



## **Employee Self Service for New Employees**

### **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.

This document assists New Employees in establishing understanding and setting up their Compensation and Benefit Services.

New Employee Enrollment is used by employees during their first 90 days of employment to establish their benefit elections. After 90 days, new employees may no longer be eligible for benefits until the next open enrollment period unless approval is granted by our insurance carrier. However, the compensation and other services in the Portal are always available to all employees.

Please note, the examples shown may not reflect the benefits available to you. Depending on your employee plan you may have more or fewer options to select from.



## Employee Self Service for New Employees

### 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.

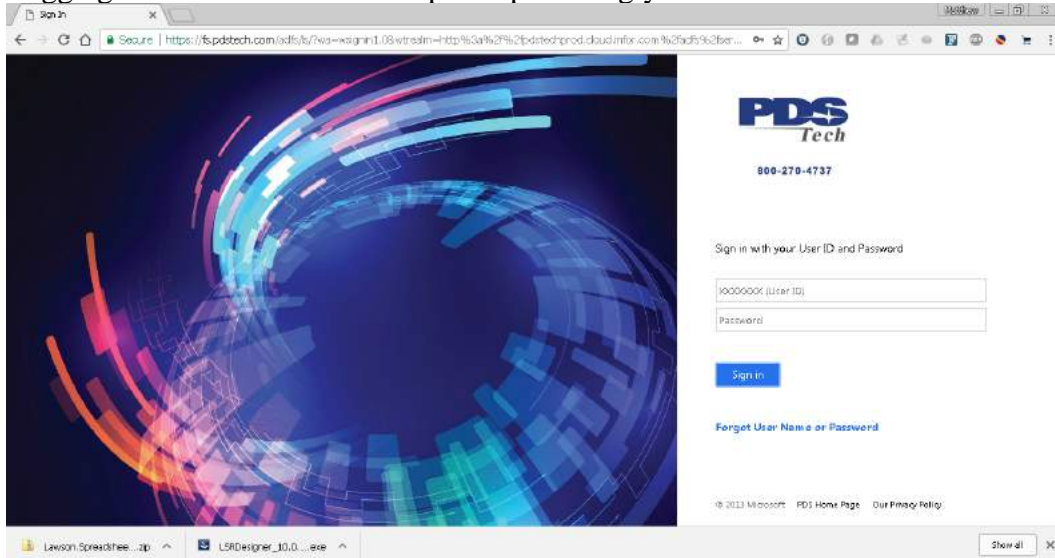
Your default password is the Month (2 digits) and Year (4 digits) of your birthday, followed by the first two letters of your last name. For example, if you are John Doe and were born in January of 1975, your password would be 011975Do. **Note, the FIRST LETTER of your LASTNAME must be capitalized.**

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.

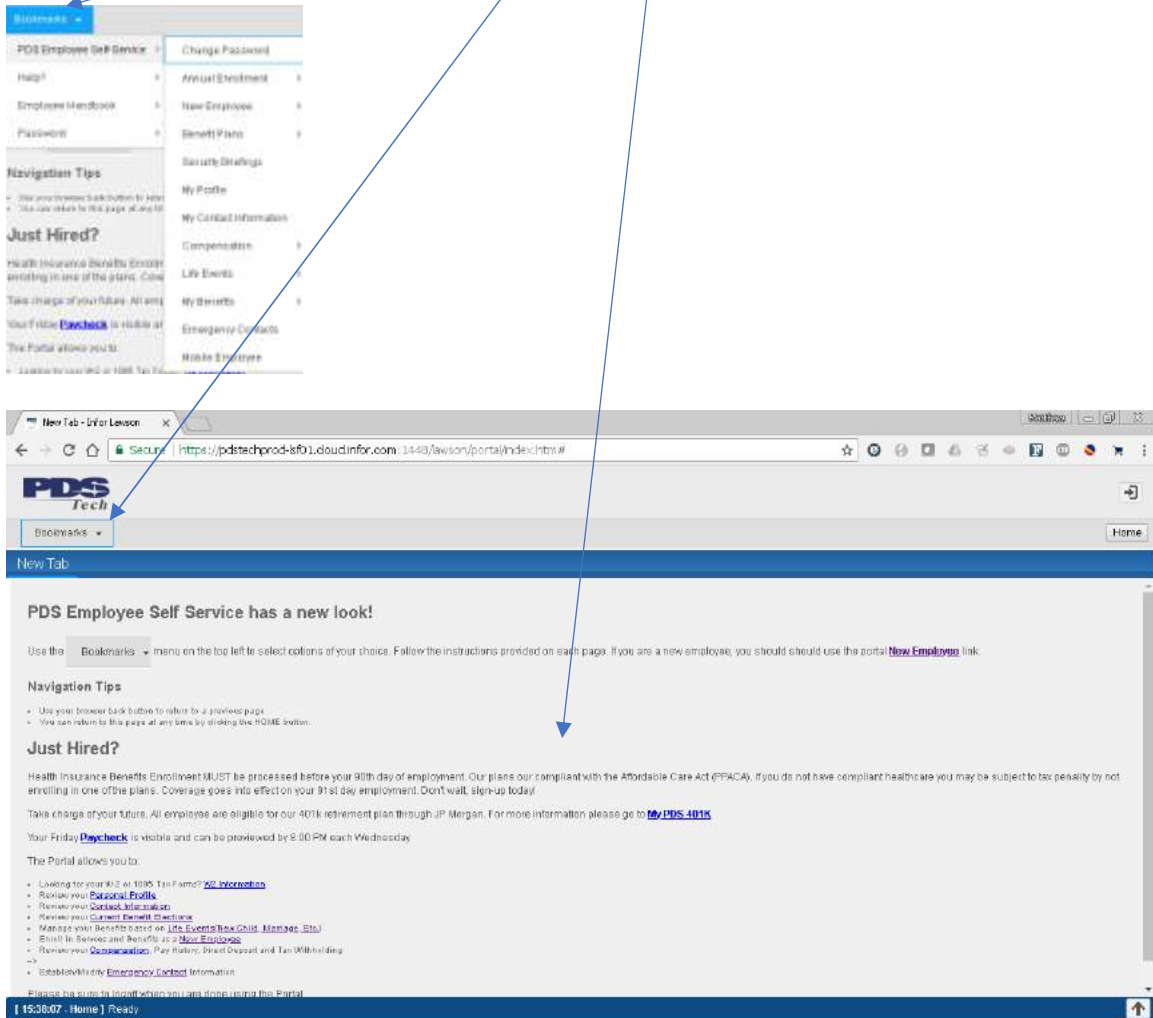




## Employee Self Service for New Employees

After logging in you will be presented with a welcome screen

The screen is divided into two sections. The bookmark menu allows you to select the service of interest to you in the portal. The bottom panel 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.



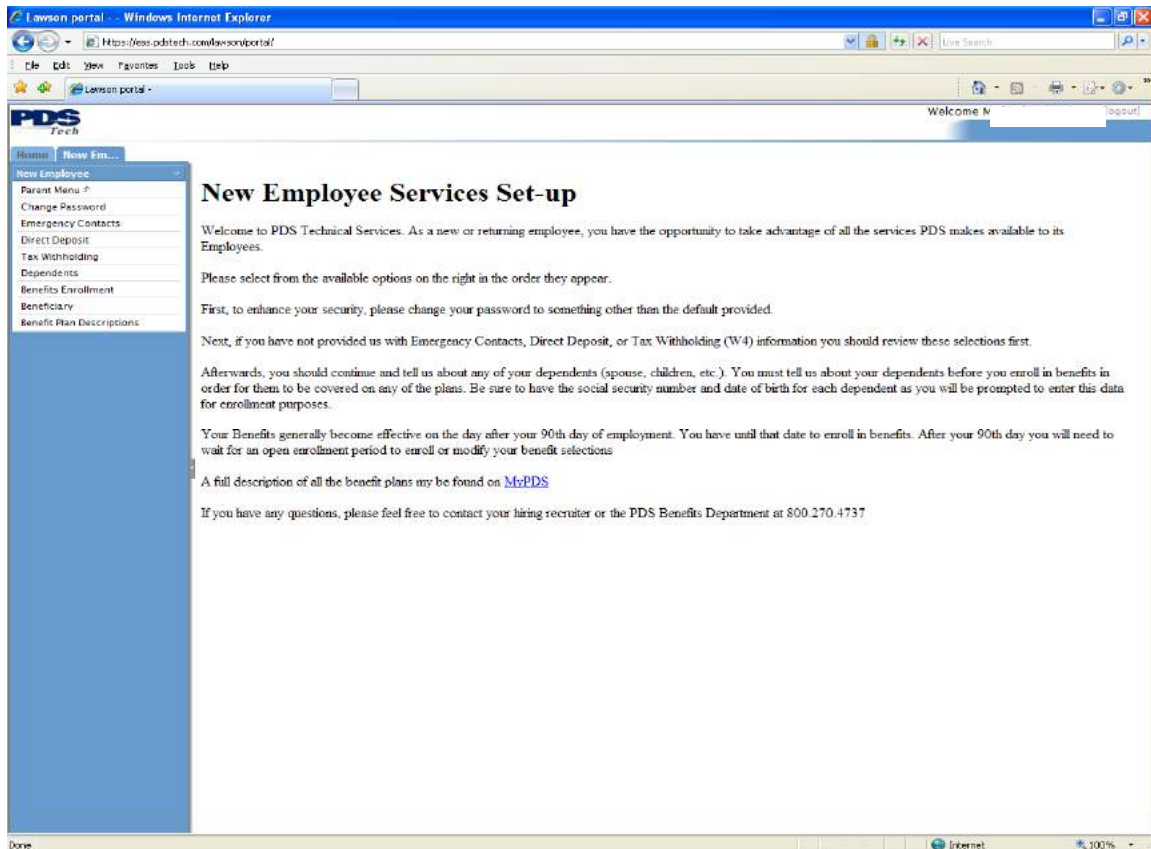


## Employee Self Service for New Employees

### New Employee Services

The first item you should choose from the Menu is the *New Employee* link in the left side navigation. We recommend you follow the suggested order on this menu:

1. Change your password if you have not done so already.
2. Establish Emergency Contact Information
3. Review and/or Establish your Payroll Direct Deposit Designation
4. Review and/or Establish your W4 Tax withholding
5. Define your Spouse and Children (Dependents) if any
6. Select your Benefit Plan Elections for your available benefits



Each of these functions are discussed on the following pages.



## Employee Self Service for New Employees

### Change Password

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

The screenshot shows a web browser window with the address bar displaying 'https://ess.pdstech.com/ - Change Password - Windows Internet Ex...'. The main content area features the PDS Tech logo at the top. Below the logo is a form with the following fields and labels:

User name	
Current password	<input type="password"/>
New password	<input type="password"/>
Verify password	<input type="password"/>

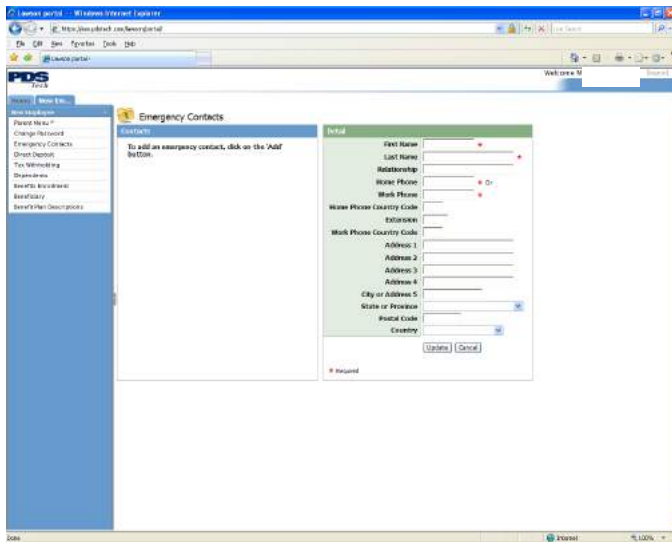
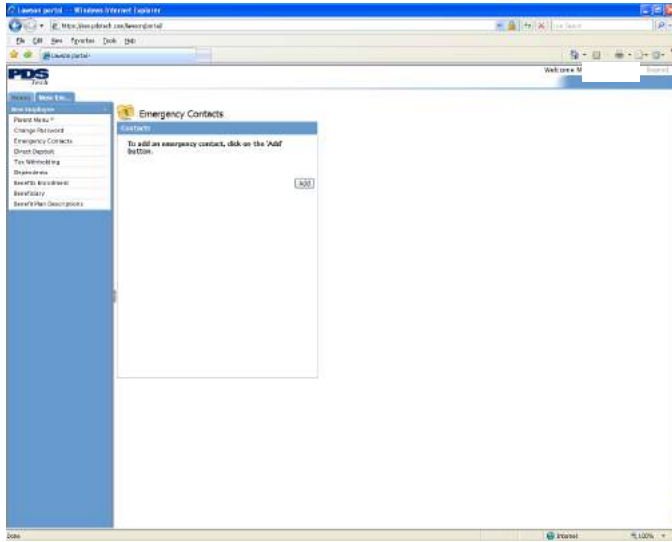
At the bottom of the form are two buttons: 'Change' and 'Close'. Below the buttons, the version information is displayed: 'Version: 9.0.0.5.258 2008-06-09 04:00:00 (200805)'.

