

———— 2022 ————

BENEFITS RENEWAL PORTAL USER GUIDE

———— BROKER PARTNERS ————



Table of Contents

- 4** Introduction
- 5** Getting Started (Home Page, Dashboard, Building Contribution Models)
- 15** Entering Your Contribution Amounts
- 20** Creating Different Models
- 21** Reviewing Your Potential Renewal Costs
- 22** Submitting Your Renewal
- 23** Summary

Broker Instructions for the Prestige Benefits Renewal Portal

1. You will receive an email from prestigepeobrokerbenefitsportal@okta.com
2. Within that email, you will see an activate button.
3. Click the **Activate Portal Account** button.
4. You will be brought to a new screen.
5. On that screen, use your Prestige-given email address as your username and **create a new password**.
 - a. Additionally, “Submitted” means their decided-on contribution model was sent to Prestige for review. And “Published” means the rules of the contribution model they chose has been pushed into Prism and it is final.
6. Once you land on the welcome page, you will see a blue welcome banner at the top of the page.
7. On this welcome page, you will see a list of all your clients.
8. Next to each client’s name is their renewal status which captures the journey from start to finish.
 - “Not Started” they have not begun to make any models. At least one model will be required to progress forward.
 - “In Progress” designates that you or your client has begun to create a model.
 - “Submitted” designates that your client has sent a contribution model to Prestige for review.
 - “Published” is the final phase and designates that model is final and no further changes can be accepted by the system. Plans are able to be accessed as “view only”.

We encourage you to reference the **Benefits Renewal Portal Guide** that has been created for Client Managers. You can access a PDF or video version of the guide posted below.

Tips for using the Portal with your clients

Our goal is to deliver the best experience possible for you and your client. While we are excited to launch all-new exclusive technology, there may be some unplanned nuances. Here are some tips to enhance your experience this season:

Currently, only one user (broker or client) can make changes at a time. This is to prevent a model override. If you plan to assist your client with their contribution strategy, we suggest that you set up a screen share to view the system in tandem.

Currently, models are not able to be downloaded. This has been identified as an enhancement for future seasons.

If you and your client choose to not make any changes for this coming year, a contribution model will still need to be created to proceed through the renewal process as mentioned in #8 above.

To replicate the 2021-2022 contribution strategy, you or your client will create a new model, save it, and review the contribution amounts in blue text. You can build the same model as the current contribution by matching the amount on the right side of your screen and entering each number into the Monthly Contributions section. You will need to do this for each class and plan listed. System notifications will prompt you or your client when all boxes have been selected or if something is missing.

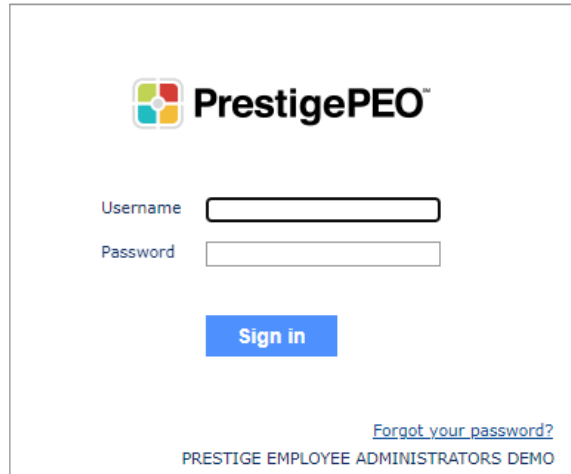
Open Enrollment season is here!

Open Enrollment season is here! PrestigePEO is excited to introduce the Benefits Renewal Portal, which will allow you to compare contribution models to find the best and most cost-effective plans for your business. The PrestigePEO Benefits Renewal Portal is a new and all-inclusive way to review and make your contribution choices for your employees. Below is a step-by-step user guide to navigating this new portal.

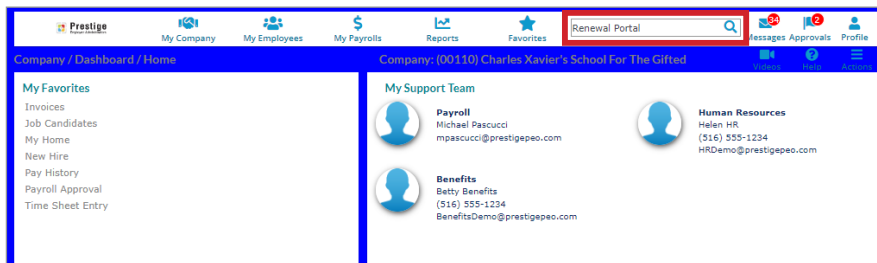


Getting Started

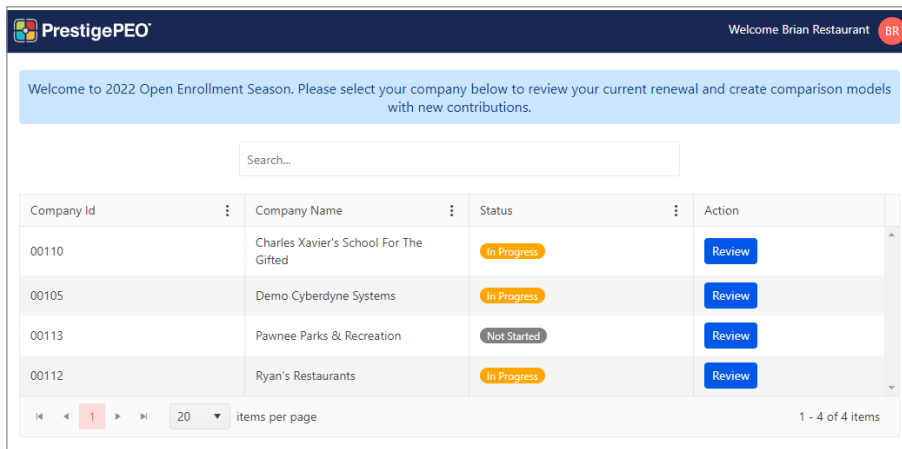
Log in to PrestigePRO with your username and password.



