



# Mini-Manual

## PERSONAL INFORMATION IN PEOPLESOFT

**Note:** This document is designed to be used online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.

If you have not used one of the new “Mini-Manuals” you may wish to consult the document [“Getting the Most Out of Mini-Manuals”](#) prior to using this document.

If you have questions about information in this mini-manual, or, if after reading the entire manual, you cannot find the information you need, please e-mail [psguides@uvm.edu](mailto:psguides@uvm.edu).

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## Mini-Manual

### Background

Employee Self Service functions in PeopleSoft allows quick, easy changes to personal information.

Self Service functions currently available in PeopleSoft:

- [Add, Edit or Delete Emergency Contact](#)
- [Edit Home Address](#)
- [Add or Change Phone Numbers](#)
- [Add or Edit Direct Deposit](#)
- [View Benefits](#)
- [Set Up a Voluntary Deduction](#)
- [Change W-4 Tax Information](#)
- [Request a New W-2](#)
- [Updating or reviewing Ethnicity](#)

### Add, Edit or Delete Emergency Contact

Use this process to add a new or make changes to existing emergency contacts. These directions apply to personal emergency contacts. To add CatAlert, the UVM emergency system, see [Add CatAlert Emergency Contacts](#)

#### Step-by-Step Instructions: Adding an Emergency Contact

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).
2. Navigation: **Self Service > Personal Information > Emergency Contacts**
3. The screen will open, displaying current information.



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**Emergency Contacts**  
Mickey Mouse

Emergency Contacts				
Contact Name	Relationship to Employee	Primary Contact	Edit	Delete
Donald Duck	Friend	<input checked="" type="checkbox"/>		
Minnie Mouse	Sibling	<input type="checkbox"/>		

- Click **Add Emergency Contact**.
- The **Emergency Contact Detail** page will appear. Enter the contact information and click **Save**.

**Emergency Contacts**  
**Emergency Contact Detail**

**Address and Telephone**

\*Contact Name:

\*Relationship to Employee:

Contact has the same address as the employee

Contact has the same telephone number as the employee

**Address**

Country: United States [Change Country](#)

Address:

**Phone**

Telephone:

## Step-by-Step Instructions: Editing an Emergency Contact

- Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).



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### 2. Navigation: **Self Service > Personal Information > Emergency Contacts**




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3. Current Emergency Contacts will appear on the screen:

**Emergency Contacts**  
Mickey Mouse

Emergency Contacts				
Contact Name	Relationship to Employee	Primary Contact	Edit	Delete
Donald Duck	Friend	<input checked="" type="checkbox"/>		
Minnie Mouse	Sibling	<input type="checkbox"/>		

4. Click the edit icon  next to the contact to be edited.

5. Update or delete information as appropriate and click **Save**.

## Step-by-Step Instructions: Deleting an Emergency Contact

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).

2. Navigation: **Self Service > Personal Information > Emergency Contacts**


3. Current Emergency Contacts will appear on the screen:

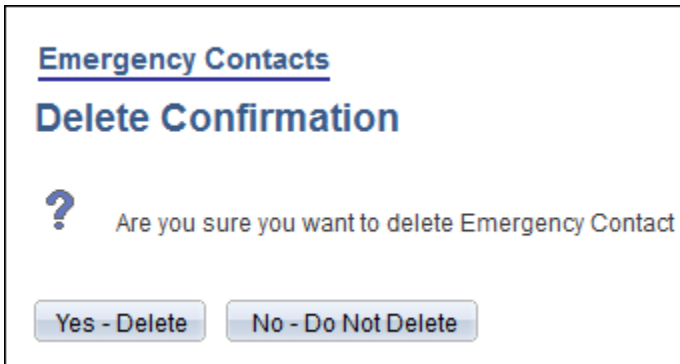
**Emergency Contacts**  
Mickey Mouse

Emergency Contacts				
Contact Name	Relationship to Employee	Primary Contact	Edit	Delete
Donald Duck	Friend	<input checked="" type="checkbox"/>		
Minnie Mouse	Sibling	<input type="checkbox"/>		



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4. Click the  icon next to the person to be removed.
5. The confirmation screen will appear. Click **Yes-Delete**.



