

I. Introduction to Employee Self-Service (ESS) and My First Days

General Information

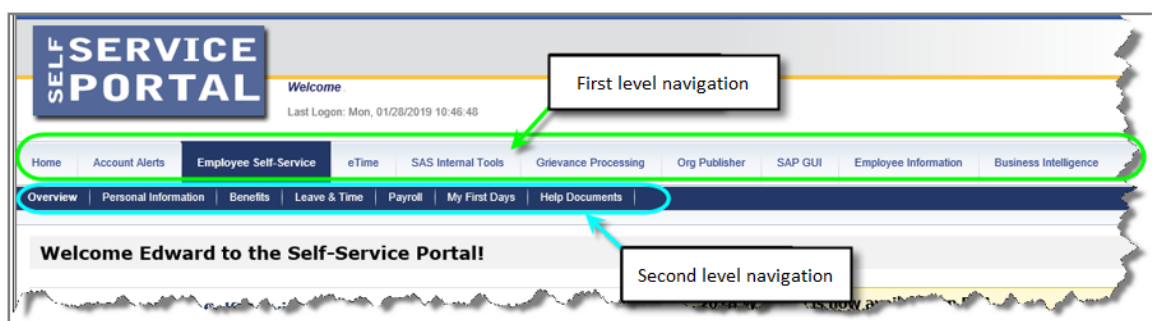
Employee Self-Service (ESS) is a web-based service within the Self-Service Portal that provides employees with the ability to view and update information related to their employment with the Pennsylvania State System of Higher Education (PASSHE).

ESS contains the application, My First Days. My First Days allows employees to add and update personal information such as Dependent(s), W-4 Tax Withholding Information, Education, Ethnicity, Direct Deposit and Emergency contact. It also allows employees to enroll into benefit plans such as Medical, Retirement, Flexible Spending Account(s) and Basic Group Life.

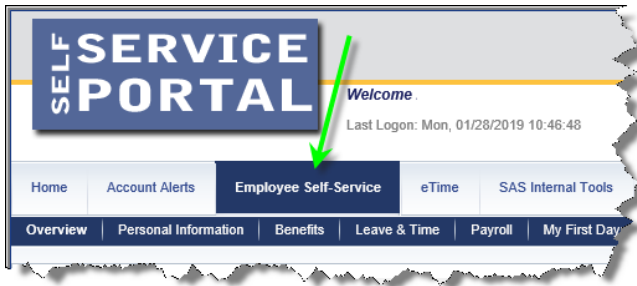
Contact your Human Resources Office immediately if you have any questions regarding the information appearing on ESS.

II. Overview of Self-Service Portal Navigation

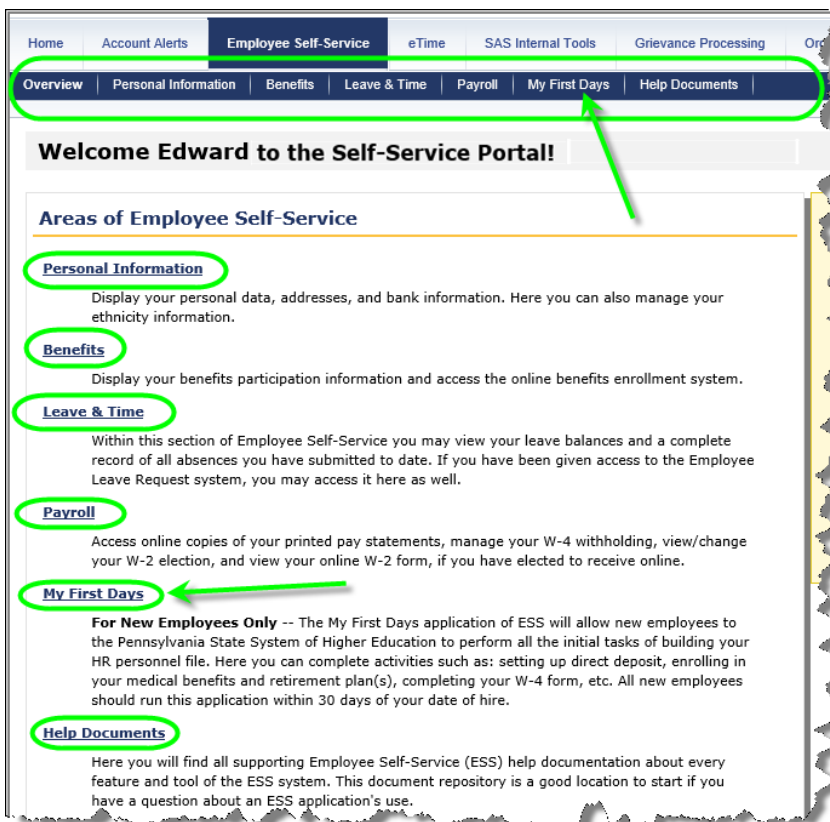
The **first level navigation tabs** will only display the applications to which the Username in effect has access and may vary. When a first level navigation tab is selected, the **second level navigation links** will refresh to show what options are available for use under the selected first level navigation tab.



