PrestigePEO™

RENEWAL PORTAL USER GUIDE

CLIENT MANAGER

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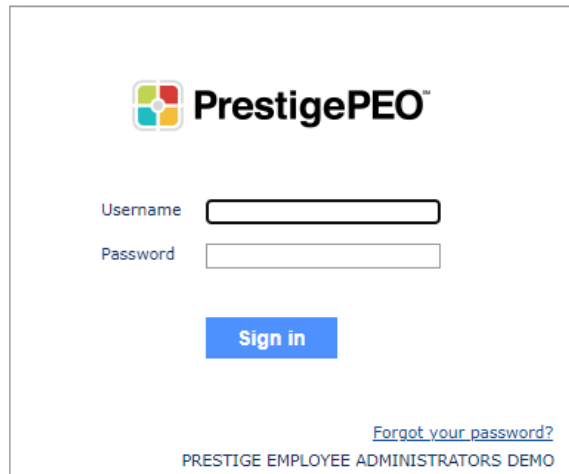**PrestigePEO**™

Open Enrollment season is here!

The PrestigePEO Renewal Portal showcases enhanced features for this Open Enrollment season.

This step-by-step user guide will show you how to create, compare, and share contribution models, to find the best plans for your business.
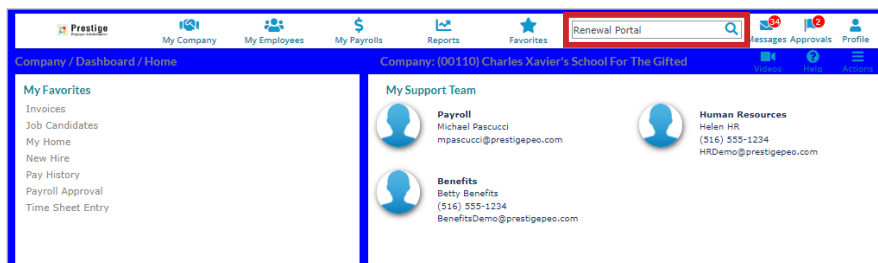
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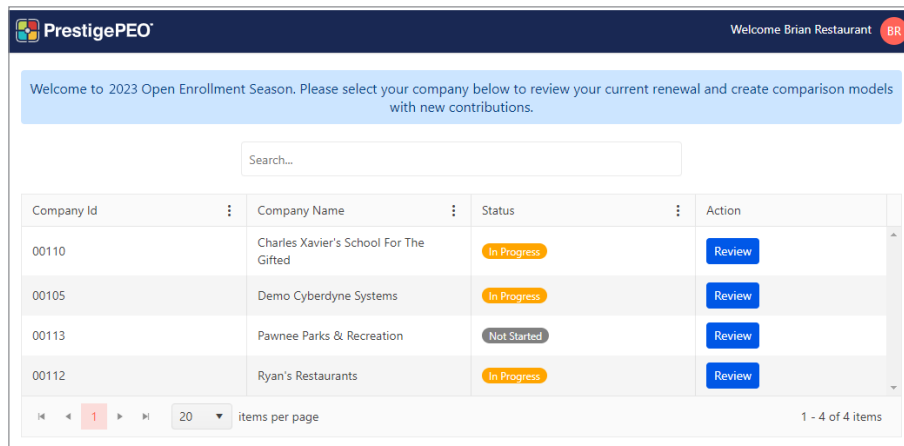
Getting Started

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.

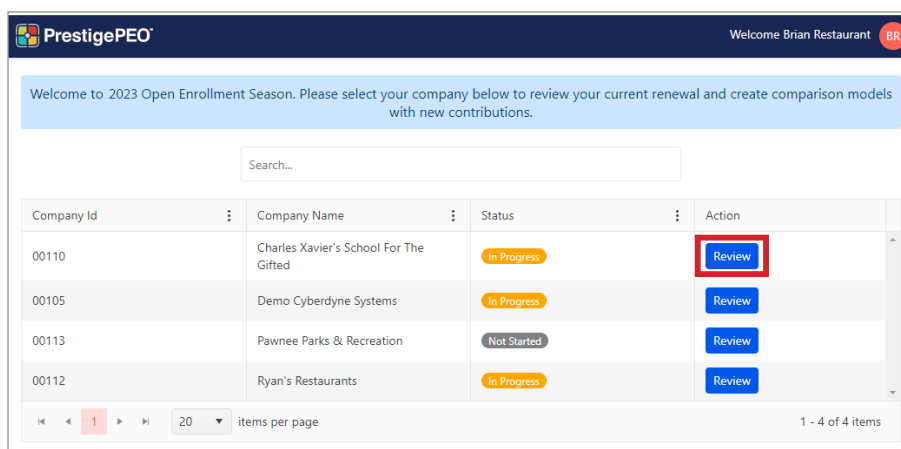
This will bring you to your Renewal Portal homepage, where you'll find a list of all your company's entities with PrestigePEO.