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 (@#!\$%&\*).

# Employee Self Service for New Employees

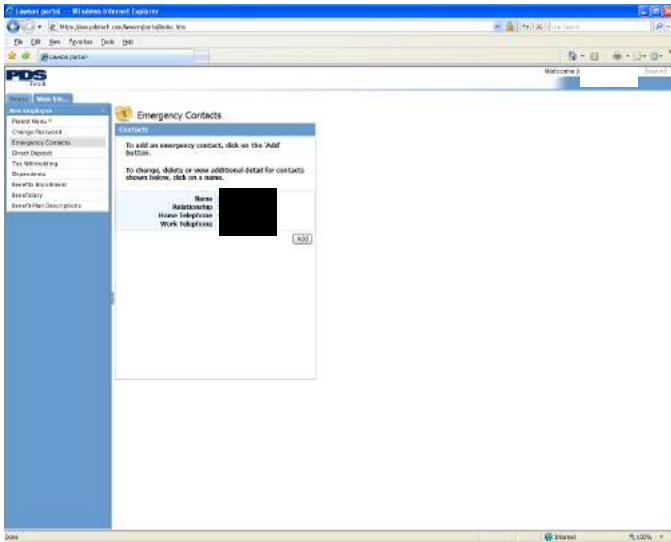
## Emergency Contacts

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.





## Employee Self Service for New Employees

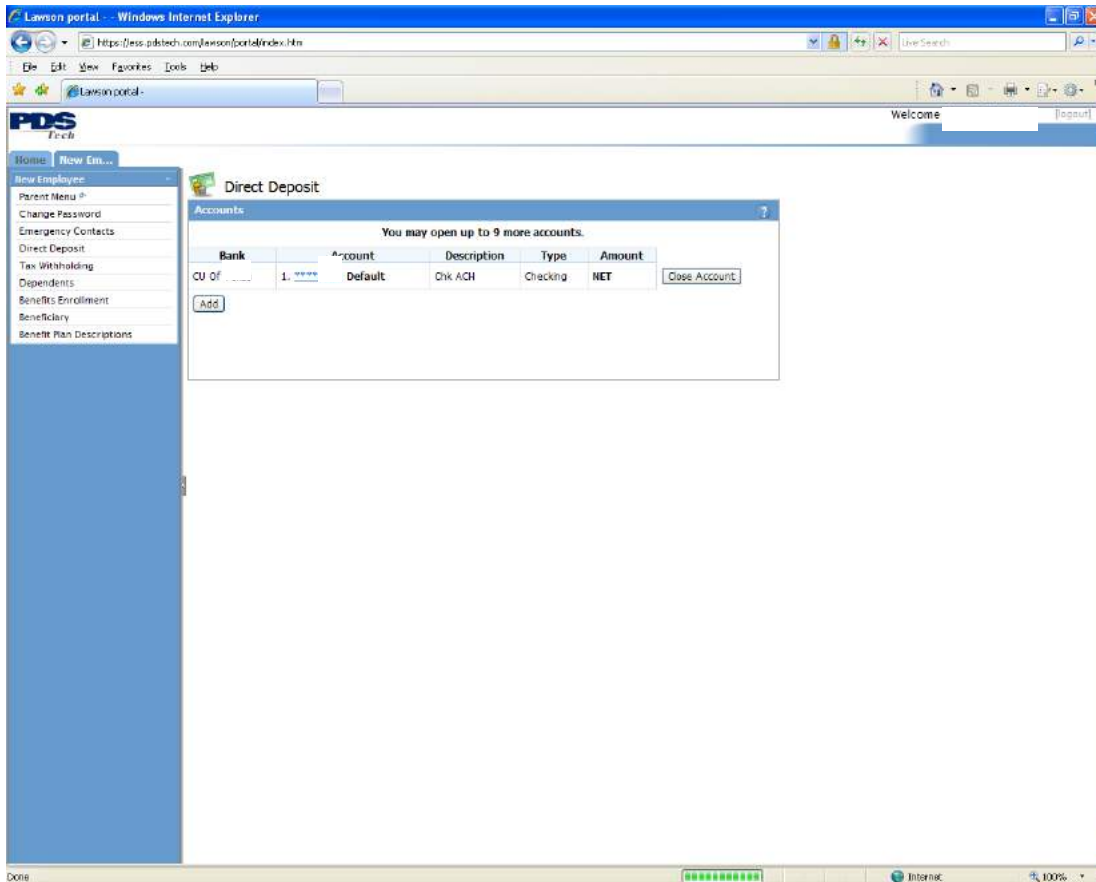





## Employee Self Service for New Employees

### 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, 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  button. After giving us permission to act on your behalf for direct deposit transactions you will be presented with a screen for adding accounts.





## Employee Self Service for New Employees

**Add Account** ?

Bank  06/08/2009

Description  \* Account Type  Checking  Savings \*

Flat Amount  or  
Percent of Net

Deposit \_\_\_\_\_ AMOUNT



\*     \*  
Routing Number    Account Number  
\* Required

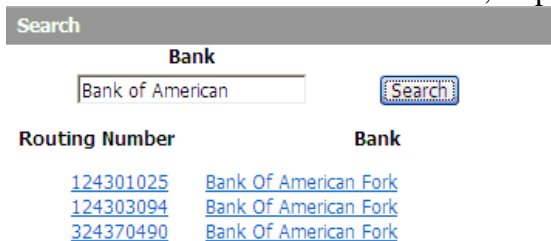


## Employee Self Service for New Employees

### 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  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.  
Note: Many banks have changed names recently. For example. Chase Manhattan is now JPM Chase, or perhaps JPMorgan Chase.



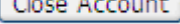
The screenshot shows a search interface with a 'Search' button at the top left. Below it is a 'Bank' search box containing 'Bank of American' and a 'Search' button. Below the search box is a table with two columns: 'Routing Number' and 'Bank'. The table contains three rows of results, all for 'Bank Of American Fork'.

Routing Number	Bank
<a href="#">124301025</a>	<a href="#">Bank Of American Fork</a>
<a href="#">124303094</a>	<a href="#">Bank Of American Fork</a>
<a href="#">324370490</a>	<a href="#">Bank Of American Fork</a>

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”, “Xmas” 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  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  button next to the account you wish to close and confirm your intentions.

### Tax Withholding



## Employee Self Service for New Employees

Tax withholding allows you to review and update your Federal W4 Tax withholding. The Federal Withholding form is available for completion online by clicking on the [Federal Withholding](#) link.

The State Tax forms are available for downloading by clicking the [State Forms](#) link.

The screenshot shows a web browser window displaying the Lawson portal. The page title is "Tax Withholding". On the left, there is a navigation menu with the following items: Home, New Em..., New Employee, Parent Menu, Change Password, Emergency Contacts, Direct Deposit, Tax Withholding (highlighted), Dependents, Benefits Enrollment, Beneficiary, and Benefit Plan Descriptions. The main content area displays a table with the following data:

Description	Resident Status	Marital Status	Exemptions	Additional Amount
Federal Withholding	Resident	Single	0	

Below the table, there is a link for "Download state forms" and instructions: "Complete, print and mail to: PDS Technical Services, Attn: Payroll W4 Processing, P.O. Box 619020, Dallas, TX 75261-9020".

## Employee Self Service for New Employees

### Federal Withholding Form

Complete the Federal withholding form by following the instructions given in the link for [W-4 Instructions](#). When you have completed your changes click on the **Continue** button. You may also click on the **Model** if you want to see what effect your elections will have on the Net Pay of your paycheck.

The screenshot shows a web browser window displaying the PDS Tech employee self-service portal. The main content area is titled 'Tax Withholding' and features a 'W-4 Form' titled 'Employee's Withholding Allowance Certificate' for the year 2009. The form includes various fields for personal information such as name, social security number, marital status, and address. At the bottom of the form, there are buttons for 'Continue', 'Model', 'Back', and 'Print'. A link for 'W-4 Instructions' is also visible.

To save your new elections you must click the **Update** button to confirm your choices.

The screenshot shows a confirmation dialog box with the following text: "Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete." Below this text are two bullet points: "• If you select 'Update', you are authorizing these changes." and "• If you 'Cancel', your changes will not be processed." At the bottom of the dialog box are two buttons: "Update" and "Cancel".

