Open Enrollment Employee Self-Service How-to-Guide

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 questions about information in this mini-manual, or, if after reading the entire manual, you cannot find the information you need, please e-mail hrsinfo@uvm.edu.

Background Information
PeopleSoft Self-Service during Open Enrollment allows employees to review and update personal information/demographics, dependent information and make/update elections for Vision, Voluntary Short-term Disability, and Flexible Spending Accounts (Medical & Dependent Care.)

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Updated October 2021
1. Log-into PeopleSoft HR using your UVM netID and password
   a. You will need to have your DUO Authentication ready. For more information about DUO please see the Identify and Account Management website.

2. If you regularly use PeopleSoft as a Central User you will need to navigate to UVM Employee

3. Select the Open Enrollment Tile
4. Navigate between tasks using the task list or next button

**Note:** You will need to complete and save the Acknowledgement prior to the “Choose Elections” opening for review.

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**Step 1: Review & Complete the Acknowledgement**

1. Review the acknowledgement details
2. Sign your name
3. Check the “I agree” check box
4. Click the “save” button located at the bottom of the Acknowledgement task’s page.
   a. Once saved your Acknowledgement status will show as “Complete”
Review and Update Confirm Personal Information Tasks

These tasks pull directly from PeopleSoft Employee Self-Service and for the most part, can be updated at any time during the year. The home and mailing addresses 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.

**Note:** Providing demographic information regarding race/ethnicity, disability status, and veteran status is optional, but encouraged.
Home & Mailing Address

1. The screen will open, displaying current information

   ![Home Address](image1)

   ![Mailing Address](image2)

2. Click the arrow/edit icon to EDIT

3. The **Edit Home Address** page will appear. Make changes as appropriate then click **Save**

   ![Employee Instruction](image3)

4. An e-mail verifying changes have been made will be sent automatically.
1. The Contact Information page will open, displaying current information:

   ![Contact Information Page]

2. Click the plus icon to Add a phone number or the Click the arrow/edit icon to EDIT.
3. The Phone Number Detail page will appear.

4. Enter information into each field or click to delete the phone number.

   ![Phone Number Detail]

   - Click the Phone Type list from the drop down box and select from multiple options.
   - Once Type is selected, fill in all Required Fields and click Save.
1. The Contact Information page will open, displaying current information:

2. Click the plus icon to Add a phone number or the click the arrow/edit icon to EDIT.
   - **Note**: You will not be able to edit your default business email address.

3. The Email Address Detail page will appear.
   - Enter information into each field or click to delete to delete the email address.
   - Click the **Email Type** list from the drop down box and select from multiple options.
   - Once Type is selected, fill in all Required Fields and click **Save**.
Emergency Contacts

Use this process to add a new or make changes to existing emergency contacts. These directions apply to personal emergency contacts.

1. The Emergency Contacts page will open, displaying current information.

2. Click the plus icon to ADD an Emergency Contact or the click the arrow/edit icon to EDIT.

3. The Emergency Contact Detail page will appear.

4. Enter information into each field or click to delete to delete the email address.

5. Enter the contact name and relationship. Click Add Address to add an address, click Add Phone Number to add a phone number, and Save.
Degrees

Please indicate your higher education degrees earned and most importantly your highest level of education. We ask that you flag a degree if it is a terminal degree. If your degree, school, or major do not appear in the list please submit a ticket to PeopleSoft Footprints or email Human Resource Services at HRSinfo@uvm.edu and we will assist in submitting a help desk ticket to make the missing items available.

1. Currently entered degree information will appear.
   a) To add a degree, click
   b) click the icon next to the degree/school you would like to edit
   c) Click the icon next to the degree/school you would like to remove

2. The Add New Degree Details page will appear

3. Click the next to each required field to assist you with your selections. If your degree, school, or major do not appear in the list please submit a ticket to PeopleSoft Footprints or email Human Resource Services at HRSinfo@uvm.edu and we will assist in submitting a help desk ticket to make the missing items available.
4. Once you have completed the required fields (*) click Review or Update Ethnic Group (Voluntary)

**Note:** Demographic information is voluntary, but encouraged.

1. The Voluntary Self-Identification form will appear

   1) Are you Hispanic or Latino?
   - Yes
   - No

   2) What is your race? Select one or more.
   - American Indian or Alaska Native
   - Asian
   - Black or African American
   - Native Hawaiian or Pacific Islander
   - White

2. Complete form by selecting one or more option.

3. Then click Save.
Disability Status (Voluntary)

After submission the check boxes on this form are cleared. This is a known issue that we are working to resolve. Please know that the most up to date information entered is held in PeopleSoft.