1. To access My First Days, select **Employee Self-Service** (ESS) from the first level navigation tab.



2. The window will display a listing of the *ESS* applications available. Navigation to the desired *ESS* application can be accomplished either by using the second level navigation links under *ESS* or by the optional navigation links depicted in the screenshot below. Select the **My First Days** link from either of the provided navigational options.

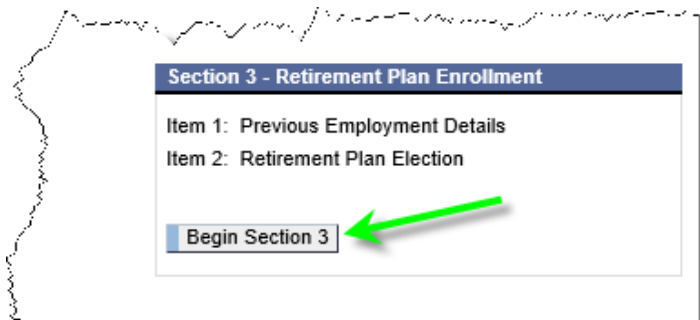


3. On the first page of *My First Days*, select ***Begin the My First Days Application***.



III. Navigating ESS and My First Days: Section 3 – Retirement Plan Enrollment

1. To begin the ***Retirement Plan Enrollment*** process within *My First Days*, select ***Begin Section 3***.



- The following pop-up screen will appear with important information regarding available retirement plan options.

Section 3 - Retirement Plan Enrollment

Employees eligible for enrollment in a retirement plan must select from one of the following plan options within 30 calendars days of eligibility:

- **State System Alternative Retirement Plan - 5% Mandatory Employee Contribution**
(Defined Contribution Plan)

OR

- **State Employees' Retirement System (SERS) Class A5 Hybrid Retirement Plan - 8.25% Mandatory Employee Contribution**
(Combination Defined Benefit and Defined Contribution Plan)

Prior to making your plan election, please visit the State System's website, [Retirement Plan Information](#), for a complete explanation and comparison of retirement plan options.

Select the checkbox below to confirm you have read the information on the State System's website and are ready to make an election. Upon clicking the checkbox, access to the Retirement Enrollment Offers will be activated.

I confirm I have reviewed the group retirement plan information available to me. I understand my retirement election is final and binding and cannot be changed once I submit my elections 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 A5 Hybrid Retirement Plan.

*If you are a current member of the Public School Employees' Retirement System (PSERS), you may elect to continue your enrollment with PSERS. Contact your Human Resources department for information.

The first section defines the available retirement plan options.

