Submitting a CVC Voucher Request

Step	Action
1.	Click the **Benefits** tile.
2.	The **Benefits Self Service** page displays. This page is a classic page, not a fluid page. The benefits self service portion of PeopleSoft has not yet been converted to Fluid. This page contains the links that you use to review and manage your benefits information. These links allow you to -- Review benefits summary information—to see your current or past benefits elections -- Review and/or edit your Dependent and beneficiary information -- Update your benefits information after you have experienced a qualifying Life Event—marriage, birth of a child, divorce, adoption, etc. -- Enroll in benefits during an open enrollment period and/or at the time of hire -- Upload documents in support of a qualifying life event or dependent verification -- View benefit guides, forms, and provider links -- Request a CVC Voucher Each of these links is covered in topics in Employee Self Service training
3.	Click the **CVC Voucher Request.** CVC Voucher Request Submit a Request Form for a CVC Voucher
4.	The **CVC Voucher Request** page displays. The Form tab currently displays. Begin with the **Subject** field. This is a required field. Use this field to provide a description of your request.

Step	Action
5.	Click in the **Subject** field. New Window | Help | Perso Form | Instructions | Attachments **CVC Voucher Request** *Subject [ ] Priority 3-Standard Due Date [ ] 📅 Status Initial
6.	Enter the desired information into the **Subject** field. Enter a valid value e.g. "**CVC Voucher Request for Jane Smith**". *Subject [ ]
7.	The **Priority** field defaults to 3-Standard. Accept the default value in this field The **Due Date** field is not a required field. You do not have to enter any values in this field.
8.	Use the **Employee Information** section to add information about yourself. Either enter your Empl Id in the **Employee Number** field or use the look up button to select it.
9.	Click the **Employee #** button. **Employee Information:** *Employee # [ ] 🔍 Name [ ]
10.	Notice only one value is returned, your empl ID. This value is hidden here to preserve confidentiality.
11.	Click the XXXXX link. **Search Results** View 100 First ◀ 1 of 1 ▶ Last **Empl ID** █████
12.	Use the **Name** field to enter your name, First Name Last Name.
13.	Click in the **Name** field. *Employee # [██████] × 🔍 Name [ ]

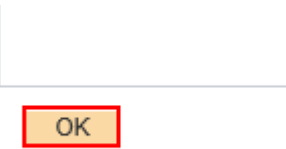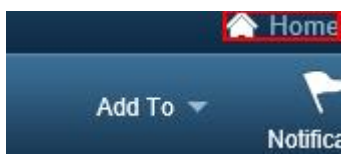| Step	Action
14.	Enter the desired information into the **Name** field. Enter a valid value e.g. "**Jane Smith**". *Employee # [ ] 🔍 Name [ ]
15.	If you know your doctors information, enter it in the **Eye Care Professional information** section. If you enter information here the doctor will be sent authorization. If you leave the fields in this section empty, authorization will be sent to you. For this example, you will provide information about your doctor: Dr. Martin James Phone: 415/555-1212 Fax: 415/555-1213
16.	Click in the **Doctor's Name** field. *Employee # [ ] 🔍 Name Jane Smith ✕ *Eye Care Professional information (if available):* Doctor's Name [ ] Doctor's Office Number [ ] Dr Fax # [ ]
17.	Enter the desired information into the **Doctor's Name** field. Enter a valid value e.g. "**Martin James**". *Eye Care Professional information (if available):* Doctor's Name [ ] Doctor's Office Number [ ] Dr Fax # [ ]
18.	Click in the **Doctor's Office Number** field. *Employee # [ ] 🔍 Name Jane Smith *Eye Care Professional information (if available):* Doctor's Name Martin James ✕ Doctor's Office Number [ ] Dr Fax # [ ]

Step	Action
19.	Enter the desired information into the **Doctor's Office Number** field. Enter a valid value e.g. "**415/555-1212**". *Employee #* ▮▮▮▮ Name: Jane Smith *e Care Professional information (if available):* Doctor's Name: Martin James Doctor's Office Number: [ ] Dr Fax #: [ ]
20.	Click in the **Dr Fax #** field. *Employee #* ▮▮▮▮ Name: Jane Smith *Eye Care Professional information (if available):* Doctor's Name: Martin James Doctor's Office Number: 415/555-1212 Dr Fax #: [ ]
21.	Enter the desired information into the **Dr Fax #** field. Enter a valid value e.g. "**414/555-1213**". *Employee #* ▮▮▮▮ Name: Jane Smith *Eye Care Professional information (if available):* Doctor's Name: Martin James Doctor's Office Number: 415/555-1212 Dr Fax #: [ ]
22.	Click the scrollbar to move to the bottom of the page.
23.	You can use the **More Information** text box to add any additional information in support of my request. For this example, you will not add any additional information. You are now ready to save your changes.
24.	Click the **Save** button. Save
25.	Click the scrollbar to move to the top of the page.

Step	Action
26.	Notice a **Preview Approval** button and a **Submit** button now appear. Your request must be submitted for review and approval. You do not have to attach any supporting documents. You will not use the **Attachments** tab. You can use the **Preview Approval** button to preview the approval path for your request. You can submit your request without previewing the approval path. To do so, click the **Submit** button. For this example, you will preview the approval path.
27.	Click the **Preview Approval** button. *Subject CVC Voucher Request for Jane Smith Priority 3-Standard Status Initial Preview Approval Submit
28.	The approval page for CVC Voucher requests displays. This page displays the approval path for your request. There are two levels of approval, the first level is your supervisor and the second level has multiple approvers. You can click on the **Multiple Approvers** link to view a list of these approvers. For this example, you will not use this link. Your supervisor's name is hidden here to preserve confidentiality.
29.	Notice your request has not yet been routed to any approvers, because you have not submitted it. You can submit it from this page or from the **Form** tab. For this example, you will return to the form tab and then submit your request.
30.	Click the **OK** button. OK Submit
31.	The **Form** tab displays. Notice the **Status** field displays initial. It will change to pending once you submit your request.

Step	Action
32.	Click the **Submit** button.
	CVC Voucher Request
	equest for Jane Smith
	Preview Approval Submit
33.	The approval page displays. Notice the request is now pending approval from your supervisor.
	It is still not routed to the second level approval. That will not happen until the first level approver has approved it.
34.	Click the **OK** button.
	OK
35.	The **Form** tab displays.
	The **Status** field now displays Pending.
	There are two new buttons on this page.
	The **Approver Status** button will return you to the approval page. You can use view where your request is in the approval process.
	The **Cancel Approval** button allows you to stop the approval process. If you click this button, the approval path will indicate that the request has been terminated. A new **Submit** button will display on the form tab. You can use this button to resubmit your request.
	For this example, you will not click ether of the buttons on this page.
36.	Click the **Home** link.
	Home Add To ▾ Notifica
37.	**End of Procedure.**