**Note:** Demographic information is voluntary, but encouraged.

1. The Voluntary Self-Identification form will appear (please read carefully)
   
   Please check one of the boxes below:
   
   - Yes, I Have A Disability, Or Have A History/Record Of Having A Disability
   - No, I Don’t Have A Disability, Or A History/Record Of Having A Disability
   - I Don’t Wish To Answer

2. Complete form by making a selection. Then click **Submit**
3. Confirm submission by clicking **OK**
Review or Update Veteran Status

Note: Demographic information is voluntary, but encouraged.

1. The Voluntary Self-Identification form will appear (please read carefully)

   - I belong to the following classifications of protected veterans (choose all that apply):
     - Disabled Veteran
     - Recently Separated Veteran
     - Active Duty Wartime or Campaign Badge Veteran
     - Armed Forces Service Medal Veteran
   - I am a protected veteran, but I choose not to self-identify the classifications to which I belong.
   - I am NOT a protected veteran.
   - I am NOT a veteran.

   Military Discharge Date

Note: The choice “I am NOT a protected veteran” is often misunderstood. It identifies you as a veteran, but not in one of the protected categories listed on this page.

2. Complete form by making a selection. Then click Submit

3. Confirm submission by clicking OK
**Update or Confirm Dependents**

Review dependents prior to making benefit elections to ensure that your dependents are included in your benefit election.

1. Currently entered dependent information will appear.
   a) It is acceptable for dependents to be listed on this page if they are not enrolled in benefits or if they are no longer eligible to be enrolled in benefits (e.g., over the age of 26.) This information is kept for historical purposes.

2. Click the plus icon to ADD a new dependent or the click the arrow/edit icon to EDIT.

**To Edit an Existing Dependent**

1. **Name**: click the arrow/edit icon to next to the dependent’s name to EDIT.
2. **Personal Information**: Use the drop down and calendar selections to update the Personal Information fields
a) For Relationship to employee the options available are:

3. **Home Address**: defaults to the “same as mine” and should not differ from the employee’s home address.

4. **National ID (Social Security Number)**: click the arrow/edit icon to next to the dependent’s SSN to EDIT.

5. Click “save” in the top right hand corner of the page to save the updated information.

**To Add a Dependent**

1. **Select**

2. **Name**: to enter the dependent’s name.

3. **Personal Information**: Use the drop down and calendar selections to update the Personal Information fields

a) For Relationship to employee the options available are:

4. **Home Address**: defaults to the “same as mine” and should not differ from the employee’s home address.
5. **National ID (Social Security Number):** click the [button](#) to add the dependent’s SSN.
6. Click “save” in the top right-hand corner of the page to save the updated information.
Choose Elections

Before choosing elections, please complete the following:

1. Complete Acknowledgement: you will not be allowed to select “Choose Elections” until the acknowledgement has been completed.
2. Review/Add Dependents: To ensure you are able to enroll dependents in benefits. For all benefit enrollments including those enrolled via PeopleSoft Self-Service e.g., vision or those enrolled via a fillable pdf e.g., medical, dental, life).

Based on benefit eligibility the four benefit options may be available to make or update elections:

<table>
<thead>
<tr>
<th>Benefit Plans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Type</td>
</tr>
<tr>
<td>Vision</td>
</tr>
<tr>
<td>Short-Term Disability</td>
</tr>
<tr>
<td>Flex Spending Health - U.S.</td>
</tr>
<tr>
<td>Flex Spending Dependent Care</td>
</tr>
</tbody>
</table>

Default & Positive Self-Service Elections

Default: Elections for Vision show what an employee’s current election is. This is the only benefit where the election in self-service does not need to be updated if an employee wants to continue with their current election.

Positive:

- **Voluntary Short-term Disability** is a new payroll deduction managed by UVM, therefore, this is the first election being made in the system.
  - **Note:** Even if you are currently enrolled in Voluntary Short-Term Disability, you must enroll again this year through self-service.

- **Flexible Spending Account Dependent Care** must be made annually.

- **Flexible Spending Account Health** must be made annually.

These three elections require a positive election for the next plan year. If an election is not made, the employee will waive these benefits for the next plan year. Flexible Spending allows for updates to elections based on qualifying events during a plan year. Voluntary Short-term Disability does not allow for elections outside of open enrollment.

