



HOW TO ENROLL IN YOUR BENEFITS

A Guide to Using the PeopleSoft Benefits Enrollment System

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, or life. 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 a qualifying change in your family or employee status.

Do not use a mobile device to enroll: Using your phone to enroll in benefits is not recommended due to the enrollment page layout. Instead, use your laptop or desktop.

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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.

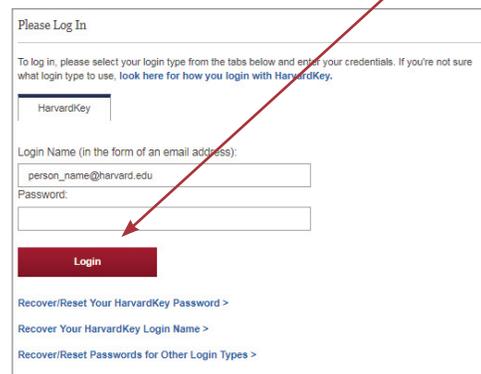
If you have not yet claimed your HarvardKey, simply visit **key.harvard.edu** and follow the prompts under *Claim your HarvardKey*. As part of the process, you'll need to supply your HUID, last name, and date of birth. If you need help claiming your HarvardKey, please contact the Harvard University Information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

ACCESSING PEOPLESOFT

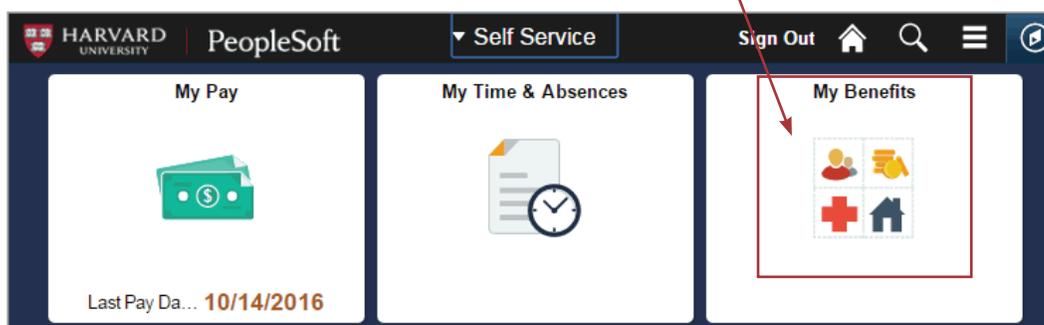
1. Visit the Harvard Human Resources (HARvie) website at hr.harvard.edu and click on **PEOPLESOFT** at the top of the page.



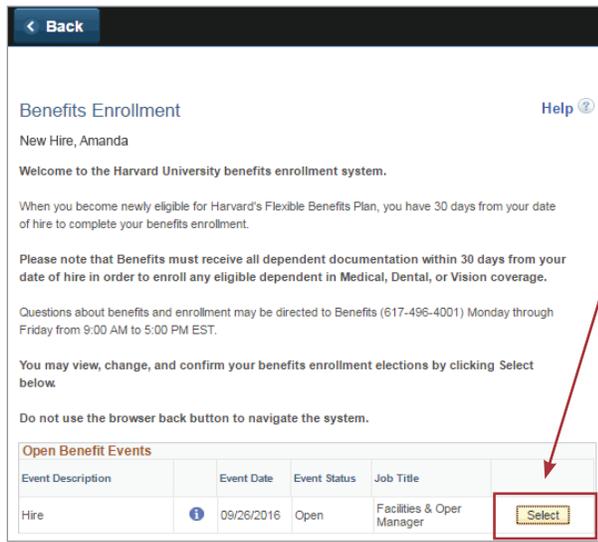
2. You will be redirected to the HarvardKey login screen. Simply enter your credentials, and then click **Login** or press the **Enter** key. Note that using the Duo two-step authorization is required for login.



3. This will bring up the PeopleSoft home page. From there, click the **My Benefits** tile.



4. From the **My Benefits** page, click **Benefits Enrollment**.



5. This is the initial **Benefits Enrollment** page. Review the displayed information, and then click **Select** button associated with the open event status to begin making your elections.