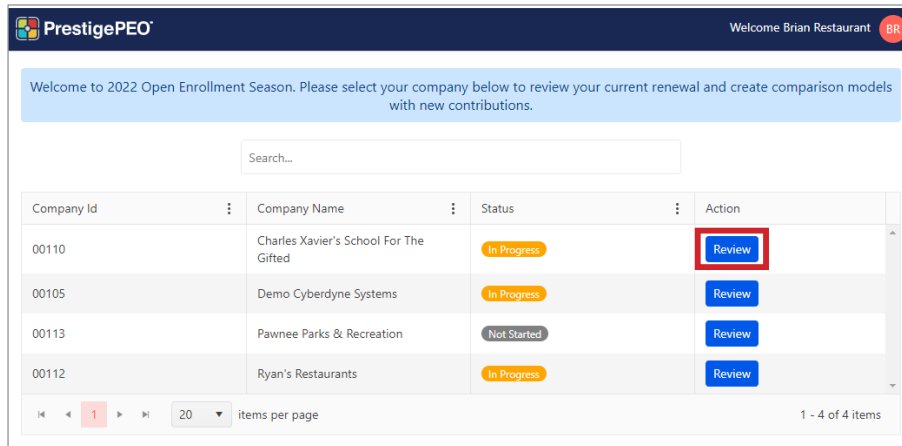
In the search box in the upper right corner, type the words “Renewal Portal” and click enter.



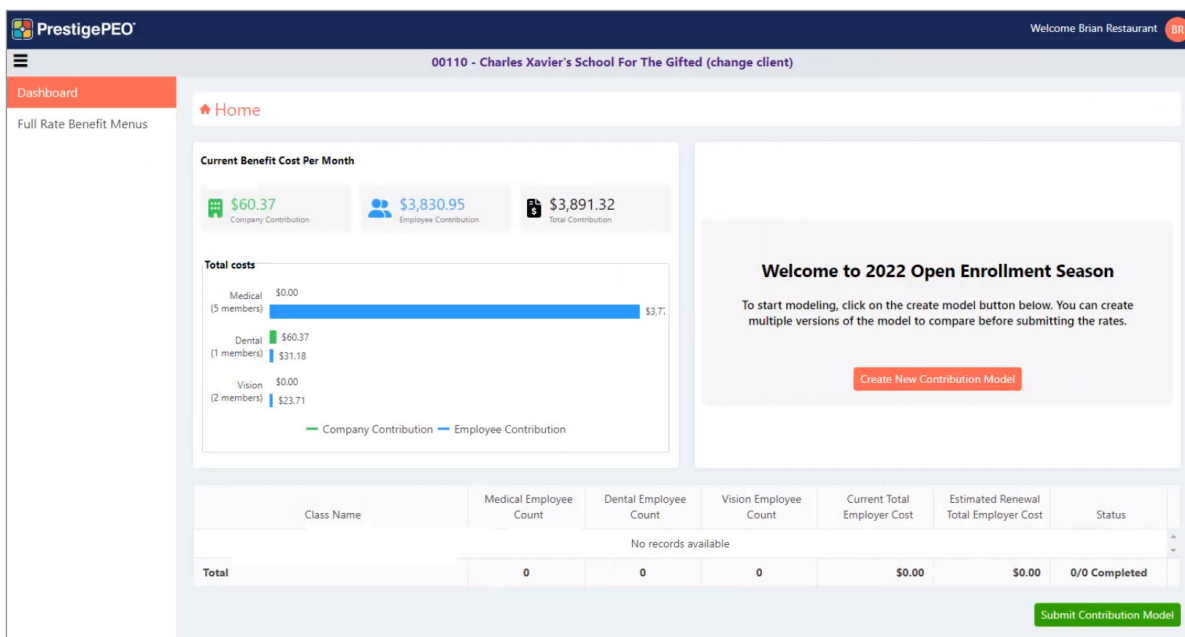
When you open the Renewal Portal, you will be brought to a Welcome Screen that will list your company’s entities with PrestigePEO.



To review and change contributions for a specific entity, click the “Review” button for that entity. (You can use the search bar and type the company or entity name you would like to start with rather than scrolling through the list.)



Once you click “Review” on the company you selected, you will be taken to the Home Page for that entity.



If you are responsible for multiple entities, you will need to perform the same process for each entity. You will have to save your work for each entity and return to the Welcome Screen to select the next entity. There are two ways to get back to the Welcome Screen:

1. By clicking the PrestigePEO logo in the top left corner.
2. By clicking your business name on the change client hyperlink on the top banner of the Home Page.



Your Home Page

You have now reached the Home Page, where you will view both your current contribution model as well as visualize and compare up to three different projected benefit costs, before having to finalize a plan.

The screenshot shows the PrestigePEO Home Page for client 00110 - Charles Xavier's School For The Gifted. The page displays the following information:

- Current Benefit Cost Per Month:**
 - Company Contribution: \$60.37
 - Employee Contribution: \$3,830.95
 - Total Contribution: \$3,891.32
- Total costs breakdown:**
 - Medical (5 members): \$0.00 (Company), \$31.18 (Employee)
 - Dental (1 members): \$60.37 (Company), \$31.18 (Employee)
 - Vision (2 members): \$0.00 (Company), \$23.71 (Employee)
- Welcome to 2022 Open Enrollment Season:** A message encouraging users to click on the "Create New Contribution Model" button.
- Table:** A table with columns: Class Name, Medical Employee Count, Dental Employee Count, Vision Employee Count, Current Total Employer Cost, Estimated Renewal Total Employer Cost, and Status. The table shows "No records available" and a total of 0 for all counts and costs.
- Buttons:** "Create New Contribution Model" (orange) and "Submit Contribution Model" (green).

Before you begin your Open Enrollment process, you have the ability to download the 2022-2023 Full Rate Benefit Menus. If you click the button on the far-left side of the page labeled “Full Rate Benefit Menus” under the Home icon, you can review all of the plan information including deductibles and network details. Reviewing the Full Rate Benefit Menus will assist you in making important decisions regarding your 2022-2023 Open Enrollment.

The screenshot shows the PrestigePEO Full Rate Benefit Menus page. The "Full Rate Benefit Menus" link in the sidebar is highlighted with a red box. The main content area displays three download options:

- Medical Benefit Menu:** Click to download Medical Benefit Menu document. File: Prestige Medical Menu.pdf. Download button.
- Dental Benefit Menu:** Click to download Dental Benefit Menu document. File: Prestige Dental Menu.pdf. Download button.
- Vision Benefit Menu:** Click to download Vision Benefit Menu document. File: Prestige Vision Menu.pdf. Download button.

Your Dashboard

The Dashboard is split into three separate sections.