To review and change contributions for a specific entity, click the "Review" button in that entity's row. You can also use the search bar to enter the name of a company or entity rather than scrolling through the list.
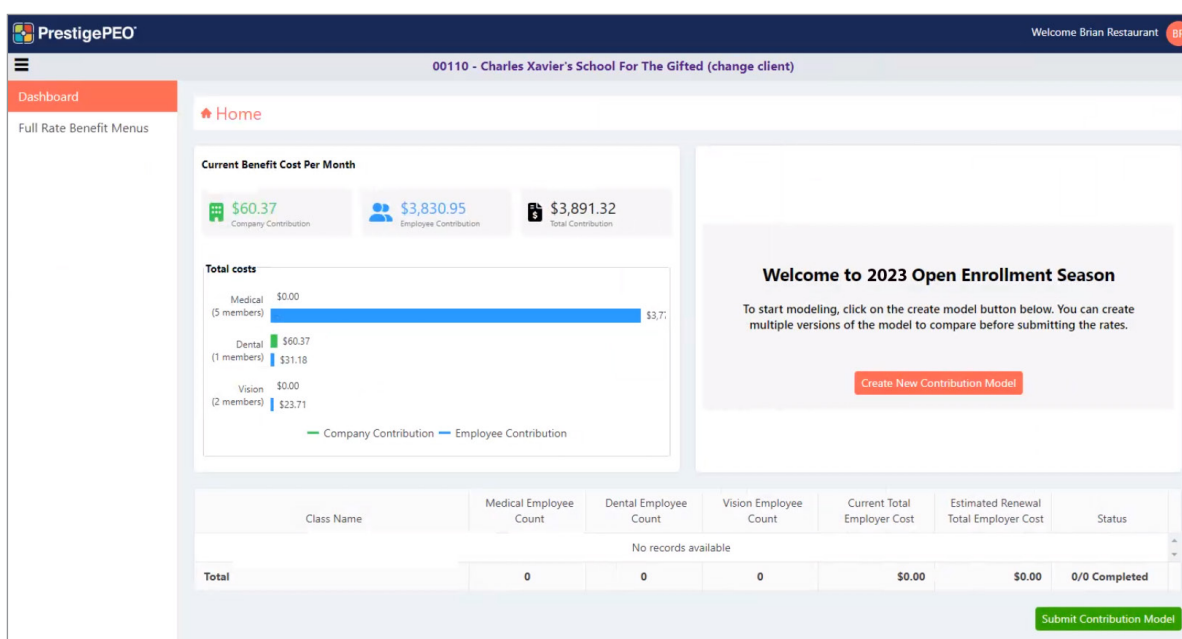

Clicking "Review" will pull up your selected entity's dashboard.

If you are responsible for multiple entities, you will need to perform the same process for each. There are two ways to return to your client list on the homepage:

1. Click the PrestigePEO logo at the top left corner of your screen.
2. Click your business' name on the "Change Client" hyperlink at the top of your screen.
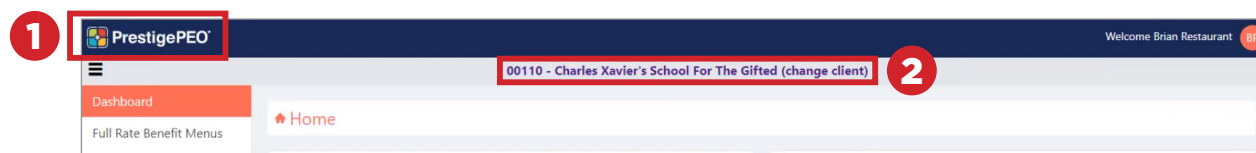
Don't forget to save your work before navigating back to the Renewal Portal's homepage.