SELECTING YOUR BENEFITS

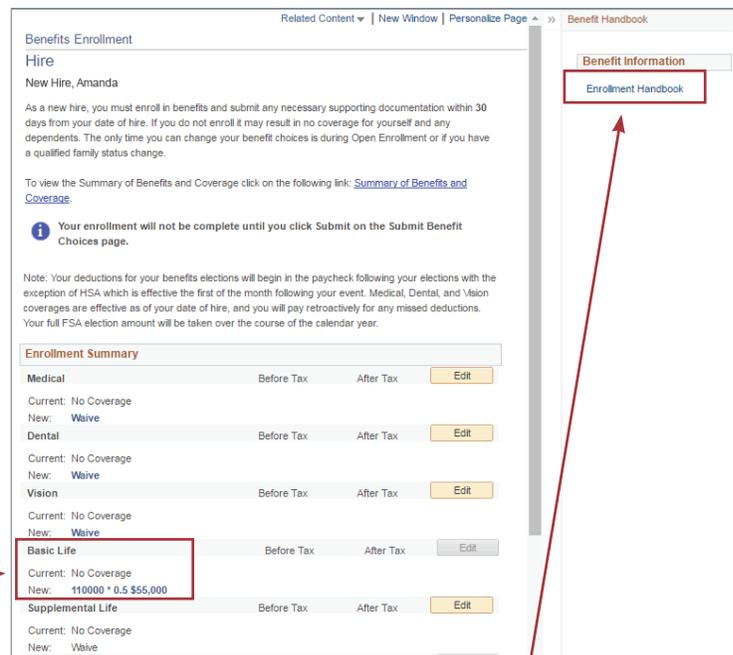
1. Make your elections.

The main **Benefits Enrollment** page displays all of your benefit enrollment elections. The default will be your current benefit elections.

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 the **Edit** button next to the benefit you are electing.

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.



Tip: Click the **Enrollment Handbook** link to review Harvard's Benefits Enrollment Guide, which is also located on the Harvard Human Resources website at hr.harvard.edu.

2. Review benefit details.

Your default coverage is set to your current benefit elections, 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, click the radio button next to the plan name.

To learn more about a specific plan, click on the plan name under the [Provider Links](#) on the right of your screen.

Click [Update and Continue](#) 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:

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.

Dependent Life Insurance

- Select amount or waive coverage
- Assign dependents to coverage

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 you select **Yes**.

Health Spending Account (if eligible)

- Select **HSA** or **wave**.
- Enter annual goal amount if **HSA** is selected.

Notes on Dependents:

- Once you make your first medical, dental, vision care or dependent life selection, the radio button will appear.
- When your dependent(s) are added to 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 names. This must be done separately for each benefit they are being enrolled in (medical, dental, and/or vision care).
- 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, vision care and/or dependent life 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
your life event.

Once you select medical, dental, vision care and/or dependent life 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 **Back**. This will leave your coverage level at Employee Only.

1. Enter your dependent's personal information, including Social Security number. Fields with an asterisk (*) 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**.

Enrollment Dependent Summary
New Hire, Amanda

Click the dependent's name if you would like to review or change personal information.

Once you have reviewed the dependent information on this page, click the Back button on the top of this page and do not forget that only those dependents who have a check mark in the Enroll box will be covered under your medical, dental or vision plan.

No Dependents on Record

Add a dependent

Dependent Personal Information
New Hire, Amanda

Click Save once you have added your dependent's personal information. This information will go into effect as of September 26, 2016. If you would like to exit this page without adding a dependent, click on the Back button on the top of this page. Dependents eligible for coverage under the medical, dental or vision plan include: spouse, same or opposite sex domestic partner, and dependent children. For any newly covered dependent, you will need to provide documentation of the dependent's relationship to you. See HARvie or your enrollment materials for details about appropriate documentation. If you still have questions about what qualifies as supporting documentation, please call Benefits at 617-496-4001.

Personal Information

*First Name
Middle Name
*Last Name
Name Prefix
Name Suffix
*Date of Birth
*Gender
SSN (Social Security Number)

Federal Qualified Dependents? Yes No

Dependent Relationship and Qualification

If you are covering a spouse or any birth or adopted children, those dependents are "Federally Qualified Dependents". If you are covering a domestic partner please see the following link for additional information as to whether your dependents are considered "Federally Qualified Dependents".

*Relationship to Employee

Status Information

*Marital Status Single As of

Address and Telephone

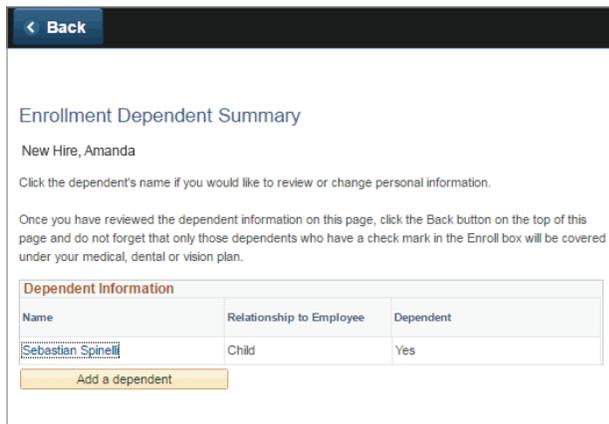
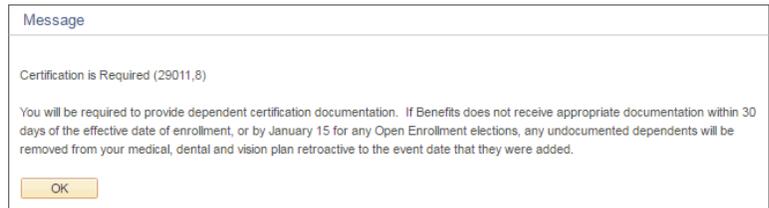
Same Address as Employee
Country United States
Address 123 Main Street
Cambridge, MA 02138