The screenshot shows the PrestigePEO dashboard for client '00110 - Charles Xavier's School For The Gifted'. The dashboard is divided into three main sections, each highlighted with a red box and a numbered callout:

- 1** **Current Benefit Cost Per Month**: This section displays three key metrics: Company Contribution at \$60.37, Employee Contribution at \$3,830.95, and Total Contribution at \$3,891.32. Below these is a horizontal bar chart titled 'Total costs' comparing Company and Employee contributions for Medical, Dental, and Vision benefits. Medical costs are \$0.00 for 5 members, Dental is \$60.37 for 1 member, and Vision is \$0.00 for 2 members. The chart shows that Employee contributions are significantly higher than Company contributions for all categories.
- 2** **Welcome to 2022 Open Enrollment Season**: This section contains a message: 'To start modeling, click on the create model button below. You can create multiple versions of the model to compare before submitting the rates.' Below the message is a red button labeled 'Create New Contribution Model'.
- 3** **Benefit Classes Table**: This section contains a table with columns for Class Name, Medical Employee Count, Dental Employee Count, Vision Employee Count, Current Total Employer Cost, Estimated Renewal Total Employer Cost, and Status. The table currently shows 'No records available' and a 'Total' row with all counts and costs at zero.

At the bottom right of the dashboard, there is a green button labeled 'Submit Contribution Model'.

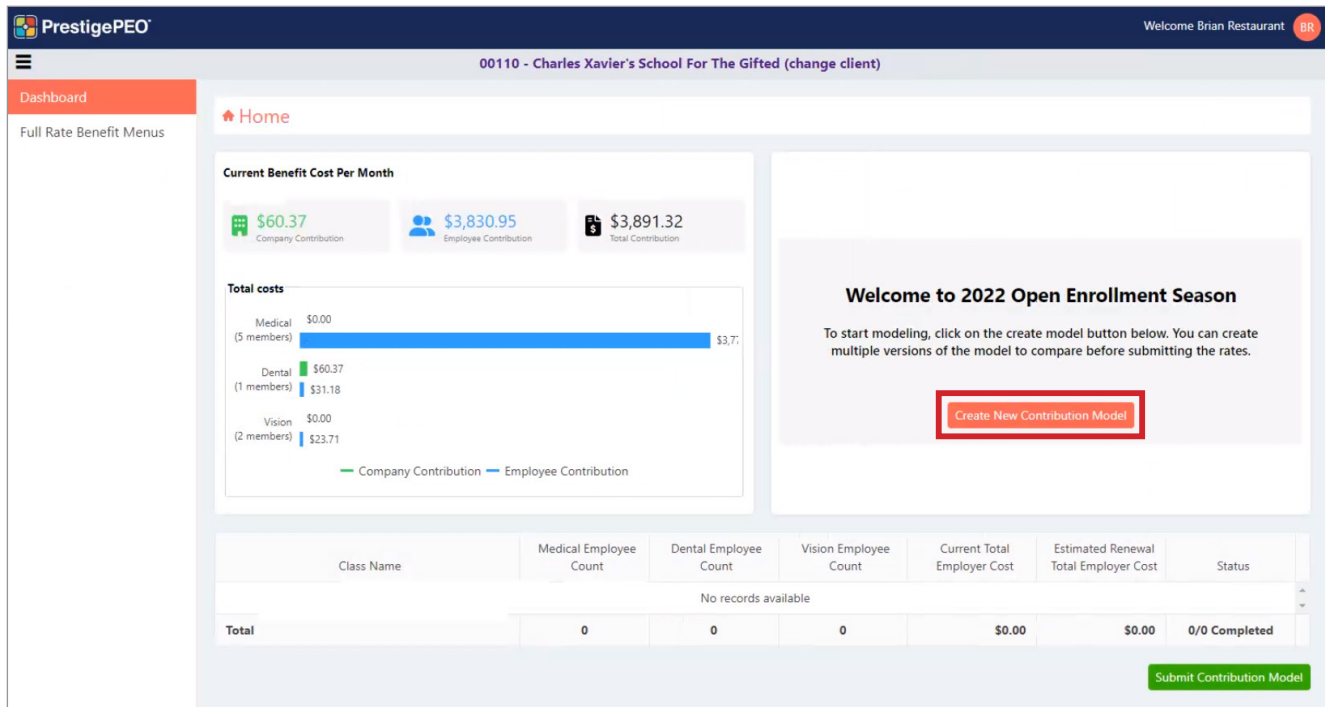
1. The section on the left are your current benefit costs per month.
2. The section on your right will reflect your potential 2022-2023 projected benefits costs per month and where you will begin your Open Enrollment journey.
3. The bottom section will be a breakdown of your current Benefit Classes once you build potential models.

**If you click the three bars on the top left hand side of the screen, the left panel will collapse allowing more visibility for your Dashboard.*

This screenshot shows the same PrestigePEO dashboard as above, but with the left sidebar collapsed. The three main sections are now more prominent and take up more of the screen width. The 'Current Benefit Cost Per Month' section, 'Welcome to 2022 Open Enrollment Season' section, and the 'Benefit Classes Table' are all visible and expanded.

Getting Started

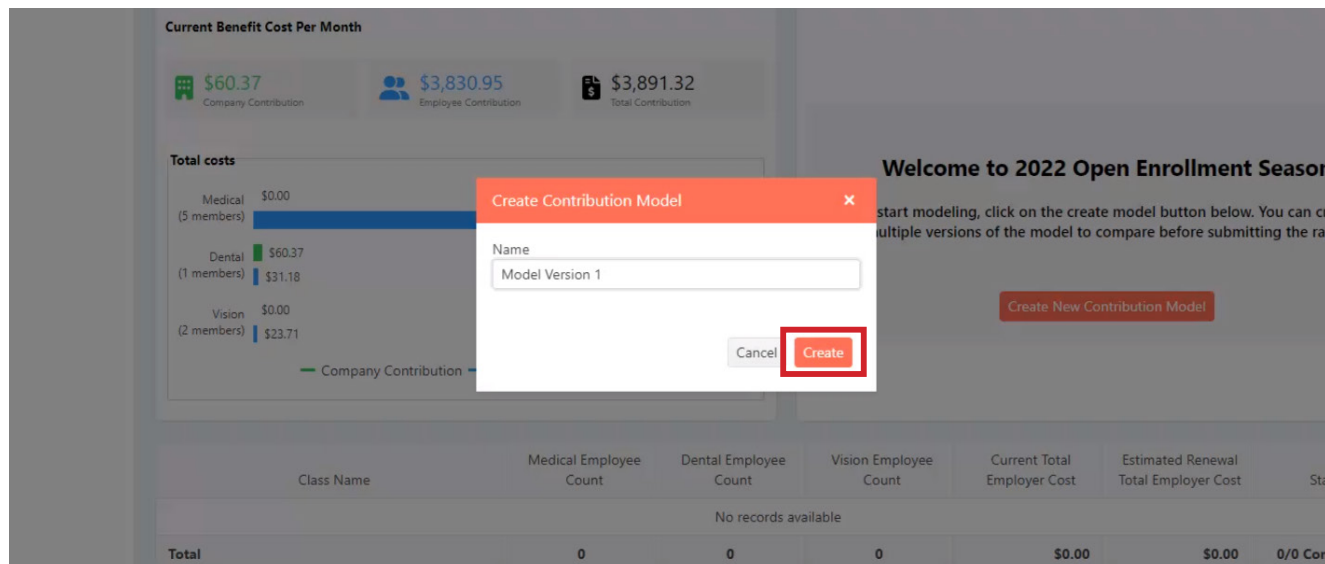
To begin, click the “Create New Contribution Model” button.