Emergency Contacts  
**Delete Confirmation**

? Are you sure you want to delete Emergency Contact

Yes - Delete    No - Do Not Delete

### Edit Home Address

The home address can be edited in PeopleSoft. This process can be used for temporary moves or permanent moves.

**Note:** This process cannot be used for work or department address changes. These changes must happen at the department level. Contact the business manager for help with work address changes.

### Step-by-Step Instructions: Editing Home Address

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).
2. Navigation: **Self Service > Personal Information > Home and Mailing Address**
3. Current information will display:



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**Home and Mailing Address**

Rally Cat

Addresses					
Address Type	Status	As Of	Country	Address	Edit
Home	Current	10/31/2011	USA	97 Spear St. Burlington, VT 05405	

\*Address Type:

\* Required Field

4. Click **Edit**.
5. The **Edit Home Address** page will appear. Make changes and click **Save**
6. An e-mail verifying changes have been made will be sent automatically.

## Add or Change Phone Numbers

- Use this page to view, add, update, and delete personal phone number information.
- In PeopleSoft multiple phone numbers can be registered: cell, pager, fax, and more.

### Step-by-Step Instructions: Changing Phone Number

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).
2. Navigation: **Self Service > Personal Information > Phone Numbers**
3. Click the **Add a Phone Number** button.





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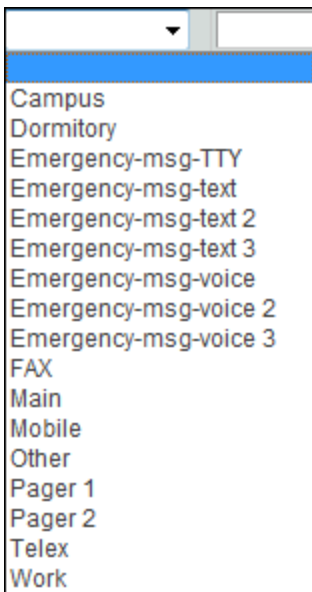
Phone Numbers				
Phone Type	*Telephone	Extension	Preferred	Delete
Business	802-656-XXXX		<input checked="" type="checkbox"/>	
Mobile	802-999-XXXX		<input type="checkbox"/>	
Emergency-msg-text	802-999-XXXX		<input type="checkbox"/>	
Home	802-555-XXXX		<input type="checkbox"/>	

Add Phone Number

Save

\* Required Field

4. Click the **Phone Type** list from the drop down box.



5. Click an entry in the list (for example, **Mobile**).

6. Enter the additional or new telephone number in the **Telephone** field.

7. Click the **Save** button.

8. Click the **OK** button.



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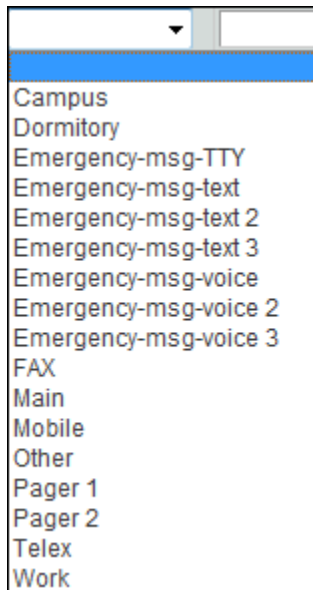
### Step-by Step Instructions: Add CatAlert Emergency Contacts

- The University has an automatic campus alert system, CatAlert. CatAlert is designed to keep UVM as informed and safe as possible if an emergency situation were to arise.
- Everyone with a UVM e-mail address gets CatAlert e-mails automatically. To receive emergency messages via another method, preferred methods must be designated.
- Remember to update contact information as necessary so that these important messages will continue to be received.

