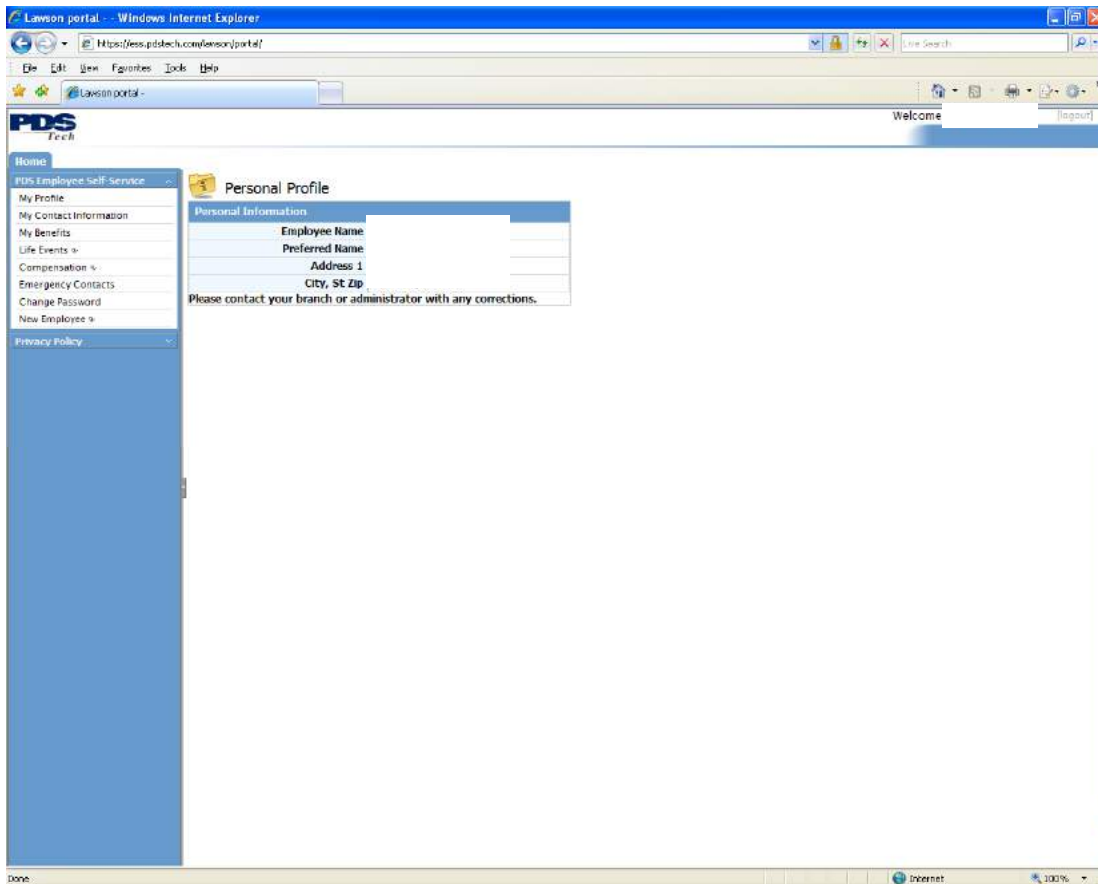
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The following section illustrates the options available and the particular navigation of each of the Portal screens.

My Profile

My Profile displays current information we have about you. The information presented is your domicile or permanent address. If it is incorrect and you are a contractor, you should contact your PDS Branch Representative and ask them to correct it. If you are a staff employee, please email humanresources@pdstech.com with your change.