A new pop-up box will appear where you are now able to name the model. (When naming the model, use a distinct name that will allow you to decipher it from other models. Example: Model Version 1, MV1, OE Model 1, Option 1.)

By clicking the “Create New Contribution Model” button, you can begin creating different potential contribution models that will allow you to select plans while viewing different contribution options.

Click “Create” to save the model’s name and to begin building the model.



Summary Page

When the model opens, you will be brought to the Summary page, where you are able to view by Class, your eligibility count (medical, dental, vision), current total employer costs, estimated renewal total employer costs (once the model is built), and the status of the contributions within the model.

The screenshot shows the PrestigePEO interface for client '00110 - Charles Xavier's School For The Gifted'. The page title is 'Model Version 1'. On the left, there is a navigation menu with 'Full Rate Benefit Menus' and a list of benefit classes: PRIMARY, Executive, Management, and All. The main content area is titled 'Summary' and contains a table with the following data:

Class Name	Medical Employee Count	Dental Employee Count	Vision Employee Count	Current Total Employer Cost	Estimated Renewal Total Employer Cost	Status
PRIMARY	0	0	0	\$0.00	\$0.00	Pending
Executive	2	1	0	\$1,084.47	\$0.00	Pending
Management	8	1	1	\$4,283.20	\$0.00	Pending
All	8	0	0	\$2,978.80	\$0.00	Pending
Total	18	2	1	\$8,346.47	\$0.00	0/4 Completed

At the bottom right of the table area, there is a green button labeled 'Submit Contribution Model'.

**Note: You cannot click the "Submit Contribution Model" button until all the classes and plans have been entered.*

On the left panel you will be able to click on different Benefit Classes to view the details of the plan offering, both current and projected. This will allow you to view the model and different contribution settings by specific Benefit Class.

This screenshot is identical to the previous one, but with a red box highlighting the 'PRIMARY' option in the left-hand navigation menu. The table data remains the same.

**Note: You cannot change or update Classes through the Benefits Renewal Portal. You will need to contact your Benefits Specialist to make any Class changes.*

Building Contribution Models

Once you choose a Class to begin working with, you will see the Class details which will show all plans offered to the specific Class, broken down into last year's rates and next year's rates with a potential to edit based on employer contribution levels.

**Your monthly contribution for last year's rate will be visible once you create a model.*

To add or remove plans from this model, you will click the “Add or Terminate Plans” button.

**Note: Plans must be added or terminated before contributions are completed.*

Once you click on “Add or Terminate Plans,” the “Manage Plans” pop-up screen will appear. This screen is where you can view all available medical, dental, and vision plans.

Summary **Class: 1 - PRIMARY** Add or Terminate Plans Set Max Medical Plan Contribution Save Draft

Manage Plans

Medical Dental Vision

	Plan Name	Employee Rate	Spouse Rate	Single Parent Rate	Family Rate
<input checked="" type="checkbox"/>	OXNY01 - Plan 01 Oxford Liberty Direct NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY02 - Plan 02 Oxford Liberty POS NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY03 - Plan 03 Oxford Freedom EPO NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY04 - Plan 04 Oxford Freedom Direct NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY05 - Plan 05 Oxford Freedom Access NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY06 - Plan 06 Oxford Liberty EPO NY	\$0.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/>	OXNY07 - Plan 07 Oxford Freedom	\$0.00	\$0.00	\$0.00	\$0.00

Cancel Save Changes

Single Parent \$1,401.23 0% \$0.00 0 \$0.00 \$0.00

To switch between plan types, click the labeled tabs at the top of the page.

Summary **Class: 1 - PRIMARY** Add or Terminate Plans Set Max Medical Plan Contribution Save Draft

Manage Plans

Medical **Dental** Vision

	Plan Name	Employee Rate	Spouse Rate	Single Parent Rate	Family Rate
<input checked="" type="checkbox"/>	OXNY01 - Plan 01 Oxford Liberty Direct NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY02 - Plan 02 Oxford Liberty POS NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY03 - Plan 03 Oxford Freedom EPO NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY04 - Plan 04 Oxford Freedom Direct NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY05 - Plan 05 Oxford Freedom Access NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY06 - Plan 06 Oxford Liberty EPO NY	\$0.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/>	OXNY07 - Plan 07 Oxford Freedom	\$0.00	\$0.00	\$0.00	\$0.00

Cancel Save Changes

Single Parent \$1,401.23 0% \$0.00 0 \$0.00 \$0.00

The plans that are highlighted, and have a check box, will reflect the plans that you already offer.

The screenshot shows a 'Manage Plans' window for 'Class: 1 - PRIMARY'. It contains a table with columns: Plan Name, Employee Rate, Spouse Rate, Single Parent Rate, and Family Rate. The table lists seven plans. The first and last rows are checked and highlighted in red. Red arrows point to the checkboxes in the first and last rows.

	Plan Name	Employee Rate	Spouse Rate	Single Parent Rate	Family Rate
<input checked="" type="checkbox"/>	OXNY01 - Plan 01 Oxford Liberty Direct NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY02 - Plan 02 Oxford Liberty POS NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY03 - Plan 03 Oxford Freedom EPO NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY04 - Plan 04 Oxford Freedom Direct NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY05 - Plan 05 Oxford Freedom Access NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY06 - Plan 06 Oxford Liberty EPO NY	\$0.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/>	OXNY07 - Plan 07 Oxford Freedom	\$0.00	\$0.00	\$0.00	\$0.00

To add a plan to your offering, click the check box next to the plan name.

This is a close-up of the table from the previous screenshot. A hand cursor is pointing to the checkbox for the second plan, 'OXNY02 - Plan 02 Oxford Liberty POS NY'.

