



# RENEWAL PORTAL USER GUIDE

BROKER PARTNERS

# Table of Contents

- 5** Introduction
- 6** Getting Started (Home Page, Dashboard, Building Contribution Models)
- 17** Entering Your Contribution Amounts
- 22** Creating Different Models
- 23** Reviewing Your Potential Renewal Costs
- 24** Submitting Your Renewal
- 25** Summary

## Password Reset Instructions for the PrestigePEO Renewal Portal

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Brokers who had access to the portal last year will be able to see the renewals for their groups as they become available by going to <https://openenrollment.prestigepeo.com/login>. To reset your password, follow the instructions below.

1. Click “Need help signing in?” link located under the Sign-In button.
2. Click “Forgot password?” link.
3. You will be prompted to enter your password or username. Your username is preset to match your email address.
4. Click “Reset via Email” button.

If you have any issues logging in, please call 833-PEO-BEN1 or email [oequestions@prestigepeo.com](mailto:oequestions@prestigepeo.com), and a Benefits Specialist will get back to you.

We encourage you to reference the PrestigePEO Renewal Portal Guide that has been created for Client Managers.

## Broker Instructions for the PrestigePEO Renewal Portal

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1. You will receive an email from [no-reply@auth.prestigepeo.com](mailto:no-reply@auth.prestigepeo.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”.

## Tips for using the Renewal Portal with Your Clients

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Our goal is to deliver the best experience possible for you and your clients. Here are some tips to help ensure a smooth Open Enrollment season.

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

Before creating your first contribution model, download and review the 2023, 2024 Full Rate Benefits Menus. Click “Full Rate Benefit Menus” on the left side of your screen to see all plan information including deductibles and network details. Reviewing the Full Rate Benefit Menus first will help you make informed decisions about your 2023, 2024 benefits offerings.

Models can now be downloaded as an Excel workbook. There is currently no functionality for uploading, so any changes made to the workbook will need to be added back to the model manually. This has been identified as an enhancement for future seasons.

If you and your client choose not to make any changes for this coming year, the Contribution Shortcut is a new feature that will be helpful to clients who have a simple strategy and are not looking to make any changes to plans offered to employees.

# Open Enrollment season is here!

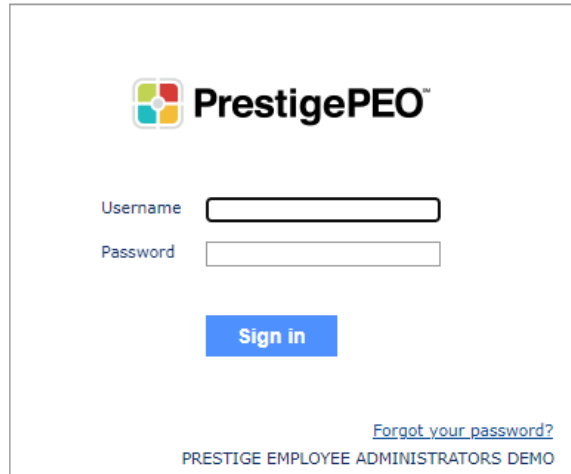
The PrestigePEO Renewal Portal showcases enhanced features for this Open Enrollment season.

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.

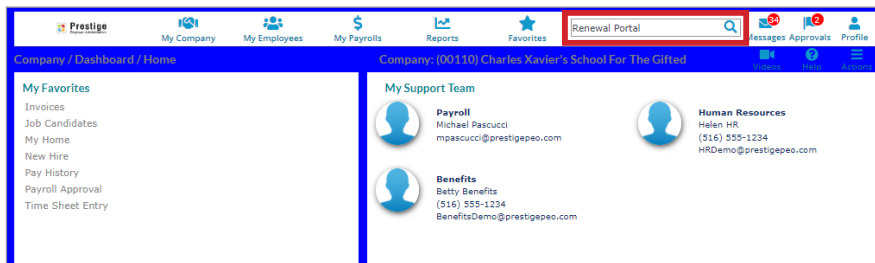


# Getting Started

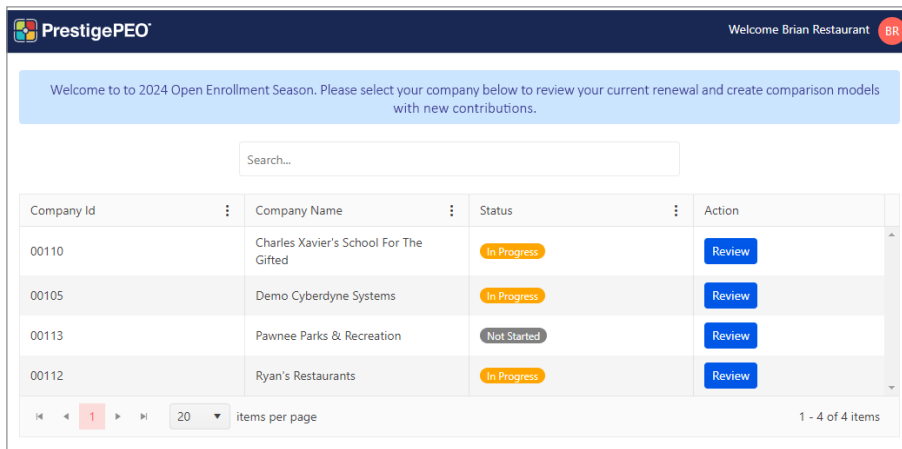
Log in to PrestigePRO with your username and password.



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.