Same Phone as Employee
Phone

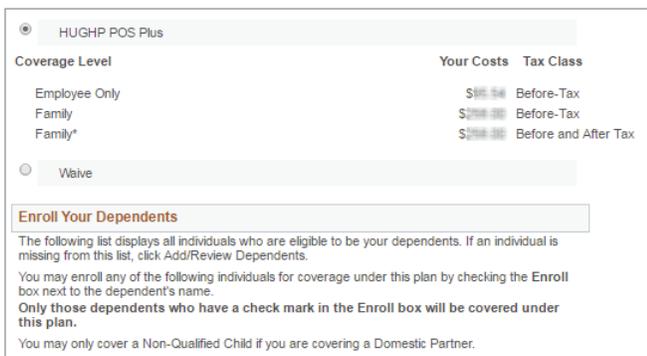
Save

Important: A warning message reminds you to provide the necessary certification documentation to Benefits within **30 days** of your effective date of enrollment.

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



To add another dependent, click **Add a dependent** on the **Enrollment Dependent Summary** page. To return to the **Benefits Enrollment** page, click **Back**.



Important: In order for your dependents to be added to your medical, dental, vision care and/or dependent life coverage, you must click the **Back** button and return to the **Benefits Enrollment** page and add them to your selection(s). To add a dependent from the medical, dental, vision care or dependent life 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 and Continue**.

SAVING YOUR BENEFIT SELECTIONS

Benefits Enrollment

Medical

New Hire, Amanda

i Your enrollment will not be complete until you click **Submit** on the **Submit Benefit Choices** page.

Your Choice

You have chosen HUGHP POS Plus with Family coverage.

Your Estimated Per-Pay-Period Cost

Your Cost \$ XXX.XX

Your Covered Dependents

Name	Relationship
Sebastian Spinelli	Child

Notes

Once submitted, this choice will take effect on 09/26/2016. Deductions for this choice will start with the first pay period after your elections are processed.

[Update Elections](#) [Edit](#)

Once you've made your selections 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), and covered dependents, if applicable.

Click [Update Elections](#) to save your choices, or click [Edit](#) to change your selections.

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, and then click [Save and Continue](#).
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 qualifying 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](#).

This table summarizes estimated costs for your new benefit election. (The "Employer" column displays the amount Harvard is contributing to subsidize the cost of your benefits.)

Election Summary				
Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax	Employer
Costs	258.00	258.00	0.00	501.33
Your Costs	258.00	258.00	0.00	

If you receive a salary increase that moves you to a higher salary tier, your costs will change.

[Save and Continue](#)

Click **Save and Continue** to save your elections above. You must complete your enrollment before the end of your enrollment period, which is 30 days from your event date. In order to complete enrollment, you must click **Submit** on the **Submit Benefits Choices** page.

Benefits Enrollment

Submit Benefit Choices

New Hire, Amanda

You have almost completed your enrollment. If you have no further changes, click **Submit** at the bottom of this page to process your benefit choices.

Once your enrollment is processed, you will not be able to make any further benefit changes until the next Open Enrollment period or if you have a qualified family status change.

Authorize Elections

By submitting your benefit choices you are authorizing the University to take deductions from your paycheck to pay for your benefit costs. You are also authorizing Benefits to send necessary personal information to your selected providers to initiate and support any changes to your coverage. **Remember that Benefits must receive dependent documentation within 30 days of your date of hire. If documentation is not received by that time, any undocumented dependents will be removed from your medical, dental, and vision plans retroactive to your date of hire. Once you click Submit below, your elections cannot be changed until the next annual Open Enrollment period unless you experience a change in family or employment status.**

[Submit](#) [Cancel](#)

Click **Submit** to finalize your benefits elections.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

ADDITIONAL RESOURCES

HarvardKey Help

reference.iam.harvard.edu
ithelp@harvard.edu
phone: 617-495-7777

Harvard Human Resources Website

hr.harvard.edu

New Employee Resources

hr.harvard.edu/new-employees

Compensation and Benefits Information

hr.harvard.edu/totalrewards

Benefits

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

Harvard University Personnel Manuals

Administrative/Professional Staff and Non-Bargaining
Unit Support Staff and Union Contracts

hr.harvard.edu/policies-forms-contracts