HARVARD
Human Resources

HOW TO ENROLL IN OR UPDATE YOUR BENEFITS

A Guide to Using the PeopleSoft Benefits System

Use this document to assist in your benefits enrollment. Newly-eligible employees please refer to your *Benefits Enrollment Guide* for detailed information about your benefit options. Those experiencing a life event (such as marriage, birth/adoption of a child, adding a dependent due to loss of coverage, etc.), please refer to your *Life Event* packet for information. 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. As a new employee, you have 30 days from your date of hire to make your benefit elections. If you experience a life event, you have 30 days from the event date to make eligible changes.

Submit your benefits. By clicking *Done* on each applicable benefit, 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 Enrollment* on the **main landing page**. If you save your elections but don't submit them, your elections won't be processed.

Enroll dependents in medical, dental, vision care, or life. You must provide certified documentation to enroll your dependents in the medical, dental, vision, or life insurance plans. If your documentation isn't received by Benefits within the 30-day window, your dependents will be removed from the plans retroactive to your hire date/first date of eligibility or the date of your life event.

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.

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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, visit **key.harvard.edu** and follow the prompts under *Claim your HarvardKey*. 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**. **New employees please note:** You will not be able to log onto PeopleSoft until your actual hire date.

ACCESSING PEOPLESOFT

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

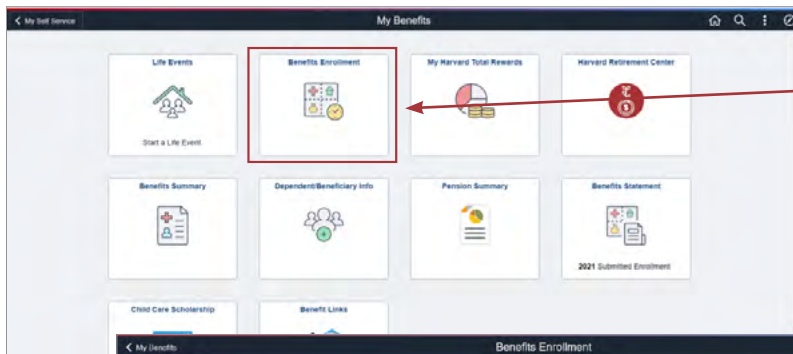**2.** You will be redirected to the HarvardKey login screen. Simply enter your credentials, and then click *Login* or press the *Enter* key. Note that using the Duo two-step authorization is required for login.
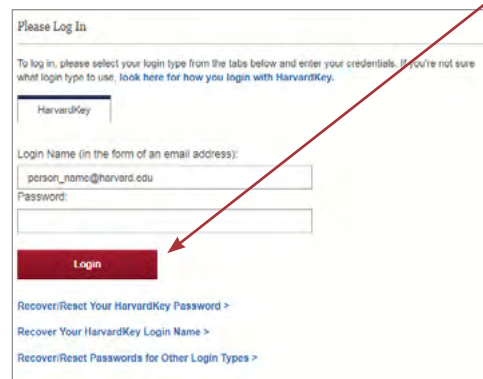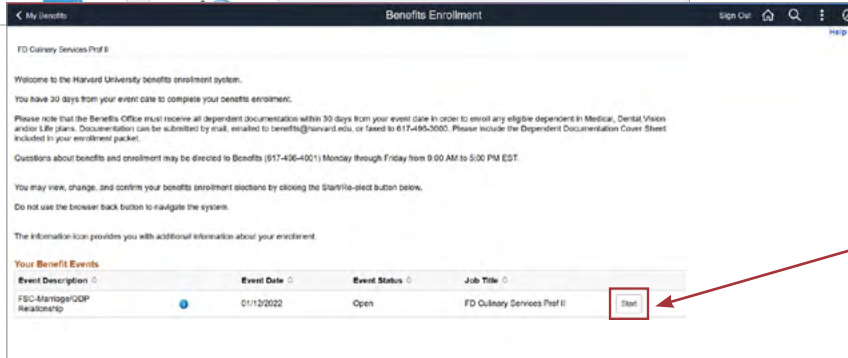