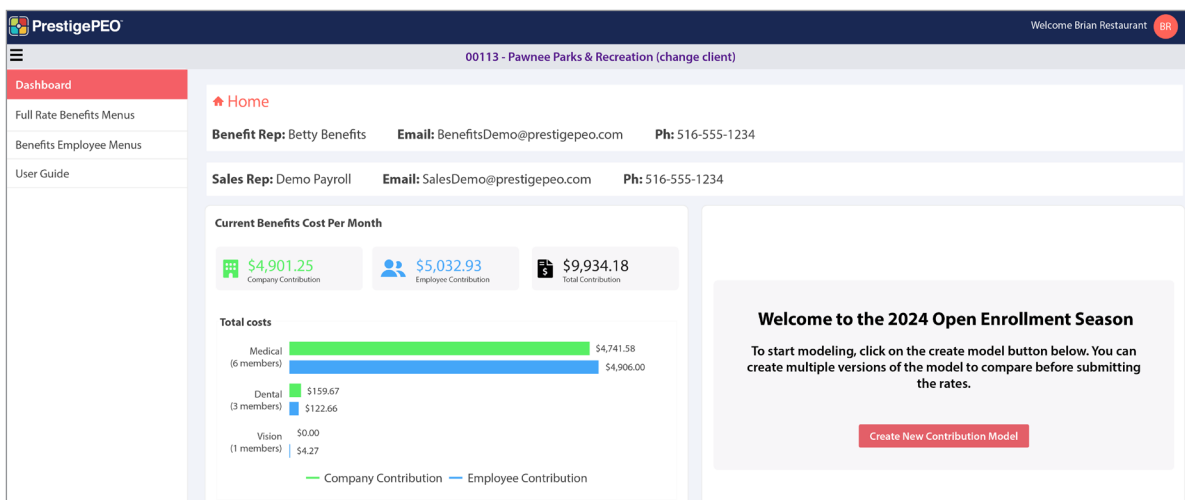
To review and change contributions for a specific entity, click the “Review” button in that entity’s row. You can also use the search bar to enter the name of a company or entity rather than scrolling through the list.

Search...

Company Id	Company Name	Status	Action
00110	Charles Xavier's School For The Gifted	In Progress	<b>Review</b>
00105	Demo Cyberdyne Systems	In Progress	Review
00113	Pawnee Parks & Recreation	Not Started	Review
00112	Ryan's Restaurants	In Progress	Review

1 - 4 of 4 items

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.

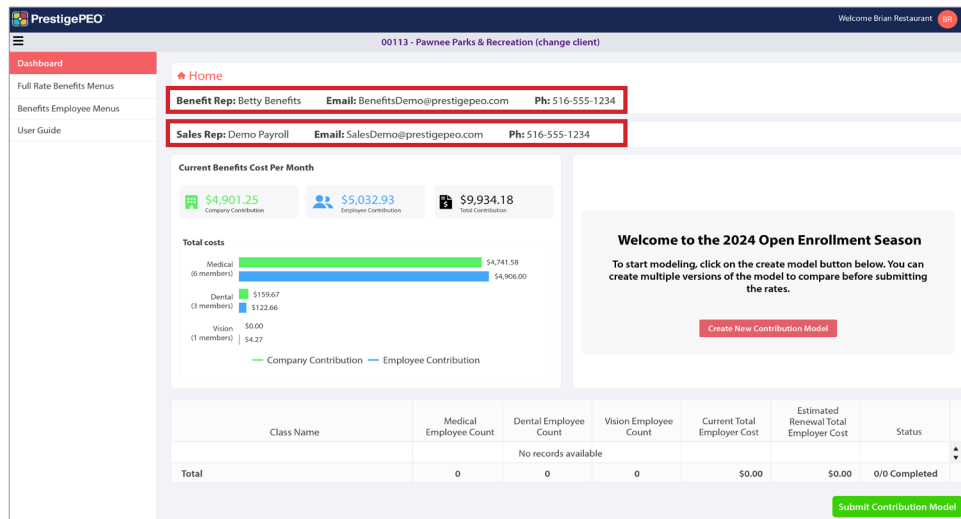


Don’t forget to save your work before navigating back to the Renewal Portal’s homepage.

*Note: There is no disruption in the model if a broker or client logs in before the other.*

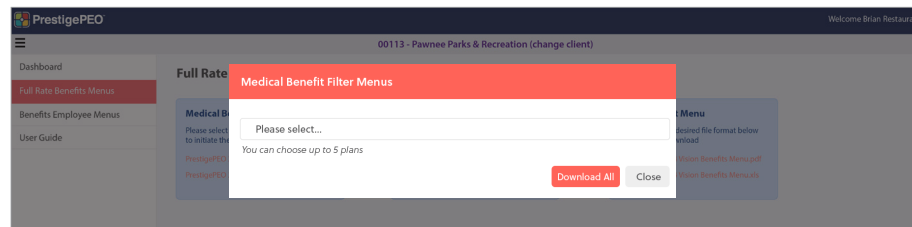
# Your Dashboard

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 and sales representative's contact information at the top of your screen.

Before you create your first contribution model, you can download and review the current year's Full Rate Benefits Menus. Click "Full Rate Benefits Menus" on the left side of your screen to see all plan information including deductibles and network details.



You can now download up to 5 plans for side-by-side comparison. This tool will help you review the Full Rate Benefit Menus and make informed decisions about your 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.

The screenshot shows the PrestigePEO dashboard for client 00113 - Pawnee Parks & Recreation. The dashboard is divided into three main sections:

- Section 1 (Left):** "Current Benefits Cost Per Month". It displays three contribution cards: Company Contribution (\$4,901.25), Employee Contribution (\$5,032.93), and Total Contribution (\$9,934.18). Below these is a "Total costs" bar chart showing Medical (\$4,741.58 for 6 members), Dental (\$1,599.67 for 3 members), and Vision (\$0.00 for 1 member). A legend indicates green for Company Contribution and blue for Employee Contribution.
- Section 2 (Right):** "Welcome to the 2024 Open Enrollment Season". It includes 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." and a red "Create New Contribution Model" button.
- Section 3 (Bottom):** A table of Benefit Classes. The table has 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 "Total" row shows 0 counts and \$0.00 costs, with a status of "0/0 Completed".

A green "Submit Contribution Model" button is located at the bottom right of the dashboard.

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.
3. The section at the bottom of the dashboard will show a breakdown on your Benefit Classes with estimated monthly costs for the 2024-2025 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.*

This screenshot shows the same PrestigePEO dashboard as above, but with the hamburger menu icon at the top left corner collapsed. The menu items (Dashboard, Full Rate Benefits Menus, Benefits Employee Menus, User Guide) are no longer visible, providing more space for the main content area.