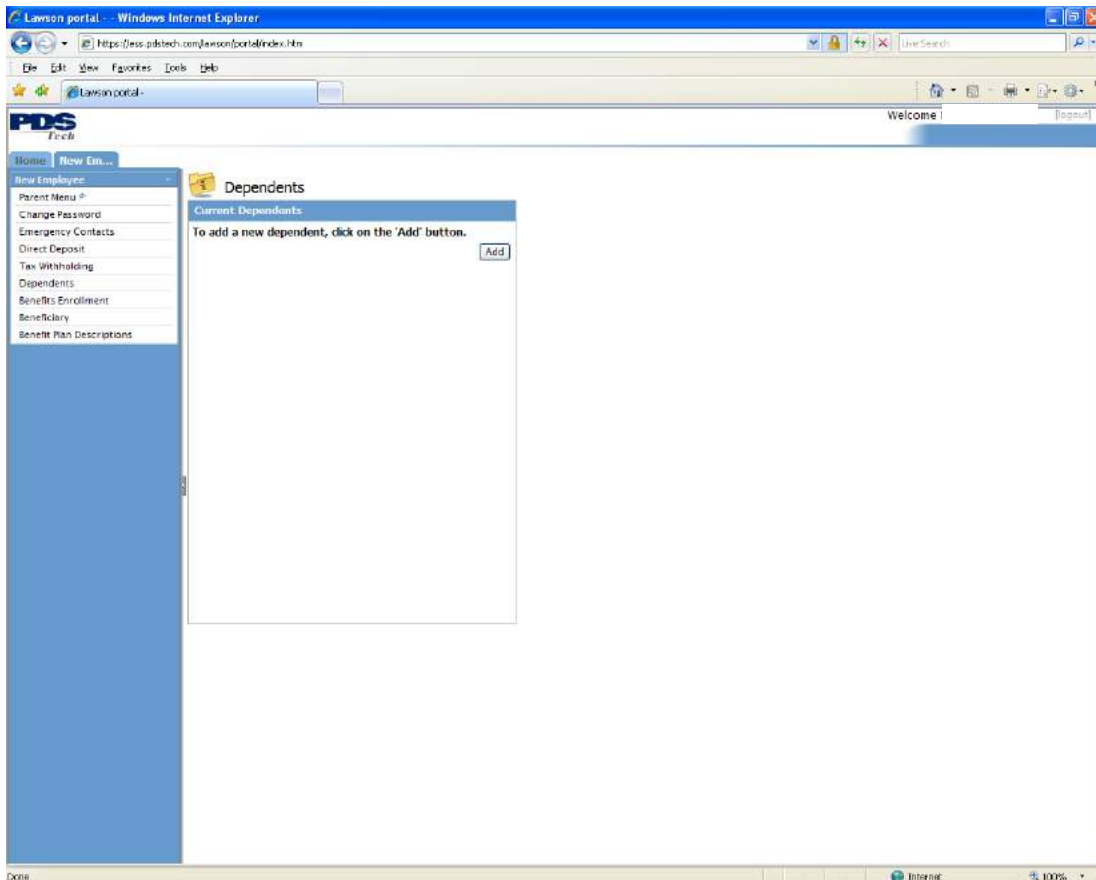


## Employee Self Service for New Employees

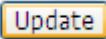
### Dependents

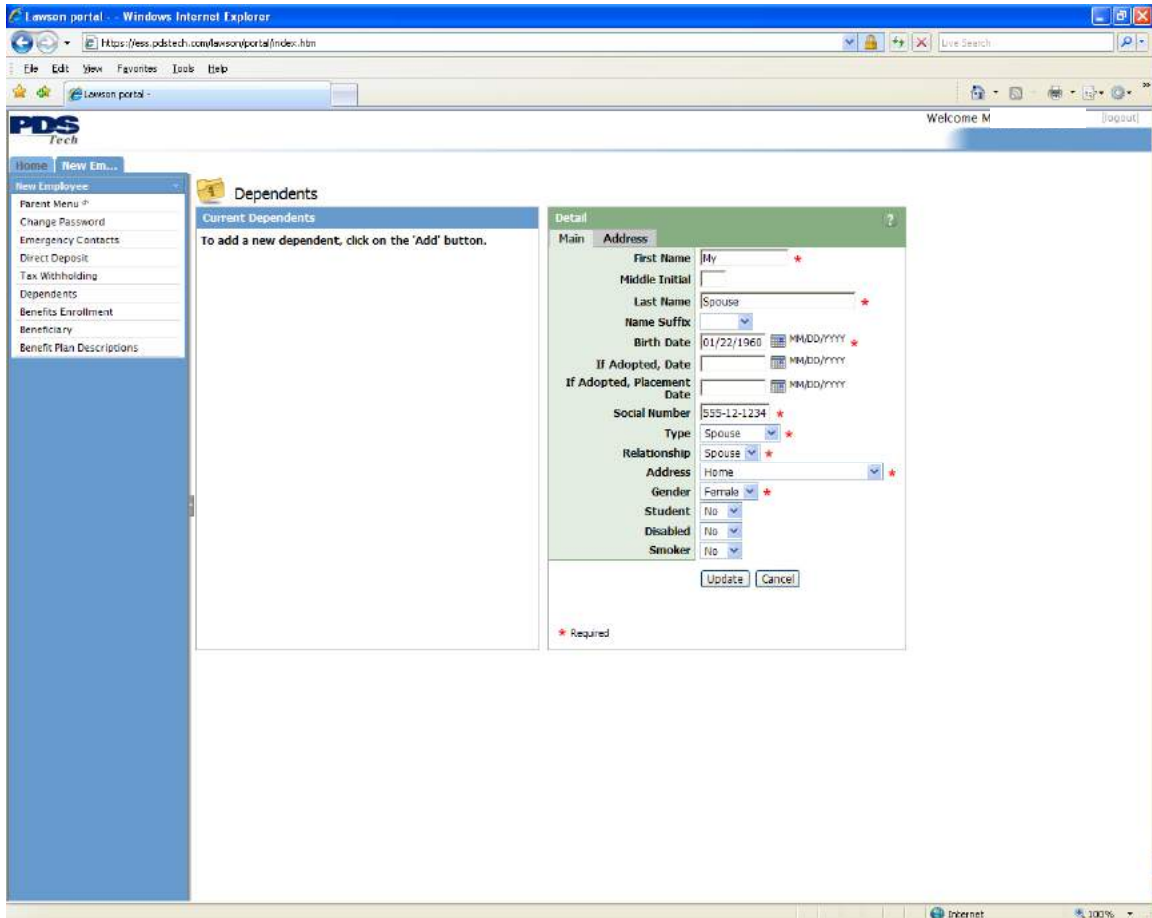
You must tell us about any Spouse or Children you plan to establish benefits for during your enrollment. You should do this before attempting to enroll in benefits. Be sure to have the social security number and date of birth available as you will be required to provide this information for enrollment purposes.

To define a dependent (spouse or child) click on the Dependents Link in the left-hand navigation panel. If you have any dependents defined they will be listed. Add a new dependent, by clicking on the  button.



## Employee Self Service for New Employees

After completing all the required fields click on the  button. Please take care to not to add any dependent more than once. Please contact the PDS Benefits department if you require any dependents be removed.



The screenshot shows the 'Dependents' section of the PDS Tech Employee Self Service portal. The 'Detail' form is filled out with the following information:

Field	Value
First Name	My
Middle Initial	
Last Name	Spouse
Name Suffix	
Birth Date	01/22/1960
If Adopted, Date	
If Adopted, Placement Date	
Social Number	555-12-1234
Type	Spouse
Relationship	Spouse
Address	Home
Gender	Female
Student	No
Disabled	No
Smoker	No

The 'Update' button is highlighted in the form. A legend at the bottom indicates that a red asterisk (\*) denotes a required field.

Your update will be confirmed with a pop-up box and the list of defined dependents will be updated.



## Employee Self Service for New Employees



### Dependents

#### Current Dependents

To add a new dependent, click on the 'Add' button.

To change or view additional detail for the dependents listed below, click on a name.

Name	Social Number
<a href="#">My Spouse</a>	555-12-1234

Continue adding dependents until everyone in your family who will be enrolled in benefits is defined.

#### Benefits Enrollment

Benefits Enrollment allows new employees to establish their benefit elections during the first 90 days of employment. The enrollment process prompts you through each of the benefits available to you. Certain benefits require the selection of options (Spouse, Child Coverage) or for you to elect a specific amount of coverage (x time salary, dollar amount or percentage of salary). After selecting each option, you will be given a summary of your selection and the option to confirm your selection.

Some benefits are paid for by PDS and are mandatory. For these benefits you will only be presented with a single option. You must select this option.

All non-mandatory benefits will give you the option of “Waive” which allows you to elect not to have the coverage. If you choose to “Waive” a coverage it may limit your ability to select coverage in the future.

Your cost for the benefits you elect are shown as well as showing whether the benefit is taxable.

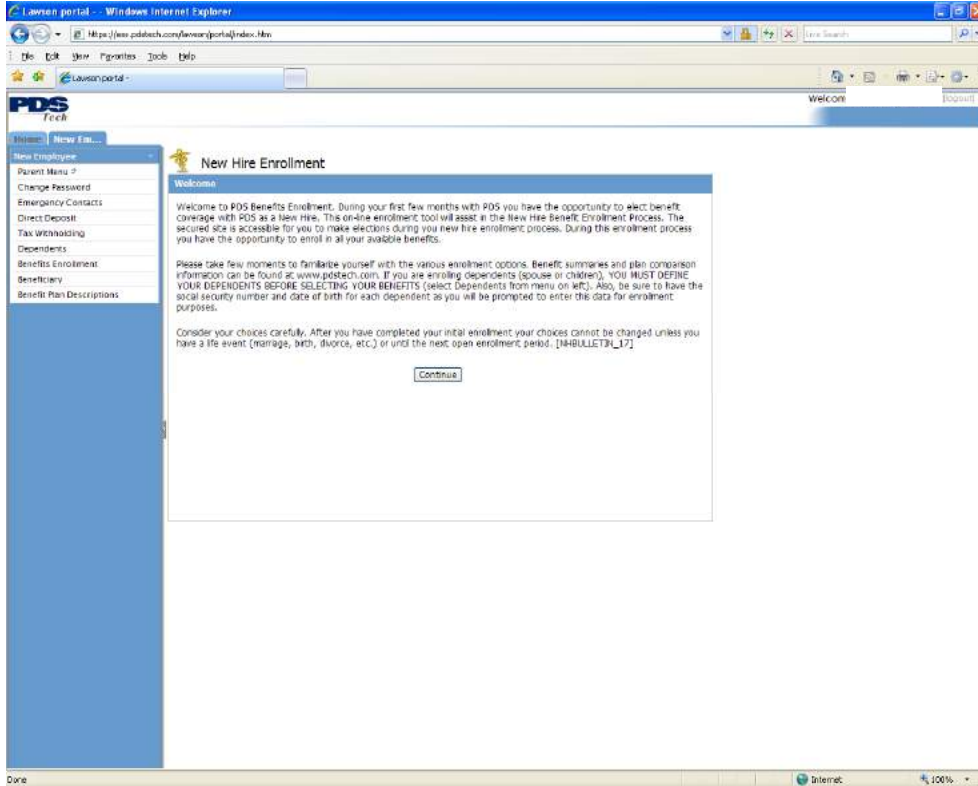
At the end of enrollment you may elect to save your selections or to print your elections and return at a later time. Note, your elections once saved cannot be modified. If you must change your elections prior to your 90<sup>th</sup> day of employment you must contact the PDS Benefits department.

The following screens walk through a typical benefits enrollment process for a new employee.



