

PEO Annual Enrollment Phase 1 Workflow

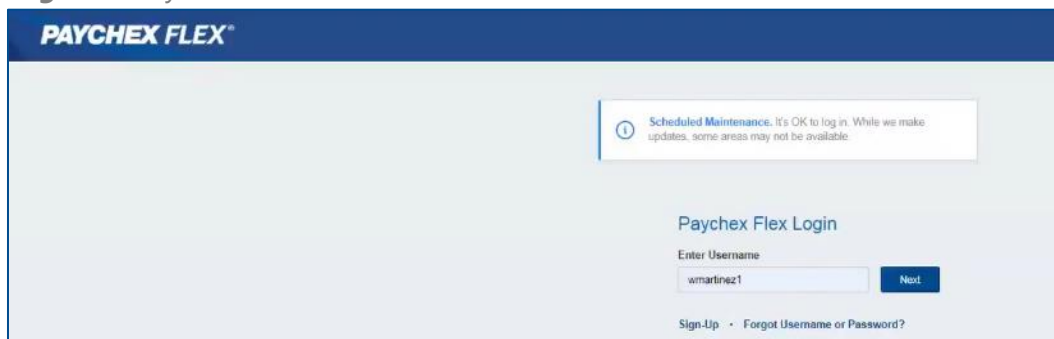
Phase 1 Enrollment in Paychex Flex® Job Aid

PEO Health and Benefits annual enrollment phase 1 elections are selected in the revised Paychex Flex workflows, bringing the Phase 1 experience in line with the rest of the Paychex Flex application. The Paychex Flex Phase 1 experience is available on any internet-connected tablet or computer that supports HTML5. This job aid outlines the Phase 1 process in Paychex Flex.

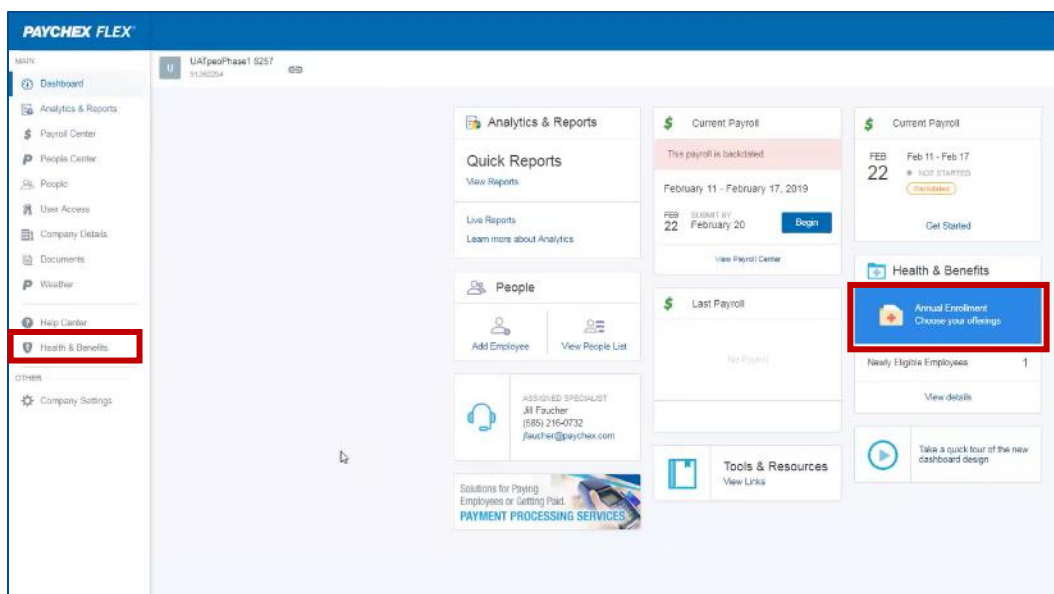
For the best results when working with clients, recommend that your clients read their reports and contribution and participation rules, available in the header of each step, before accessing the Flex workflow so they know what plans they want before working in the system.

Access and Navigate H&B Phase 1 Benefit Election

1. **Log in** to Paychex Flex.