Section 3 - Retirement Plan Enrollment

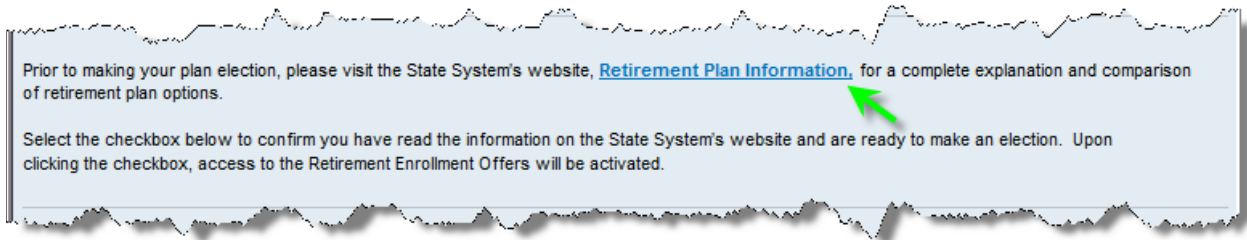
Employees eligible for enrollment in a retirement plan must select from one of the following plan options within 30 calendars days of eligibility:

- **State System Alternative Retirement Plan - 5% Mandatory Employee Contribution**
(Defined Contribution Plan)

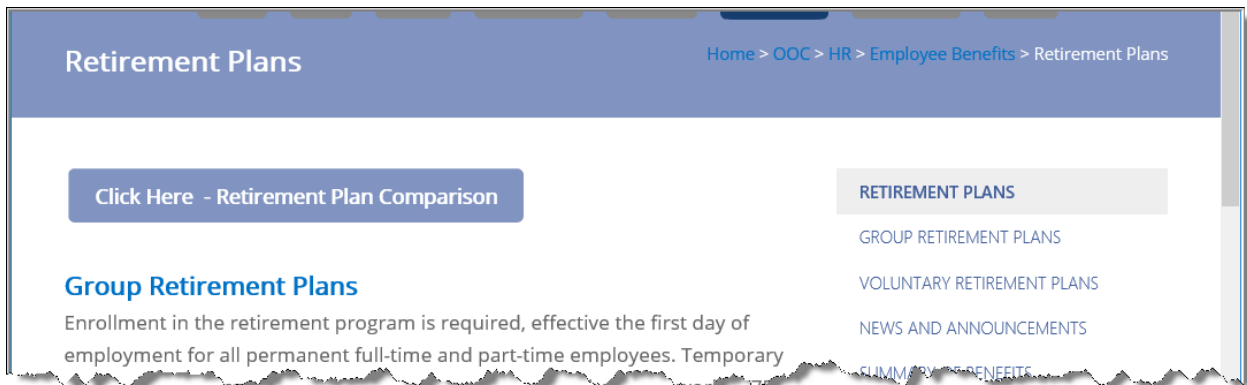
OR

- **State Employees' Retirement System (SERS) Class A5 Hybrid Retirement Plan - 8.25% Mandatory Employee Contribution**
(Combination Defined Benefit and Defined Contribution Plan)

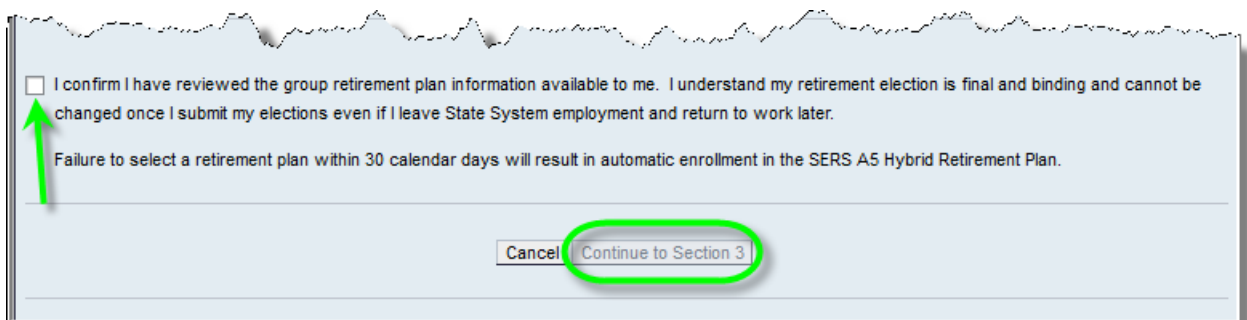
The second section provides a link to the State System's website where a complete explanation and comparison of retirement plan options is located. **Employees are required to review the information provided by selecting the link, *Retirement Plan Information*.**