# Building Contribution Models

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

The screenshot shows the PrestigePEO dashboard for client '00113 - Pawnee Parks & Recreation'. The dashboard includes a sidebar with navigation options: Dashboard, Full Rate Benefits Menus, Benefits Employee Menus, and User Guide. The main content area displays contact information for the Benefit Rep (Betty Benefits) and Sales Rep (Demo Payroll). It also shows 'Current Benefits Cost Per Month' with three metrics: Company Contribution (\$4,901.25), Employee Contribution (\$5,032.93), and Total Contribution (\$9,934.18). A bar chart titled 'Total costs' shows Medical (\$4,741.58), Dental (\$159.67), and Vision (\$0.00) costs, with a legend for Company Contribution (green) and Employee Contribution (blue). A table at the bottom shows 'No records available' for the current period. A green button labeled 'Submit Contribution Model' is at the bottom right. A red box highlights the 'Create New Contribution Model' button in a welcome message on the right.

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.

This screenshot shows the same PrestigePEO dashboard as above, but with a red 'Create Contribution Model' pop-up window open. The window has a title bar with a close button (X) and a text input field containing 'Model Version 1'. Below the input field are 'Cancel' and 'Create' buttons, with the 'Create' button highlighted by a red box. The background dashboard content is dimmed.

# 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.

Class Name	Medical Employee Count	Dental Employee Count	Vision Employee Count	Current Total Employer Cost	Estimated Renewal Total Employer Cost	Status
OWNERS	2	1	0	\$3,225.18	\$0.00	Pending
SUPERVISORS	1	0	0	\$626.07	\$0.00	Pending
ALL EMPLOYEES	3	2	1	\$1,050.00	\$0.00	Pending
<b>Total</b>	<b>6</b>	<b>3</b>	<b>1</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0/3 Completed</b>

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											Add or Terminate Plans		Set Max Medical Plan Contribution		Contribution Shortcuts		Save Draft	
Class:3 - ALL EMPLOYEES																		
OWNERS																		
SUPERVISORS																		
ALL EMPLOYEES																		
Last Year Rate											Next Year Rate							
Tier	Rate	Monthly Contributions		Employee Count	Total	Rate Effective 11/1/2023	Monthly Contributions		Final Contribution			Rate Change %						
		%	\$				%	\$	Employer	Employee								
▼ Plan 01 Oxford Liberty Direct NY											<input type="checkbox"/>	<input type="checkbox"/>						
Single	\$897.57	38%	\$350.00	2	\$700.00	\$1,005.28	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 12.00%					
Couple	\$1,840.47	19%	\$350.00	0	\$0.00	\$2,146.73	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 16.64%					
Single Parent	\$1,549.20	22%	\$350.00	0	\$0.00	\$1,806.99	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 16.64%					
Family	\$2,707.05	12%	\$350.00	0	\$0.00	\$3,343.41	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 23.50%					
▼ Plan 02 Oxford Liberty POS NY											<input type="checkbox"/>	<input type="checkbox"/>						
Single	\$897.57	31%	\$350.00	0	\$0.00	\$1,225.91	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 36.58%					
Couple	\$1,840.47	15%	\$350.00	1	\$350.00	\$2,518.40	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 36.38%					
Single Parent	\$1,549.20	18%	\$350.00	0	\$0.00	\$2,092.91	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 35.09%					
Family	\$2,707.05	10%	\$350.00	0	\$0.00	\$3,657.12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 35.09%					
▼ Plan 03 Oxford Freedom EPO NY											<input type="checkbox"/>	<input type="checkbox"/>						
Single	\$1,252.15	27%	\$350.00	0	\$0.00	\$1,402.41	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 12.00%					
Couple	\$1,840.47	13%	\$350.00	1	\$350.00	\$2,874.93	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 56.20%					
Single Parent	\$1,549.20	16%	\$350.00	0	\$0.00	\$2,420.56	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 56.24%					
Family	\$2,707.05	9%	\$350.00	0	\$0.00	\$4,229.61	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 56.24%					
▼ Plan 08 Oxford Freedom HDHP EPO NY											<input type="checkbox"/>	<input type="checkbox"/>						
Single	\$811.85	61%	\$500.00	0	\$0.00	\$909.27	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 11.99%					
Couple	\$1,840.47	30%	\$500.00	1	\$350.00	\$1,863.99	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 1.51%					
Single Parent	\$1,549.20	35%	\$500.00	0	\$0.00	\$1,569.38	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 1.30%					
Family	\$2,707.05	20%	\$500.00	0	\$0.00	\$2,742.30	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 1.30%					
▼ Plan 12 Oxford Metro EPO NY											<input type="checkbox"/>	<input type="checkbox"/>						
Single	\$1,252.15	100%	\$500.00	0	\$0.00	\$894.34	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 0.28%					
Couple	\$1,840.47	100%	\$500.00	1	\$350.00	\$1,833.42	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 0.38%					
Single Parent	\$1,549.20	100%	\$500.00	0	\$0.00	\$1,543.65	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 0.35%					
Family	\$2,707.05	100%	\$500.00	0	\$0.00	\$2,697.32	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 0.35%					
▼ Metlife Dental DHMO											<input type="checkbox"/>	<input type="checkbox"/>						
Single	\$12.75	0%	\$0.00	1	\$0.00	\$14.28	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 12.00%					
Couple	\$24.17	0%	\$0.00	0	\$0.00	\$27.07	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 11.99%					
Single Parent	\$25.52	0%	\$0.00	0	\$0.00	\$28.58	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 11.99%					
Family	\$36.34	0%	\$0.00	0	\$0.00	\$40.70	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▲ 11.99%					

Tier	Rate	Last Year Rate		Employee Count	Total	Rate Effective 11/1/2023	Next Year Rate			
		Monthly Contributions %	Monthly Contributions \$				Monthly Contributions %	Monthly Contributions \$	Final Contribution Rate Change %	
<b>Plan 01 Oxford Liberty Direct NY</b>										
Single	\$897.57	38%	\$350.00	2	\$700.00	\$1,005.28				▲ 12.00%
Couple	\$1,840.47	19%	\$350.00	0	\$0.00	\$2,146.73				▲ 16.64%
Single Parent	\$1,549.20	22%	\$350.00	0	\$0.00	\$1,806.99				▲ 16.64%
Family	\$2,707.05	12%	\$350.00	0	\$0.00	\$3,343.41				▲ 23.50%
<b>Plan 02 Oxford Liberty POS NY</b>										
Single	\$897.57	31%	\$350.00	0	\$0.00	\$1,225.91				▲ 36.58%
Couple	\$1,840.47	15%	\$350.00	1	\$350.00	\$2,518.40				▲ 36.38%

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 four options under this feature, keep same percentage, keep same dollar amount, split the increase 50/50 between employee and employer, and Assign 100% of increase to employer.