PrestigePEO Renewal Portal Client Manager User Guide

Your Dashboard

You have now reached your dashboard where you can see your current contribution model, as well as create and compare up to three new contribution models before you finalize next year's benefits plans.

If you have questions or any issues while navigating the portal, you can easily access your benefit specialist's contact information at the top of your screen.

Before you create your first contribution model, you can download and review the 2023-2024 Full Rate Benefits Menus. Click "Full Rate Benefits Menus" at the left side of your screen to see all plan information including deductibles and network details.

Reviewing the Full Rate Benefits Menus will help you make informed decisions about your 2023-2024 benefits offerings. Please note, you can now export your previous year's benefits menu as a PDF or Excel file for a side-by-side comparison with this year's plan options.

The Dashboard is split into three separate sections.
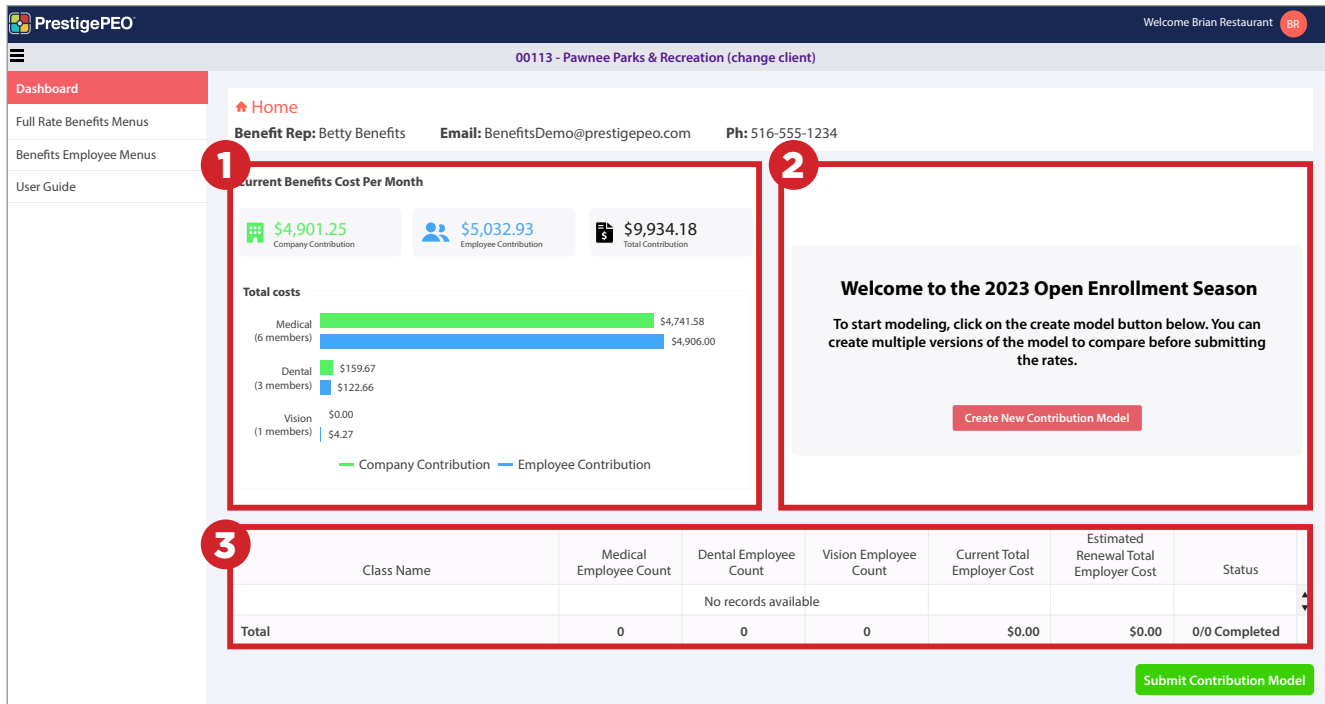
1. The section on the left shows your current benefit costs per month.
2. The section on the right is where you can create up to three contribution models for the upcoming year's benefits plans.

The section at the bottom of the dashboard will show a breakdown on your Benefit Classes with estimated monthly costs for the 2023-2024 contribution models you build.

Don't forget: once you build a contribution model, it can't be deleted, only edited.