	Plan Name	Employee Rate	Spouse Rate	Single Parent Rate	Family Rate
<input checked="" type="checkbox"/>	OXNY01 - Plan 01 Oxford Liberty Direct NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY02 - Plan 02 Oxford Liberty POS NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY03 - Plan 03 Oxford Freedom EPO NY	\$0.00	\$0.00	\$0.00	\$0.00

To remove a plan from your offering, uncheck the check box next to the plan name.

This is a close-up of the table from the previous screenshot. A hand cursor is pointing to the checkbox for the first plan, 'OXNY01 - Plan 01 Oxford Liberty Direct NY'.

	Plan Name	Employee Rate	Spouse Rate	Single Parent Rate	Family Rate
<input checked="" type="checkbox"/>	OXNY01 - Plan 01 Oxford Liberty Direct NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY02 - Plan 02 Oxford Liberty POS NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY03 - Plan 03 Oxford Freedom EPO NY	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	OXNY04 - Plan 04 Oxford Freedom Direct NY	\$0.00	\$0.00	\$0.00	\$0.00

If you choose to terminate a plan that your employees are currently enrolled in from the past 2021 - 2022 enrollment year, you will see another pop-up box that will prompt you to choose a plan to move those employees to. This is necessary to estimate costs and continue to include the current employee count.

The screenshot shows the 'Manage Plans' window with a pop-up dialog box titled 'Move employees to different plan'. The dialog box prompts the user to select a plan to move employees to and includes a note about the deadline for selecting a new plan.

Move employees to different plan

Please select Plan to move the employees to estimate projected cost

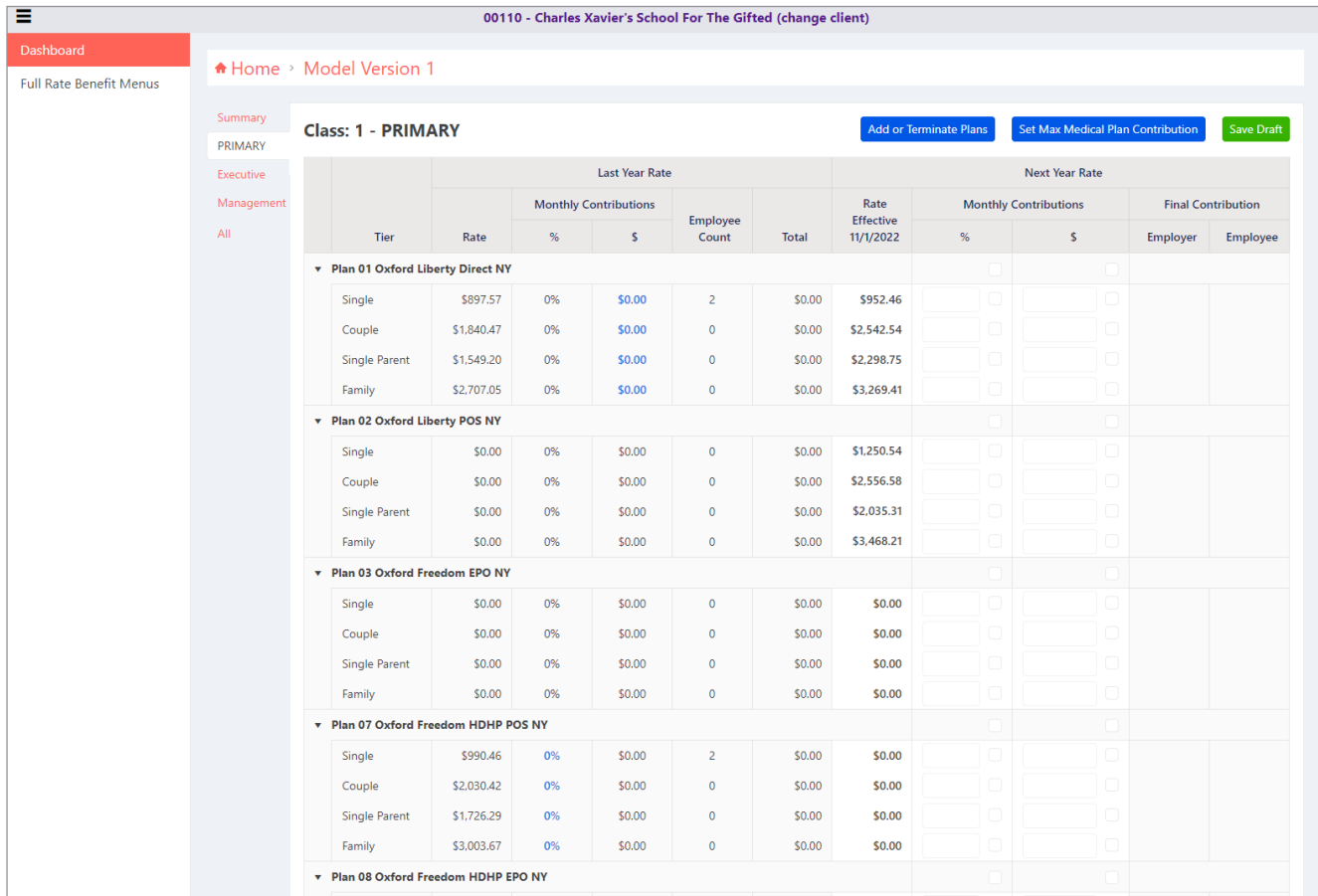
Plan

Note: Employees moved to another plan only for modeling purposes. Employees on this plan will need to elect a new plan through the employee open enrollment portal before 11/1/2022

Once you have chosen the plans that you would like to include in the model, click the “Save Changes” button.



The updated plans will now be reflected on the Class Details page.



Entering Your Contribution Amounts

After determining what plans you would like to offer your employees, you now can enter potential monthly contribution amounts, either by percentage or dollar amount. This will allow you to have a better understanding of your final contributions and therefore choose the right plans for your organization.

Follow the directions below to learn how to enter monthly contributions by either percentage or dollar amount.

**Note: The portal will only allow you to choose one contribution method per category.*

Entering Monthly Contribution by Percentage

If you choose to view potential monthly contributions by a percentage, you have two options:

1. If you want to use the same contribution method for all four categories in the plan, click the top check box to enable the ability to input a dollar amount.

