

Ceridian Self-Service Training Guide

Ceridian Self-Service is an online tool used to automate the paperwork processes associated with viewing, adding, and changing employee information. Ceridian Self-Service is an integrated part of your Payroll system, accessible for employees and managers via the Internet. Both the Payroll system and Ceridian Self-Service reside in a secure, hosted environment with appropriate access privileges.

Employees can use Ceridian Self-Service to access personal data online, such as:

- Reviewing personal information (name, address, phone number, and cell phone)
- Reviewing benefits enrollment data
- Viewing pay stubs (you will not receive a paper check or paystub)
- Reviewing and updating W-4 changes

Login Page

You will have access to the Self Service System (SSS) a few days prior to your first paycheck.

<https://sourceselfservice2.ceridian.com/matrixresources>

Your 9 digit Social Security Number will be your user name and the password will be the last four digits of your SSN. (The last four digits of your SSN is the default to login for the **first time**). The first time you login you will be asked to change your password.



Password Reminder Link

If you forget your password you can click on the Password Reminder link and your reminder phrase will appear on the login page.



Forget Your Password Link

If you forget your password you can click on the Forget Your Password link and a randomly generated password will be sent to your e-mail address. (Your e-mail address will have to be set up in Self Service System (SSS) for this to occur. Please enter your e-mail address under the “e-mail address” link. If you do not have an e-mail address set up in Self-Service, you may e-mail selfservice@matrixresources.com to have your account reactivated. A new password will be issued to you within 24 hours.



Change Your Password (First time Login)

The change password screen is divided into three sections: Enter Your Old Password (last four digits of your SSN). Enter a new password that must be between 6 and 20 characters in length and must be a combination of letters and numbers. The Password Reminder phrase is to help you remember your password, such as “my pet” for the password of “Fido1”.

The screenshot shows the 'Change Your Password' form in the Ceridian Self-Service portal. The page has a dark blue header with 'Ceridian Self-Service' on the left and the 'MATRIX' logo on the right. Below the header is a yellow bar with the word 'Password' in the center. The main content area is white and contains the following sections:

- Old Password:** A text input field with the label 'Old Password' and a sub-label 'Enter your old password'.
- Change of Password:** Two text input fields. The first is labeled 'New Password' with a sub-label 'The password must be between 6 and 20 characters in length and must be a combination of letters and numbers. No spaces or punctuation are allowed.' The second is labeled 'Verify New Password'.
- Password Reminder:** A text input field with the label 'Password Reminder' and a sub-label 'Enter a phrase to help you remember your password, such as the first 4 digits of your account ID#.' Below this field are two buttons: 'OK' and 'Cancel'.

Once you have filled out your Old Password, Change of Password, and Password Reminder you will be asked to click “OK” to save your changes.

The screenshot shows the confirmation message in the Ceridian Self-Service portal. The page has a dark blue header with 'Ceridian Self-Service' on the left and the 'MATRIX' logo on the right. Below the header is a white bar with the text 'Your changes have been saved.' and a blue 'OK' button.

Main Page

Ceridian Self-Service provides three categories: Personal Information, Payroll & Tax Information, and Benefits.