Click the hamburger menu icon at the top left corner of your screen to collapse the menu panel and allow more visibility for your dashboard. To reopen the panel, simply click the hamburger menu icon again.
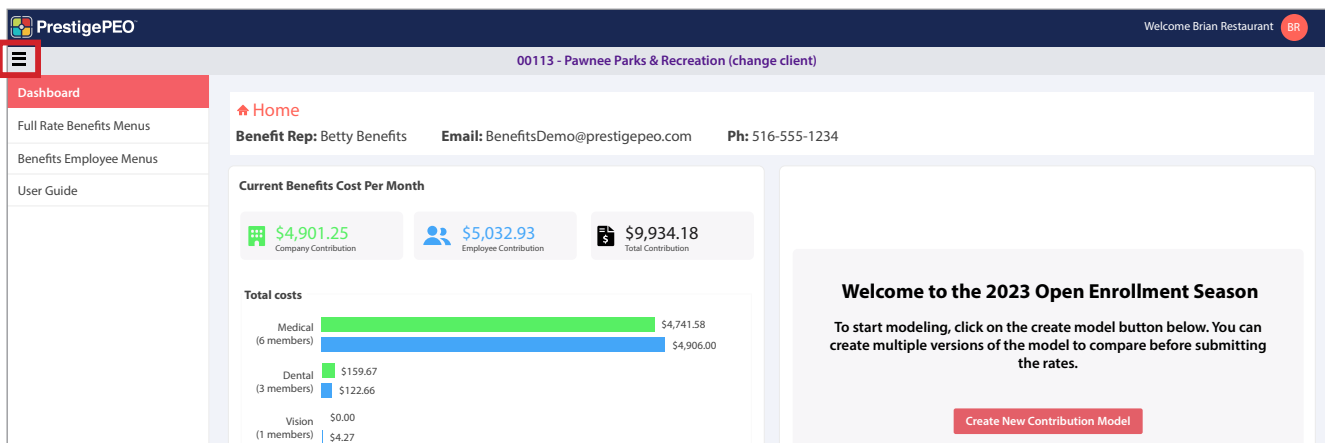
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Building Contribution Models

To begin, click the "Create New Contribution Model" button.

This will open a pop-up window that prompts you to name your contribution model. Be sure to use a naming convention to quickly distinguish one model from another. 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.

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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 and, once your new contribution model is built, estimated renewal total employer cost, and the status of the contributions within the model.

At this point, you have the option to export your renewal grid in Excel format. This will allow you to share detailed model plans between decision-makers.

Your renewal grid will download as an Excel workbook. The first tab will show a summary page and each Benefit Class on the following tabs.

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.

Note: You cannot change or update Classes through the PrestigePEO 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.

Based on the plan and the tier, the column on the far right of the chart will indicate the change in premium rates as a percent, displayed in red or green. If there is a year-over-year increase in premium costs, the percent will appear in red. If there is a year-over-year decrease in premium costs, the percent will display in green. Percentages will be calculated and shown for each contact type (single, couple, single parent, or family) and each plan.

PrestigePEO Welcome Brian Restaurant BR

00113 - Pawnee Parks & Recreation (change client)

🏠 Home > Model Version 1

Summary
OWNERS
SUPERVISORS
ALL EMPLOYEES

Class:3 - ALL EMPLOYEES [Add or Terminate Plans] [Set Max Medical Plan Contribution] [Contribution Shortcuts] [Save Draft]

