

General Information for Employees

Self Service Workplace enables employees to perform the following functions in both a desktop and a mobile-friendly environment. Choose one of the following items for more detailed information:

Benefits

- [My Benefits](#) – view/print a summary of currently enrolled benefits.
- [SECA Enrollment](#) – annual enrollment screen for SECA Charities.
- [Total Compensation Statement](#) - identifies all the compensation paid via wages to an employee, and, in addition, employer contributions made towards benefits and taxes on an employee's behalf, for a calendar year.
- [My Benefits Enrollment](#) – enroll in benefits plans such as medical, dental or retirement.

Leave and Time

- [Display Absences](#) - display absences approved by your manager.
- [My Timesheet](#) – submit working time for manager approval.
- [My Leave Request](#) - submit new leave requests and leave cancellations as well as view the status of all leave requests.

Personal Information

- [My Addresses](#) – view permanent and mailing addresses as well as view and make updates to emergency contact information.
- [My Contact Information](#) – view work email address as well as view and update personal e-mail address.
- [Direct Deposit/Bank Information](#) - view Main Bank account and view/update/end any existing Secondary Bank account(s). (Note: As added security, employees must enter their Secondary Bank account number to make any modifications such as deposit amounts/percentages or ending deposits to an account.) (Note 2: The scrolling features on this application will behave somewhat differently from the other Self Service Workplace applications.)
- [My Family Members](#) – view dependent and beneficiary information saved in the system.

- [Education Information](#) – view and update degrees and certifications earned.
- My External Organizations – view and update Charity organizations, trust funds, employee's estate and other organizations.
- [Ethnicity / Race](#) – view and update your cultural background.
- [My Personal Data](#) - display basic personal and employment information. (Note: As added security, employees must enter their Date of Birth to access this application.)

Payroll

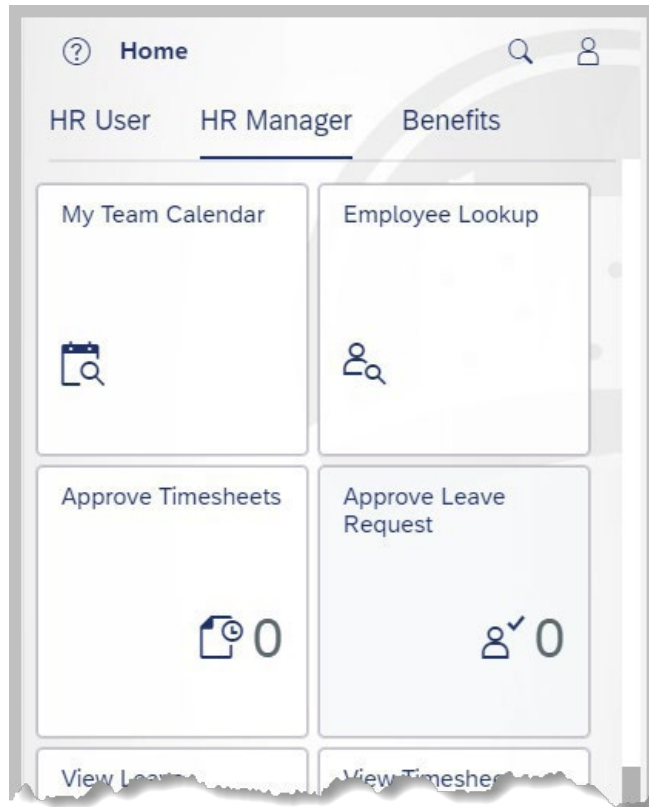
- [W-4 Withholding](#) - display or update W-4 tax information.
- [Display W-2 Form](#) – display, download, or print your electronic W-2 form.
- [Update W-2 Election](#) – choose to receive an electronic or paper W-2 form.
- [Direct Deposit/Bank Information](#) - view Main Bank account and view/update/end any existing Secondary Bank account(s). (Note: As added security, employees must enter their Secondary Bank account number to make any modifications such as deposit amounts/percentages or ending deposits to an account.) (Note 2: The scrolling features on this application will behave somewhat differently from the other Self Service Workplace applications.)
- [My Paystubs](#) – view and print paystubs.

General Information for Managers

Self Service Workplace enables managers to perform the following functions in both a desktop and a mobile-friendly environment. Choose one of the following items for more detailed information:

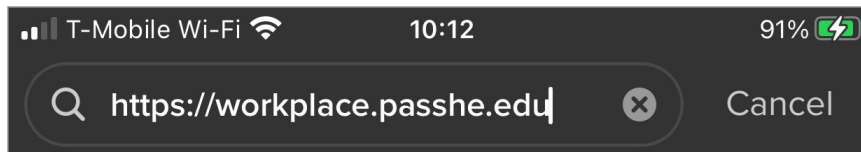
- [**My Team Calendar**](#) – view team member calendars as well as build group calendars across departments.
- [**Employee Lookup**](#) – lookup contact information of employees within the organization. Managers can also view direct reports of colleagues.
- [**Approve Timesheets**](#) – approve/reject timesheets for direct reports.
- [**Approve Leave Request**](#) – approve/reject employee leave and leave cancellation requests.
- [**View Leave Requests Processed by Me**](#) – display a detailed listing of all leave requests that you as the approver have either approved, rejected, or approved for cancellation.
- [**View Timesheet Processed by Me**](#) – display a detailed listing of all time entries, such as overtime, that the manager has either approved or rejected for direct reports.
- [**My Team**](#) – provides general data about direct reports, such as their personnel number, position, cost center, and organizational unit. For managers who have additional organizational units within their own organizational unit, this application also provides the same information on employees who are not direct reports when the “All Employee” filter is applied.

- [Absence Quota \(Staff\)](#) – view the absence quotas for direct reports for the current leave calendar year. For managers who have additional organizational units within their own organizational unit, this application also provides the same information on employees who are not direct reports when the “All Employee” filter is applied.



Logging into Self Service Workplace

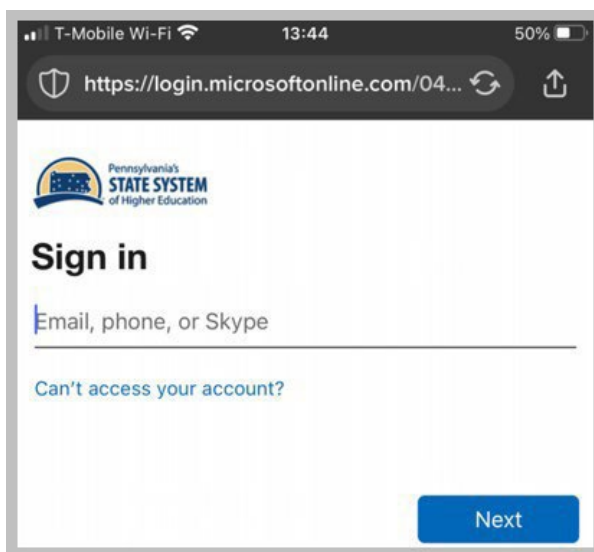
1. Visit <https://workplace.passhe.edu> on your desktop or mobile browser.



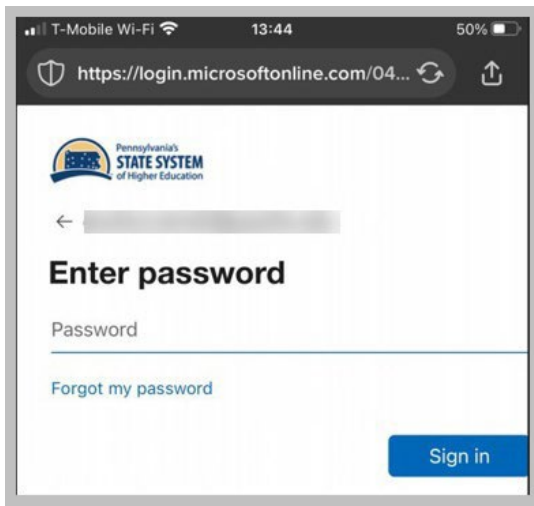
2. Select your university from the drop-down menu provided then click Continue to begin the multi- factor authentication (MFA) process.



3. Enter the username and click Next.



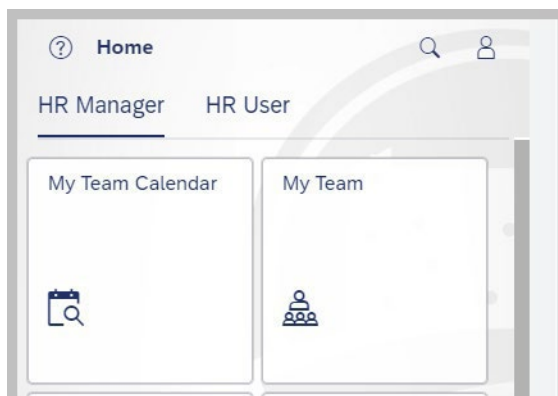
4. Enter the password and click Sign in.



5. Users will receive a multi-factor authentication code which requires entry into Microsoft Multifactor Identification application. Follow the prompts on your Microsoft Multifactor Identification application to complete entry.

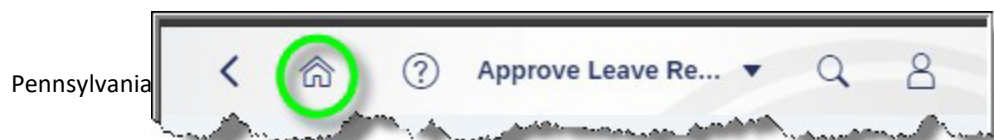


6. Once logged in, the Home screen below will appear where individual Self Service Workplace applications can be accessed. (Note: This screenshot illustrates a manager's access within Self Service Workplace. Non-manager employees will not



see the HR Manager section.)

- a. While using any of the following applications, click the Home icon to return to the main Self Service Workplace screen.



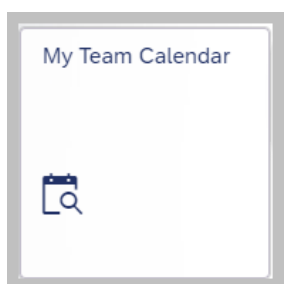
HR Manager Self Service Workplace Application Features

1. **My Team Calendar** – Enables managers to view calendars of direct reports as well as calendars of their own manager colleagues.

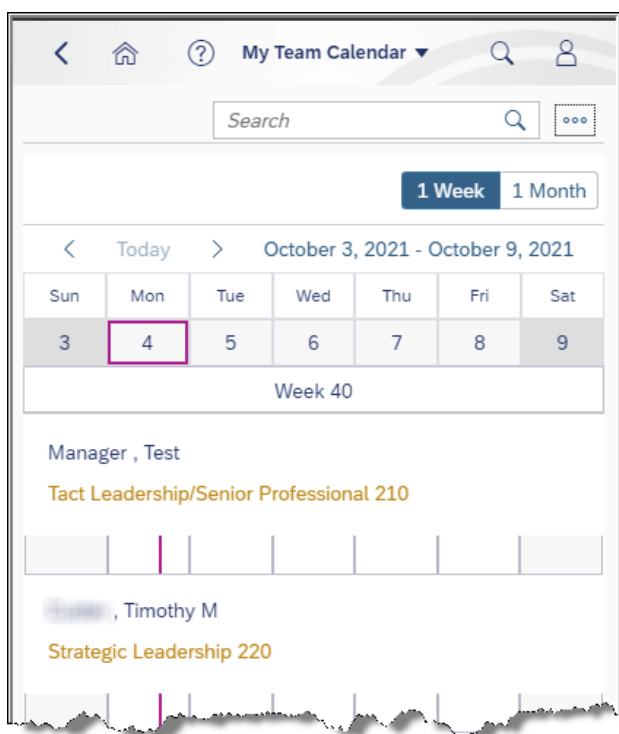
Key Features

- View upcoming absences/trainings of colleagues or for employees reporting directly to you.
- Add additional customized calendar views and assign any employees to them.
- Hide the display of employees by hiding them from the lists of colleagues, direct reports, or employees in customer views.

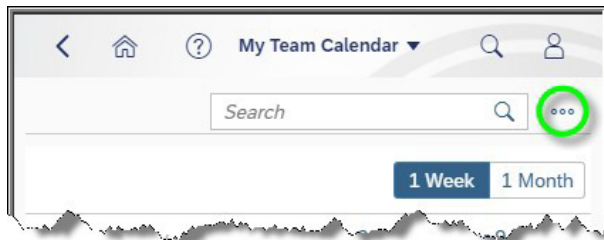
- a. Click **My Team Calendar** to begin.



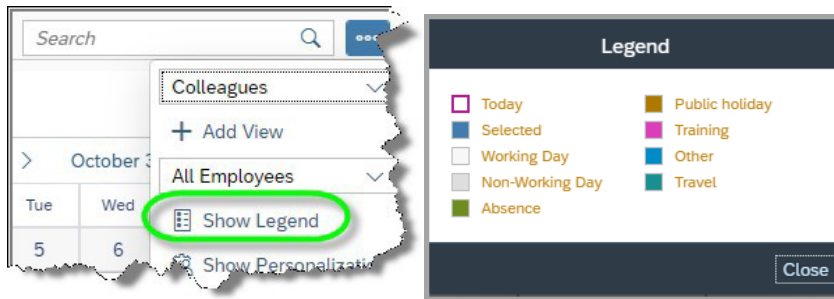
- b. The default page upon opening the tile is the **Colleagues** view. This will provide calendar details for the manager as well as colleagues who are also managers within the same department.



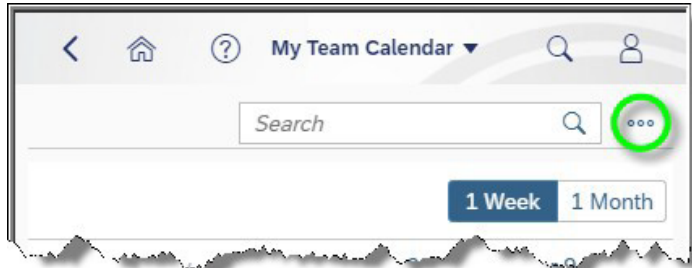
Note: To display the calendar legend, select this icon to the upper right of the screen.



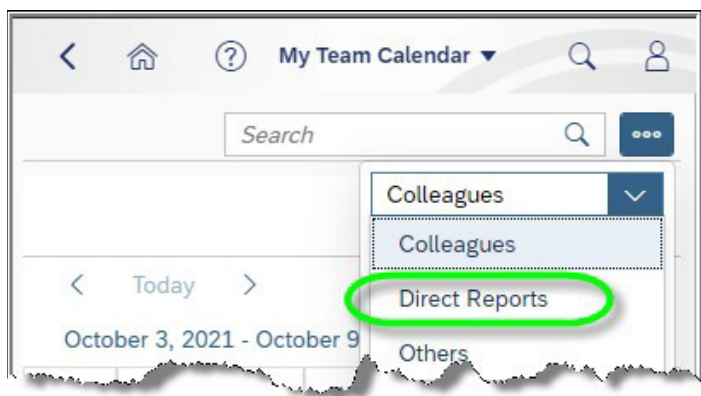
Next, select Show Legend, and the Legend will appear.



- c. The second view option for managers is **Direct Reports**. To access this view, select this icon to the upper right of the screen.

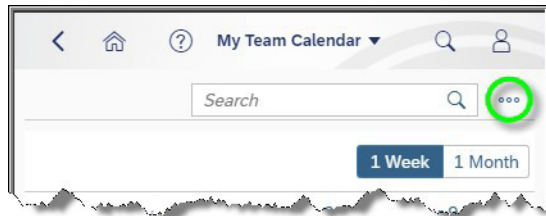


Next, select Direct Reports from the drop-down box.

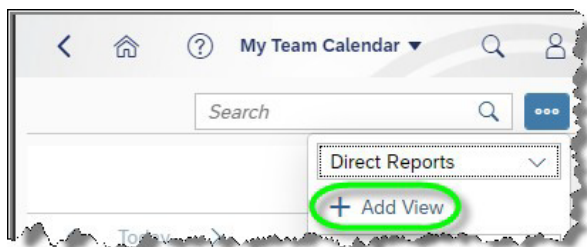


This will provide calendar details for the manager as well as the employees who are within the manager's reporting line.

- d. Users have the option of creating personalized calendars. For example, users may wish to have a calendar view that contains colleagues with whom they interact with on a regular basis. To create a customized calendar, click the following icon.



Next, select Add View.



- i. Enter a name for the view to be created. Optionally, the Template drop-down allows the user to make a copy of an existing calendar view that will automatically bring in employees that may also need to be on the custom view. Select Add View. (Note: The Existing Views is not applicable.)

- ii. Select the following icon to add employees to the custom view.

Adjust "Coworkers"

*Description Coworkers

Name

Visible

Manager , Test

Tact Leadership/Senior Professional 210

Hide

- iii. Enter the employee's name to be searched and click the magnifying glass. Find the associated employee and click the plus sign next to Add. Continue adding as many employees as desired.