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My Contact Information

My Contact Information allows you to review and modify your contact information. You should update this information whenever you change your work phone number, extension or email address. The email address is the address we use to contact you about new features and enhancements to the portal. You must have access to the email address you provide to reset your password on the portal.
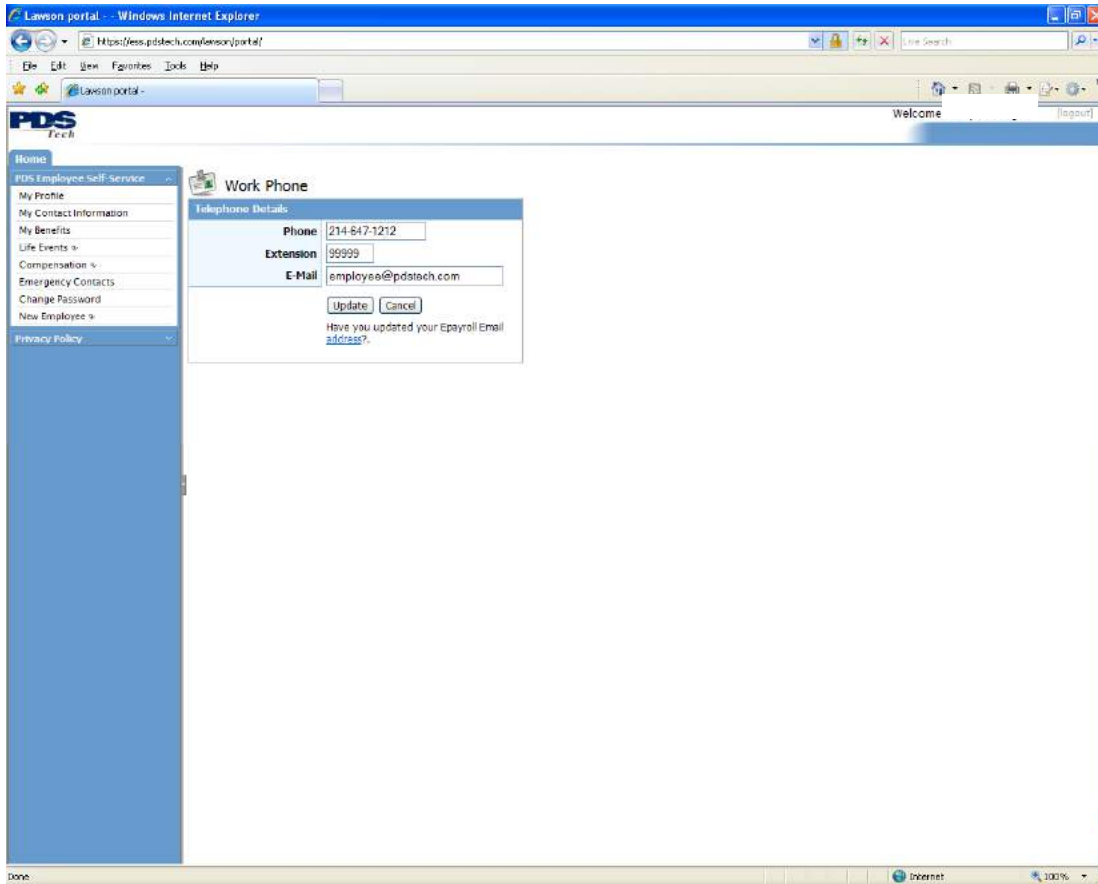
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My Benefits

My Benefits displays the PDS benefits you are currently enrolled in and any costs associated with the benefits. Your benefits can only be modified during annual enrollment and when you have a life event such as a birth, marriage or change in spouse employment. Our Insurance carrier requires you to make your new benefit elections within 31 days of the event.
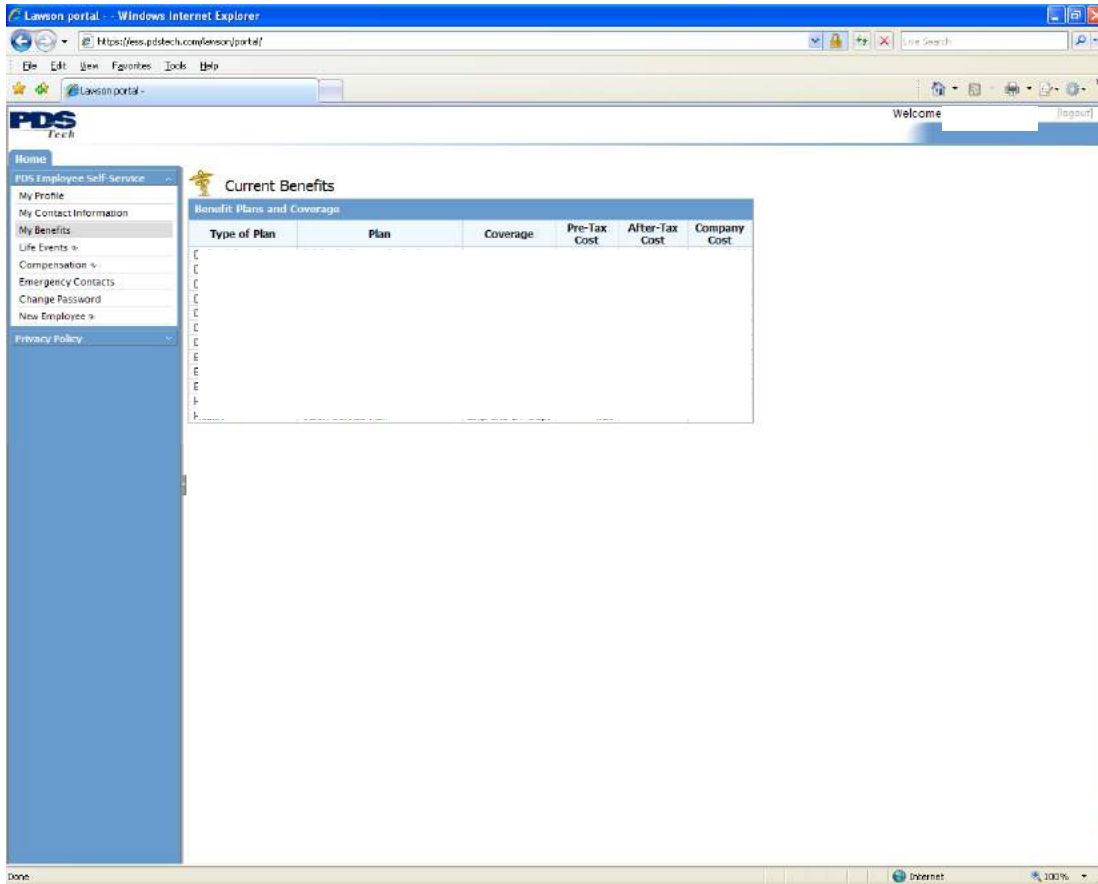
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Compensation