To add an emergency broadcast number, follow the [Add or Change Phone Number](#) step-by-step instructions and in the **Phone of Type** column choose types with the word “emergency.” These numbers will only be used by the automatic CatAlert system.

#### Note:

- Choosing to list the same phone number more than once, in more than one capacity is an option. For example, cell phone voice-mail and a text message can both be added.
- Receive emergency broadcast messages on a "Cellular" phone.
- Only phones of type **Emergency-msg-text**, **Emergency-msg-voice** and **Emergency-msg-TTY** will receive emergency broadcast messages.



- Phone numbers with **Emergency** designations will not show up in the UVM online directory.



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- Phone numbers designated as **Mobile** are treated as business phones and will show up in the online directory.

## Add or Edit Direct Deposit

- Direct deposit information may be added, changed or deleted using this screen.
- These screens allow an employee to:

### Direct Deposit

Rudolph Rednose

Review, add or update your direct deposit information.

Direct Deposit Detail							
Account Type	Routing Number	Account Number	Deposit Type	Amt/Pct	Deposit Order		
<a href="#">Savings</a>	123456789	9876654321	Amount	\$250	1	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">Checking</a>	123456789	9876654321	Balance		999	<a href="#">Edit</a>	<a href="#">Delete</a>

[Add Account](#)      [Pay Statement Print Option](#)

- [Edit an Existing Direct Deposit Record](#)
- [Add an additional account to an existing direct deposit](#)

**Note:**

- When setting up a new direct deposit request or when changing banks, the direct deposit will take two payrolls to process. A paper check will be issued in the first payroll in which the change was made effective. The next check may be directly deposited, depending on the date that direct deposit information is added it may be two payroll cycles before the pay is transmitted via DD.
- A confirmation e-mail will be sent at the end of the procedure.
- As a US entity, the University of Vermont is obligated to comply with the requirements of the United States Department of Treasury Office of Foreign Assets Control (OFAC), which oversees payments sent outside the territorial jurisdiction of the United States. This includes automated clearing house payments, such as direct deposits. If the direct deposit is into a foreign bank or if there are instructions with the recipient bank to immediately wire the full amount of the direct deposit to a foreign financial institution, we request that a [Direct Deposit Compliance](#) form be completed that provides further detail about the foreign transaction. Full information is on the [UVM HRS website](#).



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## Step-By-Step Instructions: Adding a New Direct Deposit or Account

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).
2. Navigation: **Self Service > Payroll and Compensation > Direct Deposit**
3. If a direct deposit exists, it will display on the screen:

**Direct Deposit**

Rudolph Rednose

Review, add or update your direct deposit information.

Direct Deposit Detail							
Account Type	Routing Number	Account Number	Deposit Type	Amt/Pct	Deposit Order		
<a href="#">Savings</a>	123456789	9876654321	Amount	\$250	1	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
<a href="#">Checking</a>	123456789	9876564321	Balance		999	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

     [Pay Statement Print Option](#)

4. Click the **Add Account** button.
5. The **Add Direct Deposit** page is displayed. Fill in the appropriate information. Fields marked by an asterisk (\*) are mandatory.



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**Direct Deposit**  
**Add Direct Deposit**

Rudolph Rednose  
For Direct Depositors, at least one Deposit type must be "Balance". If you have only one direct deposit account then that account's Deposit Type should be Balance. If you have more than one account then indicate Balance in the last account's Deposit Type. Also note that your last account deposit order must be 999.