**Contribution Shortcuts**

- Keep same contribution % as previous year
- Keep same contribution \$ as previous year
- Split increase 50/50 between employer and employee
- Assign 100% of increase to employer

Buttons: Cancel, Update Contribution

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.

	Plan Name	Employee Rate	Spouse Rate	Single Parent Rate	Family Rate
<input checked="" type="checkbox"/>	OXNY01 - Plan 01 Oxford Liberty Direct NY	\$939.22	\$1,925.87	\$1,621.09	\$2,832.66
<input type="checkbox"/>	OXNY02 - Plan 02 Oxford Liberty POS NY	\$1,145.34	\$2,323.04	\$1,955.39	\$3,416.80
<input type="checkbox"/>	OXNY03 - Plan 03 Oxford Freedom EPO NY	\$1,310.24	\$2,686.00	\$2,261.49	\$3,951.67
<input type="checkbox"/>	OXNY04 - Plan 04 Oxford Freedom Direct NY	\$1,432.90	\$2,937.41	\$2,473.17	\$4,321.59
<input type="checkbox"/>	OXNY05 - Plan 05 Oxford Freedom Access NY	\$1,938.05	\$3,972.97	\$3,345.05	\$5,845.13
<input type="checkbox"/>	OXNY06 - Plan 06 Oxford Liberty EPO NY	\$1,076.82	\$2,208.04	\$1,858.60	\$3,247.67
<input type="checkbox"/>	OXNY07 - Plan 07 Oxford Freedom HDHP POS NY	\$1,036.41	\$2,124.63	\$1,806.39	\$3,143.04
<input checked="" type="checkbox"/>	OXNY08 - Plan 08 Oxford Freedom HDHP EPO NY	\$849.51	\$1,741.49	\$1,466.25	\$2,562.09
<input type="checkbox"/>	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.

	Plan Name	Employee Rate	Spouse Rate	Single Parent Rate	Family Rate
<input checked="" type="checkbox"/>	OXNY01 - Plan 01 Oxford Liberty Direct NY	\$939.22	\$1,925.87	\$1,621.09	\$2,832.66
<input type="checkbox"/>	OXNY02 - Plan 02 Oxford Liberty POS NY	\$1,145.34	\$2,323.04	\$1,955.39	\$3,416.80
<input type="checkbox"/>	OXNY03 - Plan 03 Oxford Freedom EPO NY	\$1,310.24	\$2,686.00	\$2,261.49	\$3,951.67
<input type="checkbox"/>	OXNY04 - Plan 04 Oxford Freedom Direct NY	\$1,432.90	\$2,937.41	\$2,473.17	\$4,321.59
<input type="checkbox"/>	OXNY05 - Plan 05 Oxford Freedom Access NY	\$1,938.05	\$3,972.97	\$3,345.05	\$5,845.13
<input type="checkbox"/>	OXNY06 - Plan 06 Oxford Liberty EPO NY	\$1,076.82	\$2,208.04	\$1,858.60	\$3,247.67
<input type="checkbox"/>	OXNY07 - Plan 07 Oxford Freedom HDHP POS NY	\$1,036.41	\$2,124.63	\$1,806.39	\$3,143.04
<input checked="" type="checkbox"/>	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.

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

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

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

<input checked="" type="checkbox"/> OXNY01 - Plan 01 Oxford Liberty Direct NY	\$939.22	\$1,925.87	\$1,621.09	\$2,832.66
<input type="checkbox"/> OXNY02 - Plan 02 Oxford liberty POS NY	\$1,145.34	\$2,323.04	\$1,955.39	\$3,416.80
<input type="checkbox"/> OXNY03 - Plan 03 Oxford Freedom EPO NY	\$1,310.24	\$2,686.00	\$2,261.49	\$3,951.67

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

<input checked="" type="checkbox"/> OXNY01 - Plan 01 Oxford liberty Direct NY	\$939.22	\$1,925.87	\$1,621.09	\$2,832.66
<input type="checkbox"/> OXNY02 - Plan 02 Oxford Liberty POS NY	\$1,145.34	\$2,323.04	\$1,955.39	\$3,416.80
<input type="checkbox"/> OXNY03 - Plan 03 Oxford Freedom EPO NY	\$1,310.24	\$2,686.00	\$2,261.49	\$3,951.67
<input type="checkbox"/> OXNY04 - Plan 04 Oxford Freedom Direct NY	\$1,432.90	\$2,937.41	\$2,473.17	\$4,321.59

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.

<input checked="" type="checkbox"/> OXNY01 - Plan 01 Oxford Liberty Direct NY	\$939.22	\$1,925.87	\$1,621.09	\$2,832.66
<input type="checkbox"/> OXNY02 - Plan 02 Oxford Liberty POS NY	\$1,145.34	\$2,323.04	\$1,955.39	\$3,416.80
<input type="checkbox"/> OXNY03 - Plan 03 Oxford Freedom EPO NY	\$1,310.24	\$2,686.00	\$2,261.49	\$3,951.67
<input type="checkbox"/> OXNY04 - Plan 04 Oxford Freedom Direct NY	\$1,432.90	\$2,937.41	\$2,473.17	\$4,321.59
<input type="checkbox"/> OXNY05 - Plan 05 Oxford Freedom Access NY	\$1,938.05	\$3,972.97	\$3,345.05	\$5,845.13
<input type="checkbox"/> OXNY06 - Plan 06 Oxford Liberty EPO NY	\$1,076.82	\$2,208.04	\$1,858.60	\$3,247.67
<input type="checkbox"/> OXNY07 - Plan 07 Oxford Freedom HDHP POS NY	\$1,036.41	\$2,124.63	\$1,806.39	\$3,143.04
<input checked="" type="checkbox"/> OXNY08 - Plan 08 Oxford	\$849.51	\$1,741.49	\$1,466.25	\$2,562.09

