**Updating Your Benefits Using PeopleSoft**

Use this document to assist in updating your benefits enrollment due to a life event such as marriage, adding a dependent due to loss of coverage, or birth/adoption of a child. Your Life Event packet contains the information you need to make benefit elections. If you require additional assistance, please contact the Benefits office at 617-496-4001 or benefits@harvard.edu.

**Key Points**

30 Days to Submit Benefits: You have 30 days from the date of your life event to make your benefit elections.

Save vs. Submit: You may Save your elections and return to make changes within the 30-day window, but your elections will not be processed until you click Submit on the Submit Benefits page in PeopleSoft (clicking only the first Submit button on the Benefits Enrollment page will save your elections). If you do not submit your benefits before the enrollment period ends, your elections will not be processed.

Dependent Documentation: Benefits must receive all appropriate dependent certification documentation for any dependents you add to medical, dental and/or vision within the 30-day window. If documentation is not received within that timeframe, any undocumented dependents will be removed from plans, retroactive to your event date.

Please send all dependent documentation with the Dependent Certification Cover Sheet included in your Life Event packet to Benefits by fax: 617-496-3000, email benefits@harvard.edu, or in the envelope provided in the packet.

★ Must Enroll Dependents to Medical, Dental and Vision Care: Any dependents that you would like coverage for must be added to your medical, dental and/or vision care plan through the PeopleSoft Self-Service Benefits Enrollment System.

Once Submitted, No Changes: Once you have submitted your elections, they cannot be changed until the next Open Enrollment period, or in the event of a qualified change in family or employment status.

Additional Resources: Review the last section of this document for links to additional benefit resources.

**Access Requirements**

In order to enroll in benefits, you will need your HUID (Harvard Identification) and PIN (Personal Identification Number) or HarvardKey, if you have claimed this. You will not be able to log onto HARVie (Harvard Intranet for Employees) or PeopleSoft without a PIN or HarvardKey.

If you do not have a HUID password, claim your HarvardKey to gain access: Visit key.harvard.edu and follow the prompts to “Claim your HarvardKey”. You will need to supply your HUID, last name, and date of birth in order to claim. If you need help claiming your HarvardKey, please call the HUIT support desk at 617-495-7777 or email ithelp@harvard.edu.

**Table of contents**

Access PeopleSoft 9.1 Benefits Enrollment ......................................................................................................................... 2
Selecting Benefits – Benefits Enrollment Page ....................................................................................................................... 3
Adding Dependents ............................................................................................................................................................... 4
Saving Benefit Selections ....................................................................................................................................................... 7
Submitting Benefit Elections .................................................................................................................................................. 7
Additional Resources ......................................................................................................................................................... 8

11/2/15
Access PeopleSoft 9.1 Benefits Enrollment

1. Once you have logged on to HARVie, click the **PeopleSoft Log in** link located on the top center of the page: http://HARVie.harvard.edu:

![PeopleSoft Log in](image1)

2. After the PeopleSoft redirect page appears for 5 seconds, the HarvardKey login screen displays. Choose the right tab for your login type (HUID or HarvardKey), enter your credentials, then click Login or press the Enter key.

![PeopleSoft Log in](image2)

3. This will bring up the PeopleSoft home page. Click **Benefits Enrollment** in your Quick Links — Self Service, or navigate directly using the following path: Main Menu > Self Service > Benefits > Benefits Enrollment

![PeopleSoft Home Page](image3)
4. This is the initial Benefits Enrollment page. Review the information displayed, then click Select to begin making your elections.

The main Benefits Enrollment page opens.

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.

If you had previously made some choices but did not yet submit your benefits, the selection choices and associated costs will appear next to the “New” for each benefits type (such as Medical, Dental, etc.).

To review and make an election to a benefit type, click Edit.

If you are receiving a benefit which is automatic and no cost to you, the detail will display and you will not be able to make any changes to it.

Tip: click the Enrollment Handbook link to review Harvard’s Benefits Enrollment Guide. It is also located on the HHR website.
Each benefit page has a very similar set-up.

Here, John Harvard clicked Medical to review and update his medical benefit election. Notice that each election type provides the pay-period costs for each coverage level.

Click the radio button ☐ to make a selection, such as Harvard Pilgrim HMO.

To view more information about a specific plan, click the plan name. For example, if John clicked Harvard Pilgrim HMO, a new window would open to the Harvard Pilgrim HMO website.

Click Update Elections to store your selection.

Click Cancel to return to the main Benefits Enrollment page without saving.

Notes on Dependents:

- Once a medical, dental or vision care selection is made for the first time, the Add Review Dependents button appears.
- 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 that you would like coverage for must be attached to your medical, dental and/or vision care plan. You may attach them by placing a check mark in the Enroll box next to their name.
- If you make an mistake while adding a new dependent please contact Harvard Benefits at 617-496-4001.

The following will display on the PeopleSoft Benefits Enrollment pages for other common enrollment types:

Adding Dependents

The Benefits office must receive appropriate certification documentation for any dependents you add to medical, dental and/or vision care coverage within your 30-day enrollment period. If no documentation is received in that time, any undocumented dependents will be removed from your plan(s), retroactive to the date of your qualified status change (e.g., date of birth or date of marriage).

★ Important: Your dependents must be added to your medical, dental and/or vision care plan prior to submitting your elections.
Once you select a medical, dental and/or vision care plan and Add/Review Dependents, the following page will display to indicate that you do not have any dependent information in PeopleSoft. 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, 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?
A Federal Qualified Dependent is a spouse and all eligible children.

Click the link provided on the page 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 the dependent, or if applicable check “Same Address as Employee” and “Same Phone as Employee.”

5. Click [Save].
A warning message appears to remind you to provide the necessary certification documentation to Benefits within 30 days of your life event date.

Click **OK** on the warning message, then click **OK** under Save Confirmation. You are now able to add the 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, 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 the coverage.
2. Click the enroll checkbox next to the dependents you want covered under this plan.
3. Click **Update Elections**.
Saving Benefit Selections

Once you have made your selection and added/selected any dependents, a confirmation page displays. It will confirm your selection choice, pay period cost (or contribution amount for a Flexible Spending Account [FSA]), and any covered dependents.

Click to store your choices, or click to change your selection.

Remember: in order to confirm all of your elections, you must submit, then confirm your benefits from the main benefits enrollment page.

Submit Benefit Elections

Submitting your benefit elections is a two-step process.

1. From the bottom of the Benefit Enrollment page, review your total costs for the year, then click Submit.

By clicking submit, you have only saved your elections. You must go to the next step to confirm.

2. This is the second and final page to submit your benefit elections. Once they have been submitted, you will be unable to make further changes until the next Open Enrollment or if 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! Until this Submit button is checked, your elections will not be finalized in the system.
Additional Resources

Help with your HarvardKey or HUID/password login (needed to login to HARVie and PeopleSoft):
http://reference.iam.harvard.edu (for instructions)
ithelp@harvard.edu
617-495-7777

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

HARVie homepage:
http://harvie.harvard.edu

Benefits:
benefits@harvard.edu
(f) 617-496-3000
(ph) 617-496-4001

Compensation and Benefits Information:
HARVie (harvie.harvard.edu) > Compensation & Benefits
http://hr.harvard.edu/totalrewards

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

Harvard University Personnel Manuals
Administrative/Professional Staff and Non-Bargaining
Unit Support Staff
Union Contracts