Tier	Rate	Last Year Rate — Monthly Contributions %	$	Employee Count	Total	Rate Effective 11/1/2023	Next Year Rate — Monthly Contributions %	$	Final Contribution Employer	Employee	Rate Change %
Plan 01 Oxford Liberty Direct NY											
Single	$897.57	38%	$350.00	2	$700.00	$1,005.28					▲ 12%
Couple	$1,840.47	19%	$350.00	0	$0.00	$2,146.73					▲ 12%
Single Parent	$1,549.20	22%	$350.00	0	$0.00	$1,806.99					▲ 12%
Family	$2,707.05	12%	$350.00	0	$0.00	$3,343.41					▲ 12%
Plan 02 Oxford Liberty POS NY											
Single	$897.57	31%	$350.00	0	$0.00	$1,225.91					▲ 12%
Couple	$1,840.47	15%	$350.00	1	$350.00	$2,518.40					▲ 12%
Single Parent	$1,549.20	18%	$350.00	0	$0.00	$2,092.91					▲ 12%
Family	$2,707.05	10%	$350.00	0	$0.00	$3,657.12					▲ 12%
Plan 03 Oxford Freedom EPO NY											
Single	$1,252.15	27%	$0.00	0	$0.00	$1,402.41					▲ 12%
Couple	$1,840.47	13%	$0.00	1	$350.00	$2,874.93					▲ 12%
Single Parent	$1,549.20	16%	$0.00	0	$0.00	$2,420.56					▲ 12%
Family	$2,707.05	9%	$0.00	0	$0.00	$4,229.61					▲ 12%
Plan 08 Oxford Freedom HDHP EPO NY											
Single	$811.85	61%	$500.00	0	$0.00	$909.27					▲ 12%
Couple	$1,840.47	30%	$500.00	1	$350.00	$1,863.99					▲ 12%
Single Parent	$1,549.20	35%	$500.00	0	$0.00	$1,569.38					▲ 12%
Family	$2,707.05	20%	$500.00	0	$0.00	$2,742.30					▲ 12%
Plan 12 Oxford Metro EPO NY											
Single	$1,252.15	100%	$798.52	0	$0.00	$894.34					▲ 12%
Couple	$1,840.47	100%	$798.52	1	$350.00	$1,833.42					▲ 12%
Single Parent	$1,549.20	100%	$798.52	0	$0.00	$1,543.65					▲ 12%
Family	$2,707.05	100%	$798.52	0	$0.00	$2,697.32					▲ 12%
Metlife Dental DHMO											
Single	$12.75	0%	$0.00	1	$0.00	$14.28					▲ 12%
Couple	$24.17	0%	$0.00	0	$0.00	$27.07					▲ 12%
Single Parent	$25.52	0%	$0.00	0	$0.00	$28.58					▲ 12%
Family	$36.34	0%	$0.00	0	$0.00	$40.70					▲ 12%

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There are three features that represent actions which can be taken as you begin to build models.

1. **Add or Terminate Plans button**
   This feature allows you to add or remove plans from the current model.

2. **Set Max Medical Plan Contribution**
   This will allow the you to select a defined contribution across all plans and categories.

3. **The Contribution Shortcuts**
   This is a feature for those who have a simple strategy and are not looking to make any changes to the plans offered to employees.

There are three options under this feature, keep same percentage, keep same dollar amount, or split the increase 50/50 between employee and employer.

Choosing any of these options will populate the full grid for the chosen Benefit Class including medical, dental, and vision. This will also override anything previously populated in the renewal grid.

Add or Terminate Plans Feature

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

Manage Plans				✕
Medical Dental Vision				
Plan Name	Employee Rate	Spouse Rate	Single Parent Rate	Family Rate
☑ OXNY01 - Plan 01 Oxford Liberty Direct NY	$939.22	$1,925.87	$1,621.09	$2,832.66
☐ OXNY02 - Plan 02 Oxford Liberty POS NY	$1,145.34	$2,323.04	$1,955.39	$3,416.80
☐ OXNY03 - Plan 03 Oxford Freedom EPO NY	$1,310.24	$2,686.00	$2,261.49	$3,951.67
☐ OXNY04 - Plan 04 Oxford Freedom Direct NY	$1,432.90	$2,937.41	$2,473.17	$4,321.59
☐ OXNY05 - Plan 05 Oxford Freedom Access NY	$1,938.05	$3,972.97	$3,345.05	$5,845.13
☐ OXNY06 - Plan 06 Oxford Liberty EPO NY	$1,076.82	$2,208.04	$1,858.60	$3,247.67
☐ OXNY07 - Plan 07 Oxford Freedom HDHP POS NY	$1,036.41	$2,124.63	$1,806.39	$3,143.04
☑ OXNY08 - Plan 08 Oxford Freedom HDHP EPO NY	$849.51	$1,741.49	$1,466.25	$2,562.09
☐ OXNY09 - Plan 09 Oxford Freedom EPO NY	$1,084.92	$2,224.09	$1,872.58	$3,272.13