**Move employees to different plan** x

Please select Plan to move the employees to estimate project 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 11/1/2024

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
<input checked="" type="checkbox"/> OXNY01 - Plan 01 Oxford Liberty Direct NY	\$939.22	\$1,925.87	\$1,621.09	\$2,832.66
<input checked="" type="checkbox"/> OXNY02 - Plan 02 Oxford Liberty POS NY	\$1,145.34	\$2,323.04	\$1,955.39	\$3,416.80
<input checked="" type="checkbox"/> OXNY03 - Plan 03 Oxford Freedom EPO NY	\$1,310.24	\$2,686.00	\$2,261.49	\$3,951.67
<input checked="" type="checkbox"/> OXNY04 - Plan 04 Oxford Freedom Direct NY	\$1,432.90	\$2,937.41	\$2,473.17	\$4,321.59
<input checked="" type="checkbox"/> OXNY05 - Plan 05 Oxford Freedom Access NY	\$1,938.05	\$3,972.97	\$3,345.05	\$5,845.13
<input type="checkbox"/> OXNY06 - Plan 06 Oxford Liberty EPO NY	\$1,076.82	\$2,208.04	\$1,858.60	\$3,247.67
<input type="checkbox"/> OXNY07 - Plan 07 Oxford Freedom HDHP POS NY	\$1,036.41	\$2,124.63	\$1,806.39	\$3,143.04
<input checked="" type="checkbox"/> OXNY08 - Plan 08 Oxford Freedom HDHP EPO NY	\$849.51	\$1,741.49	\$1,466.25	\$2,562.09
<input type="checkbox"/> 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.

**PrestigePEO** Welcome Brian Restaurant BR

00113 - Pawnee Parks & Recreation (change client)

Home > Model Version 1

Summary

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

Tier	Rate	Last Year Rate				Rate Effective 11/1/2023	Next Year Rate			
		Monthly Contributions %	Monthly Contributions \$	Employee Count	Total		Monthly Contributions %	Monthly Contributions \$	Employer	Employee
<b>Plan 01 Oxford Liberty Direct NY</b>										
Single	\$897.57	38%	\$350.00	2	\$700.00	\$1,005.28				▲ 12.00%
Couple	\$1,840.47	19%	\$350.00	0	\$0.00	\$2,146.73				▲ 16.64%
Single Parent	\$1,549.20	22%	\$350.00	0	\$0.00	\$1,806.99				▲ 16.64%
Family	\$2,707.05	12%	\$350.00	0	\$0.00	\$3,343.41				▲ 23.50%
<b>Plan 02 Oxford Liberty POS NY</b>										
Single	\$897.57	31%	\$350.00	0	\$0.00	\$1,225.91				▲ 36.58%
Couple	\$1,840.47	15%	\$350.00	1	\$350.00	\$2,518.40				▲ 36.38%
Single Parent	\$1,549.20	18%	\$350.00	0	\$0.00	\$2,092.91				▲ 35.09%
Family	\$2,707.05	10%	\$350.00	0	\$0.00	\$3,657.12				▲ 35.09%
<b>Plan 03 Oxford Freedom EPO NY</b>										
Single	\$1,252.15	27%	\$350.00	0	\$0.00	\$1,402.41				▲ 12.00%
Couple	\$1,840.47	13%	\$350.00	1	\$350.00	\$2,874.93				▲ 56.20%
Single Parent	\$1,549.20	16%	\$350.00	0	\$0.00	\$2,420.56				▲ 56.24%
Family	\$2,707.05	9%	\$350.00	0	\$0.00	\$4,229.61				▲ 56.24%
<b>Plan 08 Oxford Freedom HDHP EPO NY</b>										
Single	\$811.85	61%	\$500.00	0	\$0.00	\$909.27				▲ 11.99%
Couple	\$1,840.47	30%	\$500.00	1	\$350.00	\$1,863.99				▲ 1.51%
Single Parent	\$1,549.20	35%	\$500.00	0	\$0.00	\$1,569.38				▲ 1.30%
Family	\$2,707.05	20%	\$500.00	0	\$0.00	\$2,742.30				▲ 1.30%
<b>Plan 12 Oxford Metro EPO NY</b>										



## 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 11/1/2023	Next Year Rate		Final Contribution			
		%	\$				%	\$	Employer	Employee	Rate Change %	
Plan 01 Oxford Liberty Direct NY							<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Single	\$897.57	38%	\$350.00	2	\$700.00	\$1,005.28	50	<input checked="" type="checkbox"/>	\$02.64	502.64	502.64	▲ 12.00%
Couple	\$1,840.47	19%	\$350.00	0	\$0.00	\$2,146.73	50	<input checked="" type="checkbox"/>	1,073.37	1,073.37	1,073.37	▲ 16.64%
Single Parent	\$1,549.20	22%	\$350.00	0	\$0.00	\$1,806.99	50	<input checked="" type="checkbox"/>	903.50	903.50	903.50	▲ 16.64%
Family	\$2,707.05	12%	\$350.00	0	\$0.00	\$3,343.41	50	<input checked="" type="checkbox"/>	1,671.71	1,671.71	1,671.71	▲ 23.50%

*\*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	Rate Change %	
Plan 01 Oxford Liberty Direct NY							<input type="checkbox"/>	<input checked="" type="checkbox"/>				
Single	\$897.57	38%	\$350.00	2	\$700.00	\$1,005.28	50	<input type="checkbox"/>	\$500.00	\$500.00	\$505.28	▲ 12.00%
Couple	\$1,840.47	19%	\$350.00	0	\$0.00	\$2,146.73	47	<input type="checkbox"/>	\$1,000.00	\$1,000.00	\$1,146.73	▲ 16.64%
Single Parent	\$1,549.20	22%	\$350.00	0	\$0.00	\$1,806.99	55	<input type="checkbox"/>	\$1,000.00	\$1,000.00	\$806.99	▲ 16.64%
Family	\$2,707.05	12%	\$350.00	0	\$0.00	\$3,343.41	45	<input type="checkbox"/>	\$1,500.00	\$1,500.00	\$1,843.41	▲ 23.50%

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.