# Employee Self Service for New Employees

## Enrollment Introduction

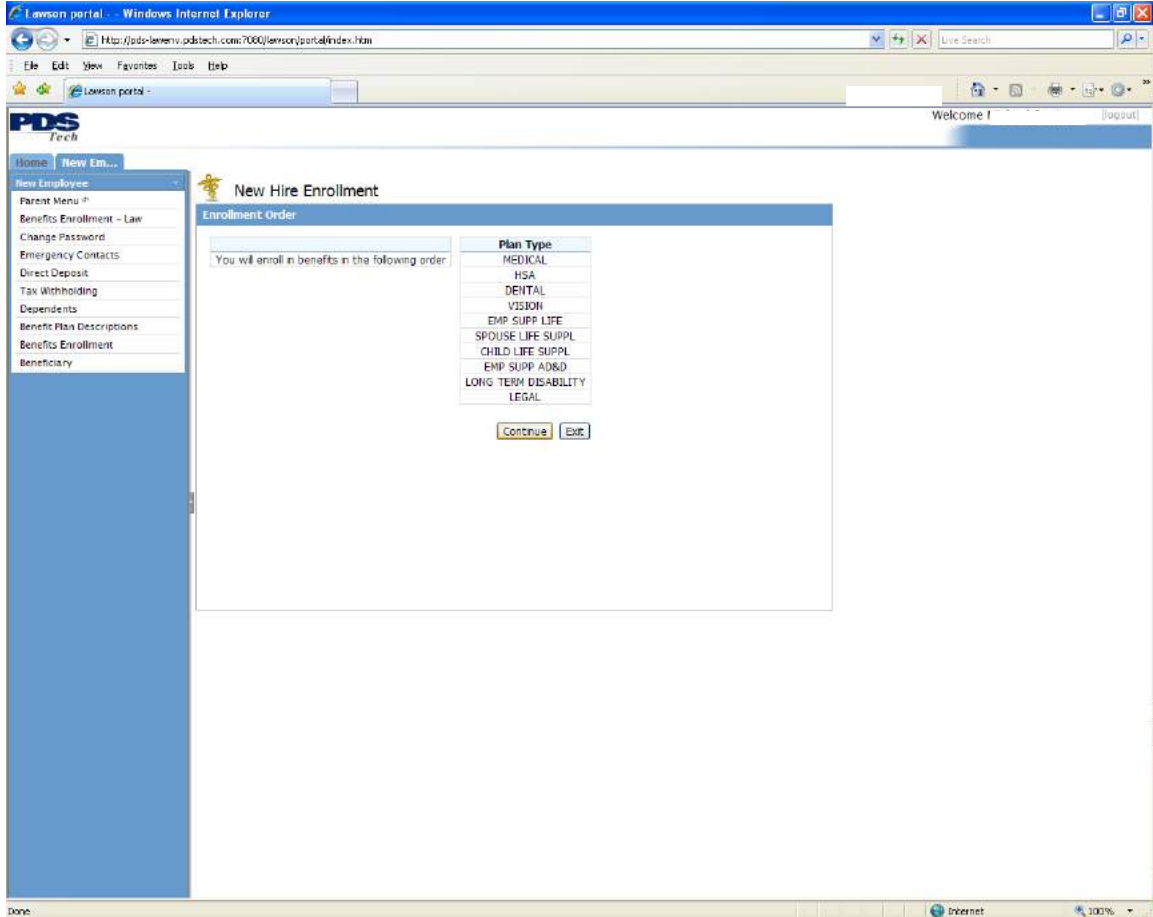






# Employee Self Service for New Employees

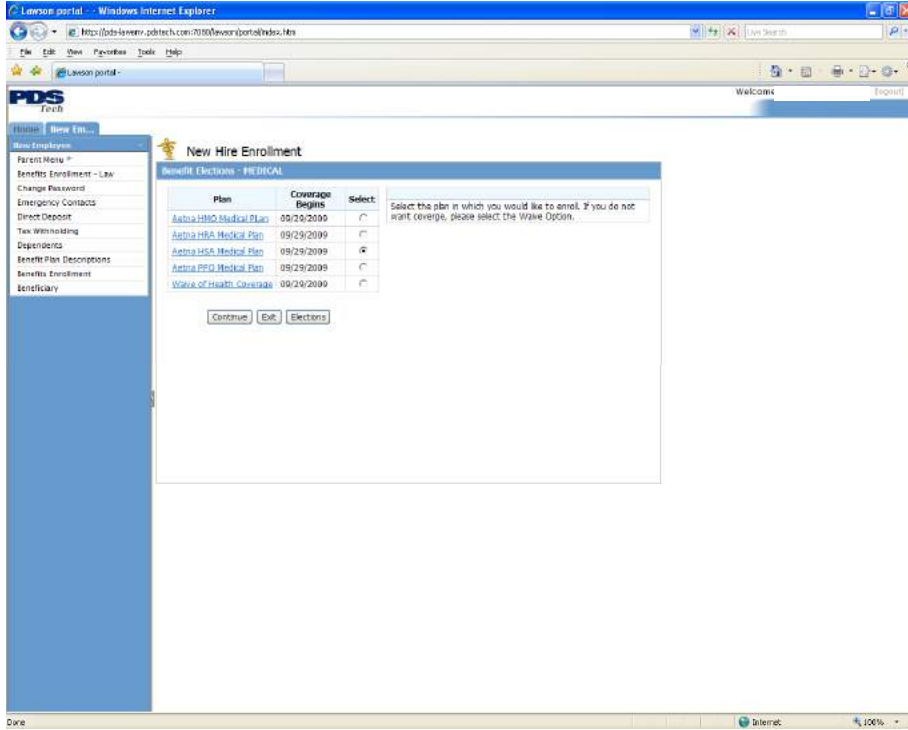
## Eligible Benefits





# Employee Self Service for New Employees

## Medical Plan Selection



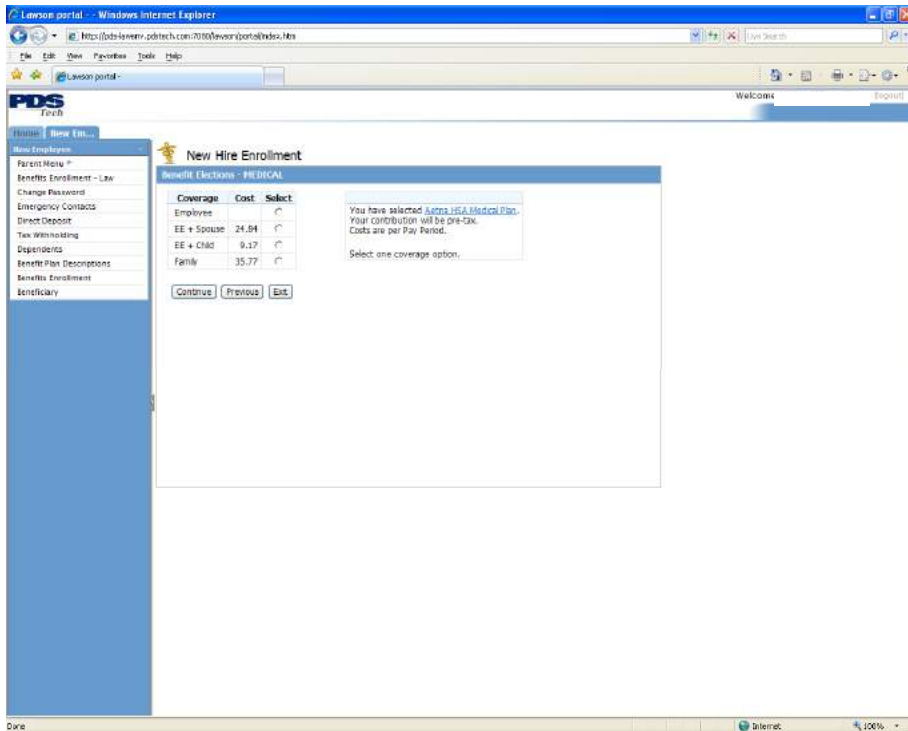


## Employee Self Service for New Employees

### Typical Medical Options

The available options for medical plans are:

- Employee      Employee Only
- EE + Spouse    Employee and Spouse Only
- EE + Child      Employee and One Child Only
- Family          Spouse and 1 or more Children





## Employee Self Service for New Employees

### Medical – Selection of Dependents

You are required to select the dependents you wish covered under many of the plans. Only dependents eligible for the coverage option you elected can be selected.

**New Hire Enrollment**  
**Benefit Elections - MEDICAL**

Dependent	Select
One Son	<input type="checkbox"/> This plan does not cover dependents.
My Spouse	<input checked="" type="checkbox"/>
Another Kid	<input type="checkbox"/> This plan does not cover dependents.
Yet ANOTHER Kid	<input type="checkbox"/> This plan does not cover dependents.
My Wife's Spouse	<input type="checkbox"/> This plan does not cover dependents.
Famous Ancestor	<input type="checkbox"/> This plan does not cover dependents.
Another One	<input type="checkbox"/> This plan does not cover dependents.
One of My Aunts	<input type="checkbox"/> This plan does not cover dependents.
John Johnson	<input type="checkbox"/> This plan does not cover dependents.
A Boy	<input type="checkbox"/> This plan does not cover dependents.

You have selected **Aetna HSA Medical Plan**.  
The plan your spouse.

Select dependents to include for plan coverage.

### Costs and Confirmation of Benefit Election

**New Hire Enrollment**  
**Benefit Elections - MEDICAL**

You have selected **Aetna HSA Medical Plan**.  
Costs are per Pay Period.  
Your coverage will begin 09/29/2009.

Plan	Coverage	Cost	Pre-Tax
Aetna HSA Medical Plan	EE + Spouse	24.84	

**Covered Dependents As Of 09/29/2009**

My Spouse
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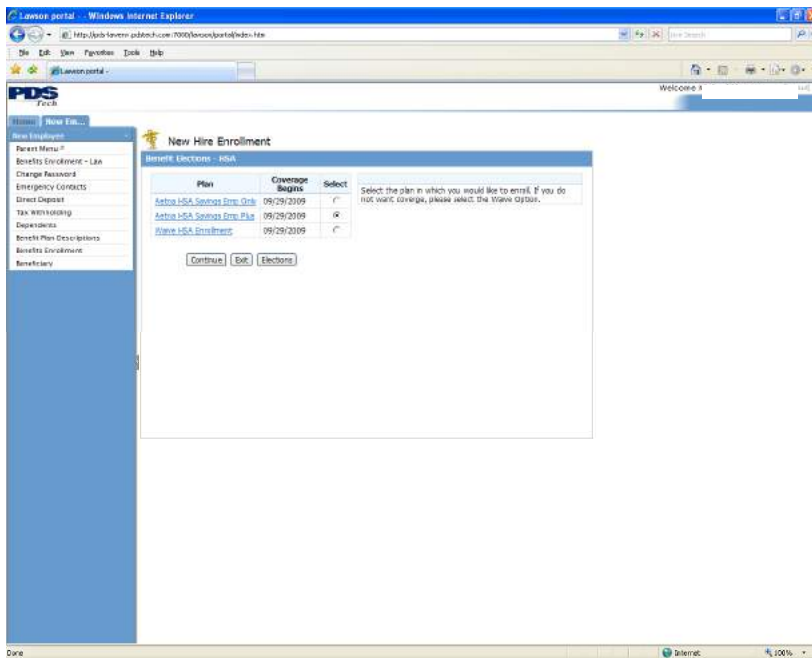
## Employee Self Service for New Employees

### Medical Health Savings Account (HSA) Election

Note: This benefit is only applicable to the HSA Medical Plan.

If you are eligible for Medical Benefits you will always be presented with the option to select a Health Savings Account. If you have elected an HSA Type Medical Plan (as shown in the previous example) you may elect to establish a Health Saving Account to pay for Medical costs not covered by the medical plan or up to the medical plans deductible.

Note: If you have selected traditional Medical Plan Coverage, HMO, or PPO you must select the Waive HSA enrollment on this screen. Other options will indicate you are not eligible and prevent you from choosing this saving plan.





## Employee Self Service for New Employees

### Health Savings Account Amount

Type in the amount you wish to have deducted on an annual basis for your health savings account. Note, the minimum and maximum allowed amounts are indicated as annual, the amount you enter will be your deduction per payroll (1/52<sup>nd</sup> of the annual amount).

The screenshot shows the 'New Hire Enrollment' page for HSA. It features a sidebar menu on the left with options like 'Parent Menu', 'Benefits Enrollment - LHA', 'Change Password', 'Emergency Contacts', 'Direct Deposit', 'Tax Withholding', 'Dependents', 'Benefit Plan Descriptions', 'Benefits Enrollment', and 'Beneficiary'. The main content area is titled 'New Hire Enrollment' and 'Benefit Elections - HSA'. It displays 'Annual Minimum: 1.00' and 'Annual Maximum: 5,800.00'. A message states: 'You have selected Aetna HSA Savings Emp Plus. Your contribution will be pre-tax.' Below this, there is a text input field containing '110' and the label 'per pay period'. At the bottom of the form are three buttons: 'Continue', 'Previous', and 'Exit'.

### Confirmation of Health Savings Amount

The screenshot shows the 'New Hire Enrollment' page for HSA, displaying a confirmation summary. It includes the same sidebar menu as the previous screenshot. The main content area is titled 'New Hire Enrollment' and 'Benefit Elections - HSA'. It states: 'You have selected Aetna HSA Savings Emp Plus. Cost is per Pay Period. Your coverage will begin 09/29/2006.' Below this is a table with the following data:

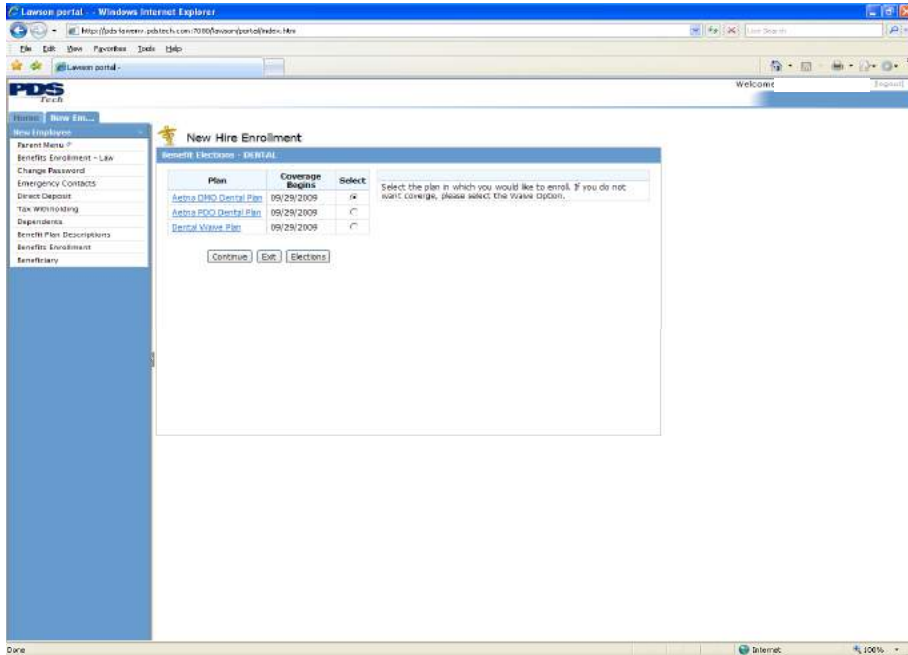
Plan	Coverage	Cost	Pre-tax
Aetna HSA Savings Emp Plus	5,720.00 per year	110.00	Pre-tax

At the bottom of the form are three buttons: 'Continue', 'Previous', and 'Exit'.