Estimated Per Pay Period Costs

This is the cost of elections based on your current payrate and job attributes. If your job attributes, e.g., pay rate, change after your election but prior to January 1, actual deductions may vary. Employees working and being paid over a period less than 12 months (e.g., 9-month staff) will see higher amounts deducted from their paychecks to account for benefit premium during their off-contract months.
<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Current</th>
<th>New</th>
<th>Dependents</th>
<th>Pay Period Cost</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision</td>
<td>VSP Vision Service Plan</td>
<td>VSP Vision Service Plan</td>
<td>0 Dependents</td>
<td>$3.53</td>
<td>Pending My Review</td>
<td>Review</td>
</tr>
<tr>
<td>Short-Term Disability</td>
<td>No Coverage</td>
<td>Waive</td>
<td></td>
<td>$0.00</td>
<td>Pending My Review</td>
<td>Review</td>
</tr>
<tr>
<td>Flex Spending Health - U.S</td>
<td>Flex Spending Acct Medical</td>
<td>Waive</td>
<td></td>
<td>$0.00</td>
<td>Pending My Review</td>
<td>Review</td>
</tr>
<tr>
<td>Flex Spending Dependent Care</td>
<td>Flex Spending Dependent Care</td>
<td>Waive</td>
<td></td>
<td>$0.00</td>
<td>Pending My Review</td>
<td>Review</td>
</tr>
</tbody>
</table>
Submitting Enrollments

Each enrollment is submitted after the save button is selected on the election screen. You may submit elections multiple times during OE. The final election will be the last election saved and effective at the end of the open enrollment period. When all benefit elections have been submitted, the employee can close out of the browser or click on the green “Click Here Before Exiting” button. Benefit elections must be submitted to update or make an election.

Submittal Statuses:
- **Pending My Review**: This benefit election has not been reviewed, or clicked into.
- **Visited**: This benefit election has been reviewed or the election page has been opened/clicked into but not changed from the default selection.
- **Submitted**: This election has been updated and submitted via clicking the “submit” button. Submitted enrollments may be updated throughout the open enrollment period.

<table>
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<td>VSP Vision Service Plan</td>
<td>VSP Vision Service Plan</td>
<td>0 Dependents</td>
<td>$383</td>
<td>Submitted</td>
<td>Review</td>
</tr>
<tr>
<td>Short-Term Disability</td>
<td>No Coverage</td>
<td>Wave</td>
<td>$0.00</td>
<td>Visited</td>
<td></td>
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<td>Wave</td>
<td>$0.00</td>
<td>Pending My Review</td>
<td></td>
<td>Review</td>
</tr>
</tbody>
</table>

Vision Election

Elections for **Vision** show what an employee’s current election is. This is the only benefit where the election in self-service does not need to be updated if an employee wants to continue with their current election. See [UVM Benefit Resources](#) for more information regarding our Vision Plan, eligibility and coverage details.

To update your vision election:

1. **Select “Review” button**

2. **Enroll**: If coverage is waived, click the “select” button next to VSP Vision Service Plan. This will enroll you in Employee Only coverage. All costs for vision are before tax.
3. **Add Dependents:** to add dependents, check the box for each dependent you would like to enroll in the “Enroll Your Dependents” section. This automatically updates the plan coverage (e.g., employee only, employee plus spouse, employee plus child(ren), or family) and the estimated cost.
   - **Dependents name not showing?**
     - You may need to add the dependent until **Update/Confirm Dependents** tab.
     - The dependent may not be eligible to enroll in coverage (e.g., age over 26.) Review dependent information on the **Update or Confirm Dependents** tab.

4. **Waive:** To waive coverage, click the “Select” button next to waive. This will unenroll the employee and dependents. Click the “submit” button in the top right-hand corner to submit.

5. **Submit your enrollment.** Your enrollment is submitted when the “submit” button is clicked. You may submit elections multiple times during OE. The final election will be the submittal effective at the end of the open enrollment period. When the election is submitted, the status of the enrollment will update to “submitted.” If the page is viewed but elections are not “submitted” then the status will change from “pending” to “visited”.

6. **Overview of All Plans**
   - This button brings up a page that details the plan costs per coverage tier e.g., employee only, employee plus spouse, employee plus child(ren), or family) and provides additional resources associated with the plan.

### Short-Term Disability Election

2022 is the first year VSTD elections will be deducted from pay checks. Due to this, employees currently enrolled in VSTD via bank ACH must make an election in PeopleSoft in order for coverage to continue. See [UVM Benefit Resources](#) for more information regarding our short-term disability plan, eligibility and coverage details.

