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.

### 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](http://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.

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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.
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.

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.

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 waive.
• 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.
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

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.
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