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

Manage Plans				✕
Medical Dental Vision				
Plan Name	Employee Rate	Spouse Rate	Single Parent Rate	Family Rate
☑ OXNY01 - Plan 01 Oxford Liberty Direct NY	$939.22	$1,925.87	$1,621.09	$2,832.66
☐ OXNY02 - Plan 02 Oxford Liberty POS NY	$1,145.34	$2,323.04	$1,955.39	$3,416.80
☐ OXNY03 - Plan 03 Oxford Freedom EPO NY	$1,310.24	$2,686.00	$2,261.49	$3,951.67
☐ OXNY04 - Plan 04 Oxford Freedom Direct NY	$1,432.90	$2,937.41	$2,473.17	$4,321.59
☐ OXNY05 - Plan 05 Oxford Freedom Access NY	$1,938.05	$3,972.97	$3,345.05	$5,845.13
☐ OXNY06 - Plan 06 Oxford Liberty EPO NY	$1,076.82	$2,208.04	$1,858.60	$3,247.67
☐ OXNY07 - Plan 07 Oxford Freedom HDHP POS NY	$1,036.41	$2,124.63	$1,806.39	$3,143.04
☑ OXNY08 - Plan 08 Oxford Freedom HDHP EPO NY	$849.51	$1,741.49	$1,466.25	$2,562.09

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

If you do not currently offer dental or vision through PrestigePEO but would like to add them this year to the plans offered to your employees, you can do that here.

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

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

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

If you choose to terminate a plan that your employees are currently enrolled in from the past 2022 – 2023 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.

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

Manage Plans   ✕

Medical   Dental   Vision

	Plan Name	Employee Rate	Spouse Rate	Single Parent Rate	Family Rate
☑	OXNY01 - Plan 01 Oxford Liberty Direct NY	$939.22	$1,925.87	$1,621.09	$2,832.66
☑	OXNY02 - Plan 02 Oxford Liberty POS NY	$1,145.34	$2,323.04	$1,955.39	$3,416.80
☑	OXNY03 - Plan 03 Oxford Freedom EPO NY	$1,310.24	$2,686.00	$2,261.49	$3,951.67
☑	OXNY04 - Plan 04 Oxford Freedom Direct NY	$1,432.90	$2,937.41	$2,473.17	$4,321.59
☑	OXNY05 - Plan 05 Oxford Freedom Access NY	$1,938.05	$3,972.97	$3,345.05	$5,845.13
☐	OXNY06 - Plan 06 Oxford Liberty EPO NY	$1,076.82	$2,208.04	$1,858.60	$3,247.67
☐	OXNY07 - Plan 07 Oxford Freedom HDHP POS NY	$1,036.41	$2,124.63	$1,806.39	$3,143.04
☑	OXNY08 - Plan 08 Oxford Freedom HDHP EPO NY	$849.51	$1,741.49	$1,466.25	$2,562.09
☐	OXNY09 - Plan 09 Oxford Freedom EPO NY	$1,084.92	$2,224.09	$1,872.58	$3,272.13

Cancel   **Save Changes**

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

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🏠 Home › Model Version 1

Summary
OWNERS
SUPERVISORS
ALL EMPLOYEES

Class:3 - ALL EMPLOYEES   Add or Terminate Plans   Set Max Medical Plan Contribution   Contribution Shortcuts   Save Draft

		Last Year Rate					Next Year Rate					
			Monthly Contributions					Monthly Contributions		Final Contribution		
Tier	Rate	%	$	Employee Count	Total	Rate Effective 11/1/2023	%	$	Employer	Employee	Rate Change %
Plan 01 Oxford Liberty Direct NY											
Single	$897.57	38%	$350.00	2	$700.00	$1,005.28					▲ 12%
Couple	$1,840.47	19%	$350.00	0	$0.00	$2,146.73					▲ 12%
Single Parent	$1,549.20	22%	$350.00	0	$0.00	$1,806.99					▲ 12%
Family	$2,707.05	12%	$350.00	0	$0.00	$3,343.41					▲ 12%
Plan 02 Oxford Liberty POS NY											
Single	$897.57	31%	$350.00	0	$0.00	$1,225.91					▲ 12%
Couple	$1,840.47	15%	$350.00	1	$350.00	$2,518.40					▲ 12%
Single Parent	$1,549.20	18%	$350.00	0	$0.00	$2,092.91					▲ 12%
Family	$2,707.05	10%	$350.00	0	$0.00	$3,657.12					▲ 12%
Plan 03 Oxford Freedom EPO NY											
Single	$1,252.15	27%	$0.00	0	$0.00	$1,402.41					▲ 12%
Couple	$1,840.47	13%	$0.00	1	$350.00	$2,874.93					▲ 12%
Single Parent	$1,549.20	16%	$0.00	0	$0.00	$2,420.56					▲ 12%
Family	$2,707.05	9%	$0.00	0	$0.00	$4,229.61					▲ 12%
Plan 08 Oxford Freedom HDHP EPO NY											
Single	$811.85	61%	$500.00	0	$0.00	$909.27					▲ 12%
Couple	$1,840.47	30%	$500.00	1	$350.00	$1,863.99					▲ 12%
Single Parent	$1,549.20	35%	$500.00	0	$0.00	$1,569.38					▲ 12%
Family	$2,707.05	20%	$500.00	0	$0.00	$2,742.30					▲ 12%
Plan 12 Oxford Metro EPO NY											