Tier	Rate	Last Year Rate		Employee Count	Total	Rate Effective 11/1/2022	Next Year Rate		Final Contribution	
		%	\$				%	\$	Employer	Employee
▼ Plan 01 Oxford Liberty Direct NY										
Single	\$897.57	0%	\$0.00	2	\$0.00	\$952.46	80	<input checked="" type="checkbox"/>		
Couple	\$1,840.47	0%	\$0.00	0	\$0.00	\$2,542.54	80	<input checked="" type="checkbox"/>		
Single Parent	\$1,549.20	0%	\$0.00	0	\$0.00	\$2,298.75	80	<input checked="" type="checkbox"/>		
Family	\$2,707.05	0%	\$0.00	0	\$0.00	\$3,269.41	80	<input checked="" type="checkbox"/>		
▼ Plan 02 Oxford Liberty POS NY										

**The dollar amount column is shown on this guide as blank to emphasize the impact of entering the monthly contribution by percentage. Monthly contributions will populate with the dollar amount that coincides with the inputted percentage in the portal.*

2. OR if you want to use different contribution methods for the four categories, you will click the specific category's check box under the percentage symbol, to enable the ability to input a percentage.

Tier	Rate	Last Year Rate		Employee Count	Total	Rate Effective 11/1/2022	Next Year Rate		Final Contribution	
		%	\$				%	\$	Employer	Employee
▼ Plan 01 Oxford Liberty Direct NY										
Single	\$897.57	0%	\$0.00	2	\$0.00	\$952.46	80	<input checked="" type="checkbox"/>		
Couple	\$1,840.47	0%	\$0.00	0	\$0.00	\$2,542.54	0	<input type="checkbox"/>	2,034.03	<input checked="" type="checkbox"/>
Single Parent	\$1,549.20	0%	\$0.00	0	\$0.00	\$2,298.75	80	<input checked="" type="checkbox"/>		
Family	\$2,707.05	0%	\$0.00	0	\$0.00	\$3,269.41	0	<input type="checkbox"/>	2,615.53	<input checked="" type="checkbox"/>
▼ Plan 02 Oxford Liberty POS NY										

The percent calculation for the premiums will populate to the right of the box in the Final Contribution column showing the new employer and employee potential contribution costs.

Tier	Rate	Last Year Rate				Rate Effective 11/1/2022	Next Year Rate			Final Contribution	
		Monthly Contributions		Employee Count	Total		Monthly Contributions		Employer	Employee	
		%	\$				%	\$			
▼ Plan 01 Oxford Liberty Direct NY											
Single	\$897.57	0%	\$0.00	2	\$0.00	\$952.46	80	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$761.97	\$190.49
Couple	\$1,840.47	0%	\$0.00	0	\$0.00	\$2,542.54	80	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$2,034.03	\$508.51
Single Parent	\$1,549.20	0%	\$0.00	0	\$0.00	\$2,298.75	80	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$1,839.00	\$459.75
Family	\$2,707.05	0%	\$0.00	0	\$0.00	\$3,269.41	80	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$2,615.53	\$653.88

Entering Monthly Contribution by Dollar Amount

If you choose to view potential monthly contributions by dollar amount, you have two options:

1. If you want to use the same contribution method for all four categories in the plan, click the top check box to enable the ability to input a dollar amount.

Tier	Rate	Last Year Rate				Rate Effective 11/1/2022	Next Year Rate			Final Contribution	
		Monthly Contributions		Employee Count	Total		Monthly Contributions		Employer	Employee	
		%	\$				%	\$			
▼ Plan 01 Oxford Liberty Direct NY											
Single	\$897.57	0%	\$0.00	2	\$0.00	\$952.46	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Couple	\$1,840.47	0%	\$0.00	0	\$0.00	\$2,542.54	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Single Parent	\$1,549.20	0%	\$0.00	0	\$0.00	\$2,298.75	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Family	\$2,707.05	0%	\$0.00	0	\$0.00	\$3,269.41	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

*The percentage column is shown on this guide as blank to emphasize the impact of entering the monthly contribution by percentage. Monthly contributions will populate with the percentage that coincides with the inputted dollar amount in the portal.

2. OR if you want to use different contribution methods for the four categories, you will click the specific category's check box under the dollar symbol, to enable the ability to input a dollar amount.

Tier	Rate	Last Year Rate				Rate Effective 11/1/2022	Next Year Rate			Final Contribution	
		Monthly Contributions		Employee Count	Total		Monthly Contributions		Employer	Employee	
		%	\$				%	\$			
▼ Plan 01 Oxford Liberty Direct NY											
Single	\$897.57	0%	\$0.00	2	\$0.00	\$952.46	80	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$761.97	\$190.49
Couple	\$1,840.47	0%	\$0.00	0	\$0.00	\$2,542.54	0	<input type="checkbox"/>	2,034.03	\$2,034.03	\$508.51
Single Parent	\$1,549.20	0%	\$0.00	0	\$0.00	\$2,298.75	80	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$1,839.00	\$459.75
Family	\$2,707.05	0%	\$0.00	0	\$0.00	\$3,269.41	0	<input type="checkbox"/>	2,615.53	\$2,615.53	\$653.88

The dollar amount calculation for the premiums will populate to the right of the box in the Final Contribution column showing the new employer and employee potential contribution costs.

Tier	Rate	Last Year Rate				Rate Effective 11/1/2022	Next Year Rate		
		Monthly Contributions		Employee Count	Total		Monthly Contributions		Final Contribution
		%	\$			%	\$	Employer	Employee
Plan 01 Oxford Liberty Direct NY									
Single	\$897.57	0%	\$0.00	2	\$0.00	\$952.46		\$761.97	\$190.49
Couple	\$1,840.47	0%	\$0.00	0	\$0.00	\$2,542.54		\$2,034.03	\$508.51
Single Parent	\$1,549.20	0%	\$0.00	0	\$0.00	\$2,298.75		\$1,839.00	\$459.75
Family	\$2,707.05	0%	\$0.00	0	\$0.00	\$3,269.41		\$2,615.53	\$653.88

Setting a Max Contribution (Max Contributions can only be entered for Medical Plans.)

If the dollar amount you would like to contribute will remain the same across all plans, refer to the following instructions for using the “Set Max Medical Plan Contribution” button. This will allow you to select a defined contribution across all plans and categories. If a max contribution is selected, then the portal will automatically populate the correlating monthly contributions.

Begin by clicking the “Set Max Medical Plan Contribution” button.