**Your Bank Information**

Routing Number:  [View check example](#)

**Distribution Instructions**

Account Number:

\*Account Type:

\*Deposit Type:

Amount/Percent:

\*Deposit Order:  (example: 1 = first account processed)

[Return to Direct Deposit](#)

\* Required Field

**\*Account Type:** Select **Checking** or **Savings**

**\*Deposit Type:** Specify a flat amount, the balance of the paycheck or a percent.

**Note:**

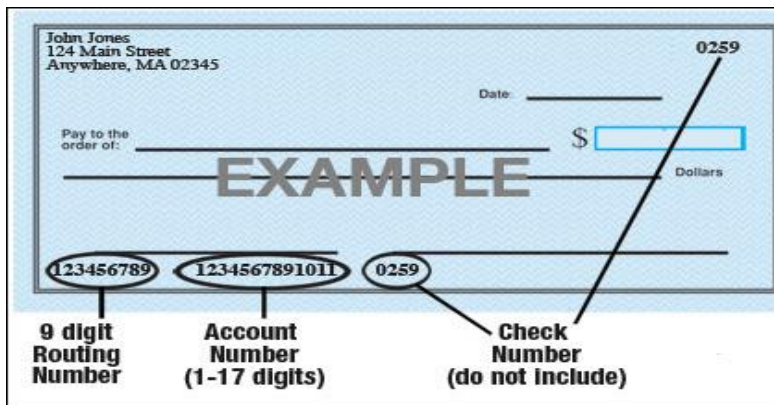
- If only one account is specified, choose **Balance** in this field.
- If multiple accounts are used, one of the accounts should receive the **Balance** of the paycheck amount. This is particularly important when amount is chosen for any account.
- When using direct deposit, the total amount of the check must be distributed electronically. A paper check cannot be issued for a partial distribution of the check.

**Amount/Percent:** To be used only when amount or percent is chosen for the deposit type.

**Routing Number:** This is a nine-digit number obtained from the bottom of a personal check. (See below for an example.)



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**Deposit Order:** When depositing to more than one account, use **Deposit Order** to indicate which distribution is made first, which second, etc. (The deposit marked **Balance** should be distributed last.)

**Example:** Depositing 6% into a savings account and the balance in a checking account: The savings account would have a deposit order of 1, and the checking account a deposit order of 2.

6. Click the **Save** button.

### Edit an Existing Direct Deposit Record

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).
2. Navigation: **Self Service > Payroll and Compensation > Direct Deposit**
3. If a direct deposit exists, it will display on the screen:



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**Direct Deposit**

Rudolph Rednose

Review, add or update your direct deposit information.

**Direct Deposit Detail**

Account Type	Routing Number	Account Number	Deposit Type	Amt/Pct	Deposit Order		
<a href="#">Savings</a>	123456789	9876654321	Amount	\$250	1	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">Checking</a>	123456789	9876564321	Balance		999	<a href="#">Edit</a>	<a href="#">Delete</a>

[Add Account](#)      [Pay Statement Print Option](#)

- Click the **Edit** button for the appropriate line.

**Direct Deposit**

**Change Direct Deposit**

Rudolph Rednose

For Direct Depositors, at least one Deposit type must be "Balance". If you have only one direct deposit account then that account's Deposit Type should be Balance. If you have more than one account then indicate Balance in the last account's Deposit Type. Also note that your last account deposit order must be 999.

**Your Bank Information**

Routing Number:  [View check example](#)

**Distribution Instructions**

Account Number:

\*Account Type:

\*Deposit Type:

Amount/Percent:

\*Deposit Order:  (example: 1 = first account processed)

[Save](#)

[Return to Direct Deposit](#)

\* Required Field

- The **Change Direct Deposit** page is displayed. Make the necessary changes on this page.
- Click the **Save** button.
- An e-mail will be generated.



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## Mini-Manual

### View Benefits

#### Step-by-Step Instructions: Viewing Benefits

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).
2. Navigation: **Self Service > Benefits > Benefits Summary**
3. The current **Benefits Summary** will appear.