# Employee Self Service for New Employees

## Dental Care Elections



## Dental Coverage Options

The following options are available for dental care:

Employee

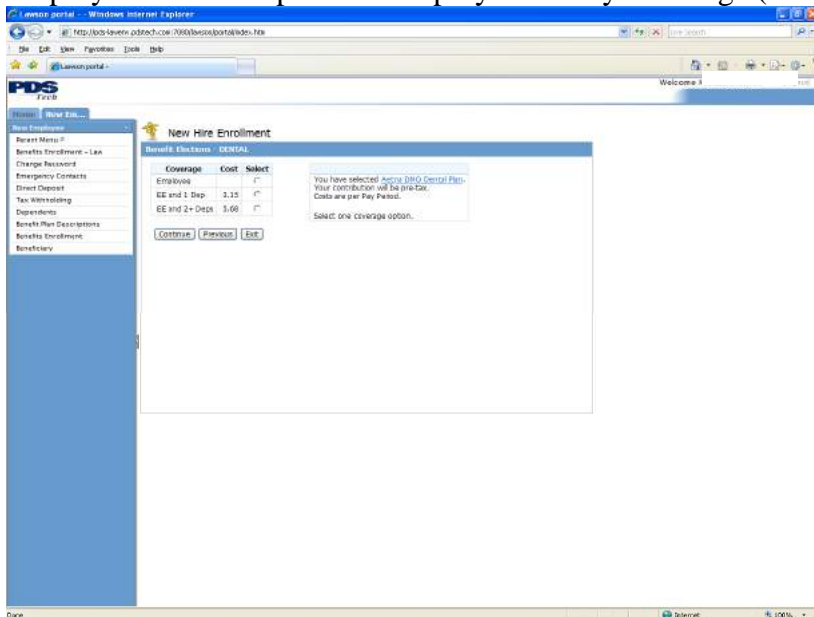
Employee and 1 Dep

Employee and 2+ Deps

Employee Only

Employee and 1 Dependent (spouse or 1 child)

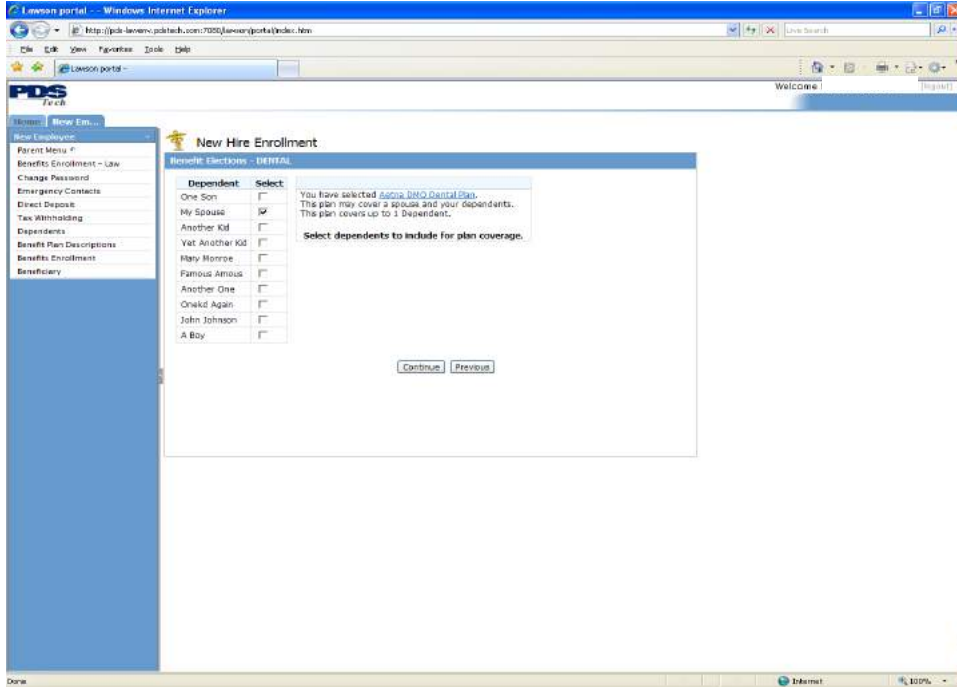
Employee Family Coverage (2 or more dependents)



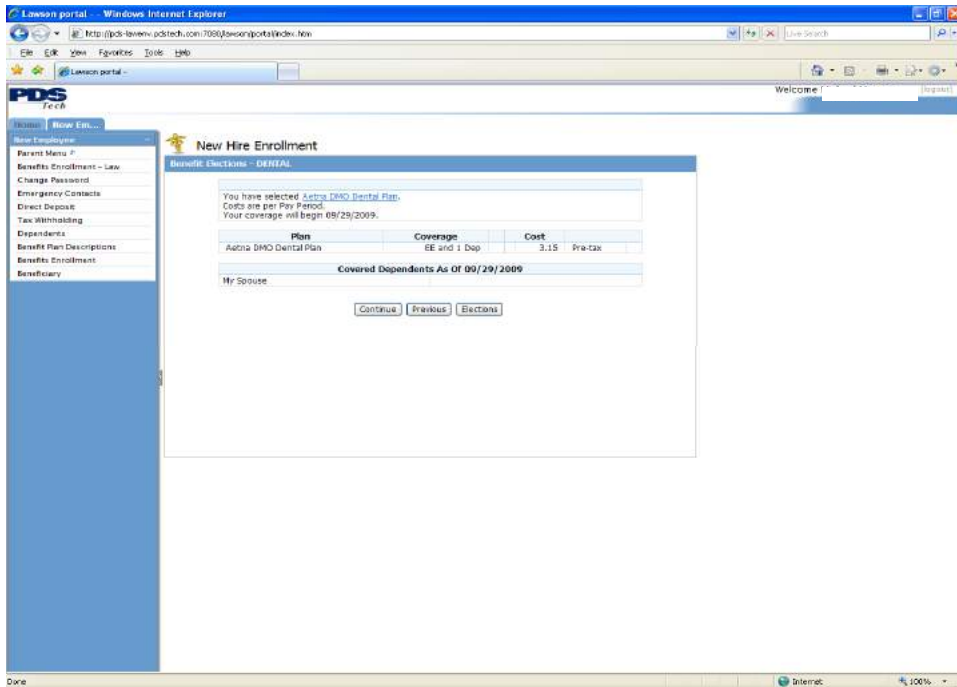


# Employee Self Service for New Employees

## Dental Coverage Dependent Selection



## Dental Coverage Confirmation

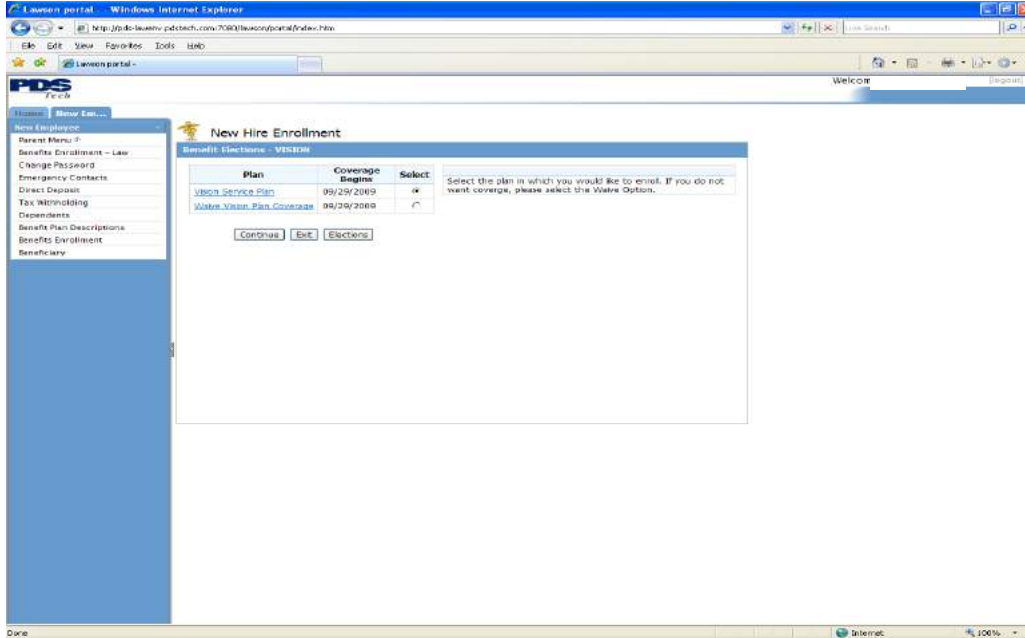






# Employee Self Service for New Employees

## Vision Care Elections



## Vision Care Options

The following options are available for Vision care:

Employee

Employee and 1 Dep

Employee and 2+ Deps

Employee Only

Employee and 1 Dependent (spouse or 1 child)

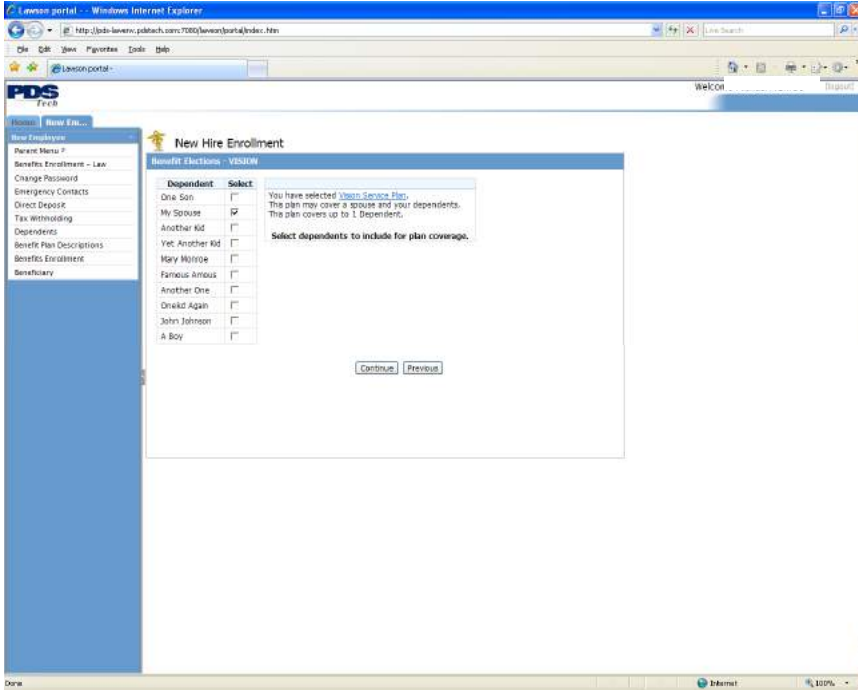
Employee Family Coverage (2 or more dependents)