Tier	Rate	Last Year Rate				Rate Effective 11/1/2022	Next Year Rate		
		Monthly Contributions		Employee Count	Total		Monthly Contributions		Final Contribution
		%	\$			%	\$	Employer	Employee
Plan 01 Oxford Liberty Direct NY									
Single	\$897.57	0%	\$0.00	2	\$0.00	\$952.46			
Couple	\$1,840.47	0%	\$0.00	0	\$0.00	\$2,542.54			
Single Parent	\$1,549.20	0%	\$0.00	0	\$0.00	\$2,298.75			
Family	\$2,707.05	0%	\$0.00	0	\$0.00	\$3,269.41			
Plan 02 Oxford Liberty POS NY									
Single	\$0.00	0%	\$0.00	0	\$0.00	\$1,250.54			
Couple	\$0.00	0%	\$0.00	0	\$0.00	\$2,556.58			
Single Parent	\$0.00	0%	\$0.00	0	\$0.00	\$2,035.31			
Family	\$0.00	0%	\$0.00	0	\$0.00	\$3,468.21			
Plan 03 Oxford Freedom EPO NY									
Single	\$0.00	0%	\$0.00	0	\$0.00	\$0.00			
Couple	\$0.00	0%	\$0.00	0	\$0.00	\$0.00			
Single Parent	\$0.00	0%	\$0.00	0	\$0.00	\$0.00			
Family	\$0.00	0%	\$0.00	0	\$0.00	\$0.00			

A pop-up box will appear, and you can enter the contribution for each category (Single, Couple, Single Parent, and Family).



**You can only set a max contribution by dollar amount.*

When all the contributions are entered, click the “Set Max Contribution.”



**By using this button, any contribution amount that was previously entered either by percentage or dollar amount will be overridden.*

That will populate the contribution for all medical plans listed for that Benefits Class.

Tier	Rate	Last Year Rate				Next Year Rate					
		Monthly Contributions		Employee Count	Total	Rate Effective 11/1/2022	Monthly Contributions		Final Contribution		
		%	\$						%	\$	Employer
Plan 01 Oxford Liberty Direct NY											
Single	\$897.57	0%	\$0.00	2	\$0.00	\$952.46			\$1,000.00		
Couple	\$1,840.47	0%	\$0.00	0	\$0.00	\$2,542.54			\$2,000.00		
Single Parent	\$1,549.20	0%	\$0.00	0	\$0.00	\$2,298.75			\$1,500.00		
Family	\$2,707.05	0%	\$0.00	0	\$0.00	\$3,269.41			\$3,000.00		
Plan 02 Oxford Liberty POS NY											
Single	\$0.00	0%	\$0.00	0	\$0.00	\$1,250.54			\$1,000.00		
Couple	\$0.00	0%	\$0.00	0	\$0.00	\$2,556.58			\$2,000.00		
Single Parent	\$0.00	0%	\$0.00	0	\$0.00	\$2,035.31			\$1,500.00		
Family	\$0.00	0%	\$0.00	0	\$0.00	\$3,468.21			\$3,000.00		

However, once a Max Contribution is entered and calculated, you have the ability to make adjustments to the final contribution amount, as long as the amount that you enter is less than the maximum that you set.

For example, if a group wants to contribute 50% of the premium but does not want to go beyond a maximum amount. In that case, you would set the max contribution, then change the plans where the 50% contribution would be less than the max contribution by using the percentage option.

Once you complete all contributions for medical, dental, and vision for a specific Benefits Class, click the “Save Draft” button which can be found at either both the top and bottom of the page.

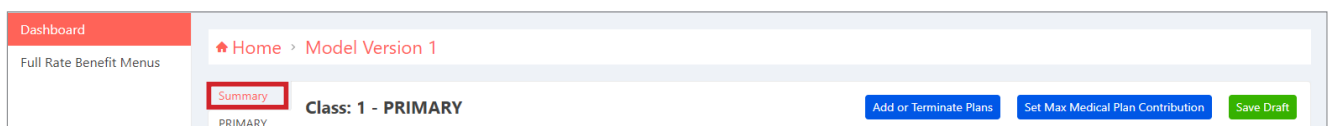


To adjust the contribution amounts for the next Benefits Class click the class name on the left panel and repeat the steps above.



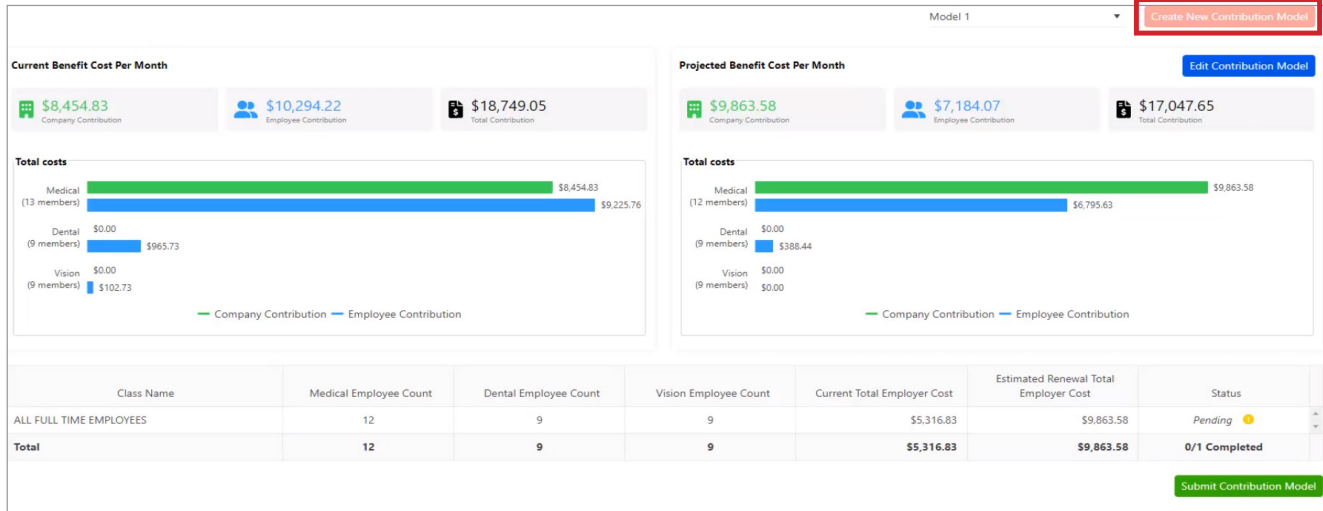
**Make sure you save your work often, and before you switch to another model, as the portal will not automatically save your changes.*

Once all contributions for all Benefit Classes and plans have been determined, you can view your estimated renewal costs by clicking the “Summary” link on the left panel.