### Set Up a Voluntary Deduction

#### General Information:

- Use the **Voluntary Deductions** page to add, change, or stop voluntary deductions.
- This page allows updates to the following voluntary deductions: CATCARD, Staff Emergency Loan Donation, and UVM Annual Giving.
- Notification of the changes made on this screen will be sent to a UVM e-mail address.

#### Step-by-Step Instructions: Setting Up a Voluntary Deduction

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).
2. Navigation: **Self Service > Payroll and Compensation > Voluntary Deductions**

#### Change an Existing Deduction

3. Click the **Edit** button next to the deduction to be changed.





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**Voluntary Deductions**

Rally Cat  
The University of Vermont

Review, add or update your voluntary deductions information.

Voluntary Deductions							
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance	
CATCARD	04/01/2012		Current	\$100.00		0.00	<input type="button" value="Edit"/>

[Return to Self Service](#)

- To change the amount of the deduction, enter the new amount or percent into the **Enter Amount/Percent to be deducted** field.

**Voluntary Deductions**

**Change Voluntary Deduction**

Rally Cat  
The University of Vermont

\*Type of Deduction: CATCARD

\*Check whether Deduction is a Flat Amount or Percent:

\*Enter Amount/Percent to be deducted:

Take deduction until I reach this Goal Amount:

\*Enter Deduction Start Date: 04/15/2012 (example: 12/31/2000)

Enter Deduction Stop Date:  (example: 12/31/2000)

Current Balance: 0.00

\* Required Field

[Return to Voluntary Deductions](#)

- Click the **Save** button.
- Click the **OK** button.



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## Add a New Deduction

7. Click the **Add Deduction** button.

**Voluntary Deductions**  
Rally Cat  
The University of Vermont

Review, add or update your voluntary deductions information.

Voluntary Deductions							
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance	
CATCARD	04/01/2012		Current	\$125.00		0.00	Edit

Add Deduction

[Return to Self Service](#)

8. The **Voluntary Deduction** screen will appear. Click the **Magnifying glass icon** to select from a list of available deductions.

Look Up

Look Up \*Type of Deduction:

Cancel

Search Results

View 100 First 1-3 of 3 Last

Deduction Description
CATCARD
Staff Emergency Loan Donation
UVM Annual Giving

9. Fill in the fields with deduction information and click **Save**.



# Mini-Manual

**Voluntary Deductions**

Rally Cat  
The University of Vermont

Review, add or update your voluntary deductions information.

Voluntary Deductions							
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance	
<a href="#">CATCARD</a>	04/01/2012		Current	\$125.00		0.00	<input type="button" value="Edit"/>
<a href="#">UVM Annual Giving</a>	04/10/2012		Current	2%	\$150.00	0.00	<input type="button" value="Edit"/>

[Return to Self Service](#)

## End a Current Deduction

- Click the **Edit** button next to the deduction to be changed.

**Voluntary Deductions**

Rally Cat  
The University of Vermont

Review, add or update your voluntary deductions information.

Voluntary Deductions							
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance	
<a href="#">CATCARD</a>	04/01/2012		Current	\$125.00		0.00	<input type="button" value="Edit"/>
<a href="#">UVM Annual Giving</a>	04/10/2012		Current	2%	\$150.00	0.00	<input type="button" value="Edit"/>

[Return to Self Service](#)



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11. Enter an end date in the **Deduction Stop Date** field to stop the deduction.

**Voluntary Deductions**

**Change Voluntary Deduction**

Rally Cat  
The University of Vermont

\*Type of Deduction: UVM Annual Giving

\*Check whether Deduction is a Flat Amount or Percent: % of Total Gross

\*Enter Amount/Percent to be deducted: 2

Take deduction until I reach this Goal Amount: \$150.00

\*Enter Deduction Start Date: 04/10/2012 (example: 12/31/2000)

Enter Deduction Stop Date: 03/31/2013 (example: 12/31/2000)

Current Balance: 0.00

\* Required Field

[Return to Voluntary Deductions](#)

**Voluntary Deductions**

Rally Cat  
The University of Vermont

Review, add or update your voluntary deductions information.

