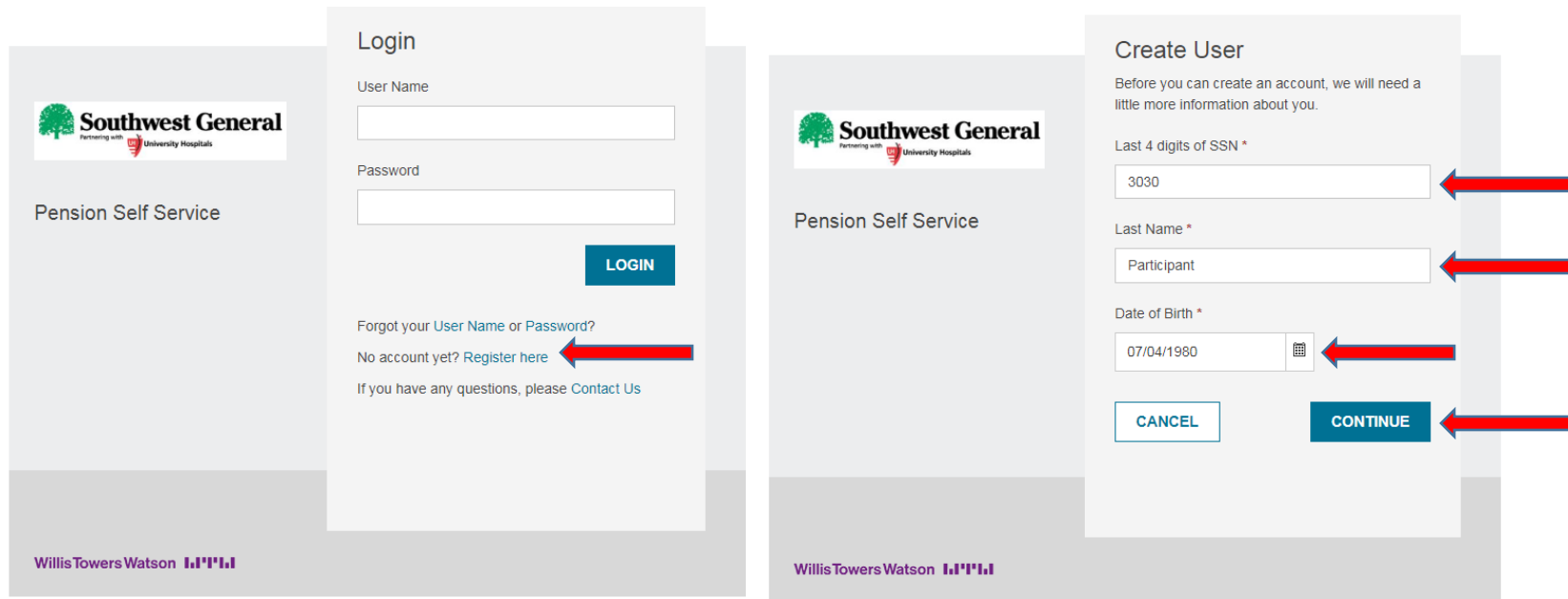


QUICK GUIDE TO PENSION SELF-SERVICE





Log In

1. The website address (URL) for the ESS site is <https://eepoint.com/swg>. Upon accessing ESS, you will be brought to the Log In screen.
2. As a first time user on the Log in screen, select the “No account yet?” link to setup your Log In information. Upon selecting this link, you will be brought to the “Create User” screen where you will be asked enter personal information required to uniquely identify you as a valid user of the system. Once validated, you will be asked to create a User ID and Password for subsequent use of the ESS site


QUICK GUIDE TO PENSION SELF-SERVICE

Pension Self Service

WillisTowersWatson 


User Name * 

Confirm User Name *


Password * 


Confirm Password *

Security Question 1 *


In what city was your father born? 

Security Question 2 *


In what city was your first job located? 

Email Address * 

Confirm Email Address *

Phone Number * 

Confirm Phone Number *



QUICK GUIDE TO PENSION SELF-SERVICE

Verify Email Address

Before you can access the site we first need to confirm your access to the email address provided by sending a 6-digit verification code. Please enter the code you received below.

Security Code

867510

VERIFY

Please note that codes are only valid for a few minutes. If you have not received your code or if the one received is not working, you can click the button below to have a new one sent.

RESEND

Enhanced Security Complete

Thank you for verifying your email address and phone number. You may now continue to the site.

If you wish to change either your email address or your phone number you may do so at any time via Manage Security under the Profile menu.

CONTINUE

Authentication

3. A second level of authentication will be required either via text message or phone call; choose your preferred method using the drop down arrow and then click "Send".
4. Once you click "Send", the phone call or text message will provide a 6-digit verification code; enter the code and click "Verify".
5. You will receive confirmation your verification process is complete. Click "Continue".