< Add Employee to "Coworkers"

Edward Miller

Name

Miller , Edward

Tact Leader/Sr Professional 190-Exempt

Add

- iv. When finished, select OK to finalize adding the employee to the custom calendar.

Delete View OK Cancel

- v. The custom calendar will now be available for use.

< Home ? My Team Calendar

Search

Coworkers

Colleagues

Direct Reports

Others

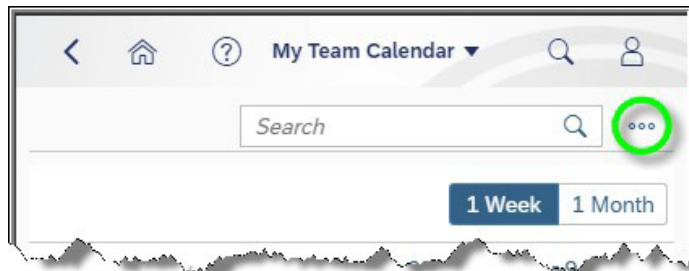
Coworkers

< Today > October 3

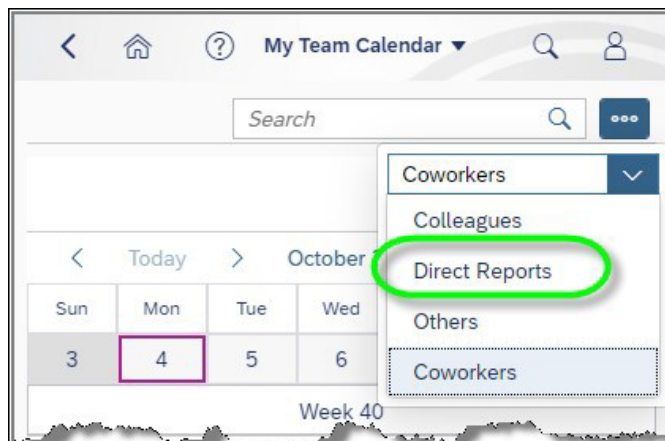
Sun	Mon	Tue	Wed
3	4	5	6

Week 40

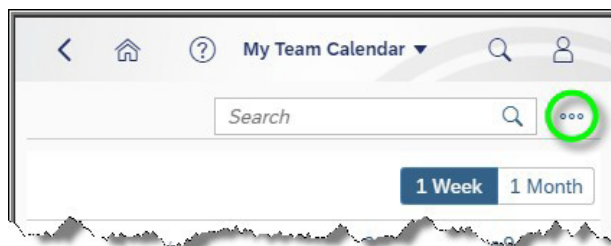
vi. To modify any calendar view, select the following icon:



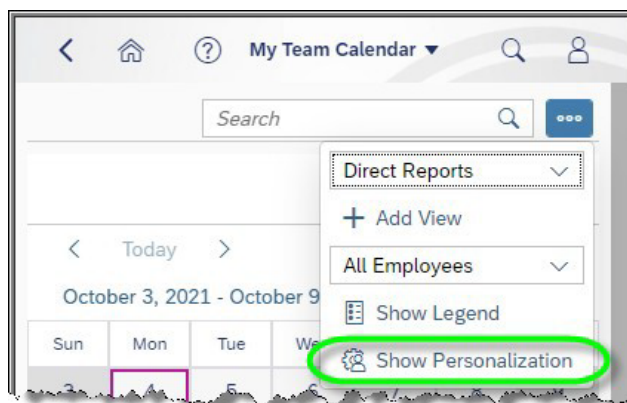
Select the calendar view to be modified.



vii. Click this icon again.



viii. Click Show Personalization.



From here, additional employees can be added by clicking the plus sign, or existing employees can be hidden or removed as desired.

The image shows two side-by-side screenshots of the "Adjust 'Direct Reports'" interface. The left screenshot shows a list of direct reports with a plus sign icon circled in green at the top right. The right screenshot shows the same interface with a "Hide" button circled in green next to "Manager, Test" and a "Show" button circled in green next to "Manager, New".

- ix. When finished making changes, select OK to save updates, or to delete a customized view entirely, select Delete View.

The image shows a dialog box with three buttons: "Delete View" (highlighted with a red border), "OK" (blue), and "Cancel" (grey).

Note: The Colleagues and Direct Reports view cannot be deleted; however, employees can be hidden from view as desired.

- e. To view the details of an employee event listed on the calendar, simply click on the event.

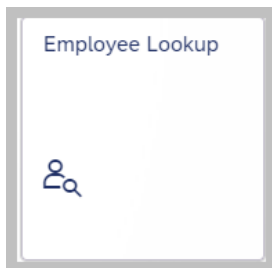
The image shows a calendar view with a grid of dates. A green arrow points to a date cell containing a house icon and the text "Op Leader/Professional 170-Exempt". The name "Noah D" is visible above the calendar and "Edward J" below it.

When finished viewing details for the event, click Close.

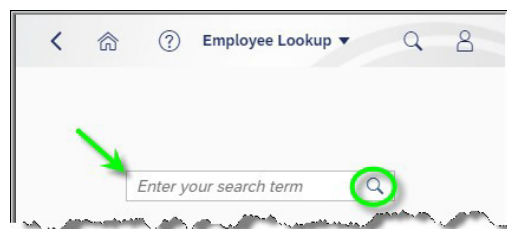
The screenshot shows a modal window titled "Event Details". At the top, it displays the name "Noah D" and the status "Op Leader/Professional 170-Exempt". Below this is a section titled "Details". Inside this section, the following information is listed: "Title: Out of Office", "Date: May 3, 2022", "Time: 11:00 – 14:00", and "Category: Absence (Approved)". At the bottom right of the modal, there is a "Close" button.

2. **Employee Lookup** - enables managers to lookup contact information of employees within the organization. Managers can also view direct reports of colleagues.

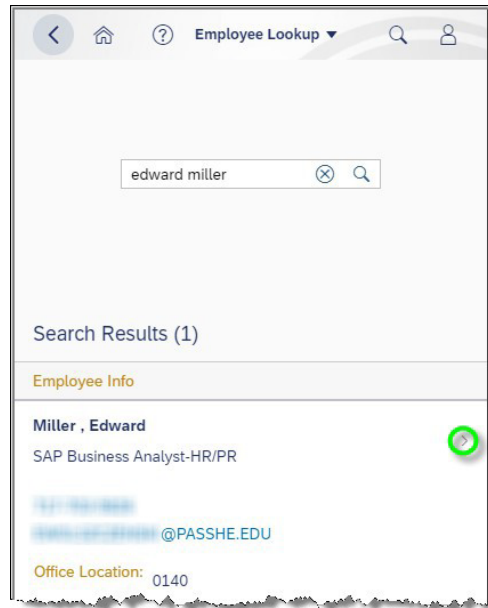
Click **Employee Lookup** to begin.



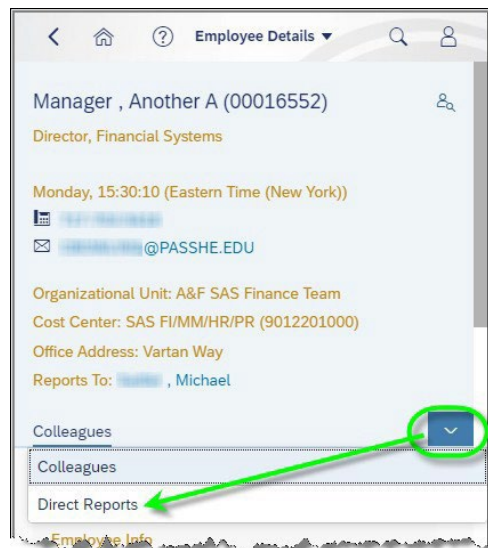
- a. Enter the name of the employee on which to search for information and click the magnifying glass icon. A first name, last name, or a combination can be used in the search.



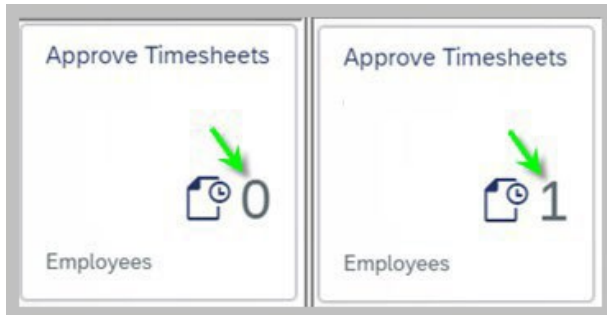
- b. Employees matching the search will be listed. Email, phone, and office location will be listed if available. Clicking the arrow will display any colleagues associated with the employee.



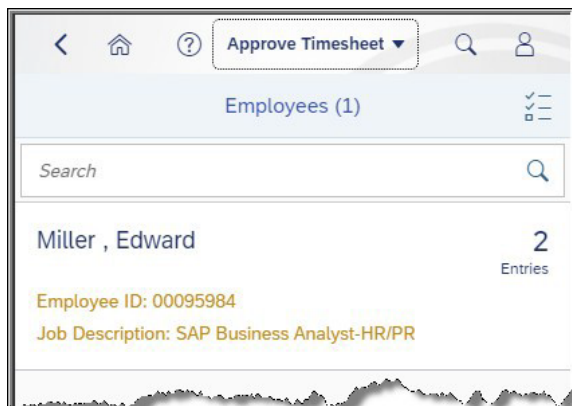
- c. If the employee is a manager, the manager's colleagues will display by default. To display the manager's direct reports, click the down arrow and choose Direct Reports.



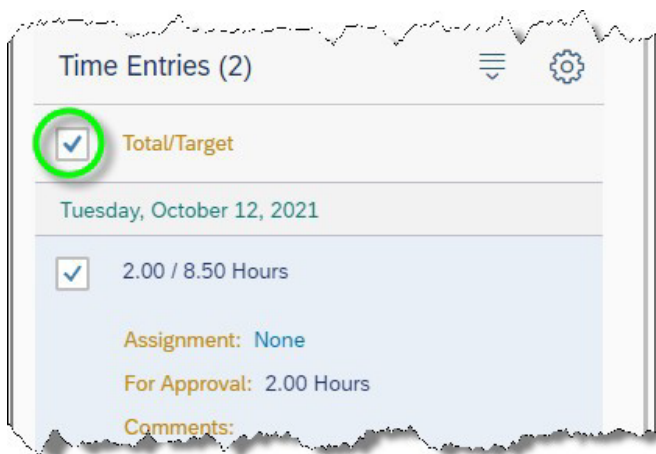
3. **Approve Timesheets** – enables managers to approve/reject employee timesheets. If '0' appears in the application tile, this means there are no timesheets pending processing. Any number other than '0' indicates the number of employees with timesheets pending processing.



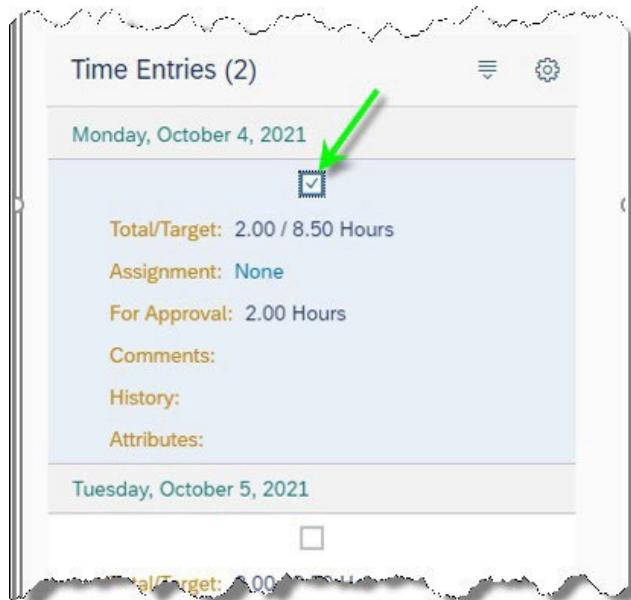
- a. Click **Approve Timesheets** to begin processing employee timesheets. In this example, there is one employee with two timesheet entries pending processing. Click the box to approve or reject the entries.



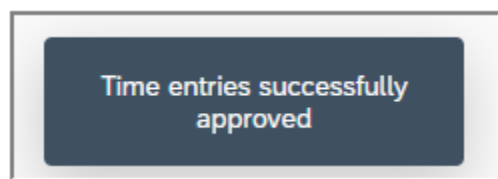
- b. If processing all entries for the employee in the same manner (i.e., process all as Approve or process all as Reject), click the checkbox for Total/Target as shown to select all entries to be processed in batch.



Note: Time entries can be processed independently by clicking the checkbox inside each individual time entry. This is useful when some entries need to be rejected while others will be approved.



- c. When approving time entries, the following message will be displayed upon clicking the Approval button.



- d. When rejecting time entries, the following window will appear for optional input as to the reason for rejecting the time entries. Time can be rejected without choosing a reason.

Reject

Optional Reasons for Rejection:

☐ Incorrect Day/Date

☐ Incorrect Time (Please Use 24 hour Clock)

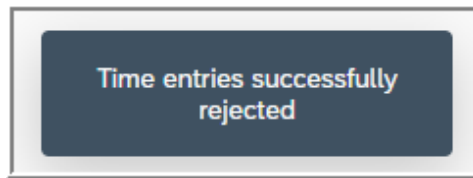
☐ Holiday Not worked

☐ No Record of Work on Subject Day

Reject

Cancel

- e. The following message will be displayed upon clicking the Reject button



4. Approve Leave Request - enables managers to approve employee leave requests.

If '0' appears, this means there are no leave requests pending processing. Any number other than '0' indicates the number of leave requests pending processing.



- a. Click **Approve Leave Request** to begin processing employee leave requests.



- b. To review the requests that appear in the inbox and determine whether to approve or reject requests, the following details are provided to the manager: Leave Type, Total Hours requested off, Start Date/Time and End Date/Time as well as remaining Leave Balance of the employee.

☐ 10/04/2021 16:13

Leave Request:
Edward Miller
 >

Leave Type:
Annual Leave

Total Hours:
24.50

Start Date:
10/07/2021

Start Time:
07:30

End Date:
10/11/2021

End Time:
16:30

Leave Balance:
133.10

- c. Additional details such as employee remarks can be found by clicking the arrow where shown.

☐ 10/04/2021 16:13

Leave Request:
Edward Miller
 >

Leave Type:

- d. To return to leave processing, Click the arrow where shown.

☐ <
 Additional Details

Leave Request: Edward Miller

Employee Number:
00094941

Medical Appointment at:
00:00

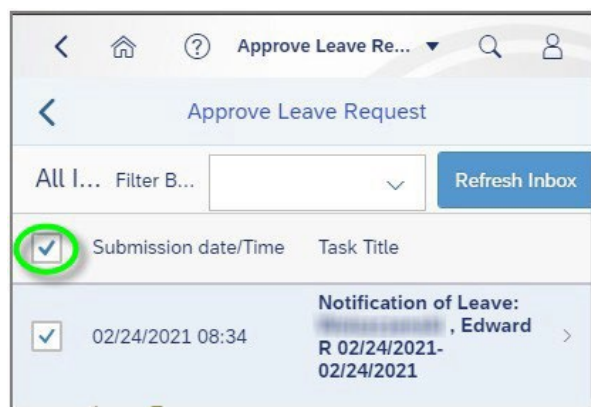
Medical Certificate:
N/A

Relationship:

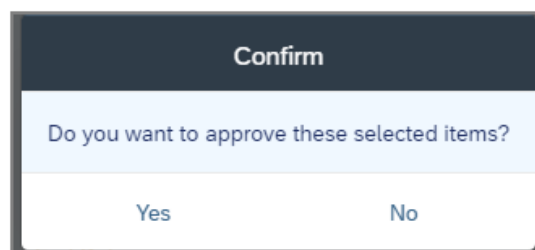
Additional Remark:
I will be in NC.

Leave Entry ID:
10042021161316

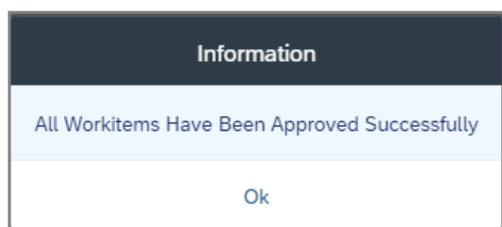
- e. If processing all of the leave requests in the inbox as Approve or conversely as Reject, Click the checkbox circled. This will automatically select all leave requests to be processed. To deselect any checkbox, Click the box again to remove it from processing.