The compensation tab brings up a sub-menu of features concerning your compensation and payroll. In this section you can review your current and historical paychecks, establish or change your direct deposit designations and update your Federal and State Tax withholdings.
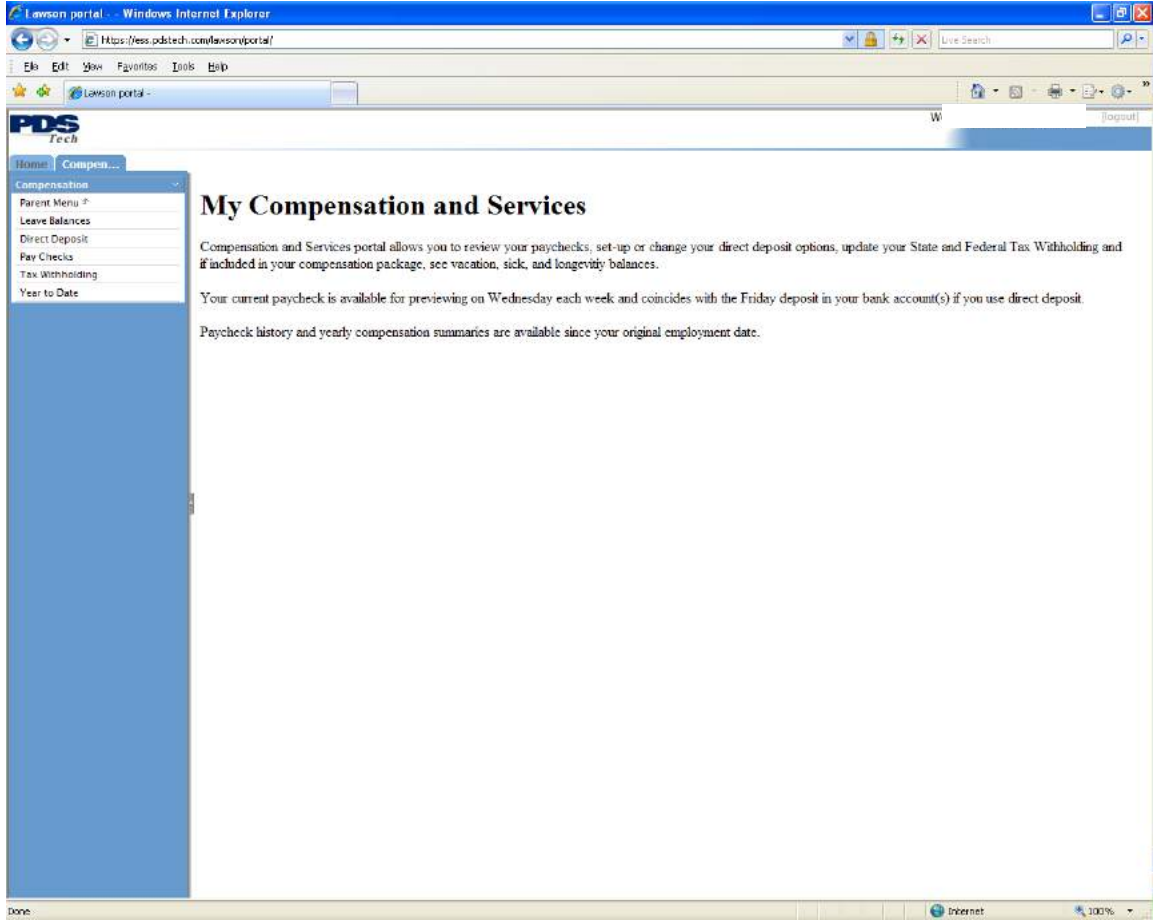
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Compensation: Leave Balances

If your compensation package includes paid time off you may review any Leave Balances you have.