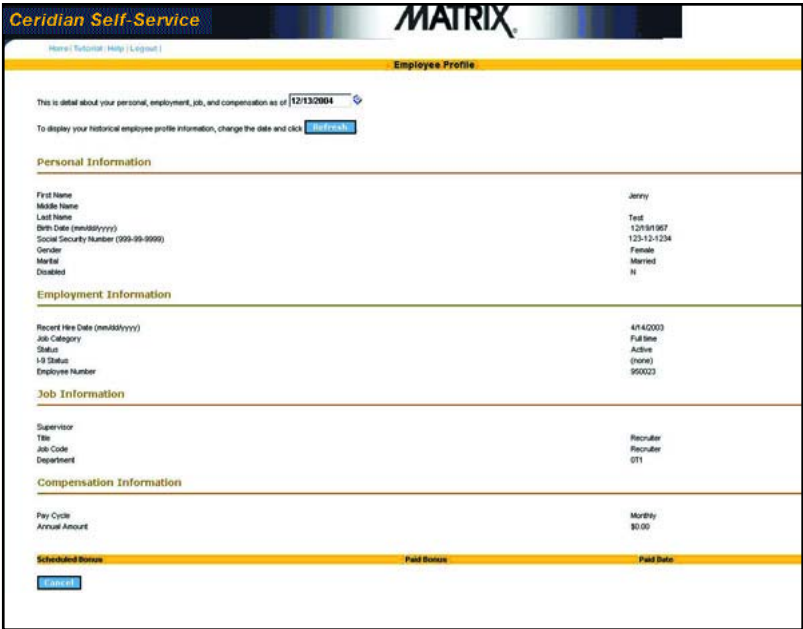


Personal Information

My Profile

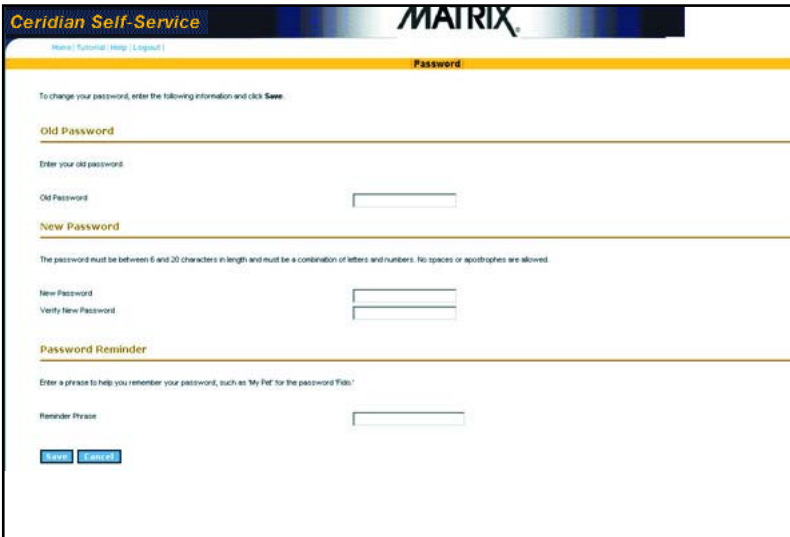
If you click on My Profile, your information will be displayed in the following sections: Personal Information, Employment Information, Job Information, and Compensation Information.

Once you're done reviewing your personal information you may click on Cancel to bring you back to the Main Page.



Password

If you click on the Password link you display the Change Password page that you first received when you first logged in to SSS. You can change your password and reminder phrase by choosing this link.



The screenshot shows the 'Ceridian Self-Service' interface with the 'MATRIX' logo. The page title is 'Password'. Below the title, there is a navigation bar with links for 'Home', 'Tutorial', 'Help', and 'Logout'. The main content area is titled 'Password' and contains the following sections:

- Old Password**: A section with the instruction 'Enter your old password' and a single text input field.
- New Password**: A section with the instruction 'The password must be between 6 and 20 characters in length and must be a combination of letters and numbers. No spaces or apostrophes are allowed.' It contains two text input fields: 'New Password' and 'Verify New Password'.
- Password Reminder**: A section with the instruction 'Enter a phrase to help you remember your password, such as My Pet for the password Tids.' It contains a single text input field for the 'Reminder Phrase'.

At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.

Personal E-mail Address

The Self Service System (SSS) uses the e-mail address to auto-generate and send new passwords when you forget your password. When you click the “Forget Your Password” button on the Login page, a new password will be sent to the e-mail address on file within 24 hours. Please be sure to enter and update your e-mail address in this link.