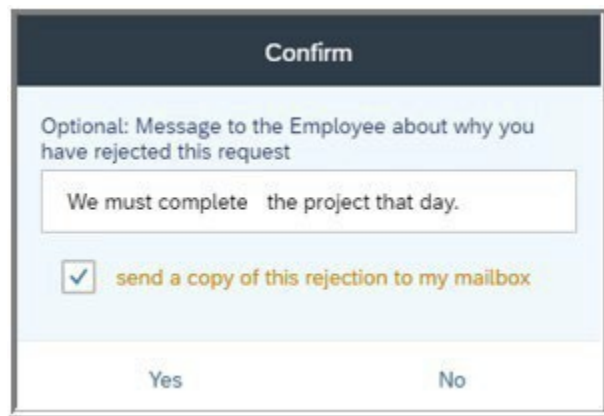
- f. Clicking Approve will display the following pop-up. Click the Yes to finalize processing.



- i. When Yes is chosen, the following message will appear for approvals.

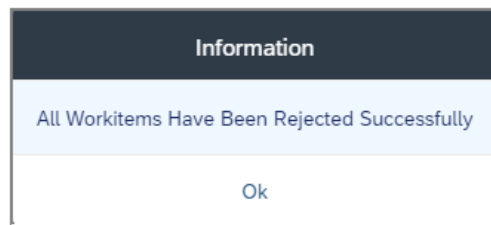


- g. Clicking Reject will display the following pop-up where the manager has the option to provide comments as well as send a copy of the rejection to their own email inbox.



A 'Confirm' dialog box with a dark header. The main content area is light blue and contains the text 'Optional: Message to the Employee about why you have rejected this request' followed by a text input field containing 'We must complete the project that day.' Below this is a checkbox with a checkmark and the text 'send a copy of this rejection to my mailbox'. At the bottom, there are two buttons: 'Yes' and 'No'.

- i. When Yes is chosen, the following message will appear for rejections.



An 'Information' dialog box with a dark header. The main content area is light blue and contains the text 'All Workitems Have Been Rejected Successfully'. At the bottom, there is a single button labeled 'Ok'.

5. **View Leave Requests Processed by Me** – display a detailed listing of all leave requests that you as the approver have either approved, rejected, or approved for cancellation.

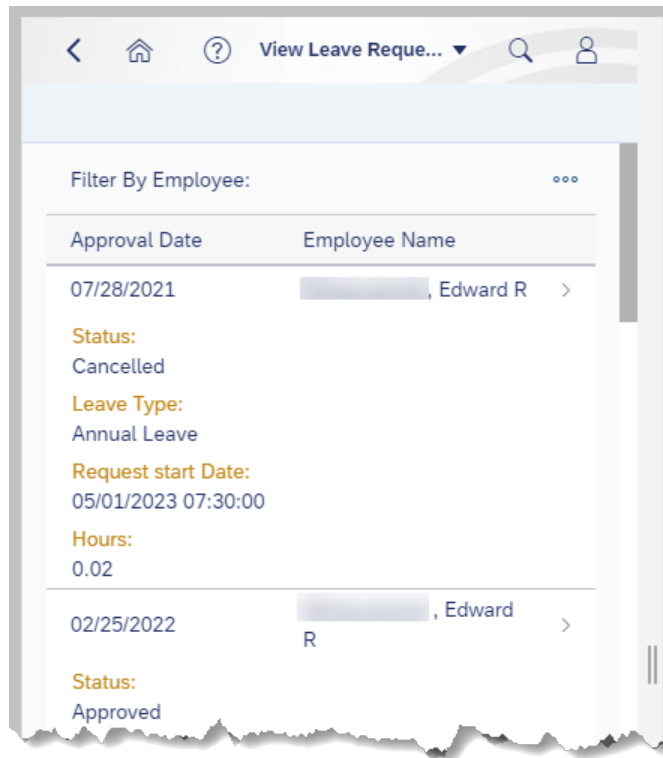
- a. Click **View Leave Requests Processed by Me** to search for leave requests.



- b. Enter the desired search parameters then click Search Leave Requests.

A screenshot of a web form titled "Search for Leave Requests". The form has a light gray background and a white border. It contains three search criteria sections: "Search For:" with a dropdown menu showing "All Requests", "Show From:" with a date input field showing "02/01/2022", and "To:" with a date input field showing "12/31/9999". At the bottom of the form are two buttons: "Search Leave Requests" and "Clear".

- c. Results will appear that can be filtered by employee. To view more details on a processed leave request, simply click the related request.



6. View Timesheet Processed by Me— display a detailed listing of all employee timesheets that you as the approver have either approved or rejected.

- a. Click **View Timesheet Processed by Me** to search for processed timesheets. Enter the desired search parameters.

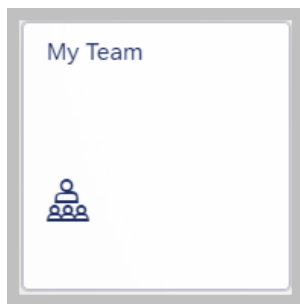


- b. Enter search parameters as desired and select Search Time Record.

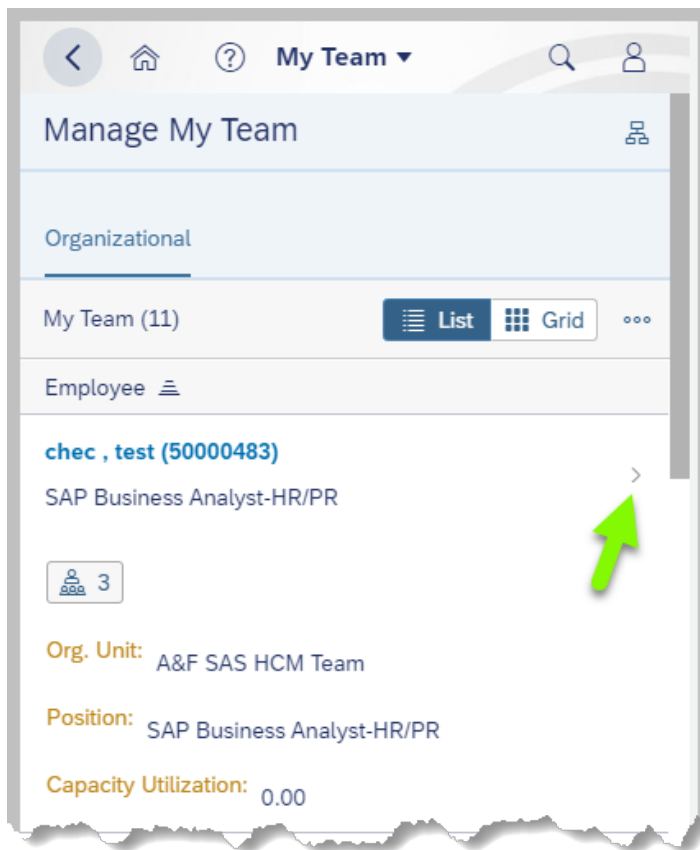
 A screenshot of a web application interface. At the top, there is a navigation bar with icons for back, home, help, and a search bar. The main title is "View Timesheet Processed By Me". Below the title, there are search filters: "* Search for:" with a dropdown menu set to "All Request", "* Date from:" with a date input field showing "02/01/2022", and "* To:" with a date input field showing "12/31/9999". At the bottom, there are two buttons: "Search Time Record" and "Clear Result".

7. **My Team** – provides general data about direct reports, such as their personnel number, position, cost center, and organizational unit. For managers who have additional organizational units within their own organizational unit, this application also provides the same information on employees who are not direct reports but are in a “subordinate” department.

- a. Click **My Team** to begin.

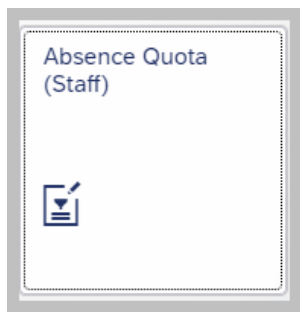


- b. Employee information will appear for review. To see additional information on a specific employee, click the right arrow where indicated.

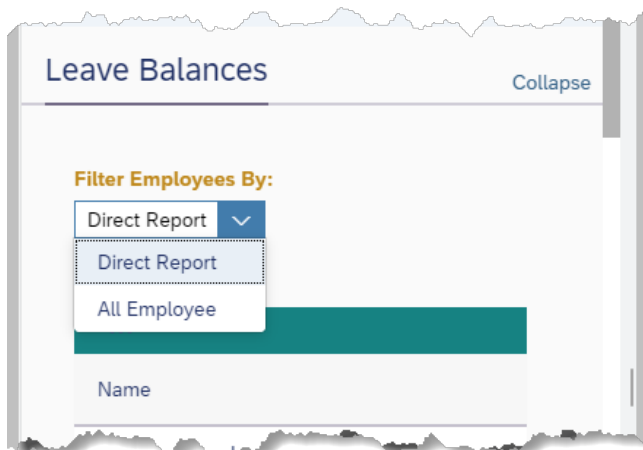


8. **Absence Quota (Staff)** – view the absence quotas for direct reports for the current leave calendar year. For managers who have additional organizational units within their own organizational unit, this application also provides the same information on employees who are not direct reports when the “All Employee” filter is applied.

- a. Click **Absence Quota (Staff)** to begin.

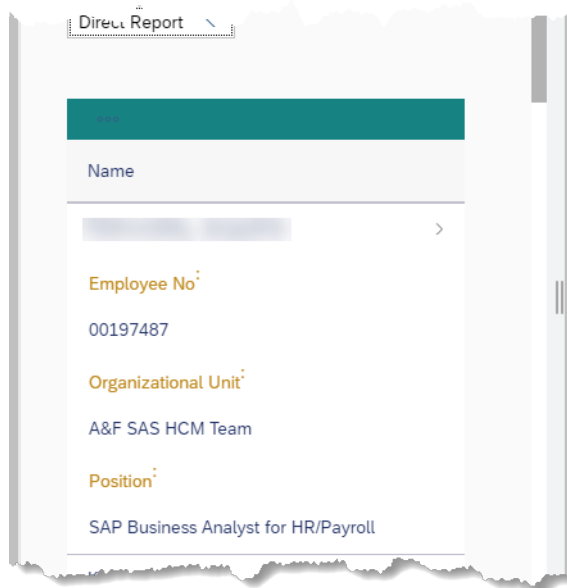


- b. To only view data for direct reports, click Direct Report. For managers who have additional organizational units within their own organizational unit and wish to see employee data in that category, click All Employee. Clicking All Employee will list all direct reports as well as employees in subordinate departments within the same organizational structure.

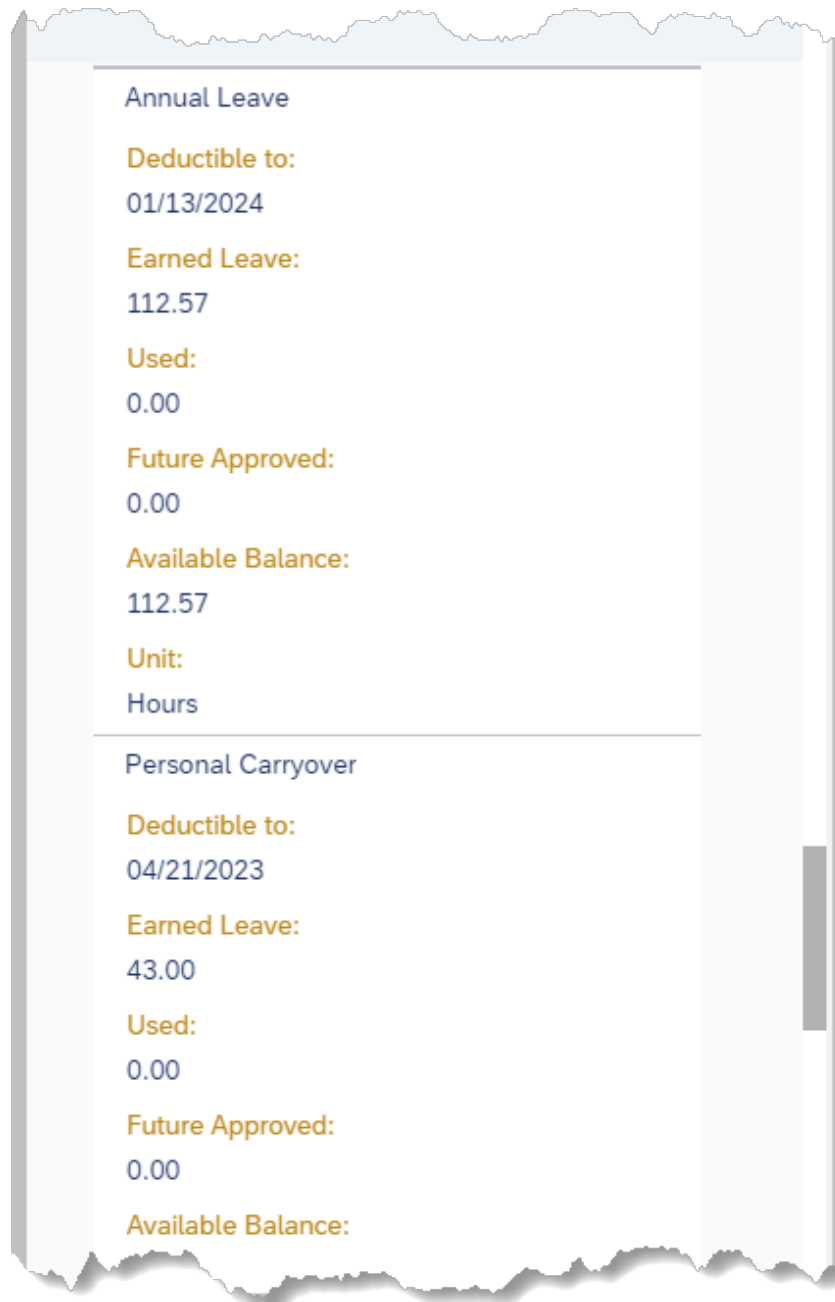


- c. Choose the employee for whom to display leave balance details by clicking on the related tile. (It may be necessary to scroll to the bottom of the list to view the employee's details.)

Example: Click this tile -



Then scroll to the bottom of the list to see the leave balance details.



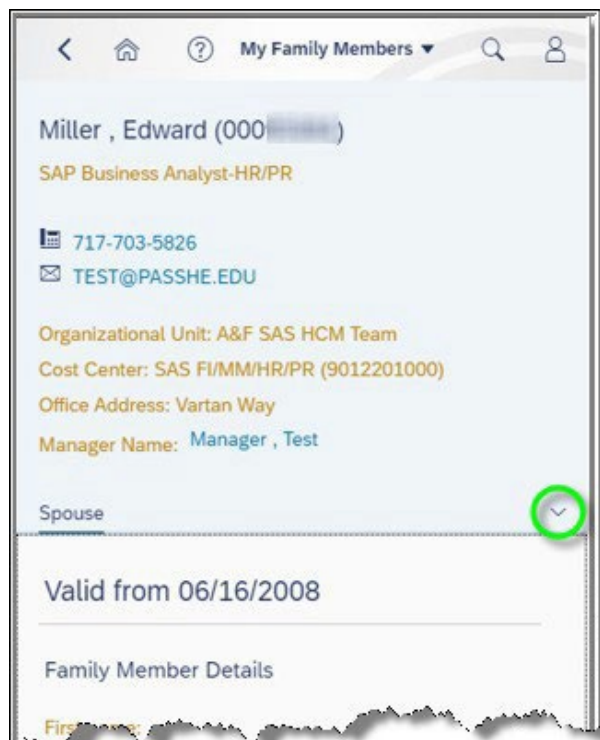
Annual Leave	
Deductible to:	01/13/2024
Earned Leave:	112.57
Used:	0.00
Future Approved:	0.00
Available Balance:	112.57
Unit:	Hours
Personal Carryover	
Deductible to:	04/21/2023
Earned Leave:	43.00
Used:	0.00
Future Approved:	0.00
Available Balance:	

HR User Self Service Workplace Application Features

1. **My Family Members** – enables employees to view dependent and beneficiary information saved in the system. Dependents are those who can be attached to medical plans, while beneficiaries can be attached to insurance plans. Changes to dependent and beneficiary information is not permitted through this application.



- a. Click **My Family Members** to begin. To view additional dependents/beneficiary information, Click the drop-down arrow for additional selections.