3. This will bring up the PeopleSoft home page. From there, click the *My Self Service* tile.
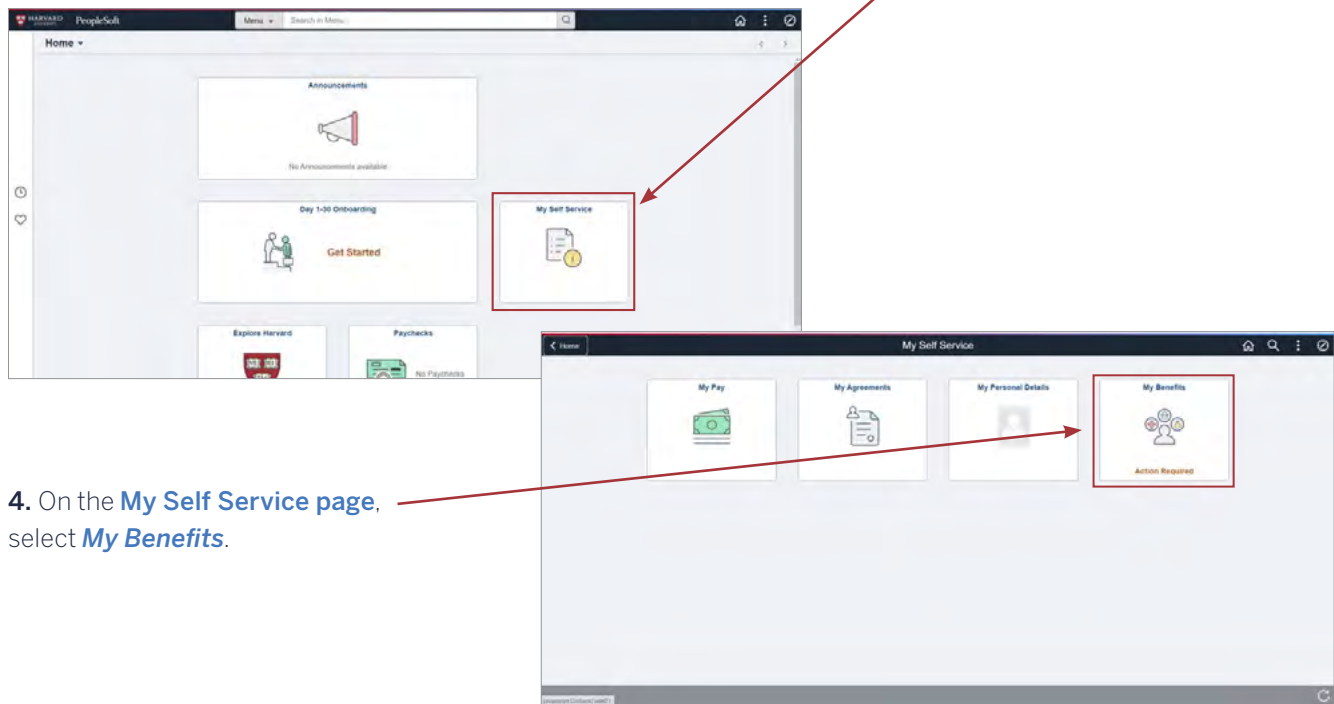
4. On the **My Self Service page**, select *My Benefits*.