Compensation: Direct Deposit
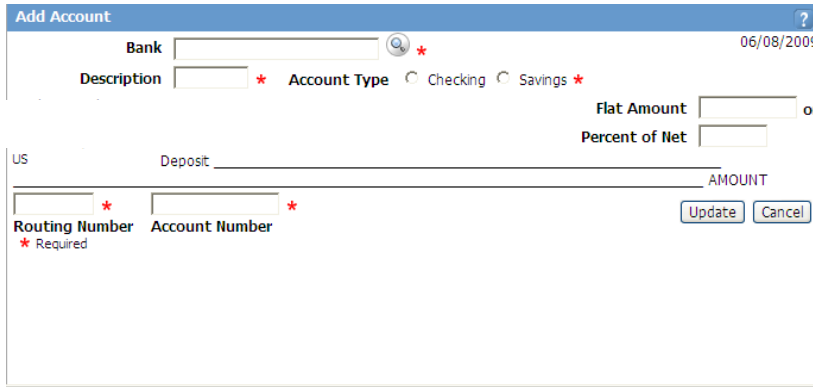
You may define up to 10 accounts to deposit your paycheck. One account is always defined as your *default* account. The *default* account is where the NET of your paycheck is deposited after all other direct deposit directives are satisfied. If you only have one direct deposit designation your entire paycheck will go to the *default* account you define.
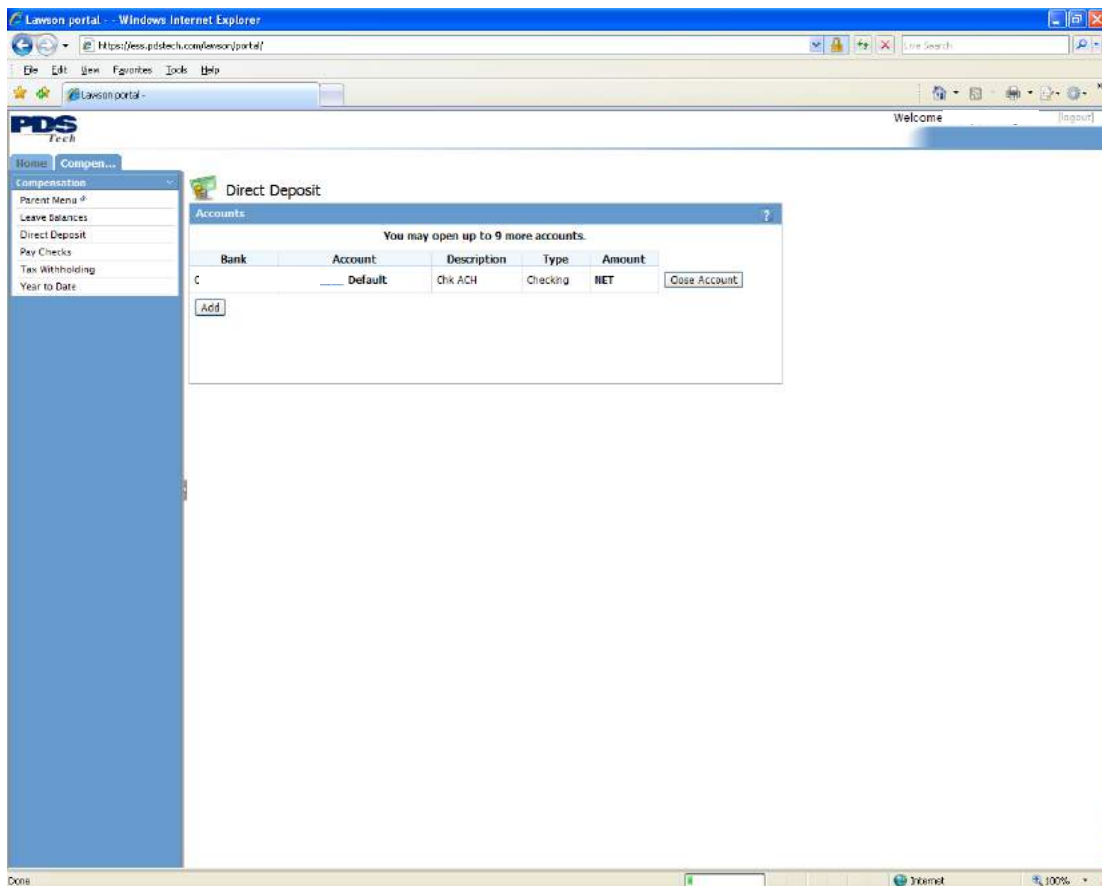
Add Account

To Add an account click on the **Add** button. After giving us permission to act on your behalf for direct deposit transactions you will be presented with a screen for adding accounts.