The screenshot shows the 'Ceridian Self-Service' interface with the 'MATRIX' logo. The page title is 'Email Address'. Below the title, there is a navigation bar with links for 'Home', 'Tutorial', 'Help', and 'Logout'. The main content area is titled 'Email Address' and contains the following sections:

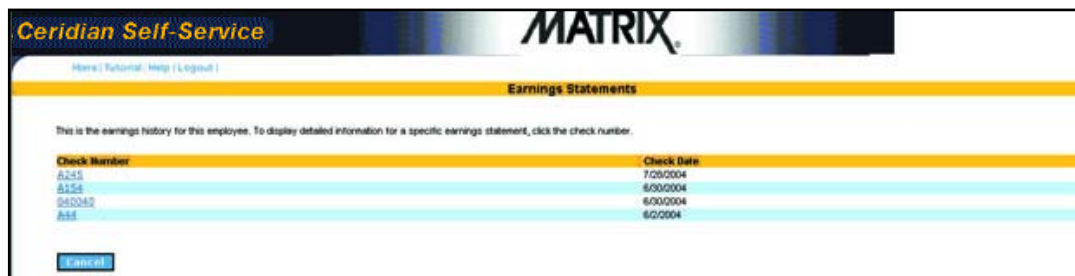
- Email Address**: A section with the instruction 'To add or change your email address, enter the following information and click Save. Each employee needs to set up an email address.' It contains a single text input field for the email address.
- Radio Buttons**: Two radio buttons are present: 'My email address is' (which is selected) and 'I don't have an email address'.

At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.

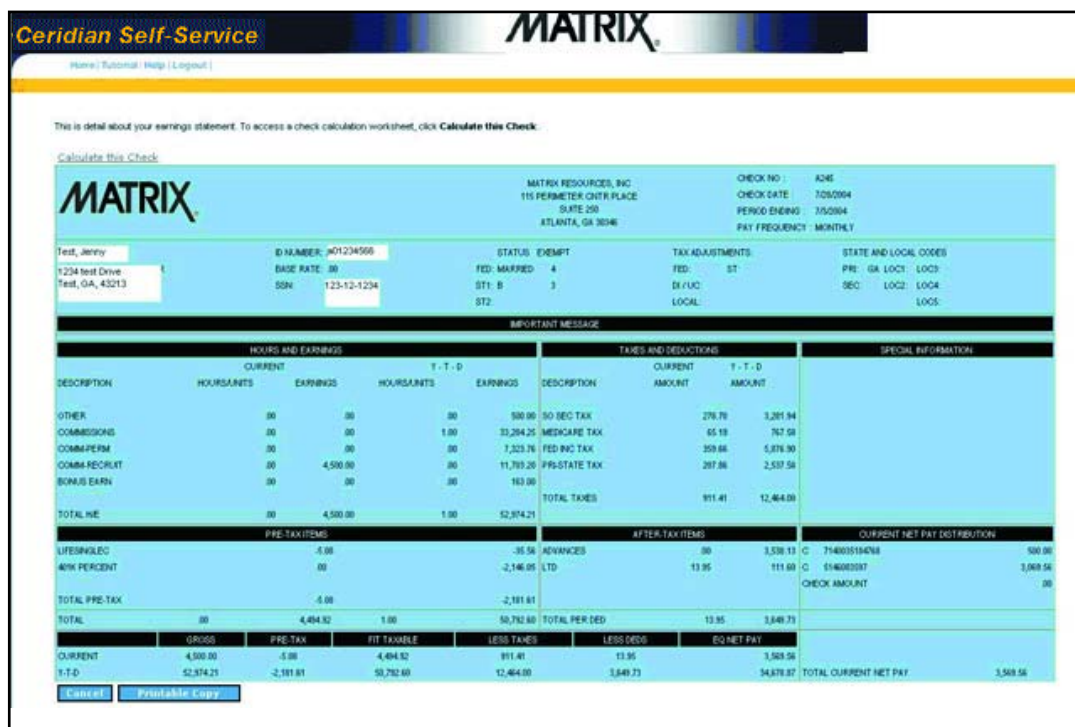
Payroll and Tax Information

Your Paychecks

Once you click on Your Paychecks you will be provided a history of your checks. By clicking the link under the Check Number you will display your check detail.