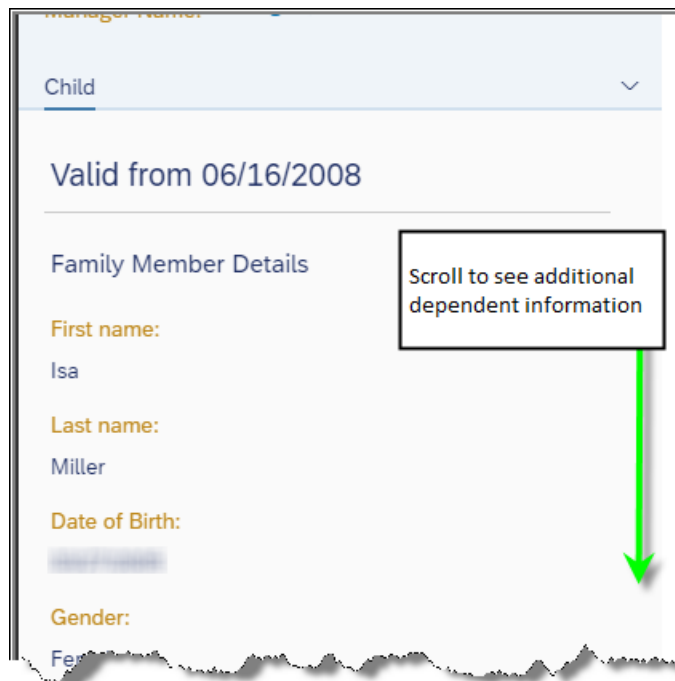


- b. Click the dependent/beneficiary type to view details.



A screenshot of a web application interface showing a dropdown menu for selecting a dependent/beneficiary type. The menu is open, displaying options: 'Spouse', 'Child', and 'Father'. The 'Child' option is highlighted with a green circle. Below the menu, the text 'Family Member Details' is visible, followed by 'First name:' and 'Emily'.

- c. When a dependent/beneficiary type has multiple entries in the system, they will all appear under that type. For example, this user has multiple children, so the user will need to scroll to see details for all children dependents.

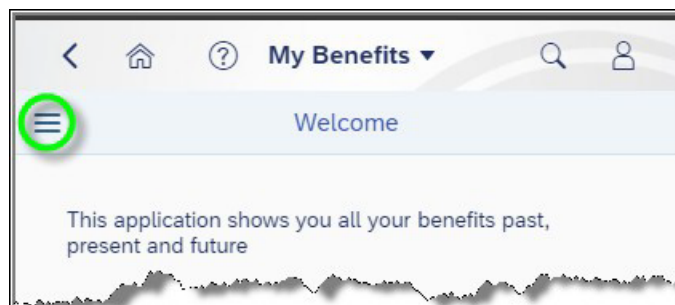


A screenshot of the 'Child' dependent details page. The page shows 'Valid from 06/16/2008' and 'Family Member Details'. The details include 'First name: Isa', 'Last name: Miller', 'Date of Birth: [redacted]', and 'Gender: Fe'. A green arrow points down from a text box that says 'Scroll to see additional dependent information', indicating that there are more entries for this type of dependent.

2. **My Benefits** – enables employees to view currently enrolled benefits. At this time, employees cannot make changes to their benefits using the Self Service Workplace application.



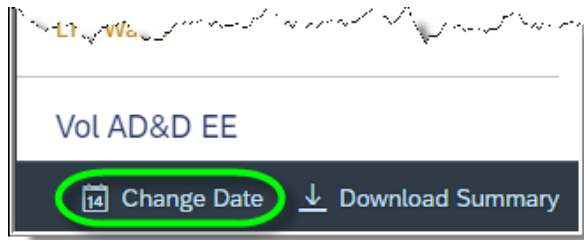
- a. Click **My Benefits** to begin.
- b. Next, click the following icon:



- c. For the best experience, users should select Benefits By Date. (Note: The remaining delivered Self Service Workplace application features do not apply to State System use.)



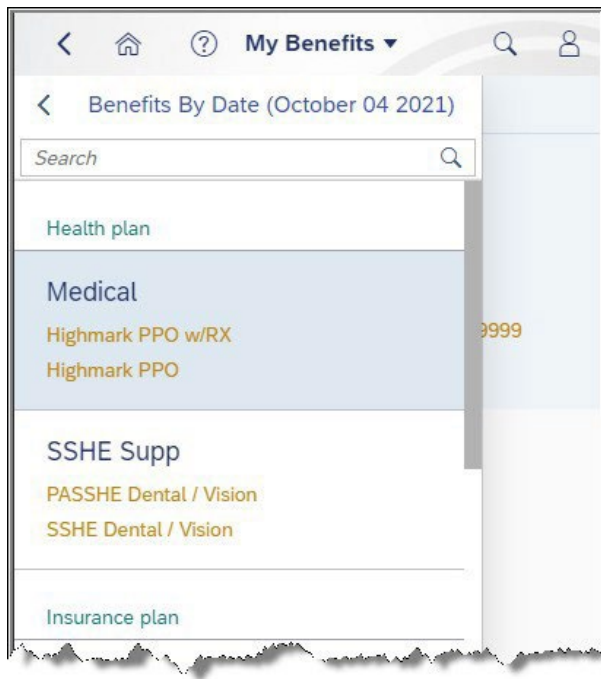
- i. To change the effective date for the plans to display, click Change Date at the bottom of the window.



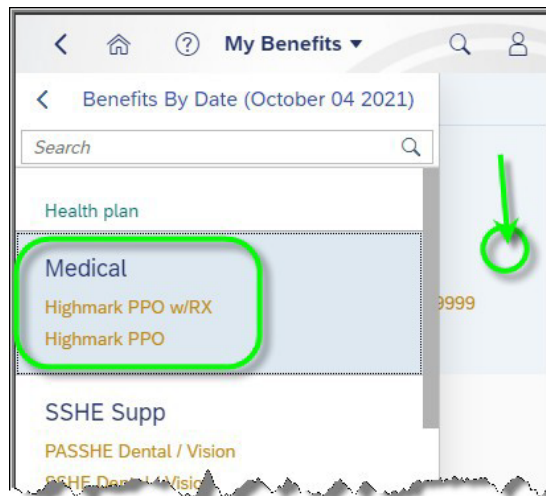
- ii. To download a summary of benefits in PDF format for viewing, saving or printing, click Download Summary. This will allow users to view and print a summary of their enrolled benefits. Both the Change Date and Download Summary features are available at all times, while using the My Benefits application.



- d. Once in the view of Benefits By Date, users can scroll through their enrolled benefits.



- e. To see additional details related to a particular plan, click the desired plan to highlight it. Next, click in the window area to the right.



- f. Additional plan information will be displayed to the user including additional links to further information regarding the plan.

Medical

Effective Date: 10/01/2008

General Information

Participation Period:
Bi-weekly

Coverage:
Multi-Party

Employee Pre Tax Cost:
151.99 USD

Employer Cost:
495.24 USD

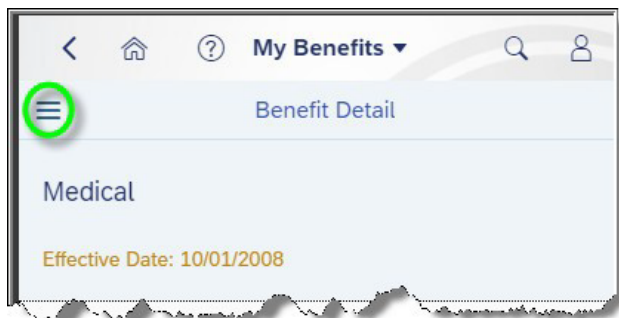
Dependents

Emily Miller (Spouse)	Isa Miller (Child)	Vincent Miller (Child)	Claire Miller (Child)	Eddie Miller (Child)
--------------------------	--------------------------	------------------------------	-----------------------------	----------------------------

Further Links

[Plan-Highmark](#)

- g. To return to the plan selection window, click the icon as shown and repeat this process as needed.



3. **My Timesheet**— enables employees to enter/report time worked and overtime. Once time is submitted on the *My Timesheet V3* screen, it is routed to the employee's supervisor for review and approval/rejection.

Before getting started, it is important to recognize that different bargaining units (unions) will display different time types for utilization in My Timesheet. Below are some examples of the time type variations by bargaining unit:

POA:

Att./Absence type
Search 
(None)
Hours Worked/OT (0100)
Hours Worked/Comp Time (0102)
Hours Worked - Voluntary (0111)
Call In Time (0240)
Call In - Comp Time (0241)
Standby Time (0250)
Standby - Comp Time (0251)

AFSCME:

Att./Absence type
Search 
(None)
Hours Worked/OT (0100)
Hours Worked/Comp Time (0102)
Call In Time (0240)
Call In - Comp Time (0241)
Standby Time (0250)
Standby - Comp Time (0251)

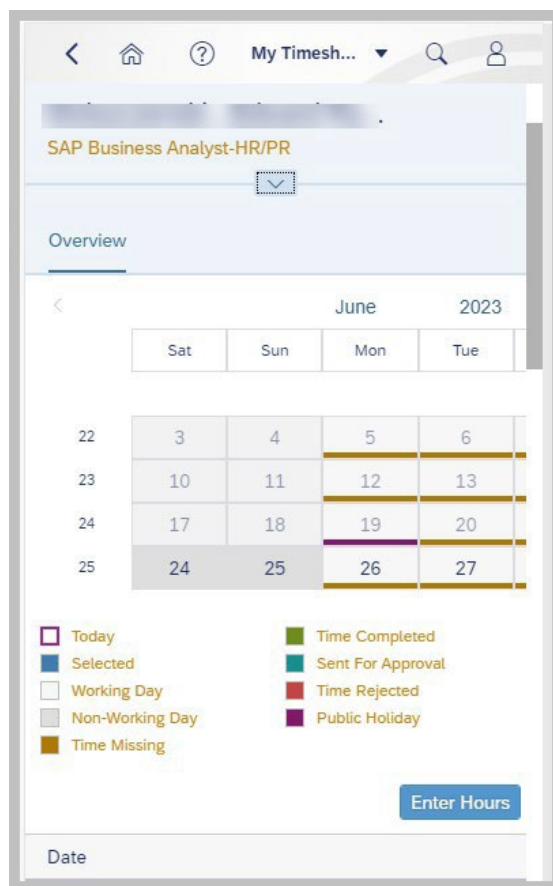
SCUPA:

Att./Absence type
Search 
(None)
Hours Worked/OT (0100)
Standby Time (0250)
Standby - Comp Time (0251)

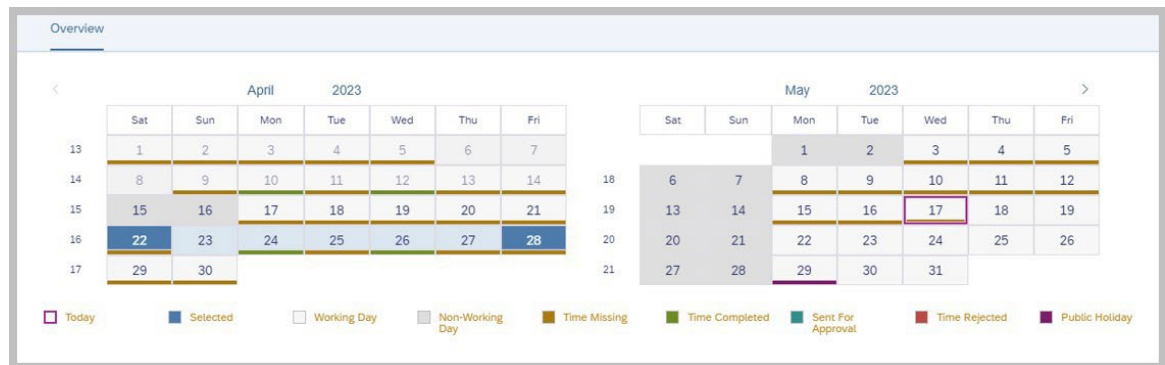
- a. Click **My Timesheet** to begin entering time.



- b. Employees have access to a legend at the bottom of the display, which will assist in understanding the colors used on the calendar at the top of the screen.



- c. The Calendar section provides an overview of overtime that has been entered by the employee along with the processing results. In this example, in April, the employee had overtime approved for April 24 and April 26, 2023, as indicated by the “Time Completed” green underlined dates. Then for May 15 and 17, 2023, the employee submitted additional overtime for approval that has yet to be processed by the employee’s supervisor as indicated by the “Sent for Approval” dark green underlined dates and the “Submitted” Status.



- d. The Timesheet section is where employees can enter time. In this example, the current system date is 7/27/2023, so the system will display the schedule (Start Time, End Time, Scheduled (Hours)) that overlaps with that week.

The screenshot shows the 'Overview' tab of the Timesheet section. It displays the schedule for Monday, July 24, 2023, and Tuesday, July 25, 2023. The schedule includes fields for Start Time, End Time, Scheduled (Hours), Att./abs. type, Entered (Hours), and Status. The current system date is 7/27/2023, so the system displays the schedule for the week of July 24-25, 2023.

- e. Once the correct set of dates is displayed, the following actions should be taken by the employee to properly enter/submit time.

- i. Click Enter Hours.

The screenshot shows the 'My Timesheet' interface for a 'Police Supervisor'. It displays a calendar for June 2023. The calendar grid shows dates from 1 to 28. A green arrow points to the 'Enter Hours' button located at the bottom right of the calendar view.

- ii. Locate the specific date for time entry and click the Att./abs.type field to display the time types available. (Note: The time types appearing for use will vary depending on the employee.) Click the time type to be used for entry.

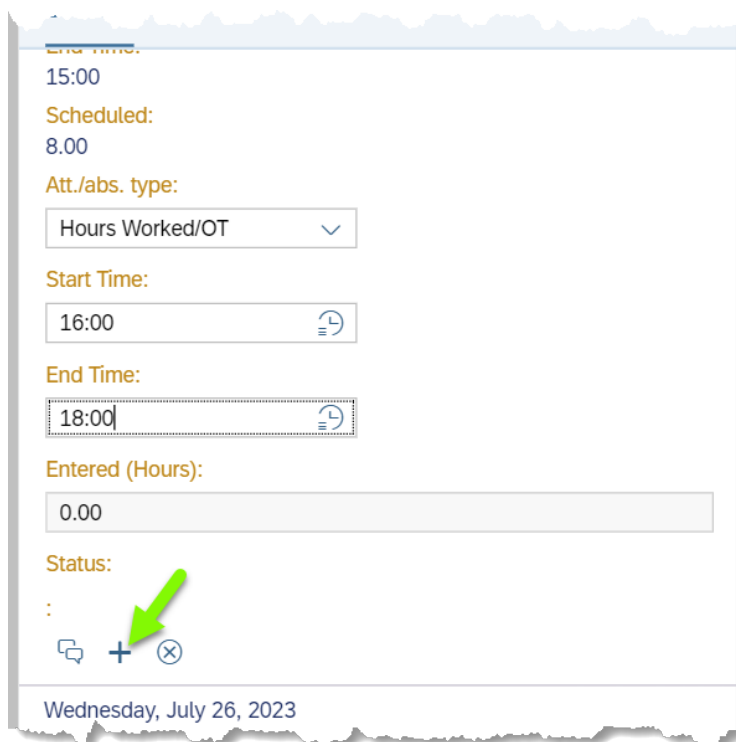
The screenshot shows the 'Overview' section for Monday, July 24, 2023. It displays the 'Start Time' (07:00), 'End Time' (15:00), and 'Scheduled' (8.00) information. The 'Att./abs. type' field is highlighted with a green arrow, and its dropdown menu is open, showing a list of time types and their corresponding codes:

Att./abs. type	Code
Hours Worked/OT	0100
Hours Worked/Comp Time	0102
Hours Worked - Voluntary	0111
Call In Time	0240
Call in - Comp Time	0241
Standby Time	0250
Standby - Comp Time	0251

At the bottom of the screen, there are buttons for 'Check', 'Submit', and 'Cancel'.

- iii. Enter the Start Time and End Time in the appropriate fields. Hours must be entered in military time format. In this example, the employee's normal schedule on Monday is from 7:00 until 15:00, but the employee wants to enter two hours of overtime past 16:00. In this example, the employee entered 15:00 to 17:00 to indicate 2 hours of overtime worked. (**NOTE:** If an employee needs to enter time that covers more than one day, please see the section [Entering time that spans more than a single day](#) below.)

NOTE: If entering more than one time type on a single date, enter the first time type and associated hours and then click the + icon to insert another timesheet with the same date where additional entries can be made in similar fashion.



