Use this document to assist in your benefits enrollment and update due to a life event (such as marriage, adding a dependent due to loss of coverage, or birth/adoption of a child). Refer to your Life Event packet for detailed information about your benefit options. If you require additional assistance, please contact the Benefits office at 617-496-4001 or benefits@harvard.edu.

**Important Enrollment Reminders**

**Meet the 30-day deadline.** You have 30 days from the date of your life event to make your benefit elections.

**Submit your benefits.** By clicking Submit on the Benefits Enrollment page, you can save your elections and return to make changes within the 30-day window. However, your elections won’t be processed until you click Submit on the Submit Benefits page. If you save your elections, but don’t submit them, your elections won’t be processed.

**Enroll dependents in medical, dental, or vision care.** You must provide certified documentation to enroll your dependents in the medical, dental or vision care plan. If your documentation isn’t received by Benefits within the 30 day window, your dependents will be removed from the plans retroactive to your event date.

**Remember: submitted benefits are final.** Once you’ve submitted your elections, they can’t be changed until the next Open Enrollment period unless you experience another qualifying change in your family or employee status.

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**Obtaining login credentials**

Before you can enroll in your benefits, you’ll need your Harvard University ID (HUID) and HarvardKey, the University’s unified login credential for online applications and services.

If you have not yet claimed your HarvardKey, simply visit key.harvard.edu and follow the prompts to Claim your HarvardKey. As part of the process, you’ll need to supply your HUID, last name, and date of birth. If you need help claiming your HarvardKey, please contact the Harvard University Information Technology support desk at 617-495-7777 or ithelp@harvard.edu.
ACCESSING PEOPLESOFT

1. Visit the Harvard Human Resources (HARVie) website at http://hr.harvard.edu and click on PEOPLESOFT at the top of the page.

2. You will be redirected to the HarvardKey login screen. Simply enter your credentials, and then click Login or press the Enter key.

3. This will bring up the PeopleSoft home page. From there, click Benefits Enrollment in Quick Links – Self Service or navigate directly using the following path: Main Menu > Self Service > Benefits > Benefits Enrollment.
4. This is the initial **Benefits Enrollment** page. Review the displayed information, then click **Select** to begin making your elections.

**SELECTING YOUR BENEFITS**

1. **Make your elections.**

   The main **Benefits Enrollment** page displays all of your benefit enrollment elections. If you have not yet made any selections, the default will be “No Coverage / Waive” and the total cost will be $0.00.

   **Tip:** click the **Enrollment Handbook** link to review Harvard’s Benefits Enrollment Guide, which is also located on the HHR website at [hr.harvard.edu](http://hr.harvard.edu).

   If you previously made elections but did not yet submit your benefits, these elections, along with their associated costs, will display as shown.

   To make or change your election, simply click **Edit**.

   If you’re receiving an automatic benefit (at no cost to you), you’ll see the details, but you won’t be able to make any changes.
2. Review benefit details.

Your default coverage is set to “waive,” so be sure to make an active election if you’d like medical coverage.

As shown in this example, you can click on any benefit type—in this case, medical—to review details and make your benefit election. Each election type includes pay-period costs for each coverage level.

To make your selection, simply click the radio button next to the plan name.

To learn more about a specific plan, simply click on the plan name.

Click Update Elections to save your selection. Click Cancel to return to the main Benefits Enrollment page without saving.

Repeat this process for each benefit that you are eligible to change (your eligibility to change a benefit depends on your life event), as noted below:

Dental
• Similar to Medical.

Vision Care
• Similar to Medical.

Life
• Coverage is auto-defined and cannot be changed.

Supplemental Life
• Select amount or waive coverage.
• Cannot assign dependents.

Short-Term Disability
• Coverage is auto-defined and cannot be changed.

Long-Term Disability
• Select Yes or No to coverage.

Flex Spending – Health Care and Flex Spending – Dependent Care
• Select Yes or No.
• Enter annual goal amount if Yes is selected.

Health Spending Account (if eligible)
• Select HSA or waive.
• Enter annual goal amount if HSA is selected.