Add Account
Bank	[ ] 🔍 *	06/08/2009
Description	[ ] * **Account Type** ○ Checking ○ Savings *	

Flat Amount [ ] or
Percent of Net [ ]

US   Deposit _____

_____ AMOUNT

[ ] *   [ ] *   [Update] [Cancel]
Routing Number Account Number
★ Required
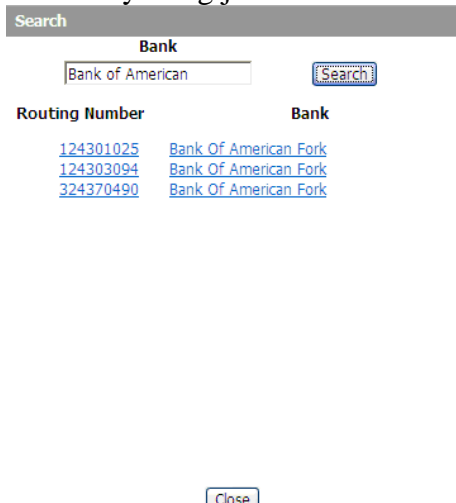
Add Account (Continued)

The following steps outline how to add an account for direct deposit:

1. Click on the search 🔍 box to find your bank and its corresponding routing number.
2. Type in the name of your bank and click on the Search button. A list of banks matching the name you entered will be displayed. If you cannot find your bank try using just the first few characters of the banks name and searching again.

Search

Bank

[Bank of American]   [Search]

Routing Number	**Bank**
124301025	Bank Of American Fork
124303094	Bank Of American Fork
324370490	Bank Of American Fork

[Close]

3. Compare the list of banks and routing numbers to the routing number of the account you are trying to set-up. The routing number of the bank you select must match the routing number of your account.
4. In the Description field, enter a meaningful description for the account. The description allows you to name the account for easy recall in the future. "Checking", "College", "Investment", "Holidays" are examples of what you could use in the description.
5. Define either a flat amount, or a percentage of your check to be deposited.
6. Enter the account number of your account

7. Click Update to save this account.

Effective Date: Changes made on this screen may or may not be reflected on your next paycheck, depending on your payroll cutoff. That is, if you update a direct deposit account the day before payday, it is unlikely that your change will appear on your paycheck until the following payroll cycle.

Close Account

To close an account, simply click the Close Account button next to the account you wish to close and confirm your intentions.

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Compensation: Pay Checks

The Pay Checks tab displays a list of the paychecks you've received this calendar year. To see the detail of a specific check, click on the date field of the check in the list.

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Check Detail

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Printable Check Stub

To create a printable check stub, click on the Printable Pay Stub link in the center of the page. A facsimile of a paycheck stub will be displayed in a new window and may be printed.

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Compensation: Tax Withholding