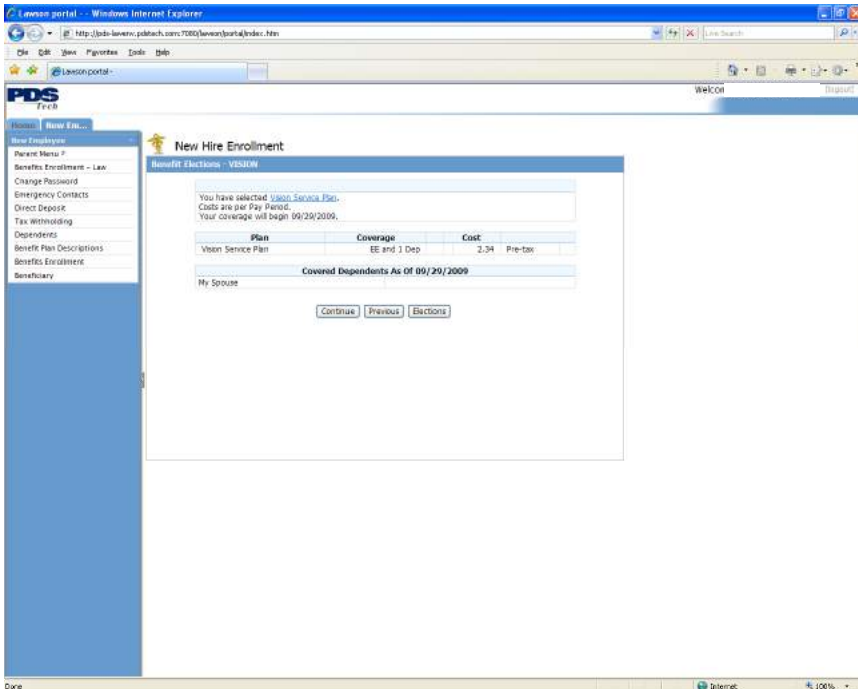


# Employee Self Service for New Employees

## Vision Care Dependent Selection



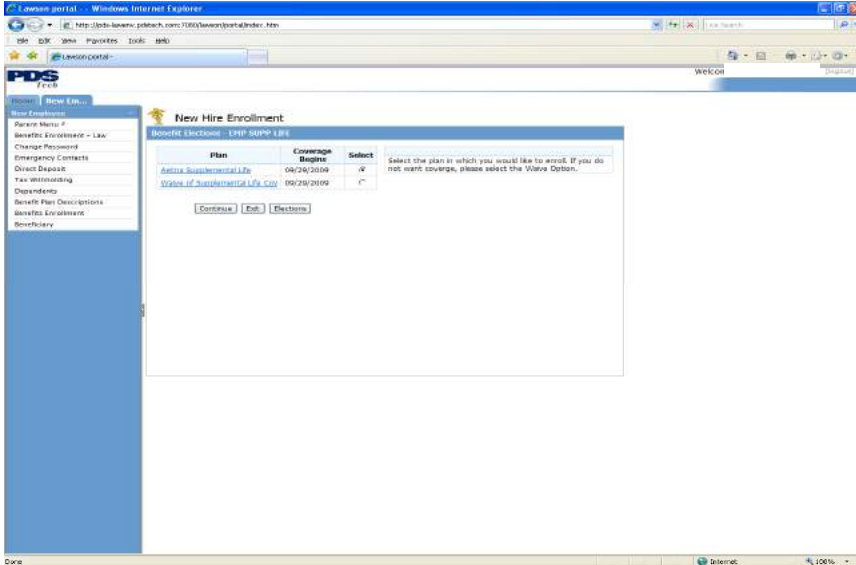
## Vision Care Confirmation





# Employee Self Service for New Employees

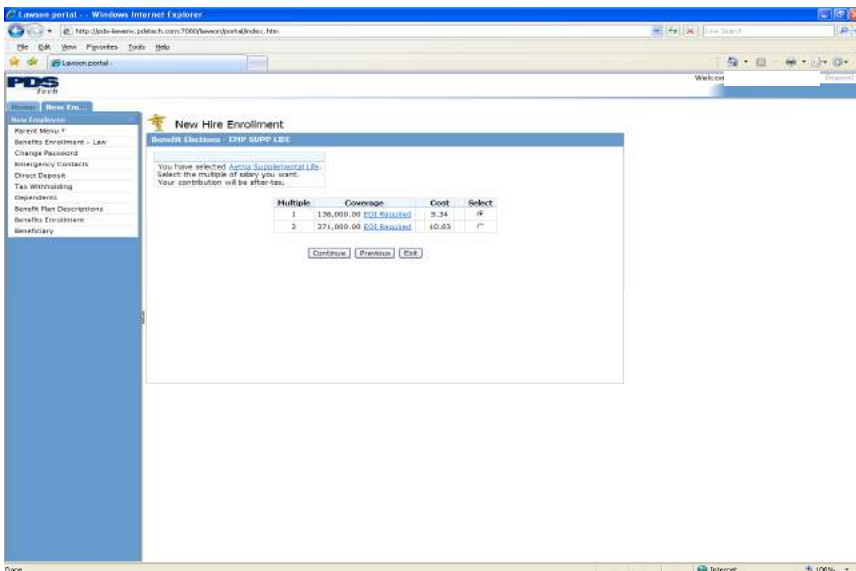
## Employee Paid Supplemental Life Election



## Employee Paid Supplemental Life Coverages

Select the number of times salary you wish. Coverage is limited by our insurance carrier to a maximum amount. Any coverage election greater than the EOI Limit will require an certificate of Evidence of Insurability (EOI) be completed and put on file with our insurance carrier.

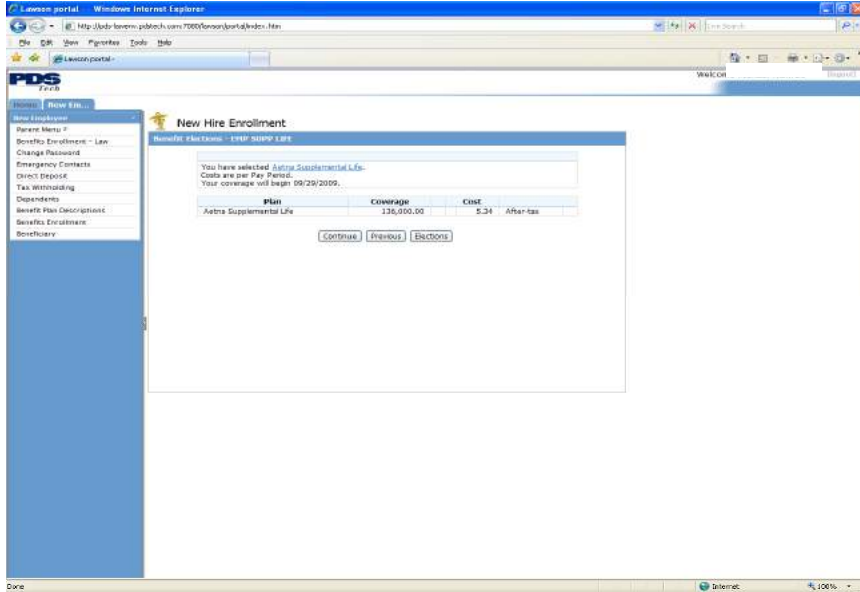
If you elect an option which requires an EOI your benefits will be limited until the EOI is received.



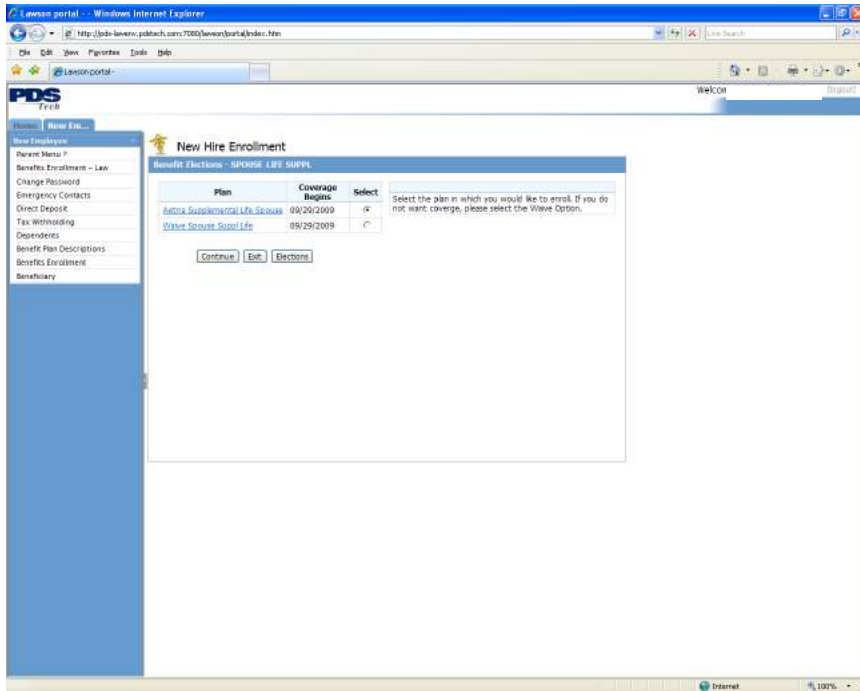


# Employee Self Service for New Employees

## Employee Paid Supplemental Life Confirmation



## Employee Paid Spouse Life Insurance Elections

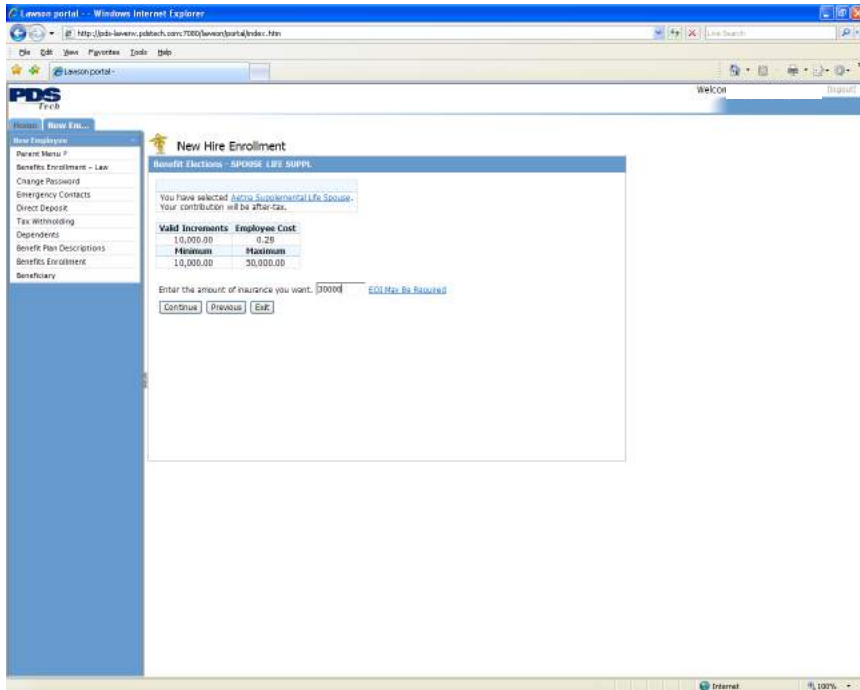




## Employee Self Service for New Employees

### Employee Paid Spouse Life Insurance Coverages

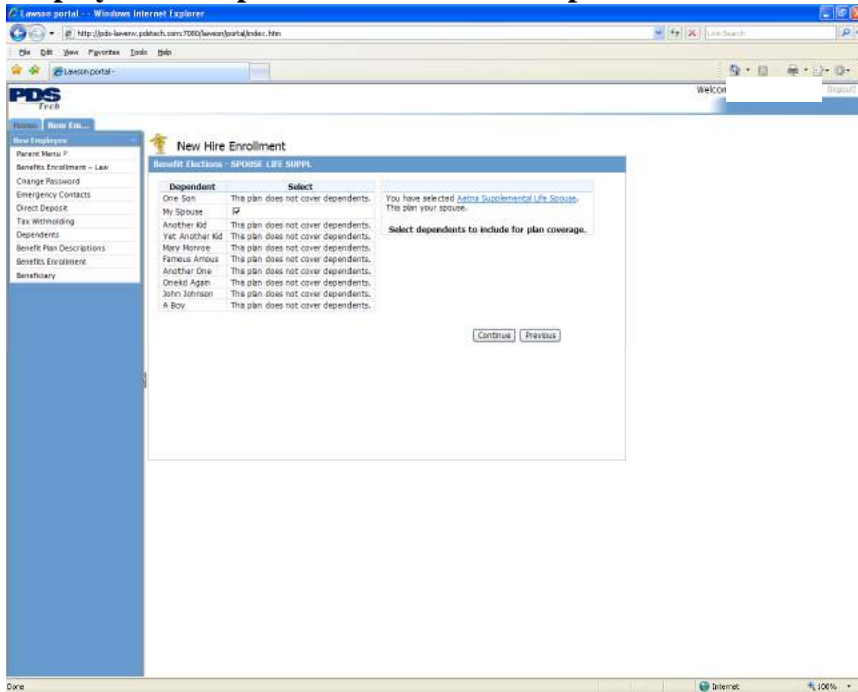
Enter the amount of insurance in whole dollars you would like to have for your spouse. Amounts over the EOI limits will require a certificate of Evidence of Insurability. The current limits can be reviewed by clicking on the [EOI May Be Required](#) link.