End Time:
15:00

Scheduled:
8.00

Att./abs. type:
Hours Worked/OT

Start Time:
16:00

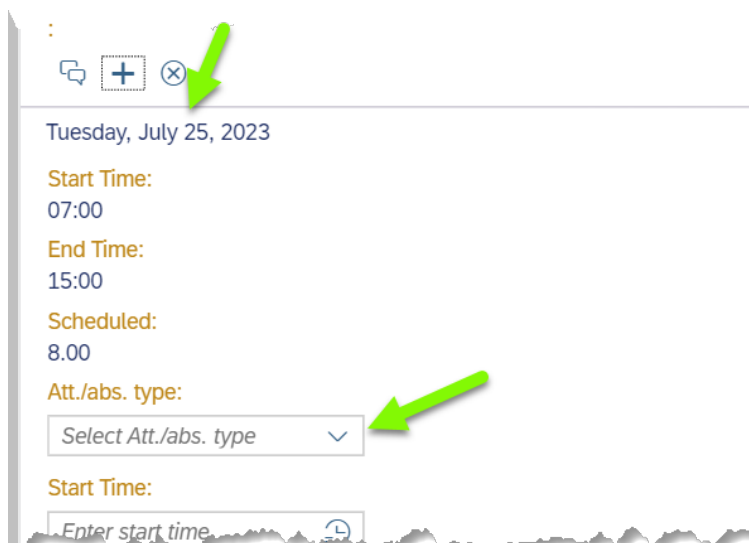
End Time:
18:00

Entered (Hours):
0.00

Status:
:

+

Wednesday, July 26, 2023



:

+

Tuesday, July 25, 2023

Start Time:
07:00

End Time:
15:00

Scheduled:
8.00

Att./abs. type:
Select Att./abs. type

Start Time:
Enter start time

- iv. When finished making all timesheet entries, click Check to validate the entry and then click Submit to submit the timesheet for processing.

Overview

Monday, July 24, 2023

Start Time:
07:00

End Time:
15:00

Scheduled:
8.00

Att./abs. type:
Hours Worked/OT

Start Time:
15:00

End Time:
17:00

Entered (Hours):
0.00

Status:

Check Submit Cancel

- v. A message will be displayed indicating the data has been saved and Submitted to the employee's supervisor.

Date

Saturday, July 22, 2023

Start Time:
00:00

End Time:
00:00

Scheduled:
0.00

Att./abs. type:

Time Entries Saved Successfully

- f. Once submitted for processing, the Entered (Hours) will display with the total number of hours for the time entry along with the Status.

Monday, July 24, 2023

Start Time:
07:00

End Time:
15:00

Scheduled:
8.00

Att./abs. type:
Hours Worked/OT

Start Time:
15:00

End Time:
17:00

Entered (Hours):
2.00

Status:
Submitted

- g. If entering more than one time type on a single date *after* the first entry has already been submitted, perform the following steps.

- i. Click Enter Hours.

My Timesheet

Police Supervisor

Overview

June 2023

Sat	Sun	Mon	Tue	Wed	Th
					1
22	3	4	5	6	7
23	10	11	12	13	14
24	17	18	19	20	21
25	24	25	26	27	28

☐ Today
☐ Selected
☐ Working Day
☐ Non-Working Day
☐ Time Missing
☐ Time Completed
☐ Sent For Approval
☐ Time Rejected
☐ Public Holiday

Enter Hours

Date

- ii. Locate the date for which two separate time types need to be entered and click the + icon to insert a row.

Scheduled:
8.00

Att./abs. type:
Hours Worked/OT

Start Time:
15:00

End Time:
17:00

Entered (Hours):
2.00

Status:
Submitted

Tuesday, July 25, 2023

- iii. A “blank” timesheet for the same date will be created where additional time entries can be entered and submitted. Follow the steps above to complete the process.

Monday, July 24, 2023

Start Time:
07:00

End Time:
15:00

Scheduled:
8.00

Att./abs. type:
Select Att./abs. type

Start Time:
Enter start time

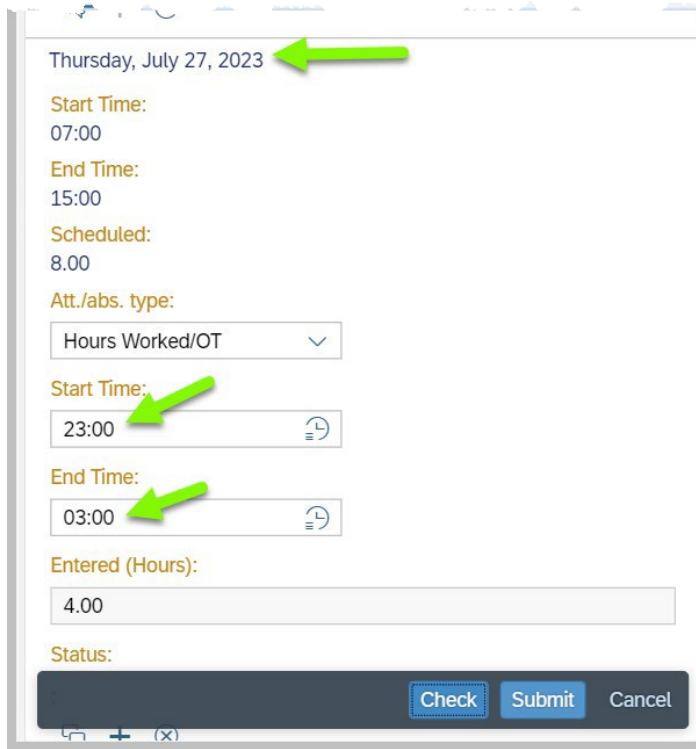
End Time:
Enter end time

Entered (Hours):
0.00

Status:

Check Submit Cancel

- h. Entering time that spans more than a single day** - Example scenario: An employee's shift begins at 22:00 on July 27, 2023 and ends on July 28, 2023 at 03:00. The time entry must be entered using the day the shift began, which in this case is July 27. Time entries must be in military time for accurate calculation as shown.



Thursday, July 27, 2023

Start Time:
07:00

End Time:
15:00

Scheduled:
8.00

Att./abs. type:
Hours Worked/OT

Start Time:
23:00

End Time:
03:00

Entered (Hours):
4.00

Status:
Submitted

Check Submit Cancel

- i. Deleting a Timesheet** – First click Enter Hours to open the timesheet section for edit. Next, click the icon shown to delete the entry. Then click Submit to save the entries. A message indicating the Time Entries were saved successfully will be displayed.



2.00

Status:
Submitted

:

⏏ + ✕

Tuesday, July 25, 2023

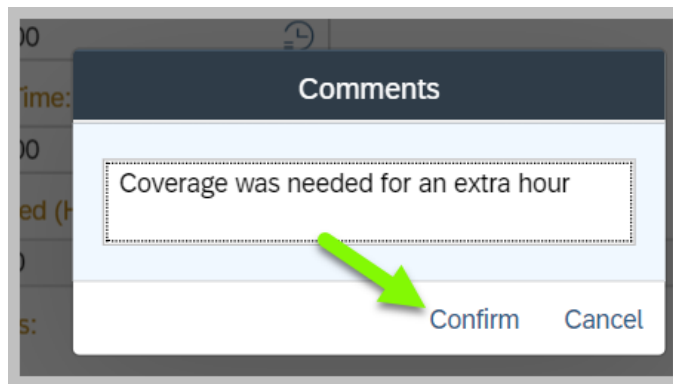
j. Adding Comments to Timesheets – Employees can provide comments or notes to managers via timesheet submissions.

i. Click the icon where indicated.



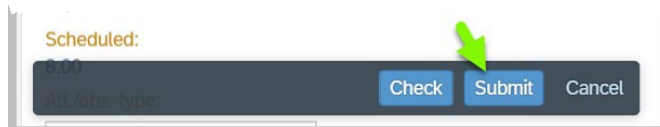
The screenshot shows a timesheet entry form. At the top, there is a field for "Time" with the value "16:00" and a clock icon. Below this is a field for "Entered (Hours):" with the value "0.00". Underneath is a "Status:" field. A green arrow points to a small icon (a square with a plus sign) located below the status field. To the right of this icon are a plus sign and a minus sign. At the bottom of the form, the date "Wednesday, July 26, 2023" is displayed.

ii. Within the “Comments” window, the employee can enter notes such as a special cost center or a reason for the overtime for their manager to review in the Manager’s “Approve Timesheet” application. Once notes have been entered, select Confirm.



The screenshot shows a "Comments" window. It has a title bar that says "Comments". Inside the window is a text entry field containing the text "Coverage was needed for an extra hour". A green arrow points from the text field down to the "Confirm" button. To the right of the "Confirm" button is a "Cancel" button.

iii. Users must still Submit the timesheet information for the changes to be saved.



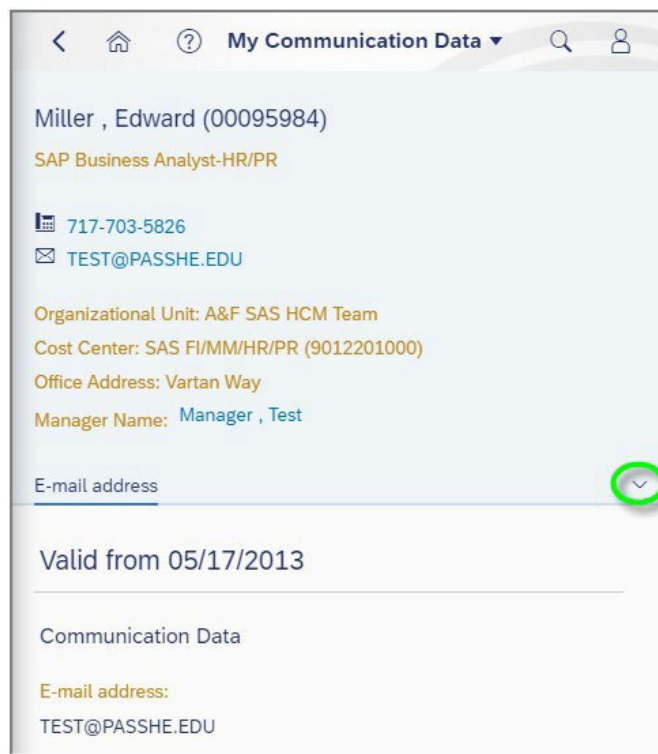
The screenshot shows the bottom of the timesheet form. It includes a "Scheduled:" field with the value "8:00". Below this are three buttons: "Check", "Submit", and "Cancel". A green arrow points to the "Submit" button.

4. **My Contact Information Data** – enables employees view work email address as well as view and update personal e-mail address.

- a. Click **My Contact Information** to begin.



- b. The default page will show employee work phone, work email, and manager name. To view/edit personal email address, click the drop-down arrow indicated in the screenshot.



- c. Click **Personal E-Mail Address**.



- i. If no personal email address exists in the system, click Create.

My Communication Data

Miller , Edward (00095984)

SAP Business Analyst-HR/PR

717-703-5826

TEST@PASSHE.EDU

Organizational Unit: A&F SAS HCM Team

Cost Center: SAS FI/MM/HR/PR (9012201000)

Office Address: Vartan Way

Manager Name: Manager , Test

Personal E-Mail Address

Create

- ii. If a personal email address already exists in the system, click Edit.
(Note: Delete may also be used if removing a personal email address entirely is desired.)

Personal E-Mail Address

Valid from Today

Communication Data

Personal E-Mail Address:

TEST@ORI@GM.COM

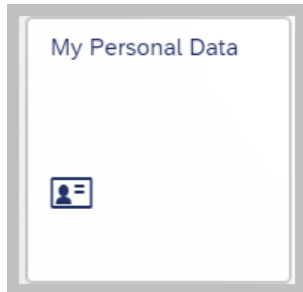
Edit Delete

- iii. Employees simply enter their personal email address and click Save.

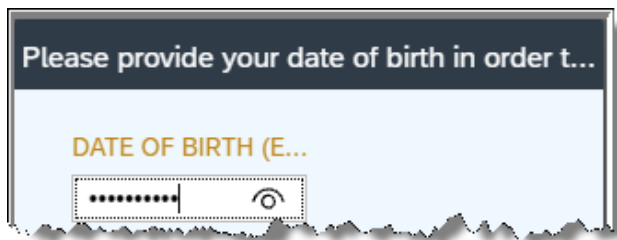
Save Cancel

- 5. My Personal Data** - displays basic personal and employment information.
(Note: As added security, employees must enter their Date of Birth to access this application.)

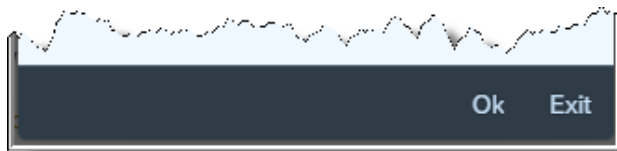
- a. Click **My Personal Data** to begin.



Due to the sensitivity of personal data, employees must enter their data of birth in mm/dd/ccyy format in order to gain access to this application.



- b. Once the date of birth is entered, click OK.



- c. If the date of birth is provided successfully, employees will be able to view their personal details as saved in the system along with basic employment information.

<

🏠

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My Personal Data ▾

🔍

👤

Miller , Edward (00095984)

SAP Business Analyst-HR/PR

📞 717-703-5826

📧 TEST@PASSHE.EDU

Organizational Unit: A&F SAS HCM Team

Cost Center: SAS FI/MM/HR/PR (9012201000)

Office Address: Vartan Way

Manager Name: Manager , Test

Personal Data

Valid from 03/13/1988

Name

Form of Address:

Mr

First Name

Employment Data

State System Hire Date:

06/16/2008

Service Date:

02/11/2001

Current Hire Date:

06/16/2008

University Hire Date:

06/16/2008

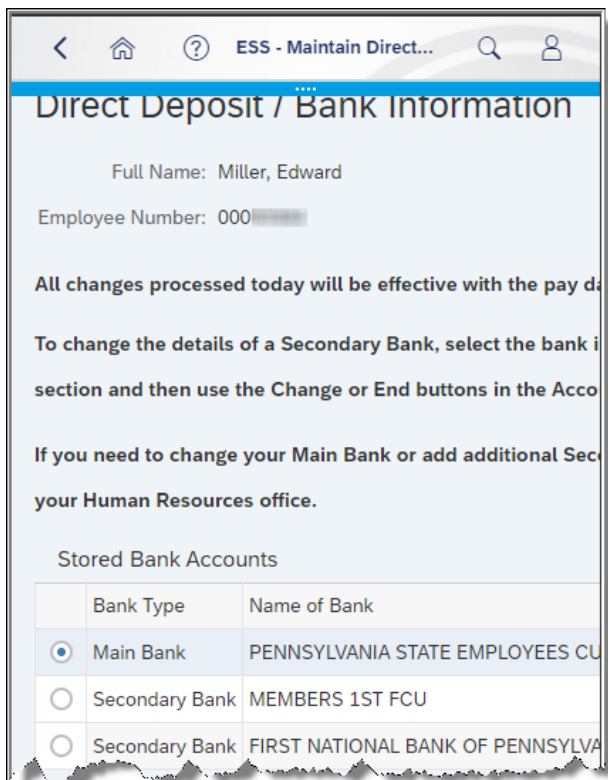
Employment Date Descriptions

- 6. Direct Deposit/Bank Information** – enables employees to view their Main Bank account if not receiving a paper check. Users cannot use this application to modify or set up a Main Bank account and must contact their HR payroll office. If any Secondary Bank(s) exist(s), this application will enable employees to modify deposit amounts or percentages with the option to entirely end the Secondary Bank. (Note: The scrolling features on this application will behave somewhat differently from the other Self Service Workplace applications.)

- a. Click **Direct Deposit/Bank Information** to begin.



- b. Main Bank account will be displayed by default.



- c. The Account Details sections for Main Bank will allow for display only details.

Account Details

Payee: Miller , Edward

Postal Code / City: 170503801 MECHANICSBURG

Bank Country: USA

Payment Method: Direct Deposit

Routing Number: 231381116 PENNSYLVANIA STATE EM

Account Number: ☐ Checking ☒ Savings

- d. To view or modify a Secondary Bank, click in the radio button next to the desired bank where shown.

Stored Bank Accounts

Bank Type	Name of Bank
☐ Main Bank	PENNSYLVANIA STATE EMPLOYEES CU
☒ Secondary Bank	MEMBERS 1ST FCU
☐ Secondary Bank	FIRST NATIONAL BANK OF PENNSYLVANIA

Account Details

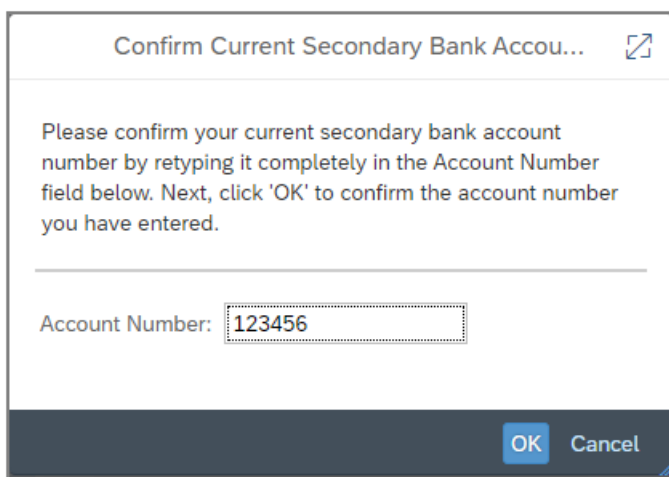
- i. To begin making modifications to the Secondary Bank, click Change Amount or Percentage of Bank Account.

