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.

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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/).

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

3. The screen will open, displaying current information.
4. Click **Add Emergency Contact**.

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

---

**Step-by-Step Instructions: Editing 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**

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Relationship to Employee</th>
<th>Primary Contact</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donald Duck</td>
<td>Friend</td>
<td>☑</td>
<td>✏</td>
<td></td>
</tr>
<tr>
<td>Minnie Mouse</td>
<td>Sibling</td>
<td></td>
<td>✏</td>
<td></td>
</tr>
</tbody>
</table>

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/).

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

3. Current Emergency Contacts will appear on the screen:
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:
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.

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### 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.
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.
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.
- 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 Screen]

  - **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](#).
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/).

2. Navigation: Self Service > Payroll and Compensation > Direct Deposit

3. If a direct deposit exists, it will display on the screen:

![Direct Deposit Screen]

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.
**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.)
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/).

2. Navigation: Self Service > Payroll and Compensation > Direct Deposit

3. If a direct deposit exists, it will display on the screen:
4. Click the **Edit** button for the appropriate line.

5. The **Change Direct Deposit** page is displayed. Make the necessary changes on this page.

6. Click the **Save** button.

7. An e-mail will be generated.
Step-by-Step Instructions: Viewing Benefits

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


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/).

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

5. Click the **Save** button.

6. Click the **OK** button.
Add a New Deduction

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

![Voluntary Deductions](image)

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

![Look Up](image)

9. Fill in the fields with deduction information and click **Save**.
End a Current Deduction

10. Click the **Edit** button next to the deduction to be changed.
11. Enter an end date in the **Deduction Stop Date** field to stop the deduction.

![Voluntary Deductions](image)

**Voluntary Deductions**

**Change Voluntary Deduction**

Rally Cat
The University of Vermont

*Type of Deduction:*

*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:*

Enter Deduction Stop Date:

Current Balance:

* Required Field

**Return to Voluntary Deductions**

![Voluntary Deductions](image)

**Voluntary Deductions**

Rally Cat
The University of Vermont

Review, add or update your voluntary deductions information.

![Voluntary Deductions Table](image)
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/).

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.
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/).


3. Click the button beside the Select where you want your W-2 delivered:

   ![W-2 Reissue Request](image)

   - W-2 Reissue Request
     - Social Security #: 111-22-3344
     - Home Address
       - 1731 UVM Way
       - Burlington, VT 00044
     - W-2 Reissue Request
       - W2 Request for year: 2011
       - Select where you want your W-2 delivered: Mailing Address

4. Click an entry in the list:

   ![Mailing Address](image)

   - 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.
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
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

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