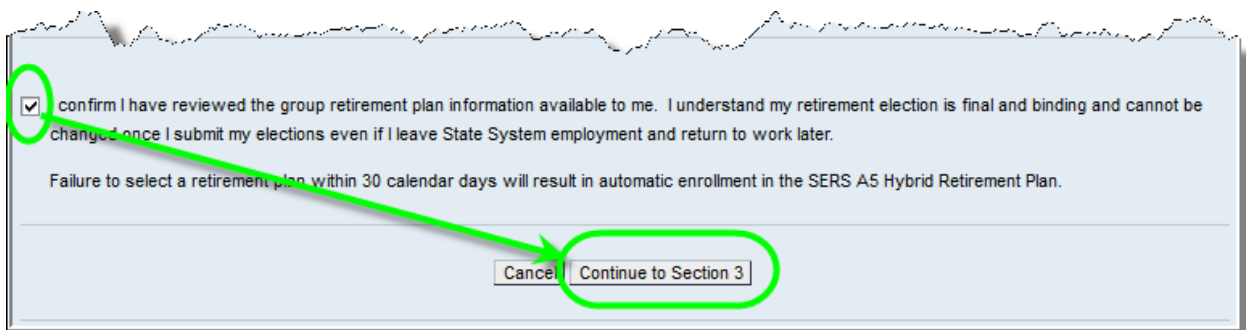


Clicking the link, ***Retirement Plan Information***, will open a new tab or window with detailed retirement plan information. Review the information provided before making an election.



Return to the ***Retirement Plan Enrollment*** screen and select the checkbox to confirm that the retirement plan information has been reviewed and you are ready to make a retirement plan election. Clicking in the checkbox will activate the ***Continue to Section 3***. **Failure to select a retirement plan within 30 calendar days will result in automatic enrollment in the SERS A5 Hybrid Retirement Plan.**



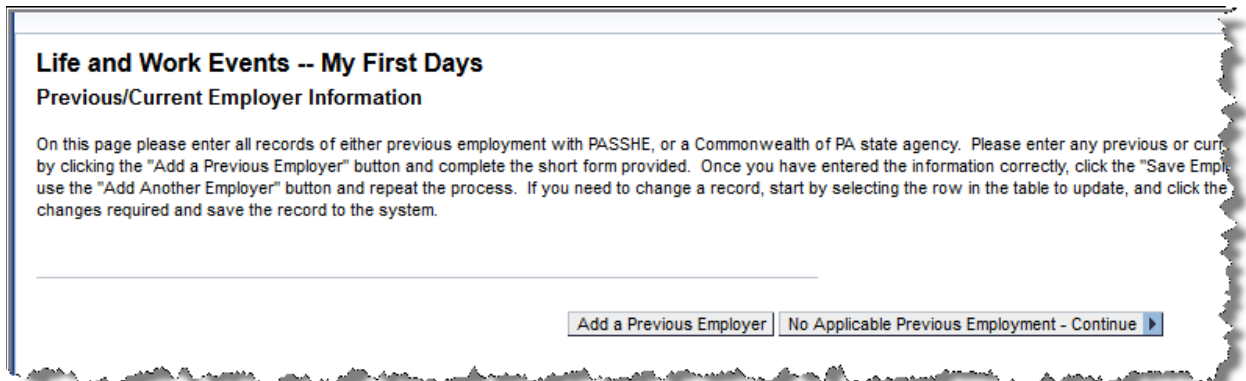


I confirm I have reviewed the group retirement plan information available to me. I understand my retirement election is final and binding and cannot be changed once I submit my elections even if I leave State System employment and return to work later.

Failure to select a retirement plan within 30 calendar days will result in automatic enrollment in the SERS A5 Hybrid Retirement Plan.