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		Employee Count	Total	Rate Effective 11/1/2022	Next Year Rate		Final Contribution					
		%	\$				%	\$	Employer	Employee	Rate Change %			
▼ Plan 01 Oxford Liberty Direct NY										<input type="checkbox"/>	<input checked="" type="checkbox"/>			
Single	\$897.57	38%	\$350.00	2	\$700.00	\$1,005.28	50	<input type="checkbox"/>	\$500.00	<input checked="" type="checkbox"/>	\$500.00	\$505.28	▲ 12.00%	
Couple	\$1,840.47	19%	\$350.00	0	\$0.00	\$2,146.73	47	<input type="checkbox"/>	\$1,000.00	<input checked="" type="checkbox"/>	\$1,000.00	\$1,146.73	▲ 16.64%	
Single Parent	\$1,549.20	22%	\$350.00	0	\$0.00	\$1,806.99	55	<input type="checkbox"/>	\$1,000.00	<input checked="" type="checkbox"/>	\$1,000.00	\$806.99	▲ 16.64%	
Family	\$2,707.05	12%	\$350.00	0	\$0.00	\$3,343.41	45	<input type="checkbox"/>	\$1,500.00	<input checked="" type="checkbox"/>	\$1,500.00	\$1,843.41	▲ 23.50%	
▼ Plan 02 Oxford Liberty POS NY										<input type="checkbox"/>	<input checked="" type="checkbox"/>			

## 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.

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		Employee Count	Total	Rate Effective 11/1/2023	Next Year Rate		Final Contribution					
		%	\$				%	\$	Employer	Employee	Rate Change %			
▼ Plan 01 Oxford Liberty Direct NY										<input type="checkbox"/>	<input checked="" type="checkbox"/>			
Single	\$897.57	38%	\$350.00	2	\$700.00	\$1,005.28	40	<input type="checkbox"/>	403.86	<input checked="" type="checkbox"/>	\$403.86	\$601.42	▲ 12.00%	
Couple	\$1,840.47	19%	\$350.00	0	\$0.00	\$2,146.73	23	<input type="checkbox"/>	503.13	<input checked="" type="checkbox"/>	\$503.13	\$1,643.60	▲ 16.64%	
Single Parent	\$1,549.20	22%	\$350.00	0	\$0.00	\$1,806.99	27	<input type="checkbox"/>	478.90	<input checked="" type="checkbox"/>	\$478.90	\$1,328.09	▲ 16.64%	
Family	\$2,707.05	12%	\$350.00	0	\$0.00	\$3,343.41	20	<input type="checkbox"/>	668.18	<input checked="" type="checkbox"/>	\$668.18	\$2,675.23	▲ 23.50%	
▼ Plan 02 Oxford Liberty POS NY										<input 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 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.

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		Employee Count	Total	Rate Effective 11/1/2023	Next Year Rate		Final Contribution					
		%	\$				%	\$	Employer	Employee	Rate Change %			
▼ Plan 01 Oxford Liberty Direct NY										<input type="checkbox"/>	<input type="checkbox"/>			
Single	\$897.57	38%	\$350.00	2	\$700.00	\$1,005.28	40	<input type="checkbox"/>	403.86	<input checked="" type="checkbox"/>	\$403.86	\$601.42	▲ 12.00%	
Couple	\$1,840.47	19%	\$350.00	0	\$0.00	\$2,146.73	23	<input checked="" type="checkbox"/>	503.13	<input type="checkbox"/>	\$503.13	\$1,643.60	▲ 16.64%	
Single Parent	\$1,549.20	22%	\$350.00	0	\$0.00	\$1,806.99	27	<input type="checkbox"/>	478.90	<input checked="" type="checkbox"/>	\$478.90	\$1,328.09	▲ 16.64%	
Family	\$2,707.05	12%	\$350.00	0	\$0.00	\$3,343.41	20	<input checked="" type="checkbox"/>	668.18	<input type="checkbox"/>	\$668.18	\$2,675.23	▲ 23.50%	
▼ Plan 02 Oxford Liberty POS NY										<input type="checkbox"/>	<input type="checkbox"/>			

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.

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				Rate Effective 11/1/2023	Next Year Rate					
		Monthly Contributions		Employee Count	Total		Monthly Contributions		Final Contribution		Rate Change %	
		%	\$				%	\$	Employer	Employee		
▼ Plan 01 Oxford Liberty Direct NY												
Single	\$897.57	38%	\$350.00	2	\$700.00	\$1,005.28	40	403.86	✓	\$403.86	\$601.42	▲ 12.00%
Couple	\$1,840.47	19%	\$350.00	0	\$0.00	\$2,146.73	23	503.13	✓	\$503.13	\$1,643.60	▲ 16.64%
Single Parent	\$1,549.20	22%	\$350.00	0	\$0.00	\$1,806.99	27	478.90	✓	\$478.90	\$1,328.09	▲ 16.64%
Family	\$2,707.05	12%	\$350.00	0	\$0.00	\$3,343.41	20	668.18	✓	\$668.18	\$2,675.23	▲ 23.50%
▼ Plan 02 Oxford 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.