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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.

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.

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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.

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.

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 entered 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.

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.

		Last Year Rate					Next Year Rate				
			Monthly Contributions				Rate Effective 11/1/2022	Monthly Contributions		Final Contribution		
Tier	Rate	%	$	Employee Count	Total			%	$	Employer	Employee	Rate Change %
Plan 01 Oxfor Liberty Direct NY							☐		☐			
Single	$897.57	38%	$350.00	2	$700.00	$1,005.28		40	☐ 403.86	☑	$403.86	$601.42	▲ 12%
Couple	$1,840.47	19%	$350.00	0	$0.00	$2,146.73		23	☑ 503.13		$503.13	$1,643.60	▲ 12%
Single Parent	$1,549.20	22%	$350.00	0	$0.00	$1,806.99		27	☑ 478.90		$478.90	$1,328.09	▲ 12%
Family	$2,707.05	12%	$350.00	0	$0.00	$3,343.41		20	☑ 668.18		$668.18	$2,675.23	▲ 12%
Plan 02 Oxfor Liberty POS NY												

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.

		Last Year Rate					Next Year Rate				
			Monthly Contributions				Rate Effective 11/1/2023	Monthly Contributions		Final Contribution		
Tier	Rate	%	$	Employee Count	Total			%	$	Employer	Employee	Rate Change %
Plan 01 Oxford Liberty Direct NY												
Single	$897.57	38%	$350.00	2	$700.00	$1,005.28						▲ 12%
Couple	$1,840.47	19%	$350.00	0	$0.00	$2,146.73						▲ 12%
Single Parent	$1,549.20	22%	$350.00	0	$0.00	$1,806.99						▲ 12%
Family	$2,707.05	12%	$350.00	0	$0.00	$3,343.41						▲ 12%
Plan 02 Oxford Liberty POS NY												
Single	$897.57	31%	$350.00	0	$0.00	$1,225.91						▲ 12%
Couple	$1,840.47	15%	$350.00	1	$350.00	$2,518.40						▲ 12%
Single Parent	$1,549.20	18%	$350.00	0	$0.00	$2,092.91						▲ 12%
Family	$2,707.05	10%	$350.00	0	$0.00	$3,657.12						▲ 12%
Plan 03 Oxford Freedom EPO NY												
Single	$1,252.15	27%	$0.00	0	$0.00	$1,402.41						▲ 12%
Couple	$1,840.47	13%	$0.00	1	$350.00	$2,874.93						▲ 12%
Single Parent	$1,549.20	16%	$0.00	0	$0.00	$2,420.56						▲ 12%
Family	$2,707.05	9%	$0.00	0	$0.00	$4,229.61						▲ 12%
Plan 08 Oxford Freedom HDHP EPO NY												

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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.

