

GUIDE TO UPDATING EMPLOYEE INFORMATION

For Plan Sponsors



Welcome to the Guide to Updating Employee Information - Your instructional path to submitting employee information changes and new employees when the changes occur outside of payroll submission.

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Getting Started

1. Go to www.PCSretirement.com/login in your web browser and select **Sponsor**, enter your username and password and click **Log in**.
If you forget your password, you can reset your password by clicking **Having trouble logging in?**
2. Select **DataXpress** from the main menu.
3. From the **Process selection** menu, select **Add/Update Employee Information**.
4. Select the radio button **Manually edit/add employee information**.
5. Select what you would like to update from the drop-down list. The options include:
 - Add New Employees
 - Add Termination Date
 - Add/Update Division/Location
 - Update Employee Information
 - Update Vesting

Add New Employees

This is used to provide the required information to create an employee account in the system for a new employee.

1. Select **Add New Employees** from the menu under **Manually edit/add employee information**, and then select **Next** to continue.
2. On the **Edit Data** screen, select the **Add New** icon and a new row will appear in the field below.
3. The required fields are:
 - Social Security Number
 - First Name
 - Last Name
 - Date of Birth
 - Date of Hire
 - Street Address
 - City

- State
- Zip code
- Internet (Email) Address

4. Select the **Add New** icon again to add additional employees.
5. Once all mandatory fields have been completed, select **Next** to continue.
6. If all information is correct, select **Complete**.

Add Termination Date

This is used for an existing employee whose termination date needs to be added and no other changes needed.

1. Select **Add Termination Date** from the menu under **Manually edit/add employee information**, and then select **Next** to continue.
2. On the **Edit Data** screen, select the **Add Existing** icon to select the employee that needs termination dates added. A window will appear to search and select the records by clicking **Add**.
3. Once employee account selections have been made, click **Continue**.
4. The SSN, first name, and last name will be populated.
5. Select the Termination Date field, enter the information, and then click **Next**.
6. If all information is correct, click **Complete**.

Add/Update Division/Location

This is used to add or update a division code or location for existing employees.

1. Select **Add/Update Division/Location** from the menu under **Manually edit/add employee information**, and then select **Next** to continue.
2. On the **Edit Data** screen, select the **Add Existing** icon to select the employee that needs to be updated.
3. The SSN, first name, and last name will be populated.
4. Select the field under **Division** to update, and then click **Next** once complete.

NOTE: Division/Location code must already be setup in the system and match. A new division code cannot be added from this screen.

5. If all information is correct, click **Complete**.

Update Employee Information

This is used to add or update information for existing employees.

1. Select **Update Employee Information** from the menu under **Manually edit/add employee information**, and then select **Next** to continue.
2. On the **Edit Data** screen, select the **Add Existing** icon to select the employee that needs to be updated. A window will appear to search and select the records by clicking **Add**.
3. Once employee account selections have been made, click **Continue**.
4. If all information is correct, click **Complete**.

Update Vesting

This is used to correct years of service related to vesting. This does not impact employee eligibility—this will need to be tracked via payroll hours.

1. Select **Update Vesting** from the menu under **Manually edit/add employee information**, and then select **Next** to continue.
2. On the **Edit Data** screen, select the **Add Existing** icon to select the employee that need to be updated.
3. The SSN, first name, last name, and current years of vesting will be populated.
4. Select the field under **Years of service-vesting** to update, and then click **Next** once complete.

NOTE: A value must be placed in this field. If vesting is being updated to 0 years of service, enter in 0.00 in this field. Leaving this blank will not make any updates to this field.

5. If all information is correct, click **Complete**.