**5.** On the **My Benefits** page, select *Benefits Enrollment*.

6. This is the initial **Benefits Enrollment** page. Review the displayed information, and then click the *Start* button at your 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 are newly eligible and have not yet made any selections, the default will be "No Coverage / Waive" and the total cost will be $0.00.
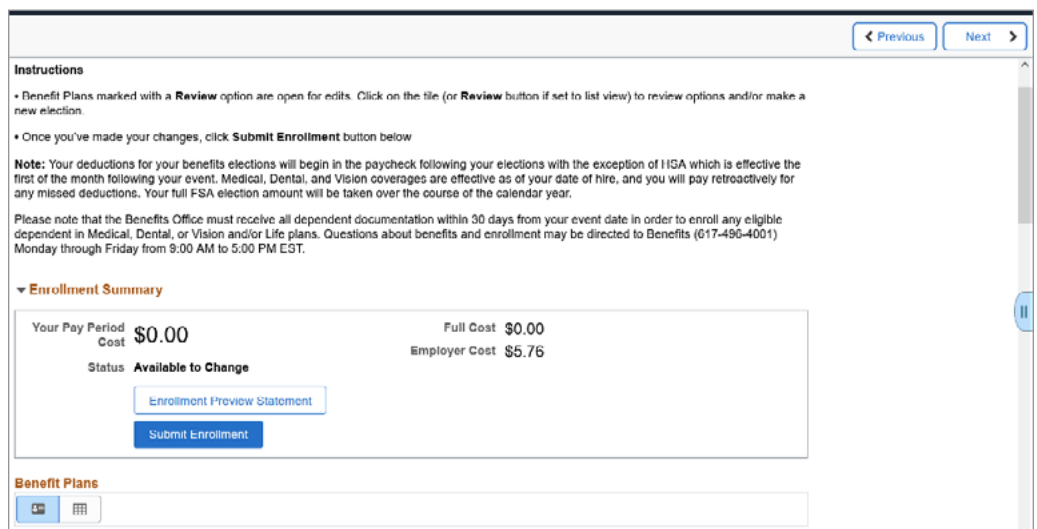
If you previously made elections but did not yet submit your benefits, these elections, along with their associated costs, will display as shown. To make or change your election, simply click the *tile of benefit you are electing*.

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.

2. Review benefit details.

Your default coverage is set to your current benefit elections (or to "waive" if you are new), 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 based on the dependents covered.

To make your selection, click the select button next to the plan name. To learn more about a specific plan, click on the plan name in the Resources section on the right of the screen.

Click *Done* to save your selection. Click *Cancel* to return to the main **Benefits Enrollment** page without saving.

Repeat this process for each of the following benefits, as noted below. (Your eligibility to change a benefit may depend on your life event.)

Dental
• Similar to medical

Vision
• Similar to medical

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

Supplemental Life
• Select amount or waive coverage

Spouse/Domestic Partner Life Insurance
• Select amount or waive coverage
• Enroll a dependent

Child Life Insurance
• Select amount or waive coverage
• Enroll dependent(s)

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

Long-Term Disability
• Select plan or waive coverage

Health Care FSA and Dependent Care FSA
• Select plan or waive coverage
• Enter annual goal amount if *electing to enroll*

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

Hyatt Legal Plan
• Select plan or waive

Identity Theft Protection
• Select *Individual* or *Family* coverage or waive.

Notes on Dependents:
• When you add dependent(s) to the system, this page will display your dependents and allow you to add them to your medical, dental, vision, spouse life and/or child life plans.
• Any dependents for whom you'd like coverage must be added to your medical, dental, vision, spouse life and/or child life plans. You may add them by placing a checkmark in the box next to their names. This must be done separately for each benefit they are being enrolled in.
• 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, spouse life and/or child life plans prior to submitting your elections.

ADDING YOUR DEPENDENTS

Want to enroll a dependent?

You will need to provide dependent documentation for any newly added dependents. For adoption, birth, marriage, and registration of domestic partnership, documentation can be uploaded to PeopleSoft when you complete the self-service enrollment. For all other events, submit the documentation, along with the Dependent Documentation Cover Sheet found in your enrollment packet, to Harvard's Benefits Department.

Remember: Documentation must be submitted within 30 days of your date of hire or life event.

Fax at **617-496-3000**   **Email** at **benefits@harvard.edu**   **Mail** using the postage-paid envelope in your packet

Once you select a medical, dental, vision, and/or dependent life plan, click *Add/ Update Dependent*, if you want to add or change dependents and the following page will display.

Any current dependents already associated with your benefits will be shown. If you are new, you will not have any dependent information in the PeopleSoft system. To add a dependent, click *Add Individual*.

If you do not wish to add any dependents, click *the X on the top right*.

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. Enter the address, phone number and email of your dependent.

4. Click *Save*.

5. To add another dependent, click *Add Individual*. To return to the **Benefits Enrollment** page click *the X on the top right*.

Important: In order for your dependents to be added to your medical, dental, vision, spouse life and/or dependent life coverage, you must go back to the **Benefits Enrollment** page by clicking the X button at the top right 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 checkbox next to the name of the dependent(s) you'd like to cover under this plan.

3. Click **Done**.

SUBMITTING YOUR BENEFIT ELECTIONS

After making your elections and adding any dependents, you must complete the process by submitting your benefit elections as follows:

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

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