The Tax Withholding tab allows you to review and update your tax withholding.
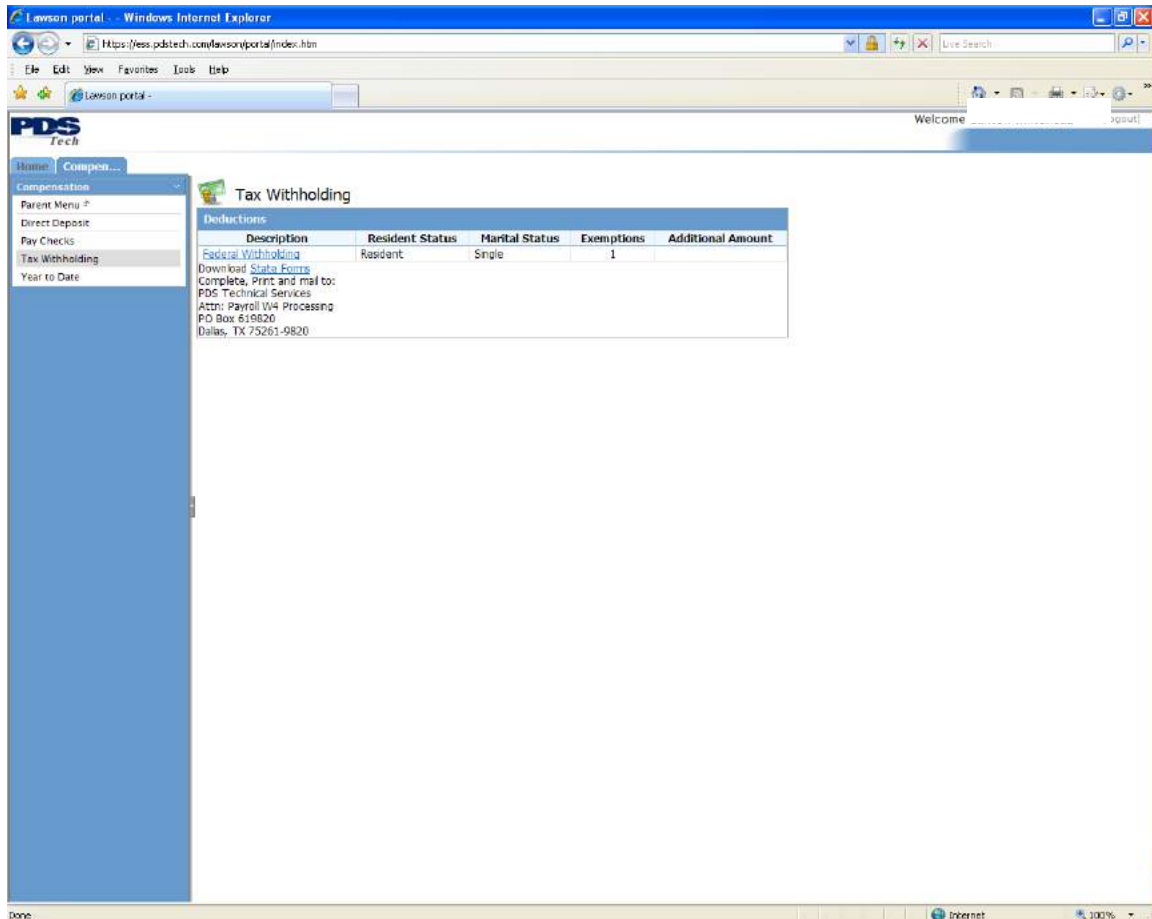
You may change your Federal Withholding by clicking on the <u>Federal Withholding</u> link.

If you are a contractor and you wish to change your State Withholding you must download the appropriate State Form and fax it to your Branch Administrator. If you are a staff member you should email your form to staffpayroll@pdstech.com or fax the form to the Human Resource Department at 866-316-4142.