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				Rate Effective 11/1/2023	Next Year Rate					
		Monthly Contributions		Employee Count	Total		Monthly Contributions		Final Contribution		Rate Change %	
		%	\$				%	\$	Employer	Employee		
▼ Plan 01 Oxford Liberty Direct NY												
Single	\$897.57	38%	\$350.00	2	\$700.00	\$1,005.28						▲ 12.00%
Couple	\$1,840.47	19%	\$350.00	0	\$0.00	\$2,146.73						▲ 16.64%
Single Parent	\$1,549.20	22%	\$350.00	0	\$0.00	\$1,806.99						▲ 16.64%
Family	\$2,707.05	12%	\$350.00	0	\$0.00	\$3,343.41						▲ 23.50%
▼ Plan 02 Oxford Liberty POS NY												
Single	\$897.57	31%	\$350.00	0	\$0.00	\$1,225.91						▲ 36.58%
Couple	\$1,840.47	15%	\$350.00	1	\$350.00	\$2,518.40						▲ 36.38%
Single Parent	\$1,549.20	18%	\$350.00	0	\$0.00	\$2,092.91						▲ 35.09%
Family	\$2,707.05	10%	\$350.00	0	\$0.00	\$3,657.12						▲ 35.09%
▼ Plan 03 Oxford Freedom EPO NY												
Single	\$1,252.15	27%	\$350.00	0	\$0.00	\$1,402.41						▲ 12.00%
Couple	\$1,840.47	13%	\$350.00	1	\$350.00	\$2,874.93						▲ 56.20%
Single Parent	\$1,549.20	16%	\$350.00	0	\$0.00	\$2,420.56						▲ 56.24%
Family	\$2,707.05	9%	\$350.00	0	\$0.00	\$4,229.61						▲ 56.24%
▼ Plan 08 Oxford Freedom HDHP EPO NY												

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

The screenshot shows a web interface with a table of contribution rates and a pop-up dialog box. The table is organized into three sections: Plan 01 Oxford Liberty Direct NY, Plan 02 Oxford Liberty POS NY, and Plan 03 Oxford Freedom EPO NY. Each plan has four tiers: Single, Couple, Single Parent, and Family. The table columns include Tier, Rate, and Monthly Contribution (%). The pop-up dialog box, titled 'Set Max Monthly Contribution', contains four input fields for 'Single Max Contribution', 'Couple Max Contribution', 'Single Parent Max Contribution', and 'Family Max Contribution'. The values entered are \$500.00, \$1,000.00, \$1,000.00, and \$1,500.00 respectively. The dialog also has 'Cancel' and 'Set Max Contribution' buttons.

Plan	Tier	Last Year Rate		Monthly Contribution	Next Year Rate				
		Rate	%		Monthly Contributions	Final Contribution			
					%	\$	Employer	Employee	Rate Change%
Plan 01 Oxford Liberty Direct NY	Single	\$897.57	38%						▲ 12.00%
	Couple	\$1,840.47	19%						▲ 16.64%
	Single Parent	\$1,549.20	22%						▲ 16.64%
	Family	\$2,707.05	12%						▲ 23.50%
Plan 02 Oxford Liberty POS NY	Single	\$897.57	31%						▲ 36.58%
	Couple	\$1,840.47	15%						▲ 36.38%
	Single Parent	\$1,549.20	18%						▲ 35.09%
	Family	\$2,707.05	10%						▲ 35.09%
Plan 03 Oxford Freedom EPO NY	Single								
	Couple								
	Single Parent								
	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.*

This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Set Max Contribution' button in the pop-up dialog. The button is located at the bottom right of the dialog, next to the 'Cancel' button.

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

	Last Year Rate					Rate Effective 11/1/2022	Next Year Rate					
	Tier	Rate	Monthly Contributions		Employee Count		Total	Monthly Contributions		Final Contribution		Rate Change %
			%	\$			%	\$	Employer	Employee		
<b>Plan 01 Oxford Liberty Direct NY</b>												
Single		\$897.57	38%	\$350.00	2	\$700.00	50	\$500.00	\$500.00	\$505.28	▲ 12.00%	
Couple		\$1,840.47	19%	\$350.00	0	\$0.00	47	\$1,000.00	\$1,000.00	\$1,146.73	▲ 16.64%	
Single Parent		\$1,549.20	22%	\$350.00	0	\$0.00	55	\$1,000.00	\$1,000.00	\$806.99	▲ 16.64%	
Family		\$2,707.05	12%	\$350.00	0	\$0.00	45	\$1,500.00	\$1,500.00	\$1,843.41	▲ 23.50%	
<b>Plan 02 Oxford Liberty POS NY</b>												
Single		\$897.57	31%	\$350.00	0	\$0.00	41	\$500.00	\$500.00	\$725.91	▲ 36.58%	
Couple		\$1,840.47	15%	\$350.00	1	\$350.00	40	\$1,000.00	\$1,000.00	\$1,518.40	▲ 36.38%	
Single Parent		\$1,549.20	18%	\$350.00	0	\$0.00	48	\$1,000.00	\$1,000.00	\$1,092.91	▲ 35.09%	
Family		\$2,707.05	10%	\$350.00	0	\$0.00	41	\$1,500.00	\$1,500.00	\$2,157.12	▲ 35.09%	
<b>Plan 03 Oxford Freedom EPO NY</b>												

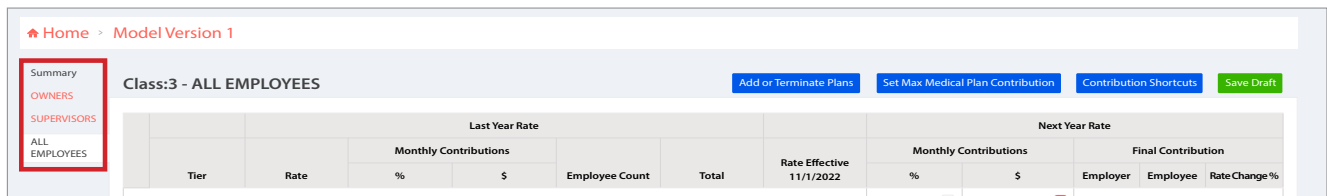
However, once a Max Contribution is entered and calculated, you have the ability to make adjustments to the final contribution amount, as long as the amount that you enter is less than the maximum that you set.

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 Benefit Class, click the “Save Draft” button which can be found at the top and bottom of the page.