1. **Select the “Review” button.**

2. **Enroll:** Coverage is defaulted to waive, click the “select” button next to Vol Short-Term Disability. This will enroll you in VSTD coverage. All costs for short-term disability are after-tax. Click the “submit” button to submit the enrollment.
3. **Waive**: This benefit will be defaulted to waive. If you have previously updated the election to enroll you may waive coverage. To waive coverage, click the “Select” button next to waive. Click the “submit” button to submit the enroll.

4. **Submit your enrollment.** Your enrollment is submitted when the “submit” button is clicked. You may submit elections multiple times during OE. The final election will be the submittal effective at the end of the open enrollment period. When the election is submitted the status of the enrollment will update to “submitted.” If the page is viewed but elections are not “submitted” then the status will change from “pending” to “visited.”

### Flexible Spending Account Election – Medical
Flexible spending accounts require employees to make an election annually. See [UVM Benefit Resources](http://www.uvm.edu/benefits) for more information regarding our FSA – medical eligibility and coverage details.

1. Click the “Review” button.

2. **Enroll**: Coverage is defaulted to waive, click the “select” button next to Flex Spending Acct Medical. All costs for FSA are before-tax.
3. **Enter your contribution amount:** This number is the annual amount you wish to have withheld using pre-tax dollars. Annual pledge must be between $50 and the IRS Maximum (currently $2,750 October 18, 2021). The IRS announces maximums between late October and the end of the calendar year. Use the Flexible spending calculator to calculate a per pay period amount into an annual amount. Employees working and being paid over less than 12 months will have the total amount of the pledge taken over the number of pay periods during which they are paid.

4. **Waive:** This benefit will be defaulted to waive. If you have previously updated the election to enroll you may waive coverage. To waive coverage, click the “Select” button next to waive. Click the “submit” button to submit the enrollment.

5. **Submit your enrollment.** Your enrollment is submitted when the “submit” button is clicked. You may submit elections multiple times during OE. The final election will be the submittal effective at the end of the open enrollment period. When the election is submitted the status of the enrollment will update to “submitted.” If the page is viewed but elections are not “submitted” then the status will change from “pending” to “visited”.
Flexible Spending Account Election- Dependent Care

Flexible spending accounts require employees to make an election annually. See UVM Benefit Resources for more information regarding our FSA – dependent care eligibility and coverage details.

1. Click the “Review” button.

2. Enroll: Coverage is defaulted to waive, click the “select” button next to Flex Spending Acct Dep. All costs for FSA are before-tax.

3. Enter your contribution amount: This number is the annual amount you wish to have withheld using pre-tax dollars. Annual pledge must be between $50 and the IRS Maximum (currently $5,000, October 18, 2021. The IRS announces maximums between late October and the end of the calendar year). Use the Flexible spending calculator to calculate a per pay period amount into an annual amount. Employees working and being paid over less than 12 months will have the total amount of the pledge taken over the number of pay periods during which they are paid.

4. Waive: This benefit will be defaulted to waive. If you have previously updated the election to enroll you may waive coverage. To waive coverage, click the “Select” button next to waive. Click the “submit” button to submit the enrollment.
5. **Submit your enrollment.** Your enrollment is submitted when the “submit” button is clicked. You may submit elections multiple times during OE. The final election will be the submittal effective at the end of the open enrollment period. When the election is submitted the status of the enrollment will update to “submitted.” If the page is viewed but elections are not “submitted” then the status will change from “pending” to “visited”.

### Submitting Other Benefit Election Information

Benefits not elected in self-service must be updated by submitting fillable PDF forms to Human Resource Services. These paper based election forms are required to enroll or make changes to the following benefit elections:

- Medical
- Dental
- Life
- Long-term Disability
- Retirement Plans (403b, 457b, Retirement Health Savings)

Submit the PDF Fillable Form via the following procedure:

1. Find the form on the HRS website - located [www.uvm.edu/hrs/forms](http://www.uvm.edu/hrs/forms)
2. Complete the forms and save them
   - Please note: the medical history form requires a “hand signature”.
3. Send the election form(s) via [UVM’s secure file transfer service](mailto:hrsinfo@uvm.edu) to Human Resource Services at hrsinfo@uvm.edu. Please do not mail or walk in forms.

### Review Current Benefit Summary

1. Log in to PeopleSoft through the Human Resources Login ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).
2. Navigation (Click on tiles):
   - **UVM Employee > UVM Benefits**

3. Click the Benefits Summary tile and the current **Benefits Summary** will appear.
Other Resources

2022 Benefit Election Forms
UVM Secure File Transfer Service
Benefit Overview & Resources
PeopleSoft HR Log-in
DUO Multi-Factor Setup

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.

Questions: Contact Human Resource Services at hrsinfo@uvm.edu or 802-656-3150.