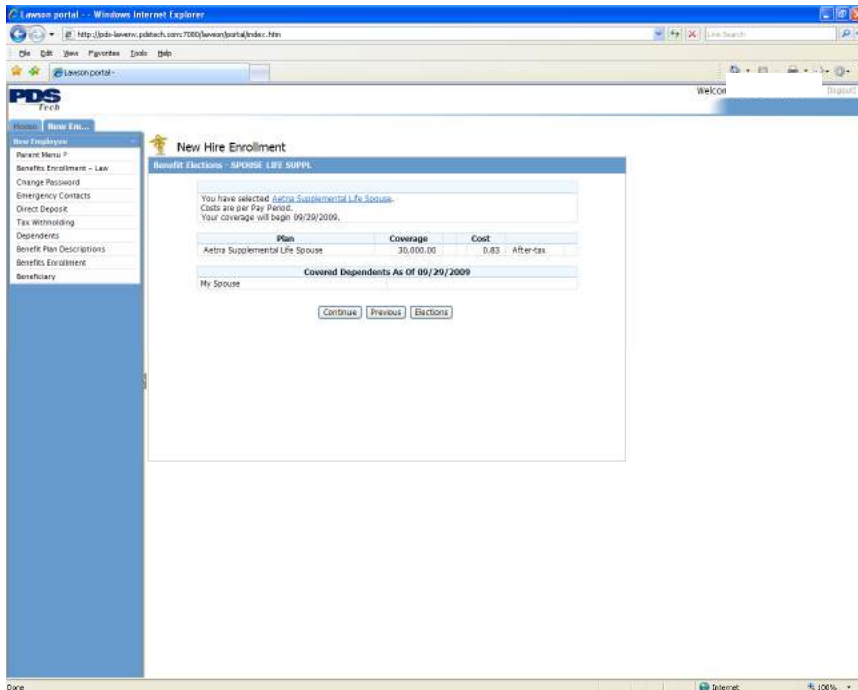


# Employee Self Service for New Employees

## Employee Paid Spouse Life Insurance Dependent Selection



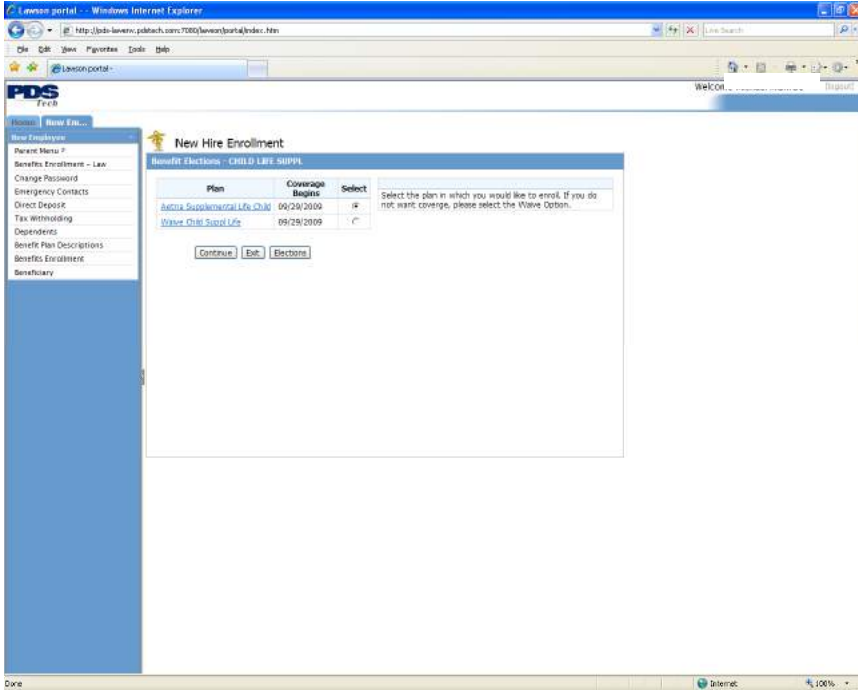
## Employee Paid Spouse Life Insurance Confirmation



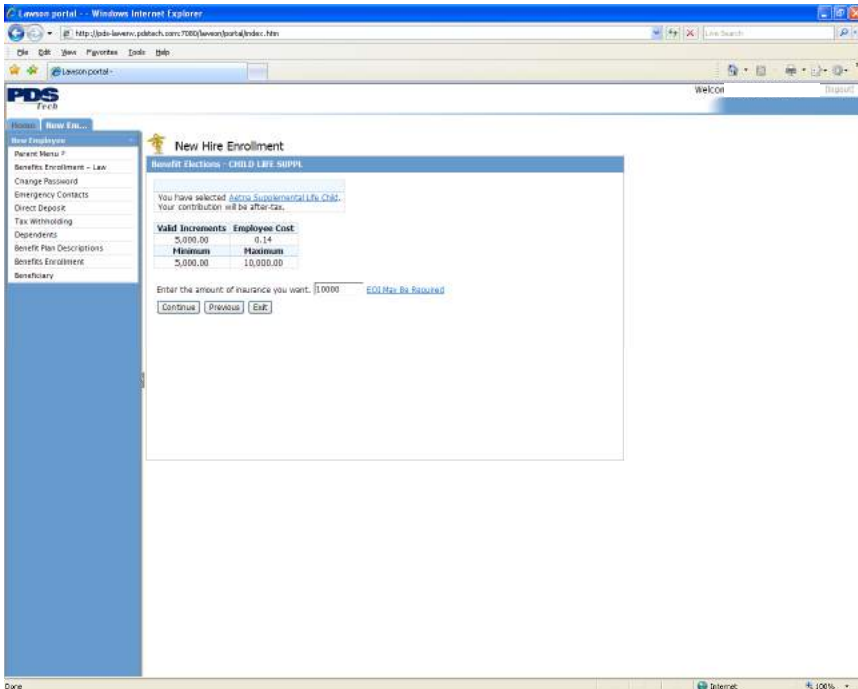


# Employee Self Service for New Employees

## Employee Paid Child Life Insurance Elections



## Employee Paid Child Life Insurance Coverage





# Employee Self Service for New Employees

## Employee Paid Child Life Dependent Selection

**New Hire Enrollment**

**Benefit Elections - CHILD LIFE SUPPL**

Dependent	Select
One Son	<input type="checkbox"/>
My Spouse	<input type="checkbox"/> This plan does not cover your spouse.
Another Kid	<input checked="" type="checkbox"/>
Yet Another Kid	<input checked="" type="checkbox"/>
Mary Monroe	<input checked="" type="checkbox"/>
Famous Amous	<input checked="" type="checkbox"/>
Another One	<input checked="" type="checkbox"/>
Ornald Aggan	<input checked="" type="checkbox"/>
John Johnson	<input checked="" type="checkbox"/>
A Boy	<input checked="" type="checkbox"/>

You have selected Antara Supplemental Life Child.  
This plan your dependents.  
**Select dependents to include for plan coverage.**

[Continue](#) [Previous](#)

## Employee Paid Child Life Confirmation

**New Hire Enrollment**

**Benefit Elections - CHILD LIFE SUPPL**

You have selected Antara Supplemental Life Child.  
Costs are per pay period.  
Your coverage will begin 09/29/2009.

Plan	Coverage	Cost	After-tax
Antara Supplemental Life Child	10,000.00	0.28	After-tax

**Covered Dependents As of 09/29/2009**

One Son	Another Kid
Yet Another Kid	Mary Monroe
Famous Amous	Another One
Ornald Aggan	John Johnson
A Boy	

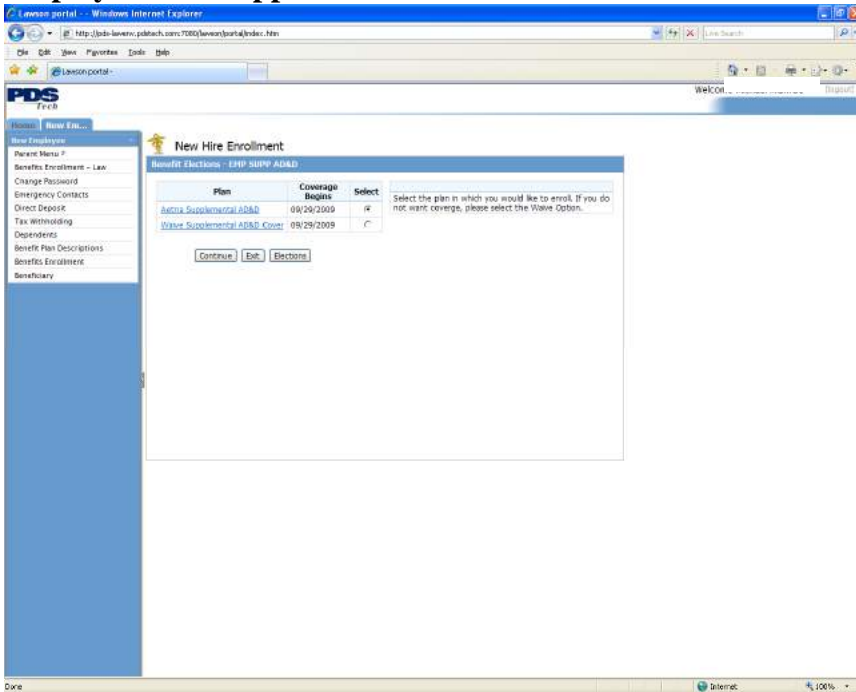
[Continue](#) [Previous](#) [Elections](#)





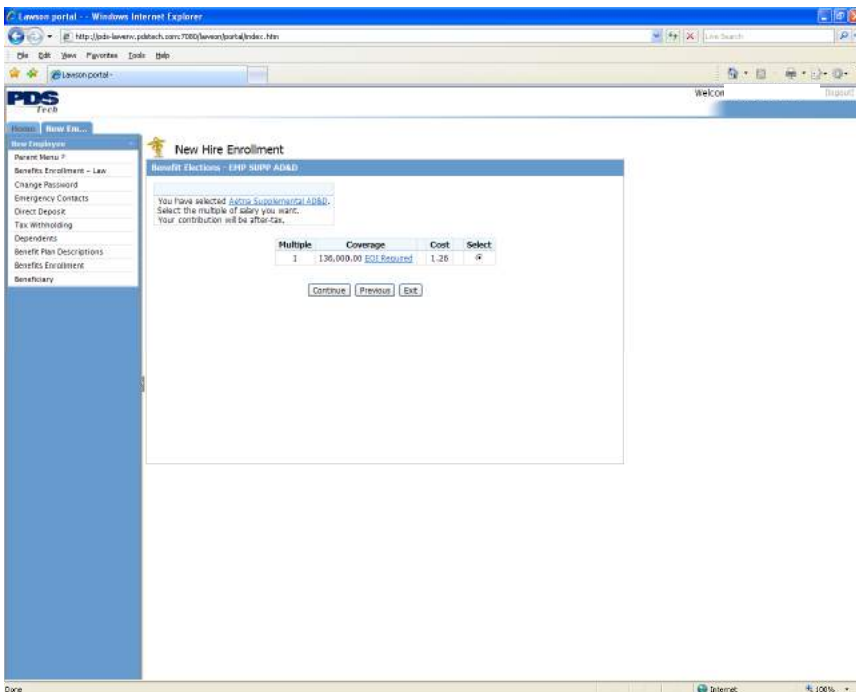
# Employee Self Service for New Employees

## Employee Paid Supplemental AD&D Elections



## Employee Paid Supplemental AD&D Coverages

Evidence of Insurability rules for this insurance are similar to those for Employee Paid Supplemental Life.