Voluntary Deductions							
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance	
<a href="#">CATCARD</a>	04/01/2012		Current	\$125.00		0.00	<input type="button" value="Edit"/>
<a href="#">UVM Annual Giving</a>	04/10/2012	03/31/2013	Current	2%	\$150.00	0.00	<input type="button" value="Edit"/>



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## Mini-Manual

### Change W-4 Tax Information

#### General Information:

Only Federal W-4 withholdings can be changed through PeopleSoft. As a convenience there is a system functionality that will update the Vermont W-4VT to match the marital status and withholding allowances found on the federal W-4. The Updated Vermont W-4VT will not include additional dollar amounts indicated on the Federal form, a paper form must be completed and submitted. [Print the Vermont W-4 Form here.](#)

#### Step-by-Step Instructions: Changing W-4 Tax Information

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).
2. Navigation: **Self Service > Payroll and Compensation > W-4 Tax Information**
3. Enter the desired information into the Enter total number of Allowances that will be claimed field and/or indicate marital status if there is a change.
4. Click the **Submit** button.
5. Confirm password after updating the W-4. This functions as an employee's electronic signature. Note that passwords are case sensitive.
6. Click the **Continue** button.
7. Click the **OK** button.
8. PeopleSoft is updated by changes made to W-4 data via self-service.

### Request a New W-2

#### General Information

These screens can be used to request a copy of an existing W-2 form.



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### Step-by-Step Instructions: Requesting a New W-2 Form

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).
2. Navigation: **Self Service > Payroll and Compensation > W-2 Reissue Request**
3. Click the button beside the **Select where you want your W-2 delivered:**

**W-2 Reissue Request**

Rally Cat Social Security #: 111-22-3344

Complete the following information to request a reissue of your W-2 form.

**Home Address**

1791 UVM Way  
Burlington, VT 00044

**W-2 Reissue Request**

\*W2 Request for year: 2011

Select where you want your W-2 delivered: Mailing Address

Submit

4. Click an entry in the list:

Mailing Address

Home Address

Mailing Address

Work Location

5. Click the **Submit** button.
6. Click the **OK** button.
7. From this page, navigate back to the **Payroll and Compensation** menu group by clicking the **Payroll and Compensation** link on the menu bar.



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## Mini-Manual

### Frequently Asked Questions

#### Can I view the UVM contribution to my 403b in PeopleSoft?

It can be viewed on the paycheck.

#### What is the \$1.96 Life Credit in the earnings box on my paycheck?

This is UVM's contribution to the cost of the basic life insurance policy.

#### Why is my Long-Term Disability insurance cost different?

If you have Long-Term Disability insurance through UVM, it may be apparent that the net pay is different due to changes in the way we calculate the cost of this insurance. Previously, insurance cost was calculated based on the mid-point of a pay scale. Now it is calculated based on the actual covered earnings.

#### How do I print my paycheck?

See the mini-manual [Understanding Your Paycheck](#).

#### What does the extension field mean in the home phone number entry?

When adding or changing a home phone number, do not use the extension field to put in the UVM extension (6-XXXX). This field would only be used if the home phone number included an extension (group housing, for example).

### Helpful Links

Here are links to register for related classes, policies, and other resources (including video tutorials).

- [Open Lab Schedule](#)
- [Vermont W-4 Tax Form](#)

### Relevant UVM Departments

- [Human Resource Services](#)
- [UVM Emergency Management CatAlert](#)



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### More Information for on specific voluntary deductions

- [Staff Council](#) (Staff Emergency Loan Fund)
- [UVM Annual Giving](#)
- [CATcard](#)

### Related Policy

- [Staff Handbook](#)

**Suggestions? Updates?** Send an e-mail to [psguides@uvm.edu](mailto:psguides@uvm.edu)

This document is designed to be used online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.