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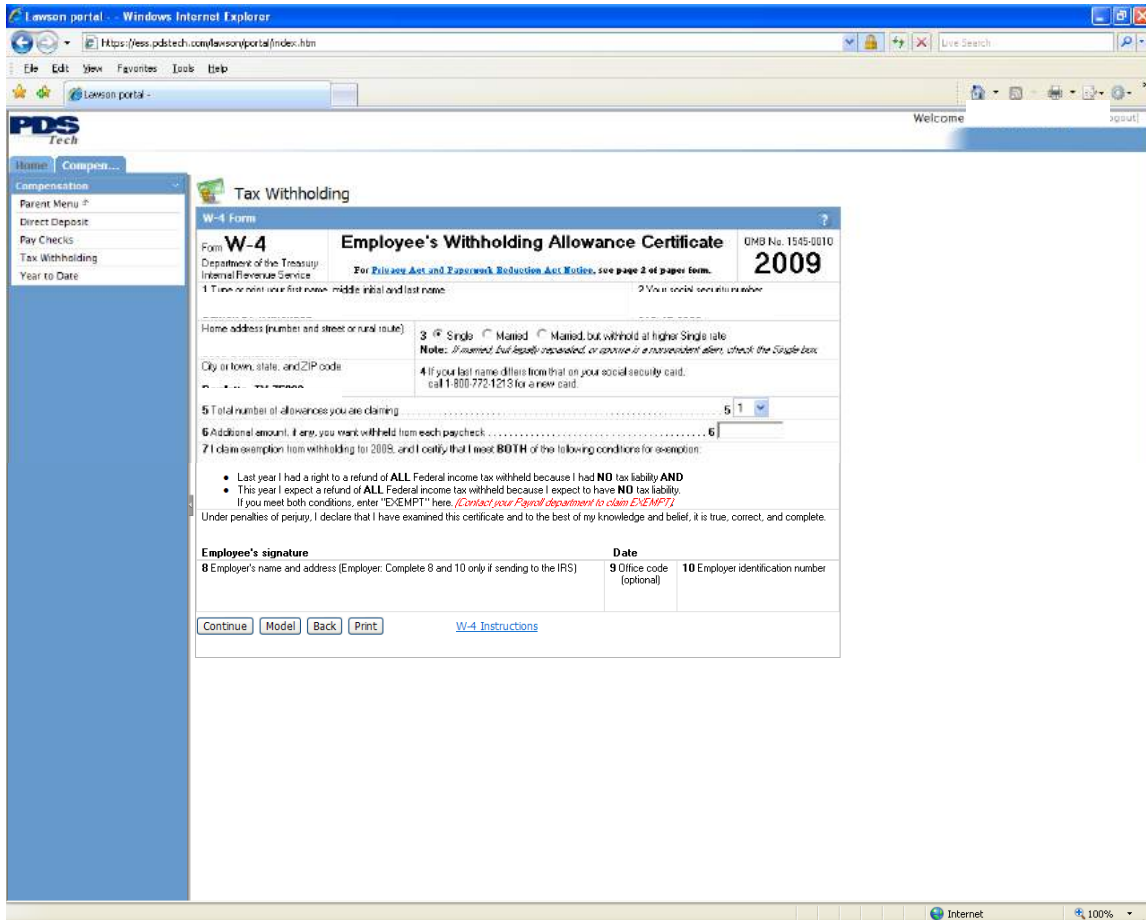
After making any changes touch the ⬚Continue button and confirm your choices.
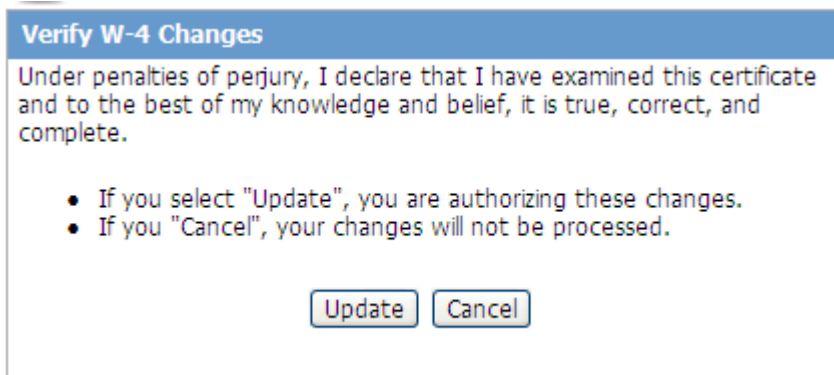
If you want to know what your changes will do to your Net Pay, you can use the ⬚Model feature to approximate what your new Net Pay will be as the result of your changes.

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Compensation: Year-to-Date

The Year-to-Date tab is used to display current or previous years' pay summary and details. The year-to-date summary information is displayed for the year selected.

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You can drill into specific paychecks by selecting Payment Details at the top of the summary page. The navigation of the screen works identical to the Pay Check feature discussed previously.
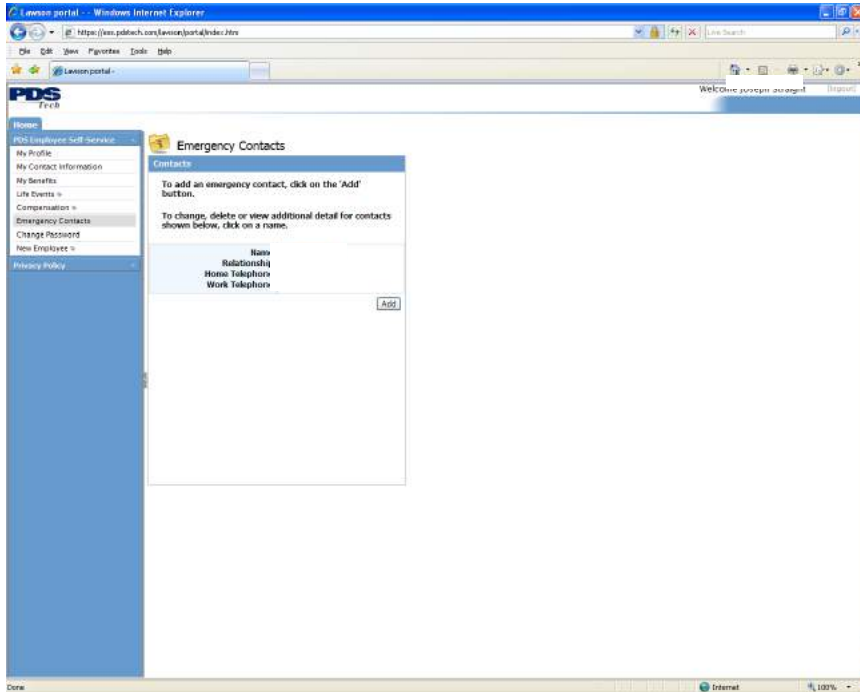
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Emergency Contacts