You can choose to click on Cancel to take you back to the SSS main page or you can choose to click on a Printable Copy to print a copy of your paycheck.



Calculate Your Check

For those employees who wish to figure the net pay of their check, the Check Calculation Worksheet provides the necessary fields and a calculator function.

As long as you enter the correct information in the Earnings, Jurisdiction, Exemption, Tax Status, and Deduction tabs, you can click Calculate to get an estimate of your new net pay. This does not affect or change the gross amount of your paycheck!

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Check Calculation Worksheet

To calculate your net pay, enter the following information and click **Calculate**. An * indicates that the field is required.

Employee Information

Clock Number: 050000
Employee Name: John Smith
Street 1: 4234 test st
Street 2:
City, State, ZIP Code: Cumming, GA 30041

Earnings Information

Total Earnings: * [input field]
Pay Type: * Regular
Pay Frequency: * M - Monthly
Check Date (mm/dd/yyyy): * 12/13/2004

State Tax Information

Primary State: Georgia
Primary State Tax Status: * B
Secondary State: (none)
Secondary State Tax Status: (none)
Primary Local Code: 3
Secondary Local Code: 3
State Exemptions: (none)
State Adjustment: (none)
Local Adjustment: (none)
SDI Adjustment Value: (none)

Federal Tax Information

Federal Tax Status: * M
Federal Exemptions: * 4
Federal Adjustment: (none)
FICA/FUTA Code: (none)

Deduction Information

Deduction	Amount	Percent
LTD - LTD	13.95	0
L9 - LIFESNILEC	5.00	0

Federal Tax Form (W-4)

The W-4 certificate determines the amount of your federal tax payment. If you are adding a member to the family, getting married, or getting divorced, the Withholding Allowance Certificate page is used to change federal W-4 information. You may also download state tax forms from this screen. State tax forms can be faxed to MATRIX at 770-698-6836.

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MATRIX

Employee's Withholding Allowance Certificate (W-4)

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Change affects Federal Exemptions only. Fax the completed form to Payroll 770-698-7836.

Click the State Tax W4 link to access hard copies of State Tax Withholding W4 forms.

You may not be allowed to edit your Employee's Withholding Allowance Certificate (W-4) due to preexisting federal adjustments or FICA overrides. If Federal exemptions are 10 or more, you must print this form and send it to your payroll department.

To add or change your withholding information, enter the following information and click **Save**.

[State Tax W4](#)

1. Your Name and Address Information

Text, Joe
1234 Testing Way
Cumming, GA, 30041

2. Your Social Security Number...123-12-1234

3. Marital Status... Single Married Married, but withhold at higher Single rate.

Note: If married, but legally separated, or spouse is a nonresident alien, click the Single radio button.

4. If your last name differs from that on your social security card, check here. **You must call 1-800-772-5213 for a new card...**

5. Total number of allowances you are claiming...

6. Additional **FEDERAL** amount, if any, you want withheld from each paycheck...\$

7. I claim exemption from withholding for 2004, and I certify that I meet **BOTH** of the following conditions for exemption:

- Last year I had a right to a refund of **ALL** Federal income tax withheld because I had **NO** tax liability **AND**
- This year I expect a refund of **ALL** Federal income tax withheld because I expect to have **NO** tax liability.

If you meet both conditions, check EXEMPT here...

8. Employer's Name and Address

Matrix Resources, INC
115 Perimeter Ctr Place
Suite 250
Atlanta, GA 30346

9. Office Code (optional)...

10. Employer's Federal Tax Identification Number: 50-1494307

There are two ways you can print the Employee's Withholding Allowance Certificate (W-4) form.

- Use the File...Print selection from your browser
- Press the printer icon on the navigation bar

Agreement Section

Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate or I am entitled to claim exempt status.

By clicking on this Save button, you have verified that this information is correct.