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

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 then 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 Benefit Class, click the "Save Draft" button which can be found at 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.
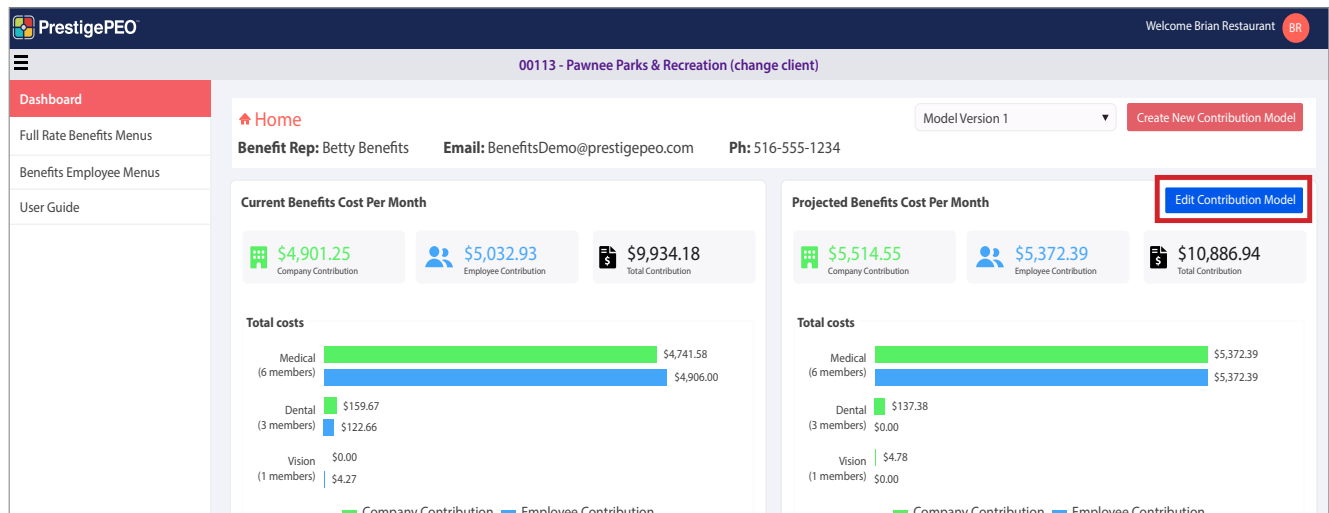

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Creating Different Models

From the dashboard, you can then create another model to compare by selecting "Create New Contribution Model" and naming the next model.
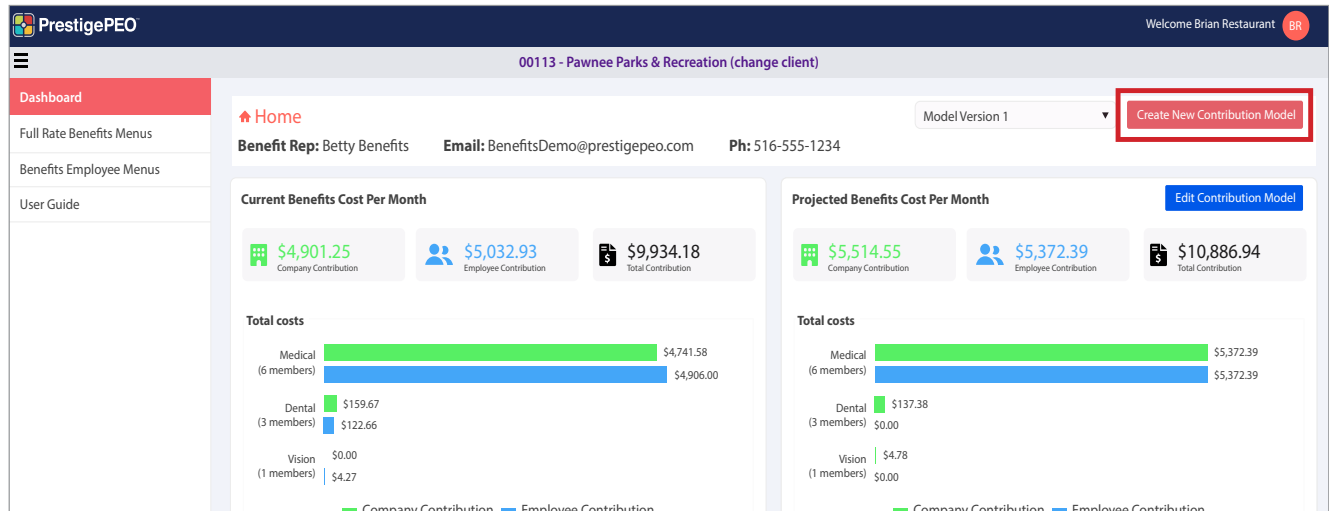
The portal will allow you to name up to three different potential contribution models. However, you can edit the plans within those three models, which allows you to continue comparing different contribution scenarios.

To edit an already named contribution model, click the "Edit Contribution Model" button on the dashboard.

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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."

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.

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.

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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 PrestigePRO Employee Benefits Portal and make their elections.

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Summary

We hope you found this guide helpful. Our

goal is to help you better understand and

navigate your PrestigePEO 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.

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