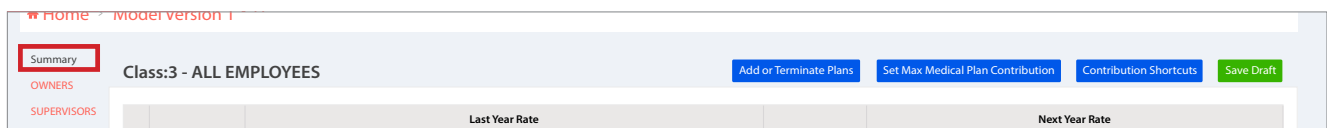


To adjust the contribution amounts for the next Benefits Class click the class name on the left panel and repeat the steps above.



*\*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.



## 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 screenshot shows the PrestigePEO dashboard for client '00113 - Pawnee Parks & Recreation'. The top navigation bar includes the PrestigePEO logo, the client name, and a 'Welcome Brian Restaurant' notification. The main content area is divided into several sections. On the left is a sidebar with navigation options: 'Dashboard', 'Full Rate Benefits Menus', 'Benefits Employee Menus', and 'User Guide'. The main area features a 'Home' section with contact information for the Benefit Rep (Betty Benefits) and Sales Rep (Demo Payroll). Below this, there are two columns of data: 'Current Benefits Cost Per Month' and 'Projected Benefits Cost Per Month'. Each column displays three contribution types: Company Contribution, Employee Contribution, and Total Contribution, along with their respective values and percentage changes. At the bottom of each column are horizontal bar charts for 'Total costs' for Medical and Dental categories. A red box highlights the 'Create New Contribution Model' button in the top right corner of the main content area.

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.

This screenshot is similar to the previous one, showing the PrestigePEO dashboard for the same client. The layout and data are consistent, but the 'Edit Contribution Model' button in the top right corner of the main content area is highlighted with a red box. Additionally, the 'Total costs' bar charts for Medical and Dental categories are more detailed, showing specific values for each category.

You have the ability to view who created the model.

This screenshot shows the PrestigePEO dashboard for the same client, focusing on the 'Created by Betty Benefits' button. This button is highlighted with a red box, indicating that users can view the creator of a model. The rest of the dashboard layout, including the sidebar, contact information, and contribution data, remains the same as in the previous screenshots.

# 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
OWNERS	2	1	0	\$3,225.18	\$0.00	Pending
SUPERVISORS	1	0	0	\$626.07	\$0.00	Pending
ALL EMPLOYEES	3	2	1	\$1,050.00	\$0.00	Pending
<b>Total</b>	<b>6</b>	<b>3</b>	<b>1</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0/3 Completed</b>

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 Benefits Cost Per Month**

- Company Contribution: \$4,901.25
- Employee Contribution: \$5,032.93
- Total Contribution: \$9,934.18

**Total costs**

Medical (6 members)	Company Contribution: \$4,741.58	Employee Contribution: \$4,906.00
Dental (3 members)	Company Contribution: \$159.67	Employee Contribution: \$122.66
Vision (1 members)	Company Contribution: \$0.00	Employee Contribution: \$4.27

**Projected Benefits Cost Per Month**

- Company Contribution: \$5,514.55 (▲13%)
- Employee Contribution: \$5,372.39 (▲7%)
- Total Contribution: \$10,886.94 (▲10%)

**Total costs**

Medical (6 members)	Company Contribution: \$5,372.39	Employee Contribution: \$5,372.39
Dental (3 members)	Company Contribution: \$137.38	Employee Contribution: \$0.00
Vision (1 members)	Company Contribution: \$4.78	Employee Contribution: \$0.00

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 PrestigePRO Employee Benefits Portal and make their elections.

Benefits Employee Menus
Sales Rep: Demo Payroll    Email: SalesDemo@prestigepeo.com    Ph: 516-555-1234

User Guide

### Current Benefits Cost Per Month

\$4,901.25  
Company Contribution

\$5,032.93  
Employee Contribution

\$9,934.18  
Total Contribution

#### Total costs

Medical (6 members)		\$4,741.58
<div style="display: flex; align-items: center;"> <div style="width: 100%; height: 10px; background: linear-gradient(to right, green 47%, blue 47%);"></div> </div>		\$4,906.00
Dental (3 members)		\$159.67
<div style="display: flex; align-items: center;"> <div style="width: 100%; height: 10px; background: linear-gradient(to right, green 100%, blue 100%);"></div> </div>		\$122.66
Vision (1 members)		\$0.00
<div style="display: flex; align-items: center;"> <div style="width: 100%; height: 10px; background: linear-gradient(to right, green 100%, blue 100%);"></div> </div>		\$4.27

— Company Contribution    — Employee Contribution

### Projected Benefits Cost Per Month

[Edit Contribution Model](#)

\$5,514.55 ▲13%  
Company Contribution

\$5,372.39 ▲7%  
Employee Contribution

\$10,886.94 ▲10%  
Total Contribution

#### Total costs

Medical (6 members)		\$5,372.39
<div style="display: flex; align-items: center;"> <div style="width: 100%; height: 10px; background: linear-gradient(to right, green 100%, blue 100%);"></div> </div>		\$5,372.39
Dental (3 members)		\$137.38
<div style="display: flex; align-items: center;"> <div style="width: 100%; height: 10px; background: linear-gradient(to right, green 100%, blue 100%);"></div> </div>		\$0.00
Vision (1 members)		\$4.78
<div style="display: flex; align-items: center;"> <div style="width: 100%; height: 10px; background: linear-gradient(to right, green 100%, blue 100%);"></div> </div>		\$0.00

— Company Contribution    — Employee Contribution

Class Name	Medical Employee Count	Dental Employee Count	Vision Employee Count	Current Total Employer Cost	Estimated Renewal Total Employer Cost	Status
OWNERS	2	1	0	\$3,225.18	\$1,603.87	Completed <span style="color: green;">✔</span>
SUPERVISORS	1	0	0	\$626.07	\$1,161.62	Completed <span style="color: green;">✔</span>
ALL EMPLOYEES	3	2	1	\$4,901.25	\$5,514.55	Completed <span style="color: green;">✔</span>
<b>Total</b>	<b>6</b>	<b>3</b>	<b>1</b>	<b>\$8,752.50</b>	<b>\$8,137.88</b>	<b>3/3 Completed</b>

Submit Contribution Model



# 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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