401(k) Elections and Changes

Employees may elect or change their 401(k) contributions at any time by clicking on “401(k) Elections” under “Benefits.” Participants may elect to have 2-50% of their check contributed into a traditional or Roth 401(k). Any combination of the two methods may be used, up to a total IRS maximum of \$15,000 (in 2006). Participants may elect to contribute a percent of their pay, or a flat dollar amount. Beneficiaries must be designated or changed using this link, as well.



The screenshot shows the Ceridian Self-Service MATRIX interface. At the top, there is a navigation bar with 'Home | Tutorial | Help | Logout' and the 'MATRIX' logo. Below this is a yellow header bar with '401(k) Account'. The main content area is titled '401(k)' and contains a section labeled 'Click Change to elect 401(k)'. This section includes a 'Change' button and a 'Refresh Page' button. Below this are three buttons: 'Save', 'Start Over', and 'Cancel'.

401(k) investment allocations may be selected or changed at any time by visiting the Great West Web site at www.gwrs.com. From the SSS site you will need your PIN to enter the Great West Site. Call Great West at 800-338-4015 to obtain your PIN. Participants may click on “Retirement Contribution,” and the Great West link will appear. If a new 401(k) participant does not designate investment choices for their contributions, their funds will be deposited in the Guaranteed Portfolio Fund.



The screenshot shows the Ceridian Self-Service MATRIX interface. At the top, there is a navigation bar with 'Home | Tutorial | Help | Logout' and the 'MATRIX' logo. Below this is a yellow header bar with '401(k) Account'. The main content area contains the text: 'To access information about your 401(k) account, click the link that applies.' Below this text is a blue hyperlink labeled 'Great West Life'.

Orientation Guide

Benefits Summary

The Benefits Summary page displays a list of your current benefits. Details such as the level of coverage, cost, and limits are displayed for each benefit you have. Enter a specific date to view information as of that point-in-time. Click on the plan name to view more information about the plan on the Plan Information page.

You can click on the link to print a printable copy of your current Benefits Statement.

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Benefits Summary

This is a summary of your benefits as of

To display your historical or future benefits information, change the date and click **Refresh**. To display plan and coverage information, if available, click the benefit.

Benefit	Coverage	Tax	Per Pay Period Cost	Annual Cost
Life Insurance - Employee Only	50000	Before	+\$5.00	(\$66.00)
LTD - Mass Mutual	1	After	+\$13.95	(\$181.35)
Total			+\$19.03	(\$247.35)

[Display a printable benefits statement as of 12/13/2004.](#)

Current Benefits Statement

The current Benefits Statement displays your current benefit elections or elections as of today. Details of the statement include the plan effective date, plan costs, dependents, beneficiaries, and 401(k) details. Use the browser's print function to print the Benefits Statement. To view a statement as of another date, go to the Benefits Summary page, enter the appropriate date, and click Display to create a printable Benefits Statement.

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Current Benefits Statement

This is a statement of your benefit elections as of 12/13/2004. Review the information carefully. If you have any questions, contact your benefit administrator.

Personal Information

Social Security Number	012-12-1234	Date As Of	12/13/2004
Name	Test, Jenny	Birth Date	12/19/1967
Address	1234 test way Cunning, GA. 30041	Hire Date	4/14/2003

Benefits

Benefit	Tax	Effective	Per Pay	Annual
Miscellaneous Insurance				
LTD - Mass Mutual	After	5/6/2004	(\$13.95)	(\$181.35)
Primary Care Provider #				
Life Insurance				
Life Insurance - Employee Only (\$50,000.00)	Before	7/1/2004	(\$5.00)	(\$66.00)
Primary Care Provider #				

Summary

	Per Pay	Annual
Total Credits	+\$0.00	+\$0.00
Total Before Tax Cost	(\$5.00)	(\$66.00)
Total After Tax Cost	(\$13.95)	(\$181.35)
Total Cost	(\$19.03)	(\$247.35)