Standard Value: 200.00

Standard Percentage: 0.00

Change Amount or Percentage of Bank Account End Se

- ii. For security purposes, the following pop-up will appear for the user to confirm the Secondary Bank account number. Once the account number is entered, click OK.

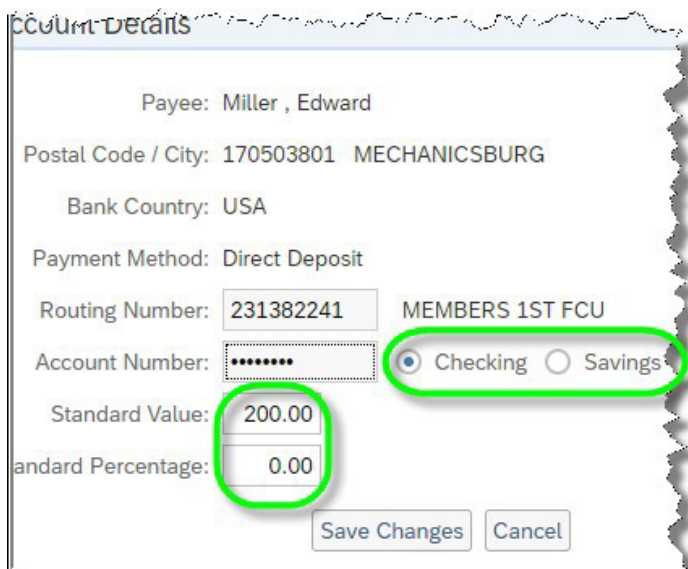


Confirm Current Secondary Bank Account...

Please confirm your current secondary bank account number by retyping it completely in the Account Number field below. Next, click 'OK' to confirm the account number you have entered.

Account Number:

- iii. Users can now make modifications to the Standard Value and Standard Percentage fields. The Standard Value field is used to designate a consistent dollar amount to be deposited to the account. The Standard Percentage field is used to designate a consistent percentage of the employee's net pay to be deposited to the account. Only one of these fields may be utilized at a time. When finished, click Save Changes. Users can also change the account type by clicking the radio button for either Checking or Savings.



Account Details

Payee: Miller, Edward

Postal Code / City: 170503801 MECHANICSBURG

Bank Country: USA

Payment Method: Direct Deposit

Routing Number: MEMBERS 1ST FCU

Account Number:

☒ Checking ☐ Savings

Standard Value:

Standard Percentage:

7. **My Leave Request** – enables employees to submit new leave requests and leave cancellations as well as view the status of previous requests.

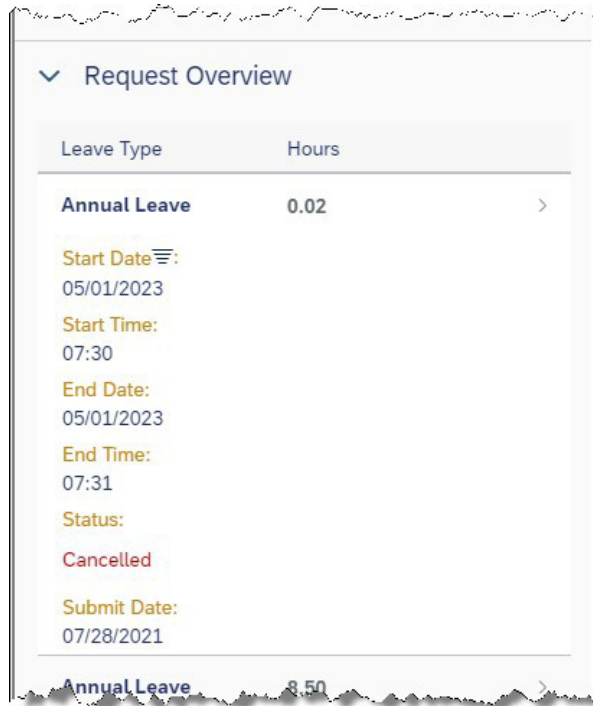
- a. To begin, click **My Leave Request**.



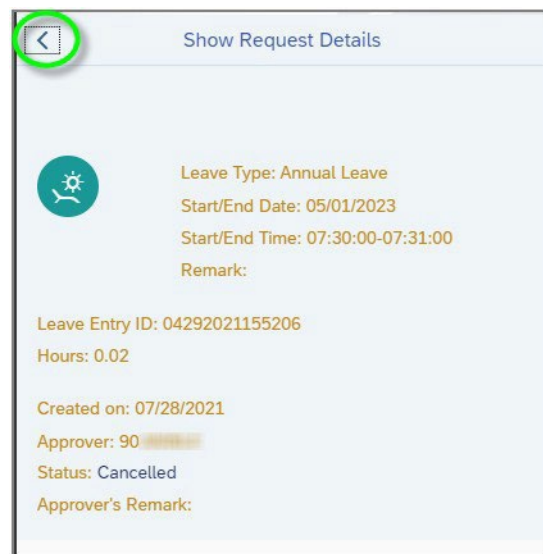
- b. At the top of the page under Entitlement, employee leave balances will display for the different leave types available as well as the start/end dates for the usage period.

Entitlement	
Items	
Leave Type	Available
Annual Leave	439.50000 Hours
01/02/2021-01/01/2022	
Personal Leave	11.83000 Hours
01/02/2021-01/01/2022	
Sick Family	37.50000 Hours

- c. As user's scroll down the page, the Request Overview section will appear. This section is sorted in ascending order by leave request start date and displays details for employee leave requests already submitted, including Leave Type, Hours requested off, Start Date, Start Time, End Date, End Time, Status of the request, and the Submit Date of the leave request.



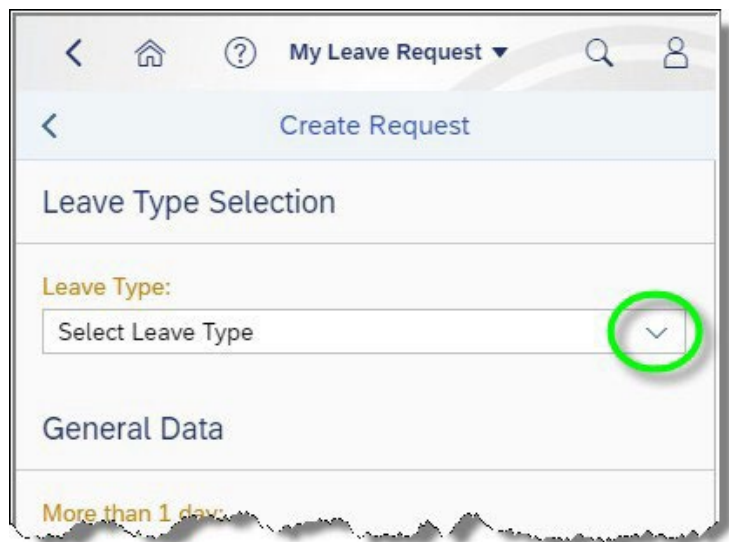
- d. To view additional details about a particular leave request, simply click the desired leave request, and the Show Request Details screen will appear. To return to the main page, click the back arrow where shown.



- e. To submit a new leave request, click Create Request.

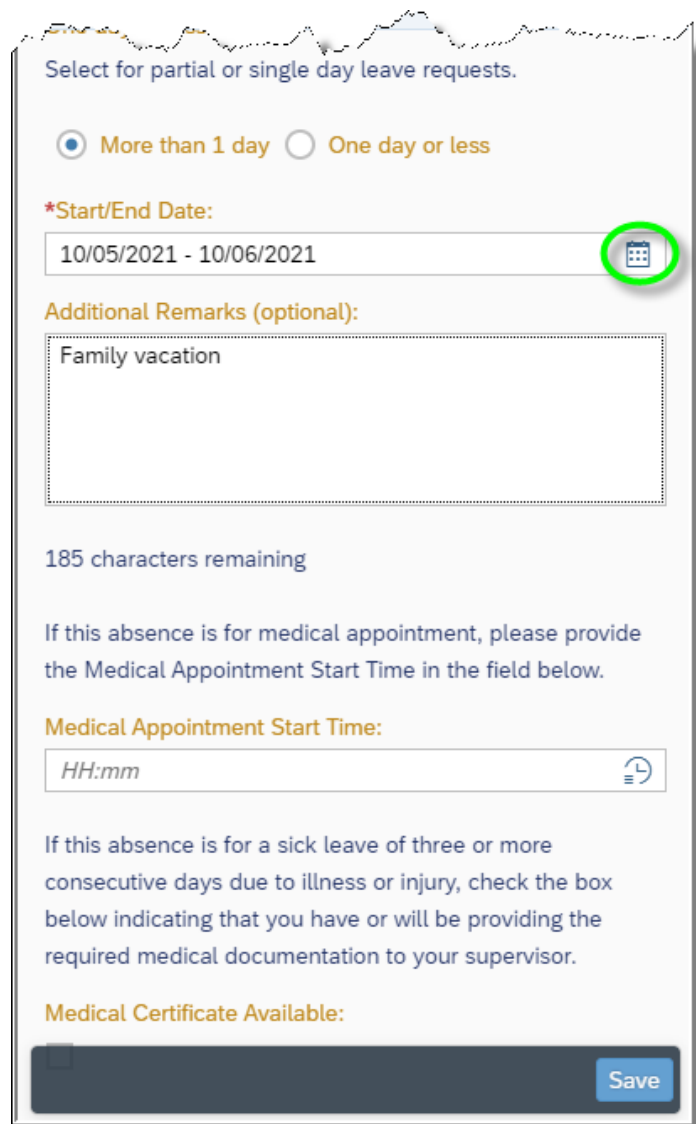


- f. On screen instructions will be provided for employees to assist them with submitting leave requests, but users must select a Leave Type from the drop-down box first by clicking the down arrow.



Note: Depending on the Leave Type selected, users may be required to provide more details on the screen, but guidance for these situations will be provided in real-time during the use of the application.

- g. After selecting a Leave Type, choose whether the leave request is for more than one day or if it will be for one day or less by clicking the appropriate radio button. Next, enter the Start/End Date by either typing it in or using the calendar feature provided. Additional Remarks are optional as indicated. When finished



Select for partial or single day leave requests.

☒ More than 1 day ☐ One day or less

***Start/End Date:**
10/05/2021 - 10/06/2021 

Additional Remarks (optional):
Family vacation

185 characters remaining

If this absence is for medical appointment, please provide the Medical Appointment Start Time in the field below.

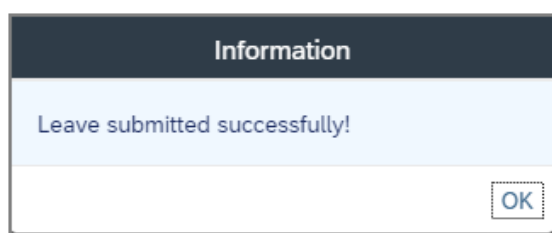
Medical Appointment Start Time:
HH:mm 

If this absence is for a sick leave of three or more consecutive days due to illness or injury, check the box below indicating that you have or will be providing the required medical documentation to your supervisor.

Medical Certificate Available:
☐

Save

- i. The following pop-up will appear indicating the request was submitted successfully to the manager.

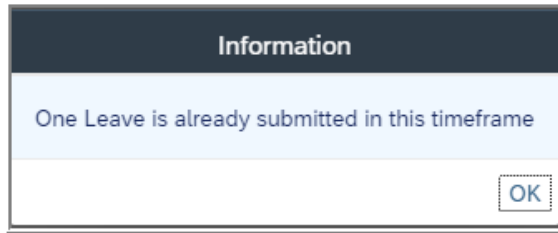


Information

Leave submitted successfully!

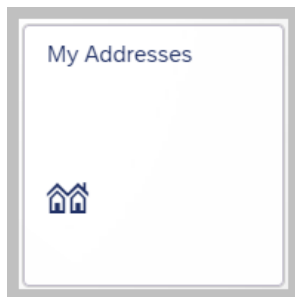
OK

- ii. If a collision is found between previously submitted leave request, the following pop-up will appear, and the employee will need to resubmit the request using date(s)/time(s) that do not collide with requests already submitted.



8. **My Addresses** – enables employees to view permanent and mailing addresses as well as view and make updates to emergency contact information.

- a. To begin, click **My Addresses**.



- b. The employee's **Permanent Residence** will be displayed by default. Due to local tax requirements, employees must contact their campus HR office to make any changes to their permanent Address Information.

- c. Click the drop-down arrow to access additional addresses saved to the system.

Miller , Edward (00095984)
SAP Business Analyst-HR/PR

717-703-5826
TEST@PASSHE.EDU

Organizational Unit: A&F SAS HCM Team
Cost Center: SAS FI/MM/HR/PR (9012201000)
Office Address: Vartan Way
Manager Name: Manager , Test

Permanent Residence

Permanent Residence
Emergency Contact
Mailing Address

House Number and Street:
1 Front St

- d. To view/make changes to emergency contact information, click **Emergency Contact**

Permanent Residence
Permanent Residence
Emergency Contact
Mailing Address

- e. The emergency contact information will display for review. To make changes, click Edit as shown.

Emergency Contact

Valid from 10/19/2015

Edit

Address

- f. The employee's emergency contact data will unlock for modification as needed. At the bottom of the window, employees can elect to have the emergency contact data effective immediately/from today or choose a date to make the changes effective. When finished, click Save.

Validity Period

Validity:

From today

From today

From date

Save Cancel

- g. The following confirmation will briefly display.

Record saved

- h. Mailing address will only be available in view mode for any employee who currently has an existing mailing address saved to the system. Since a mailing address is only required if the employee desires to received mail at an address that differs from their primary residence, users must visit their campus HR office to make modifications to a mailing address including deleting it from use.

Mailing Address

Valid from 10/03/2021

Address

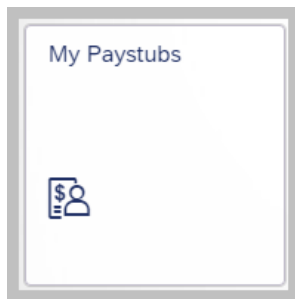
C/O:

House Number and Street:

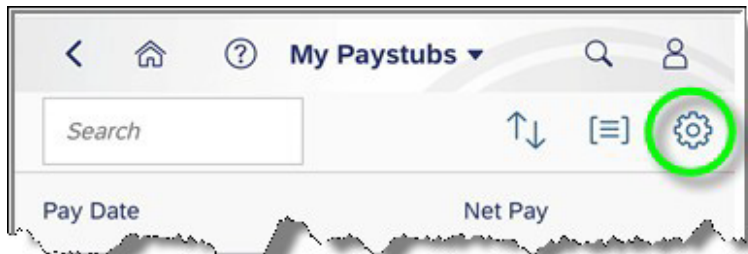
917 Susan Circle

9. My Paystubs – enables employees to view and print their paystubs.

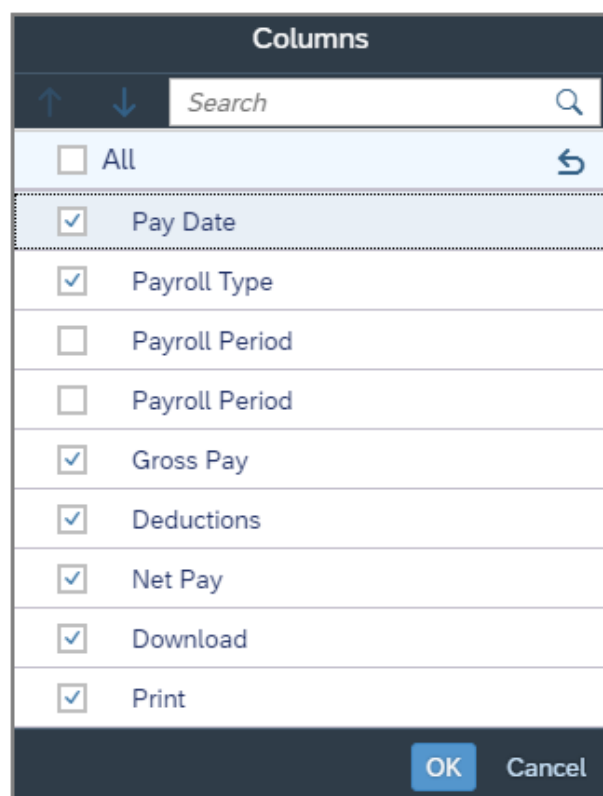
- a. Click **My Paystubs** to begin.