The Emergency Contact screen is where you tell us who to contact in the event you have an emergency. If you do not have any emergency contacts defined you should add at least one contact so we can help you in the event of an emergency.
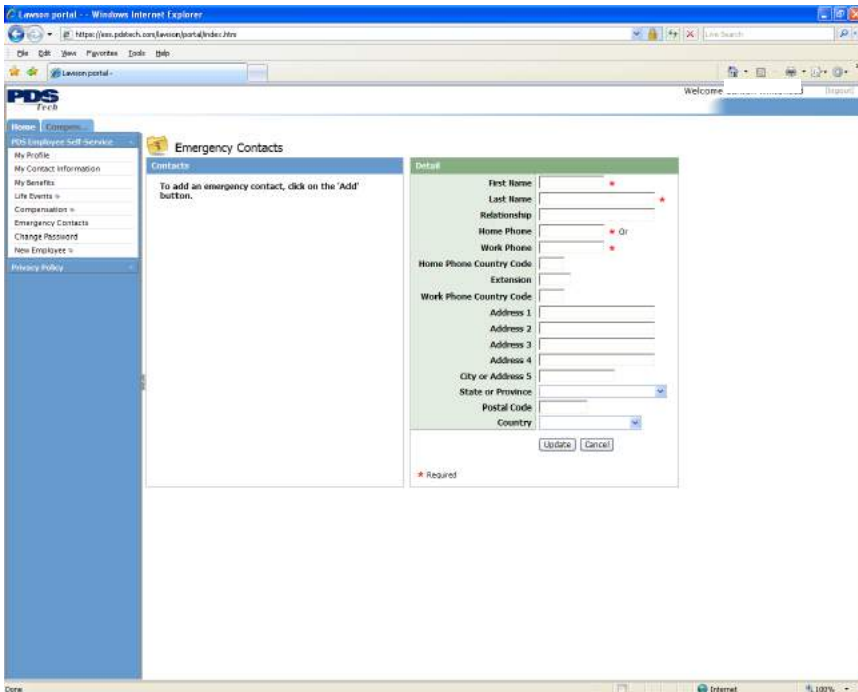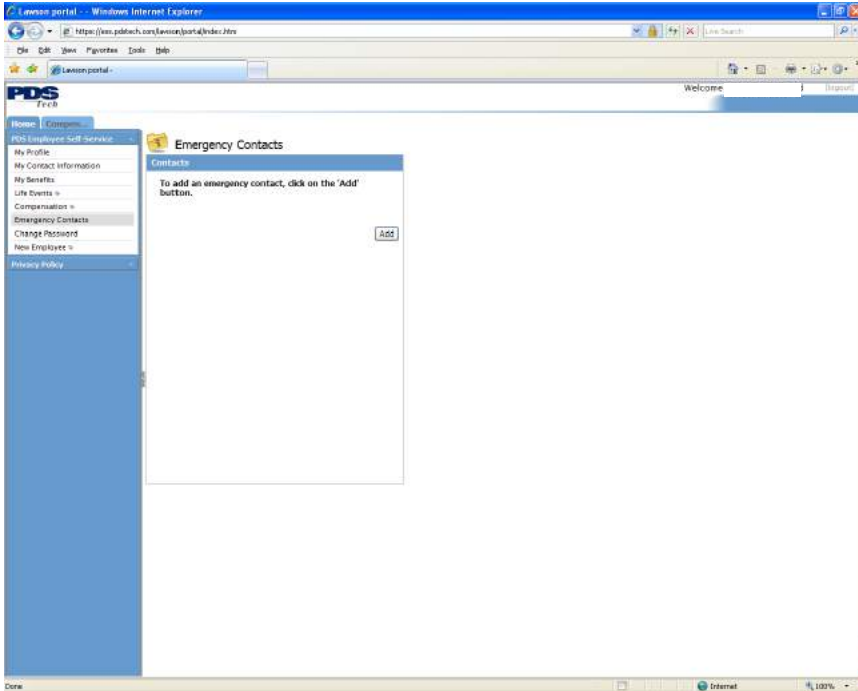
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Change Password

The change password function allows you to change the password you use to logon to the Portal.

To change your password, enter your current password and your new password twice. Your new password must be at least 8 characters in length and contain a combination of upper/lowercase letters, numbers, and special characters (@#!$%&*).