3. The **Previous/Current Employer Information** screen will appear. This screen is only applicable to employees who have previous or current employment with Pennsylvania's State System of Higher Education, a Pennsylvania public school, or a Commonwealth of Pennsylvania State Agency.

To add previous and/or current employer information, select **Add a Previous Employer**. (NOTE: If this step is not applicable, select **No Applicable Previous Employment – Continue**. Skip to step 4 below for more instructions.)



Life and Work Events -- My First Days

Previous/Current Employer Information

On this page please enter all records of either previous employment with PASSHE, or a Commonwealth of PA state agency. Please enter any previous or current employment by clicking the "Add a Previous Employer" button and complete the short form provided. Once you have entered the information correctly, click the "Save Employment" button. If you have multiple previous employers, use the "Add Another Employer" button and repeat the process. If you need to change a record, start by selecting the row in the table to update, and click the changes required and save the record to the system.

If entering previous and/or current employer information, all fields marked with a red asterisk (*) are required fields. Follow the instructions provided on the screen to enter information accurately. When finished, select **Save Employment Record**.

Previous Employment Information

Employer: *

Enter in one of the following formats:
 * PASSHE - <university name>
 * Commonwealth of PA - <agency/department name>
 * Pennsylvania Public School - <School District>

Employed From: * to * If currently employed in this position, complete the end date field with 12/31/9999.

Retirement Plan: *

Previous Last Name: Enter if last name different at time of employment.

The following screen will appear with a message indicating that employees must contact their university benefits coordinator to ensure enrollment in the appropriate retirement plan. If adding additional employment history is necessary, select **Add Another Employer**. Otherwise, select **Continue to Next Step**.

Since you have indicated that you have had previous employment with PASSHE or the Commonwealth of PA, you must contact your University Benefits Coordinator to ensure you are enrolled in the appropriate retirement plan.

Stored Previous Employers

Employer	StartDate	EndDate
PASSHE - Indiana University of Pennsylvania	12/20/2000	12/31/9999

Your employment record has been stored in the HCM system.

Employees will be taken to the **My First Days** start page, and the following message will appear confirming entries have been saved. Additional employment information can still be entered in **Section 3 of My First Days**; however, access to retirement plan elections will be now be closed.

Thank you for completing section 3. You may proceed with another section, if necessary, or exit the application.

4. If entering previous and/or current employer information is not applicable, select **No Applicable Previous Employment – Continue**.



5. The following screen will appear with the available retirement plan options. (NOTE: The available retirement plans will vary by employee, and the following is for example purposes only.)

Electing ARP enrollment:

If choosing the ARP retirement plan, highlight the row containing ARP by clicking on it. Select **Enroll in Plan**.

Plan Type	Plan	Enrolled	Contrib.	Plan Information
Retirement	ARP = 5.00% Employee Contribution	<input type="checkbox"/>		Type-Retirement
Retirement	SERS Class A5 = 5.00% Employee Contribution	<input type="checkbox"/>		Type-Retirement
Retirement Supp	SERS Class A5 DC = 3.25%	<input type="checkbox"/>		Type-Retirement

All contributions shown are bi-weekly.

[Enroll in Plan](#) [Change Enrollment](#)

[Save Enrollment and Finish Section 3](#)

The following pop-up will appear. Employees must enter their choice of vendor(s) by entering the desired investment percentage next to the desired vendor(s). Investment percentages must equal 100%. When finished making entries, select **Enroll in Plan**.

Enrollment Offer for: Retirement

Plan Name: ARP = 5.00% Employee Contribution
Plan Type: Retirement

Please designate which vendor(s) you wish to enroll. You may enroll with more than one vendor, but the total percentage across all vendors must equal 100%.
Please note: You must complete an enrollment application to activate an account with each selected ARP vendor.

Percentage	Investment Company
75	Fidelity Investments
25	TIAA-CREF

Your investment percentages must total 100%.

[Cancel](#) [Enroll in Plan](#)

Employees will be returned to the selection screen. A checkmark will appear in the **Enrolled** column for the ARP plan.