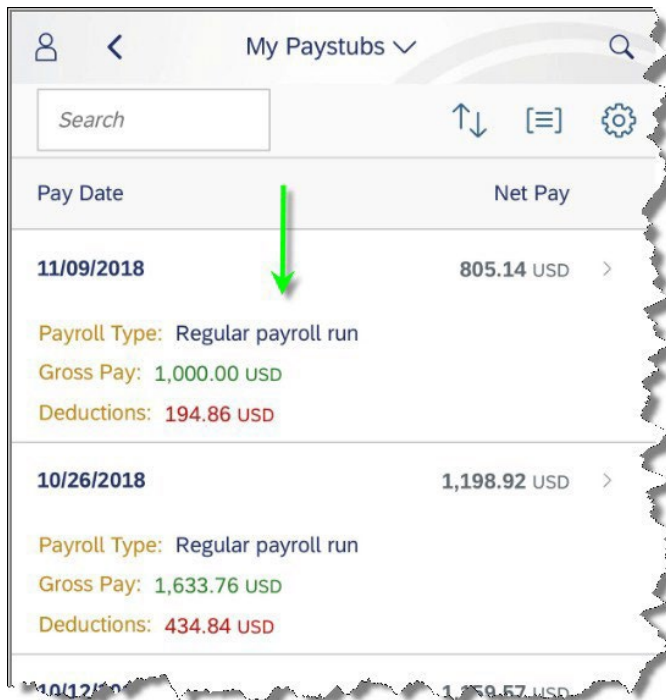
- b. The employee history of paystubs will be displayed. To control the level of paystub details displayed on the overview screen, click the following icon.



- c. Choose the columns to be displayed and click OK.



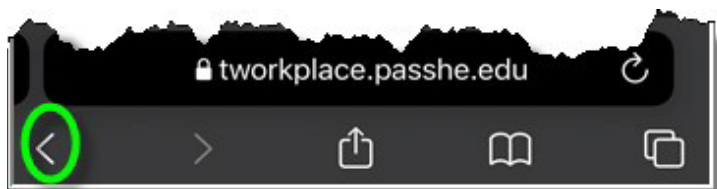
- d. To view details of a paystub, click on the desired statement.



Note: If the following window is displayed, click the download icon as shown.



- e. The statement details will be displayed. To return to the **Paystubs** screen, click the back button from the browser. (Note: Users may need to use the back button twice.)



- 10. SECA Enrollment** – allows employees access to the annual enrollment screen for SECA Charities, which can only be accessed/updated during the annual enrollment period.



- 11. Update W-2 Election** – enables employees to update their W-2. Choose to receive an electronic or paper W-2 form.

- a. Click Update W-2 Election to begin.



- b. To change to Paper Form, select the appropriate radio button and click 'Continue with Paper Enrollment'.

Choose to receive an electronic or paper W-2 form.

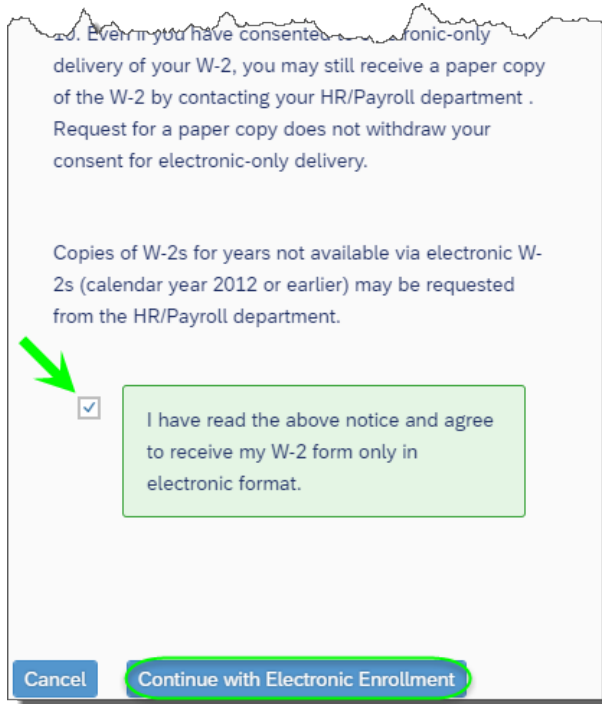
☒ I Wish to Receive My W-2 in Paper Form

☐ I Wish to Receive My W-2 Form Electronically

Note: If you elect the electronic option, you will not receive a paper copy of your W-2 via the U.S. Mail

Continue with Paper Enrollment

- c. To change to Electronic Form, select the appropriate radio button and confirm consent with a check mark in the box at the bottom of the screen. Then click 'Continue with Electronic Enrollment'.



Even if you have consented to electronic-only delivery of your W-2, you may still receive a paper copy of the W-2 by contacting your HR/Payroll department . Request for a paper copy does not withdraw your consent for electronic-only delivery.

Copies of W-2s for years not available via electronic W-2s (calendar year 2012 or earlier) may be requested from the HR/Payroll department.

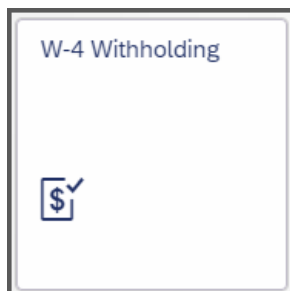
☒ I have read the above notice and agree to receive my W-2 form only in electronic format.

[Cancel](#) [Continue with Electronic Enrollment](#)

A green arrow points to the checked checkbox. The 'Continue with Electronic Enrollment' button is highlighted with a green oval.

12. W-4 Withholding – enables employees to view and update their W-4 tax information.

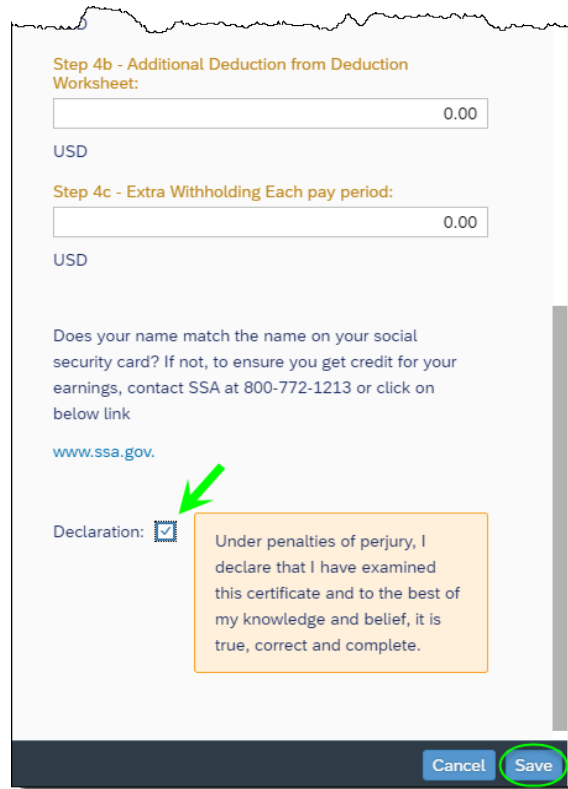
a. Click **W-4 Withholding** to begin.



b. Next, click on **Update W-4 Withholding** to make edits to fields.

 A screenshot of the "Update W-4 Withholding" form. At the top, the title "Update W-4 Withholding" is enclosed in a green rounded rectangle. Below the title, a paragraph states: "The fields below correspond to the steps in the IRS Form W-4. The IRS Form W-4 and instructions, linked below, should be used to determine the values for these fields." Below this paragraph, there is a line of text: "To review the IRS Form W-4 and instructions, click here :", followed by a blue hyperlink labeled "IRS Website W-4". Underneath, the label "Step 1c - Filing Status:" is followed by a white dropdown menu with a downward arrow. At the bottom, there is a line of text: "Check this box if you have checked the box in Step 2c of the Form W-4:", followed by a checkbox.

- c. Enter amounts into each field as needed, then click the Declaration checkbox confirming acknowledgment and click save.



Step 4b - Additional Deduction from Deduction Worksheet:

0.00

USD

Step 4c - Extra Withholding Each pay period:

0.00

USD

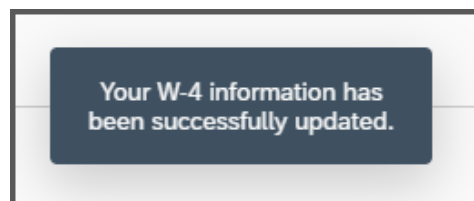
Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or click on below link

www.ssa.gov

Declaration: ☒ Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct and complete.

Cancel Save

- d. You will receive a message confirming your information has been updated



13. Display Absences – display absences approved by your manager.

- a. Click **Display Absences** to begin.



- b. Enter date range and click **Display Result**.

A screenshot of a web form titled "Search Options" in a light blue font. Below the title is a horizontal line. There are two date input fields: "Start Date:" with the value "01/02/2022" and "End Date:" with the value "01/14/2023". Each field has a green rounded rectangle around it and a small calendar icon to its right. At the bottom of the form is a dark blue bar containing an information icon (i) on the left, and two buttons: "Display Result" and "Clear Result". A green arrow points to the "Display Result" button.

- c. Scroll down to view list of Absences or use the Filter by Absence Type drop-down menu to reduce results.

Result Table

Filter by Absence Type

Show All Absences

Absence Type	Start Date
Personal Leave	11/29/2021
End date: 11/29/2021 Start Time: 13:30:00 End Time: 14:30:00 Hours: 1.00	
Sick Leave	11/02/2021
End date: 11/02/2021 Start Time: 14:45:00 End Time: 16:00:00 Hours: 1.25	

i

Display Result

Clear Result

- 14. Display W-2 Form** – display W-2 form if employed in 2021 or prior years and elected to receive your form electronically.



- a. Enter the last four digits of your social security number and click OK.

Online Forms W-2/...

Click Here to Open W-2 Previous Form

IRS W-2 Form Information

PASSHE W-2 Form Highlights

Problems Printing your W-2? Click Here

Confirm your SSN

Please provide the last four digits of your SSN in the box below

Click 'OK' to validate and view your Online W-2/W-2c form.

OK Cancel

- b. Select the year of W-2 to display, download, and/or print by clicking in the associated checkbox and then click Display.

Online Forms W-2/W-2c

Select a W-2 form below and then click the Display

Display

☐	Year	Form Description	Created
☒	2022	W-2 - Wage and Tax Statement	01/07/2
☐	2021	W-2 - Wage and Tax Statement	01/11/2
☐	2020	W-2 - Wage and Tax Statement	01/09/2
☐	2019	W-2 - Wage and Tax Statement	01/11/2

Click Here to Open W-2 < Previous Form

[IRS W-2 Form Information](#)

[PASSHE W-2 Form Highlights](#)

Problems Printing your W-2? [Click Here](#)

- c. Click anywhere in the area shown, and a separate tab will open displaying the W-2 PDF.

1 Wages, tips, other compensation	2 Federal income tax withheld
3 Social security wages	4 Social security tax withheld
5 Medicare wages and tips	6 Medicare tax withheld
a Employee's SSA number	Employer use only
b Employer's FED ID number	c Control number
c Employer's name, address, and ZIP code	
PENNSYLVANIA STATE SYSTEM OF HIGHER EDUC 2300 Vartan Way Suite 207 Harrisburg PA 17110-0000	
7 Social security tips	8 Allocated tips
9	10 Dependent care benefits

Note: To avoid confusion, it is recommended that users choose a single year at a time to display since scrolling through years of W-2 is not currently possible within the application.

However, If displaying more than one year of W-2's at a time is desired, users will need to use the Previous Form and Next Form options to toggle between years. If there is more than one W- 2 for a given year, use of this feature will also be needed.

Online Forms W-2/W-2c

Select a W-2 form below and then click the Display icon

Display

☐	Year	Form Description	Created Date
☒	2022	W-2 - Wage and Tax Statement	01/07/2023
☒	2021	W-2 - Wage and Tax Statement	01/11/2022
☐	2020	W-2 - Wage and Tax Statement	01/09/2021
☐	2019	W-2 - Wage and Tax Statement	01/11/2020

Click Here to Open W-2 < Previous Form > Next Form Hide

15. Education Information – add, edit, or view employee educational background.

- a. To begin, click Education Information.



- b. To add new education information, click Add New Educational Institution and follow the prompts.

Saved Educational Institutions

Educational Est	Institution
Post-Secondary	Indiana University of Pennsylvania >
Degree: Bachelor Degree Year: 2000 Program of Study: Spanish Language Teacher Education	
Post-Secondary	Villanova University >
Degree: Certificates/Other Year: 2011 Program of Study: Project Management	



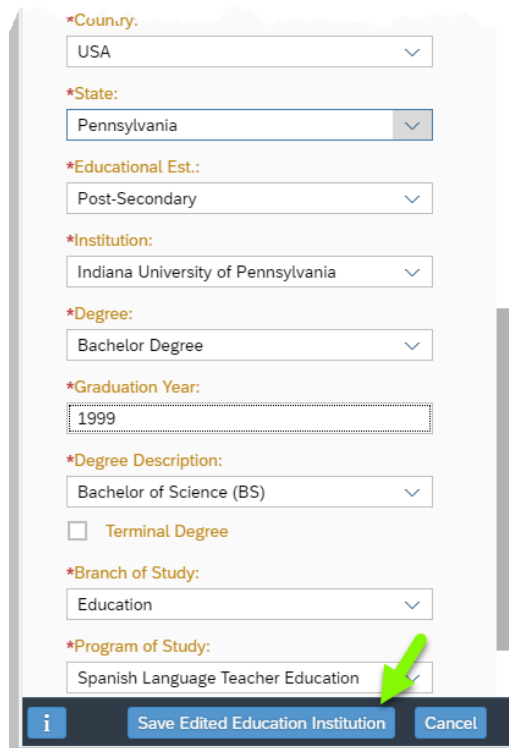
[Add New Educational Institution](#)

- c. To update a previously saved record, click on the associated record then click Edit Educational Institution.

Educational Est	Institution
Post-Secondary	Indiana University of Pennsylvania >
Degree: Bachelor Degree Year: 2000 Program of Study: Spanish Language Teacher Education	
Post-Secondary	Villanova University >
Degree: Certificates/Other Year: 2011 Program of Study: Project Management	


[Edit Educational Institution](#)
[Add New Educational Institution](#)

- d. Users may need to scroll down to find the fields open for edit. Once updates are finished, click Save Edited Education Institution.



*Country:
USA

*State:
Pennsylvania

*Educational Est.:
Post-Secondary

*Institution:
Indiana University of Pennsylvania

*Degree:
Bachelor Degree

*Graduation Year:
1999

*Degree Description:
Bachelor of Science (BS)

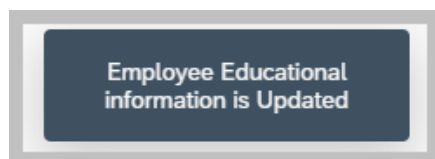
☐ Terminal Degree

*Branch of Study:
Education

*Program of Study:
Spanish Language Teacher Education

Save Edited Education Institution Cancel

The following confirmation will display.

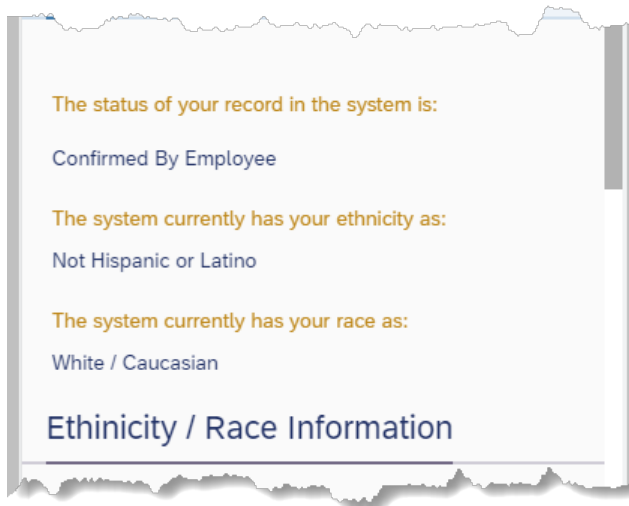


16. Ethnicity/Race – display or update existing ethnicity or race.

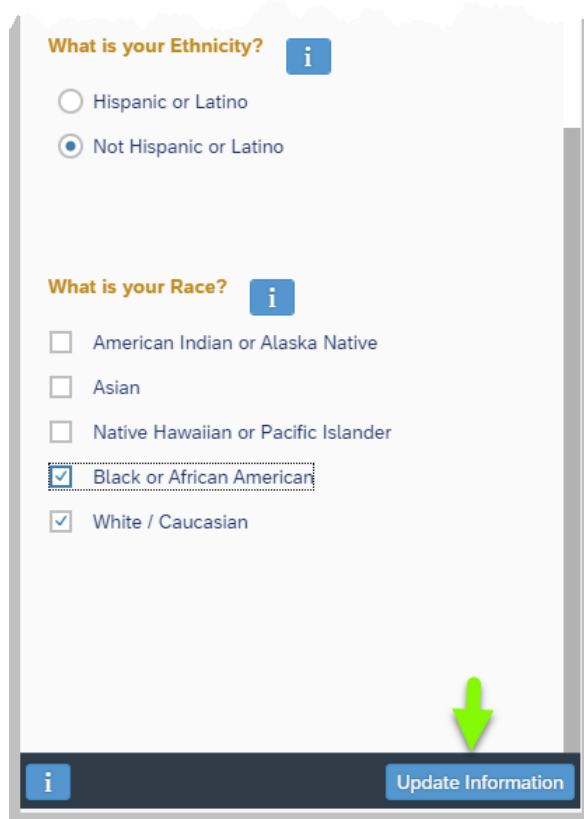
- a. To begin, click Ethnicity/Race.