QUICK GUIDE TO PENSION SELF-SERVICE

Pension Calculator

6. When you see the Home screen, you've completed the enrollment process and are ready to use the Pension Calculator!

The screenshot shows the 'Pension Self Service' web application. At the top right is the Southwest General logo with the tagline 'Partnering with University Hospitals'. Below the logo, the text 'Welcome, Test Participant' is displayed. A navigation bar contains three icons: 'Home' (house icon), 'My Retirement' (dollar sign in a shield icon), and 'Profile' (person icon). Below the navigation bar is a large banner with a woman looking at a tablet. The banner text reads: 'Access your pension information anywhere! Get the information you need using your favorite device whether tablet, phone or personal computer.' Below the banner is a section titled 'Pension Related Data'. It features two tabs: 'Southwest Retirement Plan' (selected) and 'Southwest Cash Balance Plan'. Under the 'Southwest Retirement Plan' tab, there are two data points: 'Date of Birth 7/4/1980' and 'Hire Date 1/1/2001'. To the right of these data points, it says 'Pension Plan Status Transfer' and a blue button labeled 'VIEW PENSION RELATED DATA'. Below this section is a heading 'How much money do you have after retirement?' followed by a sub-heading 'Ready to start your estimate?' and a calculator icon. A blue button labeled 'ESTIMATE MY PENSION' is positioned below the text, with a red arrow pointing to it from the right.

7. Click on the "Estimate My Pension" button.

QUICK GUIDE TO PENSION SELF-SERVICE

Pension Self Service



Home



My Retirement



Profile

Welcome, Test Participant

To estimate your pension, provide a few details about your retirement plans.

Pension Plan: Southwest Retirement Plan ⓘ

View By: **Age** Date Quick Date ⓘ

Termination Age ⓘ

Age you plan to leave the company:

This is required

Commencement Age ⓘ

Start pension benefits at age:

This is required

Beneficiary DOB ⓘ

Beneficiary's date of birth:

ⓘ

ESTIMATE PENSION BENEFIT

[Want to learn more about how your retirement age changes your pension payments? Compare up to 3 scenarios](#)

[Want to review past estimates? See estimate history](#)

8. Enter the age you plan to leave Southwest and the age you wish to begin your pension benefit, by typing the age in each box or by clicking on the up and down arrows. You can also enter your spouse or beneficiary's date of birth, but this field is not required to run the calculation. Click "Estimate Pension Benefit" when done.

QUICK GUIDE TO PENSION SELF-SERVICE

9. Selecting the “Compare Scenarios” button allows you to enter up to three different ages at termination and benefit commencement.

The screenshot displays the 'Pension Self-Service' web application interface. At the top right, the 'Southwest General' logo is visible, along with the text 'Partnering with University Hospitals' and a user greeting 'Welcome, Test Participant'. The main navigation bar includes 'Home', 'My Retirement', and 'Profile' icons. A dropdown menu is open under 'My Retirement', with 'Compare Scenarios' highlighted by a red arrow. Below the menu, the 'View By' dropdown is set to 'Age'. The main content area features three scenario columns: 'Scenario 1', 'Scenario 2', and 'Scenario 3'. Each scenario column contains three rows of input fields: 'Termination Age', 'Commencement Age', and 'Beneficiary DOB'. The 'Termination Age' and 'Commencement Age' fields are accompanied by an information icon and the text 'Age you plan to leave the company:' and 'Start pension benefits at age:' respectively, with a 'This is required' message below each. The 'Beneficiary DOB' field includes a date format 'mm/dd/yyyy' and a calendar icon.

QUICK GUIDE TO PENSION SELF-SERVICE

Pension Self Service



Home



My Retirement



Profile

Welcome, Test Participant

To estimate your pension, provide a few details about your retirement plans.


Pension Plan: Southwest Retirement Plan

View By: **Age** | Date | Quick Date

	Scenario 1	Scenario 2	Scenario 3
Termination Age Age you plan to leave the company: <i>This is required</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Commencement Age Start pension benefits at age: <i>This is required</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Beneficiary DOB Beneficiary's date of birth: mm/dd/yyyy	<input type="text"/>		

QUICK GUIDE TO PENSION SELF-SERVICE

10. When complete, the calculation results will automatically display on your screen. From this screen, you can choose to change your calculation inputs and run another estimate, or print the results of your estimate

Pension Self Service  Welcome, Test Participant

Home My Retirement Profile

Your pension benefits have been calculated based on the inputs you provided.

Southwest Retirement Plan

Pension Annuity Option	Monthly Payment to:	You	Beneficiary
<input checked="" type="radio"/> Single Life Annuity		\$234.36	N/A
<input type="radio"/> 5 Year Certain & Life Annuity		\$230.90	\$230.90
<input type="radio"/> 10 Year Certain & Life Annuity		\$222.27	\$222.27
<input type="radio"/> 15 Year Certain & Life Annuity		\$211.02	\$211.02
<input type="radio"/> 50% Joint & Survivor Annuity		\$222.95	\$111.48
<input type="radio"/> 75% Joint & Survivor Annuity		\$217.65	\$163.24
<input type="radio"/> 100% Joint & Survivor Annuity		\$212.59	\$212.59

[Learn more about pension options](#)

Other Considerations

Calc ID: 243

Annual Pension Payment
\$2,812
payable at age 65.00000

[← UPDATE CALCULATION INPUTS](#)

Monthly Payment by Plan:

Southwest Retirement Plan	\$234
---------------------------	-------

Total Monthly Payments \$234

[COMPARE UP TO 3 SCENARIOS](#)

[PRINTABLE PAGE PREVIEW](#)