# Employee Self Service for New Employees

## Employee Paid Supplemental AD&D Confirmation

The screenshot shows a web browser window displaying the PDS Tech Employee Self Service portal. The page title is "New Hire Enrollment" and the sub-header is "Benefit Elections - EMP SUPP AD&D". A message states: "You have selected Aetna Supplemental AD&D. Costs are per pay period. Your coverage will begin 09/29/2009." Below this message is a table with the following data:

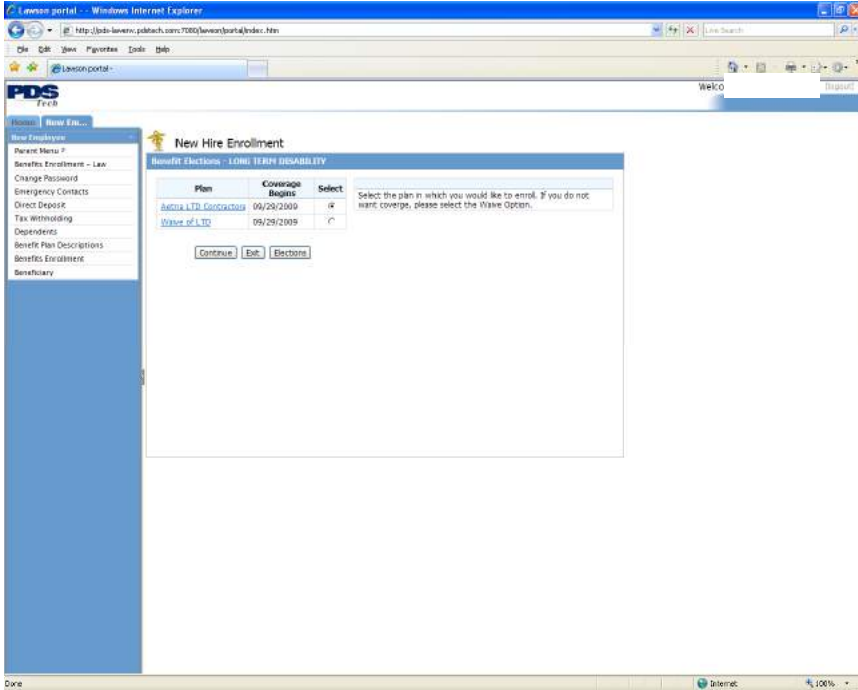
Plan	Coverage	Cost
Aetna Supplemental AD&D	130,000.00	1.20 After-tax

At the bottom of the table are three buttons: "Continue", "Previous", and "Elections". The left sidebar contains a navigation menu with items such as "Home", "New Hire Enrollment", "Parent Menu", "Benefits Enrollment - Law", "Change Password", "Emergency Contacts", "Direct Deposit", "Tax Withholding", "Dependents", "Benefit Plan Descriptions", "Benefits Enrollment", and "Beneficiary".



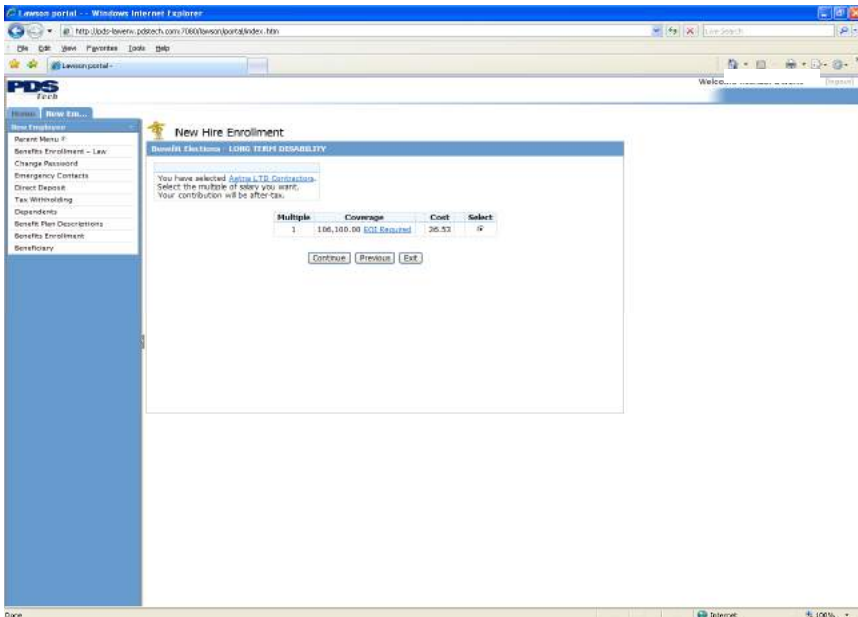
# Employee Self Service for New Employees

## Employee Paid Long Term Disability Coverages



## Employee Paid Long Term Disability Elections

Evidence of Insurability rules for this insurance are similar to those for Employee Paid Supplemental Life.





# Employee Self Service for New Employees

## Employee Paid Long Term Disability Confirmation

The screenshot shows a web browser window displaying the PDS Tech Employee Self Service portal. The page title is "New Hire Enrollment" and the sub-section is "Benefit Elections - LONG TERM DISABILITY". A message states: "You have selected Aetna LTD Contractors. Costs are per pay period. Your coverage will begin 09/29/2009." Below this message is a table with the following data:

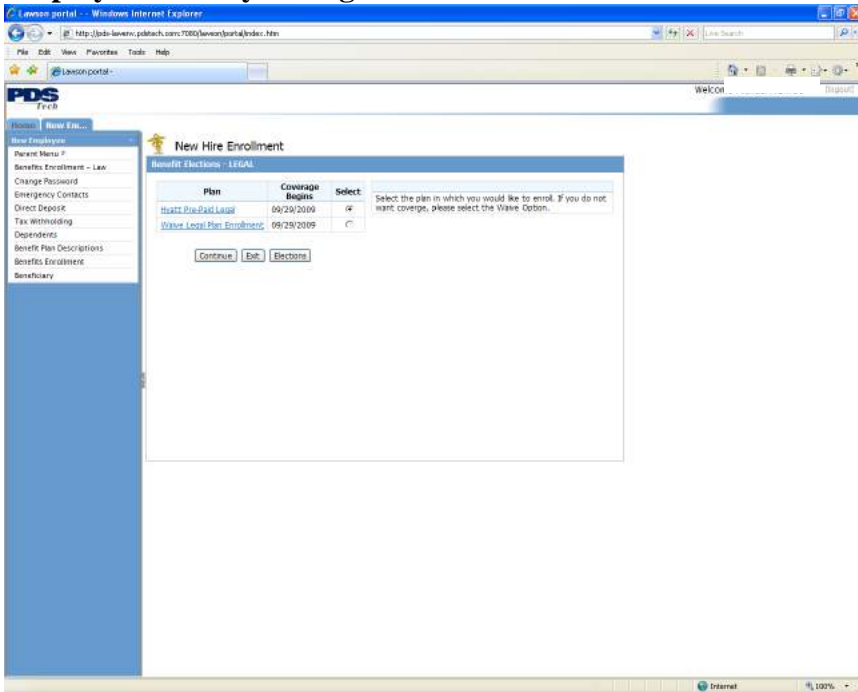
Plan	Coverage	Cost
Aetna LTD Contractors	100,100.00	26.53 After-tax

At the bottom of the table are three buttons: "Continue", "Previous", and "Elections". The left sidebar contains a navigation menu with items such as "New Employee", "Parent Menu", "Benefit Enrollment - Law", "Change Password", "Emergency Contacts", "Direct Deposit", "Tax Withholding", "Dependents", "Benefit Plan Descriptions", "Benefit Enrollment", and "Beneficiary".

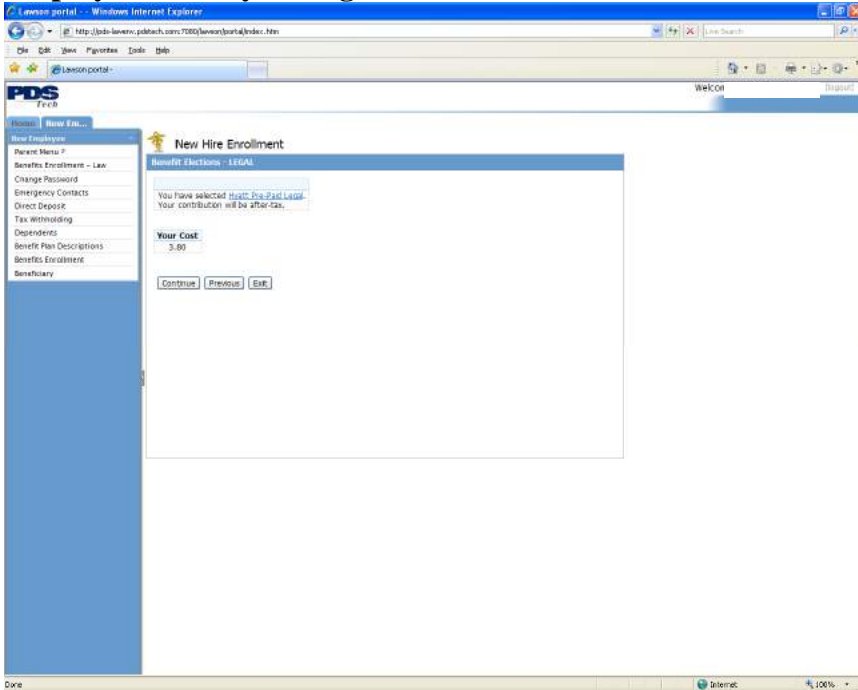


# Employee Self Service for New Employees

## Employee Paid Hyatt Legal Services



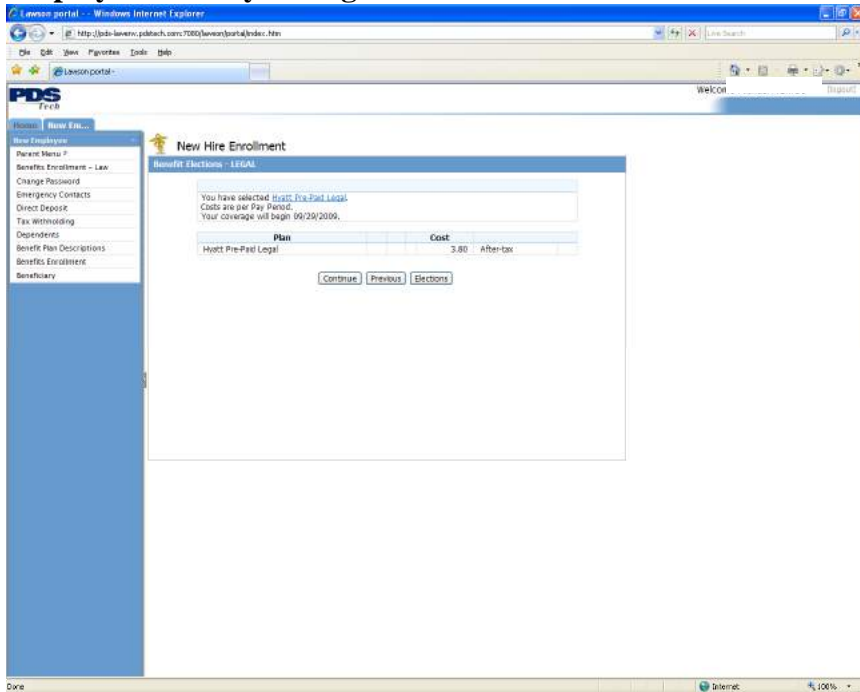
## Employee Paid Hyatt Legal Services Elections





# Employee Self Service for New Employees

## Employee Paid Hyatt Legal Services Confirmation





## Employee Self Service for New Employees

### Benefit Elections Summary

After making your benefit selections a summary screen will be presented indicating all the benefit elections, coverages and costs. If you are satisfied with your selections you should click the **Update** button to save your elections. Please be aware, you cannot make any changes to your elections after you have saved them.

If you wish to make changes to your elections, click the **Make Changes** button.

If you wish to complete your enrollment at a later date, click the **Exit** button. You will be able to print the elections you selected for future reference, however, you will have to re-enter your elections on your next visit for them to be effective.

The screenshot shows the 'New Hire Enrollment' page in a web browser. The page title is 'Benefit Elections As Of 07/01/2009'. It displays a table of selected benefits with columns for Plan Name, Amount, Effective Date, and Cost. Below the table are sections for 'Plan' and 'Covered Dependents'. At the bottom, there is a 'Pay Period Summary' table and three buttons: 'Update', 'Make Changes', and 'Exit'.

Plan Name	Amount	Effective Date	Cost	After-tax
Aetna ER Paid AD&D Staff	50,000.00	09/29/2009		
Aetna Supplemental AD&D	136,000.00	09/29/2009	1.26	After-tax
Waive of LTD		09/29/2009		
Hyatt Pre-Paid Legal		09/29/2009	3.80	After-tax

Plan	Covered Dependents
Aetna HSA Medical Plan	My Spouse
Aetna DMO Dental Plan	My Spouse
Vision Service Plan	My Spouse
Aetna Spouse Life Company Paid	My Spouse
Aetna Supplemental Life Spouse	My Spouse
Aetna Child Life Company Paid	One Son
	One Son      Another Kid
	Yet Another Kid      Mary Monroe
	Famous Amous      Another One
	Onekid Again      John Johnson
	A Boy

Pay Period Summary	Cost
Total pre-tax contributions	140.33
Total after-tax contributions	11.51