- b. Any data previously provided will appear at the top as in this example.



- c. To make changes, scroll down to the available fields and make selections as needed. When finished, click Update Information.



What is your Ethnicity? i

☐ Hispanic or Latino

☒ Not Hispanic or Latino

What is your Race? i

☐ American Indian or Alaska Native

☐ Asian

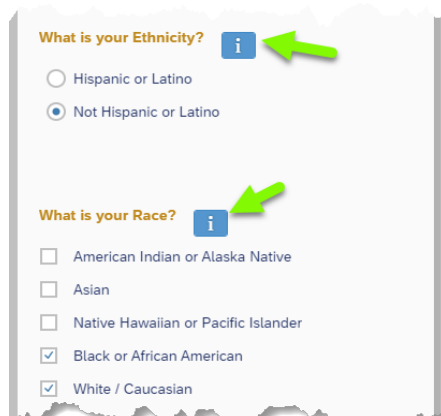
☐ Native Hawaiian or Pacific Islander

☒ Black or African American

☒ White / Caucasian

i Update Information

Note: Guidance for updating your ethnicity and race can be found by



What is your Ethnicity? i

☐ Hispanic or Latino

☒ Not Hispanic or Latino

What is your Race? i

☐ American Indian or Alaska Native

☐ Asian

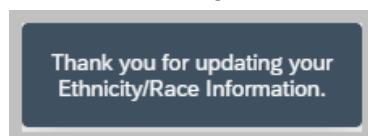
☐ Native Hawaiian or Pacific Islander

☒ Black or African American

☒ White / Caucasian

clicking on the “i” where indicated.

- d. The following confirmation message will appear.



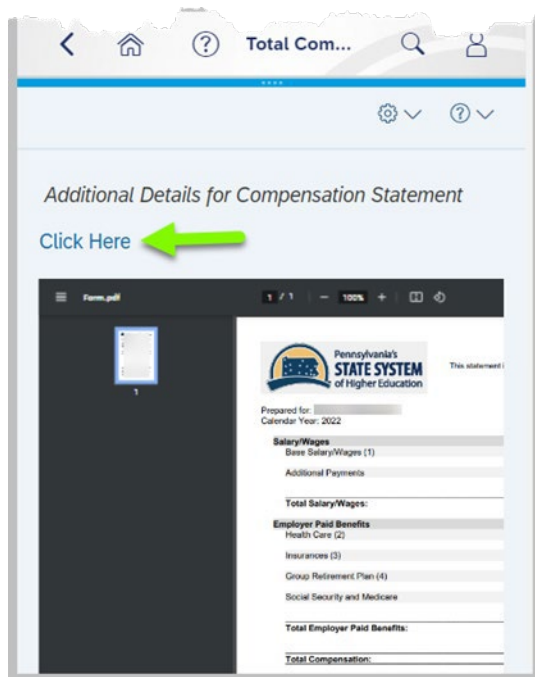
Thank you for updating your
Ethnicity/Race Information.

17. Total Compensation Statement - identifies all the compensation paid via wages to an employee, and, in addition, employer contributions made towards benefits and taxes on an employee's behalf, for a calendar year.

- a. Click Total Compensation Statement to begin.



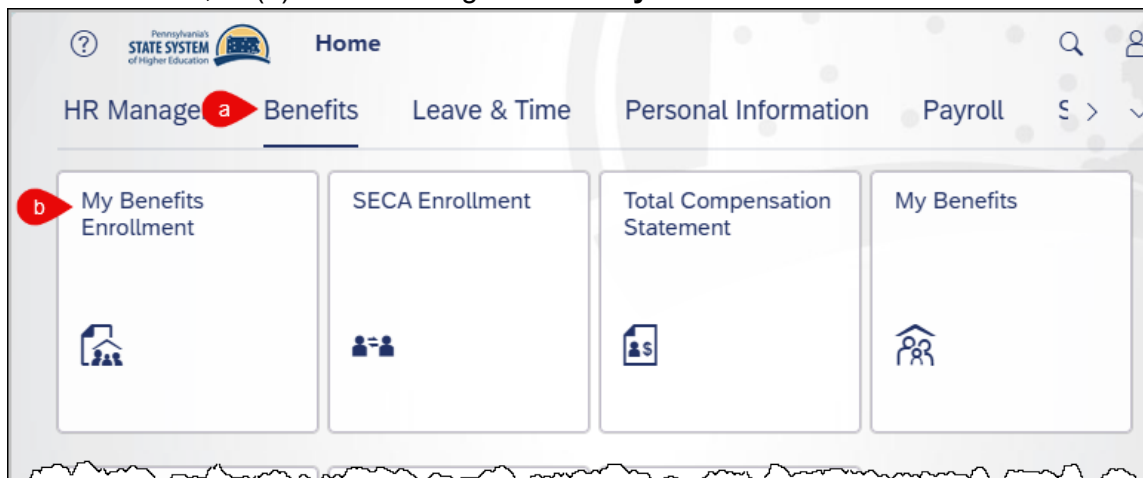
- b. To better understand the Total Compensation Statement, employees are encouraged to follow the link where indicated. This document will address all common questions related to the document.



18. My Benefits Enrollment - enroll in benefits plans such as medical, dental or retirement.

Navigating - Retirement Plan Enrollment

- a. To begin the **Retirement Plan Enrollment** process, (a) select the **Benefits** tab at the top of the screen, or (b) scroll to navigate to the **My Benefits Enrollment** tile.



- b. The next screen allows employees to review their enrollment events, listing the Enrollment Period and Effective Dates of your coverage. Below the Enrollment Event are links to **My Benefits** and **My Family Members**.

Select the Retirement Enrollment Event to proceed.

Select Enrollment Event >> Select Benefits >> Review Selections and Enroll		
Enrollment Event	Enrollment Period	Effective Dates
☐ Retirement New Elg	08/23/2025 – 12/31/2025	08/23/2025 – 12/31/9999

To get an overview of all the enrolled benefits, go to [My Benefits](#)
If you need to add a spouse/dependent, go to [My Family Members](#)

- c. The **Retirement Status** window will open for all employees to self-report current or previous retirement enrollment status. Select one of the three options then click the **Continue** button in the lower right corner of the screen.

Retirement Status

All employees are **required** to self-report their prior retirement status. Are you currently or were you previously a member of the Pennsylvania State Employees' Retirement System (SERS) or the Pennsylvania Public School Employees' Retirement System (PSERS)?

☐ Yes, I am/was a member of SERS.

☐ Yes, I am/was a member of PSERS.

☐ No, I have never been enrolled in either of these retirement plans.

[Cancel](#)
[Continue](#)

- Employees who are NOT eligible to enroll in a retirement plan will be prompted with the screen shown below. Click the **Return** button in the lower right corner to complete the Enrollment Event.

Information

You have completed the self-reporting of a current/previous retirement plan and you are not eligible to enroll in a retirement plan currently. No further action is needed.

[Return](#)

- Employees who select either the first or second options indicating current/previous member of SERS/PSERS and who are eligible to enroll in a retirement plan will be prompted with the screen shown below. Click the **Return** button in the lower right corner to complete the Enrollment Event.

Information

You are enrolled in a retirement plan, or you have indicated that you were a current/previous member of SERS or PSERS. Currently, no further action is needed.

[Return](#)

- Employees who select the third option indicating no current/previous membership with SERS/PSERS and who are eligible to enroll in a retirement program will be prompted with the **Retirement Election** window.

Retirement Election

Retirement elections are required as part of your employment. Your election is final and binding; therefore, it is important to follow the instructions below.

Prior to making your plan election, visit the State System's website, [Retirement Plan Information](#), to view:

- details about the plan options,
- a comparison of the plans,
- a video that provides an overview of the different group retirement plans.

Confirmation is required to continue with the enrollment process:

☐ I confirm I have reviewed the group retirement plan video and information available to me. I understand my retirement election is final and binding and cannot be changed once I submit my election even if I leave State System employment and return to work later.

Failure to select a retirement plan within 30 calendar days will result in automatic enrollment in the SERS Retirement Plan.

Note: If you are a member of the Public School Employees' Retirement System (PSERS) and elect to continue your enrollment with PSERS, you must contact your Human Resources department for a paper election form.

Cancel Continue

- Click the **Retirement Plan Information** link, to open a new tab or window with detailed retirement plan information. *It is important to review the retirement plan information before making an election.*



- Return to the **Retirement Election** window and select the checkbox to confirm that the retirement plan information has been reviewed and you are ready to make a retirement plan election. Click the **Continue** button in the lower right corner.
- Failure to select a retirement plan within 30 calendar days will result in automatic enrollment in the SERS (which may not reflect the plan that best meets your individual retirement goals).

Retirement Election

Retirement elections are required as part of your employment. Your election is final and binding; therefore, it is important to follow the instructions below.

Prior to making your plan election, visit the State System's website, [Retirement Plan Information](#), to view:

- details about the plan options,
- a comparison of the plans,
- a video that provides an overview of the different group retirement plans.

Confirmation is required to continue with the enrollment process:

☒ I confirm I have reviewed the group retirement plan video and information available to me. I understand my retirement election is final and binding and cannot be changed once I submit my election even if I leave State System employment and return to work later.

Failure to select a retirement plan within 30 calendar days will result in automatic enrollment in the SERS Retirement Plan.

Note: If you are a member of the Public School Employees' Retirement System (PSERS) and elect to continue your enrollment with PSERS, you must contact your Human Resources department for a paper election form.

Cancel Continue

- d. The following screen will display the available retirement plan options. Choose a plan by selecting the **Opt In** button to the right of the plan benefit name.

Retirement New Elg All Search ↕ ⚙							
Benefit Name	Benefit Type	Status	Start Date	Option	Coverage	Frequency	Action
ARP DC = 5.00%	Retirement	Not Enrolled	08/19/2025			Bi-weekly	Opt In >
SERS Class A5 DB = 5.09%	Retirement	Not Enrolled	08/19/2025			Bi-weekly	Opt In >
SERS Class A5 DC = 3.25%	Retirement Supp	Not Enrolled	08/19/2025			Bi-weekly	Opt In >

Next Cancel

- You may use the Back arrow in the top left corner to return to the previous screen to change your selection of retirement plan.



e. Electing ARP enrollment:

- Use the back arrow to return to the previous window.
- Click link to review retirement plan information.
- Select the vendor of your choice by entering 100% in the appropriate box.
- Click the **Confirm Selection** box to return to the previous window and finalize your enrollment; or click the **Cancel** box to return to the previous window to make a different selection.

ARP DC = 5.00%

Participation Period from 08/23/2025 to 12/31/99 **Type-Retirement**

Frequency: Bi-weekly

Regular Contribution Investments

Regular Pre-Tax

Pre-tax Percentage:

5.000 %

(Minimum 5.000 % - Maximum 5.000 %)

Investments

Initial selection is limited to one vendor at 100%

Investment Type	Percentage
ARP-FIDELITY (EE)	0 %
ARP-TIAA (EE)	100 %

Confirm Selection Cancel

f. Electing SERS Enrollment.

- Use the back arrow to return to the previous window.
- Click links to review retirement plan information.
- Click the **Confirm Selection** box to return to the previous window and finalize your enrollment; or click the **Cancel** box to return to the previous window to make a different selection.

SERS Class A5 DB = 5.09%

Participation Period from 08/23/2025 to 12/31/9999

Frequency: Bi-weekly

[Type-Retirement](#)

Plan-PA St Employees Retirement

Regular Contribution

Regular Pre-Tax

Pre-tax Percentage:

5.090 %

(Minimum 5.090 % -
Maximum 5.090 %)

Confirm Selection **Cancel**

NOTE: When electing SERS, if required (depending on the SERS Class of Service) you will automatically be enrolled in both the Defined Benefit and Defined Contribution plans.

Retirement New Elg		All	Search						
Benefit Name	Benefit Type	Status	Start Date	Option	Coverage	Frequency	Action		
ARP DC = 5.00%	Retirement	Not Enrolled	08/23/2025			Bi-weekly	Opt In	>	
SERS Class A5 DB = 5.09%	Retirement	Opting In	08/23/2025			Bi-weekly		>	
SERS Class A5 DC = 3.25%	Retirement Supp	Opting In	08/23/2025			Bi-weekly		>	

- g. At the main election screen you can change plans by selecting the **Opt In** button. A notice will appear asking if you are sure you want to change the plan; select **OK** or **Cancel**.

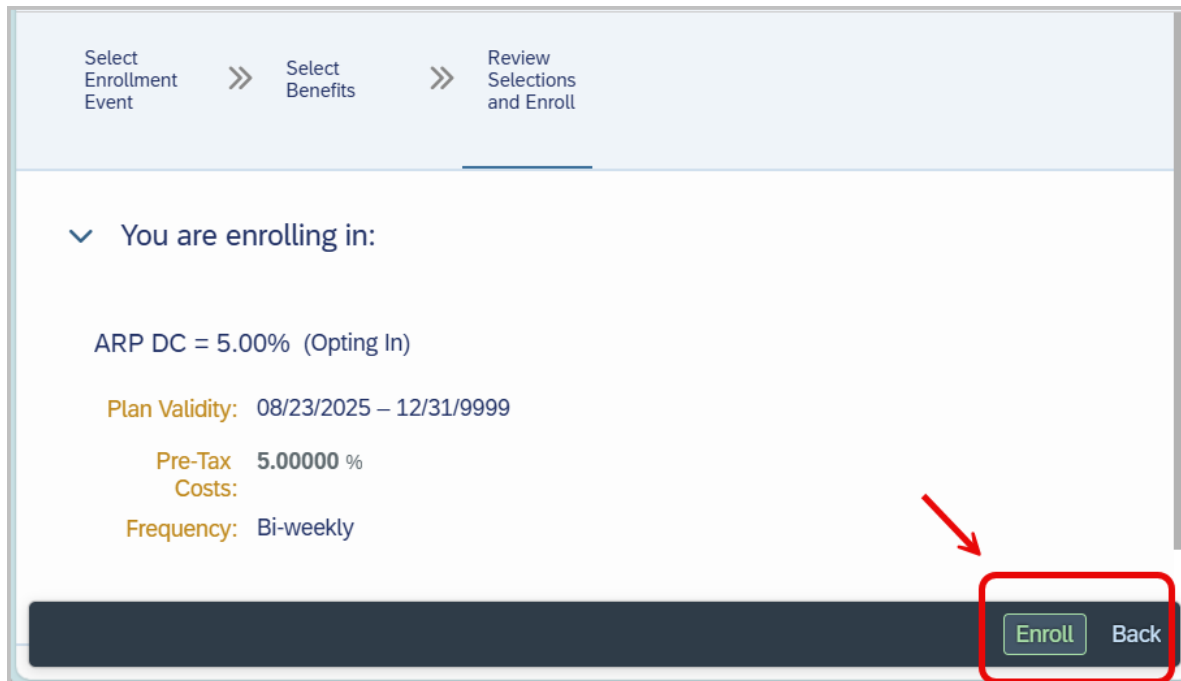
 **Opt In - SERS Class A5 DB = 5.09%**

You can opt in to only one benefit within a benefit type.
 Opting in to SERS Class A5 DB = 5.09% will automatically change your enrollment in ARP DC = 5.00% to opting out, since both benefits belong to the same benefit type Retirement.
 Are you sure you want to opt in to the benefit SERS Class A5 DB = 5.09% and opt out of ARP DC = 5.00%?

- h. When you are sure of your election, click the **Next** button in the lower right corner.

Benefit Name	Benefit Type	Status	Start Date	Option	Coverage	Frequency	Action
ARP DC = 5.00%	Retirement	Opting In	08/19/2025			Bi-weekly	>
SERS Class A5 DB = 5.09%	Retirement	Not Enrolled	08/19/2025			Bi-weekly	Opt In >
SERS Class A5 DC = 3.25%	Retirement Supp	Not Enrolled	08/19/2025			Bi-weekly	Opt In >

i. To finalize your enrollment, click the **Enroll** button. NOTE: once the **Enroll** button is selected, your election is **permanent** and cannot be changed. If this is not the plan you want to elect, click the **Back** button in the lower right corner to return to the main election screen.



j. The following message will appear confirming your election has been saved. Also, a confirmation email will be sent to your work email address. It is important to keep the confirmation email as proof of your retirement plan election. Click the **Exit** button.