Notes on Dependents:
• Once you make your first medical, dental or vision care selection, the radio button will appear.
• When your dependent(s) are added into the system, this page will display your dependents and allow you to add them to your medical, dental, and/or vision care plans.
• Any dependents for whom you’d like coverage must be added to your medical, dental and/or vision care plan. You may add them by placing a checkmark in the Enroll box next to their name.
• If you make a mistake while adding a new dependent, please contact Harvard Benefits at 617-496-4001.

Important: Your dependents must be added to your medical, dental and/or vision care plan prior to submitting your elections.
ADDING YOUR DEPENDENTS

Want to enroll a dependent?
Send all dependent documentation, including the Dependent Documentation Cover Sheet found in your Life Event packet, to Harvard’s Benefits Department via:
Fax at 617-496-3000
Email at benefits@harvard.edu
Mail using the postage-paid envelope in your Life Event packet
Remember: Documentation must be received within 30 days of the date of your life event.

Once you select a medical, dental and/or vision care plan and click Add/Review Dependents, the following page will display, indicating that you do not yet have any dependent information in the PeopleSoft system. To add a dependent, click Add a dependent.
If you do not wish to add any dependents, click Return to Event Selection.
This will leave your coverage level at Employee Only.

1. Enter your dependent’s personal information, including Social Security number, and then scroll down to complete the Federal Qualified Dependents, Status, and Address Information. Asterisked fields (*) are required.
2. Indicate whether your dependent is classified as a Federal Qualified Dependent.

**Who are Federal Qualified Dependents?**

Federal Qualified Dependents include your spouse and all eligible children.

Click the link to learn more about dependents who are domestic partners.

3. Select your dependent’s marital status and “as-of” date (if applicable).

4. Enter the address and phone number of your dependent, or if applicable, check **Same Address as Employee** and **Same Phone as Employee**.

5. Click **Save**.

A warning message reminds you to provide the necessary certification documentation to Benefits within **30 days** of the date of your life event.

Click **OK** on the warning message, then click **OK** under **Save Confirmation**. You are now able to add your dependent to your medical, dental, and/or vision care plan.

To add another dependent, click **Return to Enrollment Dependent Summary**, located at the bottom of the **Dependent Personal Information** page, and then click **Add a dependent** on the **Enrollment Dependent Summary** page.
Important: In order for your dependents to be added to your medical, dental, and/or vision care coverage, you must go back to the Benefits Enrollment pages and add them to your selection(s). To add a dependent from the medical, dental or vision care benefit page:

1. Select your coverage.
2. Click the **Enroll** checkbox next to the name of the dependent(s) you’d like to cover under this plan.
3. Click **Update Elections**.

**SAVING YOUR BENEFIT SELECTIONS**

Once you’ve made your selection and added any dependents, a confirmation page will display confirming your choice, pay-period cost (or contribution amount in the case of a Flexible Spending Account, or FSA), and covered dependents, if applicable.

Click **Update Elections** to save your choices, or click **Edit** to change your selection.

**Remember:** To confirm all of your elections, you **must** submit, and confirm your benefits from the Benefits Enrollment main page.
SUBMITTING YOUR BENEFIT ELECTIONS

Submitting your benefit elections is a **two-step process**:

1. **At the bottom of the Benefits Enrollment page**, review your total costs for the year, then click **Submit**.

   This step will only **save** your elections. You must go to the next step to **confirm** your elections.

2. You must now submit your benefit choices on the **Submit Benefit Choices** page. Once submitted, you will be unable to make further changes until the next Open Enrollment period unless you have a qualified family or employment status change.
   - To go back and make edits, click **Cancel**.
   - To submit and finalize your benefit elections, click **Submit**. **Important!** Your elections will not be finalized until you click **Submit**.

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**ADDITIONAL RESOURCES**

HarvardKey help
http://reference.iam.harvard.edu
ithelp@harvard.edu
tel: 617-495-7777

Harvard Human Resources website
http://hr.harvard.edu

Compensation and Benefits Information
http://hr.harvard.edu/totalrewards

Benefits
benefits@harvard.edu
fax: 617-496-3000
phone: 617-496-4001

Work/Life Information
http://hr.harvard.edu/worklife

Harvard University Personnel Manuals
Administrative/Professional Staff and
Non-Bargaining Unit Support Staff Union Contracts
http://hr.harvard.edu/union-contracts