To make modifications to the ARP vendor percentages, select **Change Enrollment**.

To change the plan election to SERS, see further below in the section, **Electing SERS enrollment**.

If finished, select **Save Enrollment and Finish Section 3**. See step 6 below for further instructions.

Enrollment Offers					
Plan Type	Plan	Enrolled	Contrib.	Plan Information	
Retirement	ARP = 5.00% Employee Contribution	<input checked="" type="checkbox"/>	5.00%	Type-Retirement	
Retirement	SERS Class A5 = 5.00% Employee Contribution	<input type="checkbox"/>		Type-Retirement	
Retirement Supp	SERS Class A5 DC = 3.25%	<input type="checkbox"/>		Type-Retirement	

All contributions shown are bi-weekly.

Enroll in Plan

Electing SERS enrollment

If choosing the SERS retirement plan, highlight the row for **Plan Type** of **Retirement** by clicking on it. Select **Enroll in Plan**.

Enrollment Offers					
Plan Type	Plan	Enrolled	Contrib.	Plan Information	
Retirement	ARP = 5.00% Employee Contribution	<input checked="" type="checkbox"/>	5.00%	Type-Retirement	
Retirement	SERS Class A5 = 5.00% Employee Contribution	<input type="checkbox"/>		Type-Retirement	
Retirement Supp	SERS Class A5 DC = 3.25%	<input type="checkbox"/>		Type-Retirement	

All contributions shown are bi-weekly.

Notice the **Enrolled** column now displays a checkmark for both **Plan Types** of **Retirement** as well as **Retirement Supp** as required. This is because electing this particular SERS retirement plan requires additional enrollment in the defined contribution plan. **The Retirement Supp plan cannot be selected or removed independently since enrollment in the plan depends on electing the SERS defined benefit plan.**

Plan Type	Plan	Enrolled	Contrib.	Plan Information
Retirement	ARP = 5.00% Employee Contribution	<input type="checkbox"/>		Type-Retirement
Retirement	SERS Class A5 = 5.00% Employee Contribution	<input checked="" type="checkbox"/>	5.00%	Type-Retirement
Retirement Supp	SERS Class A5 DC = 3.25%	<input checked="" type="checkbox"/>	3.25%	Type-Retirement

All contributions shown are bi-weekly.

To change the plan election to ARP, return to section **Election ARP enrollment** above.

If finished, select **Save Enrollment and Finish Section 3**.

Retirement Supp	SERS Class A5 DC = 3.25%	<input checked="" type="checkbox"/>	3.25%	Type-Retirement
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All contributions shown are bi-weekly.

- The following pop-up will appear as a warning that the enrollment that is about to be submitted is **permanent** and cannot be changed once submitted. To continue, select **Yes**. Otherwise, select **No** to return to the retirement plan selection screen to make changes.

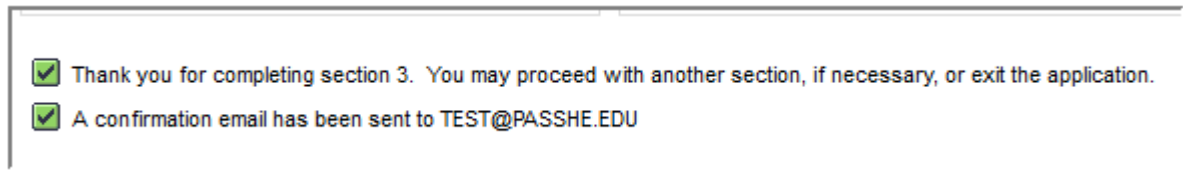
Confirmation

Are you sure you wish to enroll in the selected retirement plan?

THIS ENROLLMENT IS PERMANENT.

7. Employees will be taken to the **My First Days** start page, and the following message will appear confirming their entries have been saved.

A confirmation email of the retirement plan elections will be sent to the email address displayed. It is important that this email confirmation be retained for employee records as proof of retirement plan election.



8. The **Retirement Plan Enrollment** section is now complete. Section 3 of **My First Days**, will now be closed.