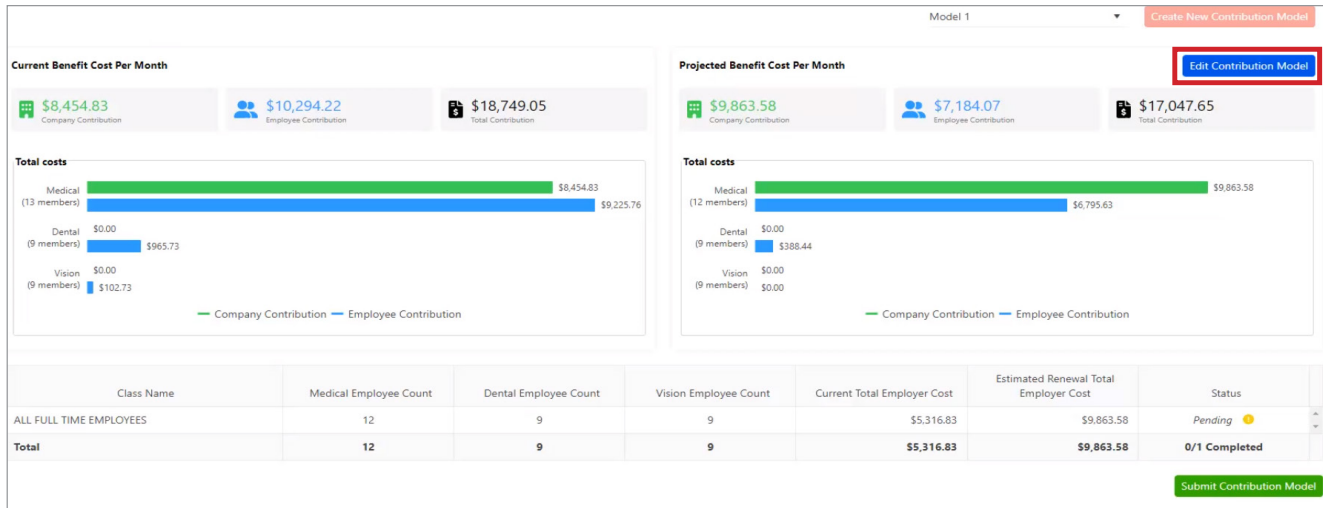
Creating Different Models

From the Home Page, you can then create another model to compare by selecting “Create New Contribution Model” and naming the next model.



The portal will allow you to name up to three different potential contribution models. However, you can edit the plans within those three models, which allows you to continue comparing different contribution scenarios.

To edit an already named contribution model, click the “Edit Contribution Model” button on the Dashboard.



Reviewing Your Potential Renewal Costs

You can view the side-by-side comparison of your current contribution costs to your projected potential benefits cost per month on the Dashboard by clicking the word “Home.”

Summary

Class Name	Medical Employee Count	Dental Employee Count	Vision Employee Count	Current Total Employer Cost	Estimated Renewal Total Employer Cost	Status
PRIMARY	0	0	0	\$0.00	\$0.00	Pending
Executive	2	1	0	\$1,084.47	\$0.00	Pending
Management	8	1	1	\$4,283.20	\$0.00	Pending
All	8	0	0	\$2,978.80	\$0.00	Pending
Total	18	2	1	\$8,346.47	\$0.00	0/4 Completed

Once on the Dashboard, you will be able to choose which model you would like to compare to your current contribution costs by using the drop-down on the top right corner.

When you select a model to review, the section on the right labeled “Projected Benefit Cost Per Month” will update to reflect the potential contributions that you built into the model. You will then see the side-by-side comparison of Total Company Contribution, Total Employee Contribution, the Total Contribution, and the total costs broken down by Medical, Dental, and Vision plans.

Current Benefit Cost Per Month

- Company Contribution: \$8,454.83
- Employee Contribution: \$10,294.22
- Total Contribution: \$18,749.05

Projected Benefit Cost Per Month

- Company Contribution: \$9,863.58
- Employee Contribution: \$7,184.07
- Total Contribution: \$17,047.65

Total costs

Plan	Members	Company Contribution	Employee Contribution
Medical	13	\$8,454.83	\$9,225.76
Dental	9	\$0.00	\$965.73
Vision	9	\$0.00	\$102.73

Class Name	Medical Employee Count	Dental Employee Count	Vision Employee Count	Current Total Employer Cost	Estimated Renewal Total Employer Cost	Status
ALL FULL TIME EMPLOYEES	12	9	9	\$5,316.83	\$9,863.58	Pending
Total	12	9	9	\$5,316.83	\$9,863.58	0/1 Completed

When you have reached your final decision based on a model you created, if you choose to, you can now review your model with your stakeholders or broker.

Once you are content with your choices, you will follow the next instructions for submitting your decisions.

Submitting Your Renewal

To submit your plan renewal, click the “Submit Contribution Model” button under section three.

Once you submit your contribution choices, your Benefits Specialist will receive a notice that your renewal decisions have been submitted. If your Benefits Specialist has no further questions, then PrestigePEO will prepare to send invitations to your benefit-eligible employees inviting them to go through the employee Open Enrollment portal and make their elections.

Current Benefit Cost Per Month

\$8,454.83
Company Contribution

\$10,294.22
Employee Contribution

\$18,749.05
Total Contribution

Total costs

Benefit Type	Company Contribution	Employee Contribution
Medical (13 members)	\$8,454.83	\$9,225.76
Dental (9 members)	\$0.00	\$965.73
Vision (9 members)	\$0.00	\$102.73

Projected Benefit Cost Per Month Edit Contribution Model

\$9,863.58
Company Contribution

\$7,184.07
Employee Contribution

\$17,047.65
Total Contribution

Total costs

Benefit Type	Company Contribution	Employee Contribution
Medical (12 members)	\$9,863.58	\$6,795.63
Dental (9 members)	\$0.00	\$388.44
Vision (9 members)	\$0.00	\$0.00

Class Name	Medical Employee Count	Dental Employee Count	Vision Employee Count	Current Total Employer Cost	Estimated Renewal Total Employer Cost	Status
ALL FULL TIME EMPLOYEES	12	9	9	\$5,316.83	\$9,863.58	Pending ●
Total	12	9	9	\$5,316.83	\$9,863.58	0/1 Completed

Submit Contribution Model

Summary

We hope you found this guide helpful. Our goal is to help you better understand and navigate your PrestigePEO Benefits Renewal Portal. We encourage you to use this portal to create different models that will help you make the right decisions for your business.

We are always standing by to assist you. Please reach out to your Benefits Specialist for more information or questions.





www.prestigepeo.com