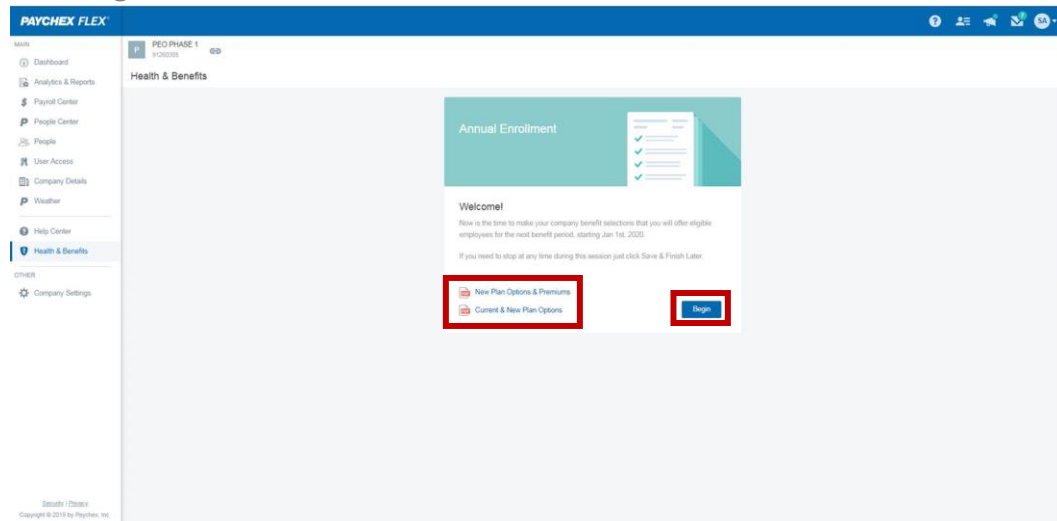


2. Click **Annual Enrollment – Choose your offerings** or click Health & Benefits in the sidebar and click **Annual Enrollment – Get Started** from the Health & Benefits Screen.

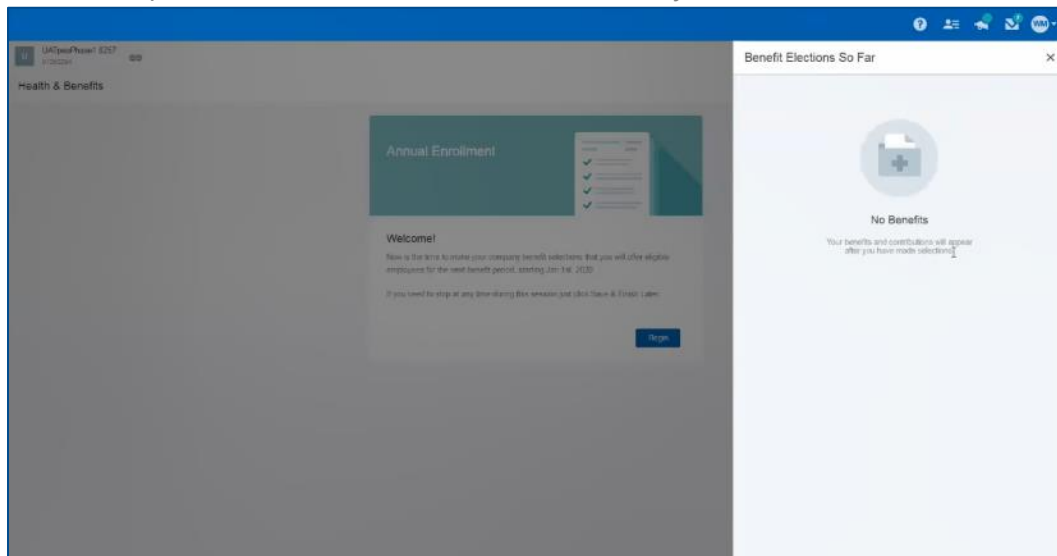


3. The Phase 1 workflow begins with a welcome screen. There are two reports to review prior to entering the workflow to help make plan selection decisions.
 - a. **New Plan Options & Premiums** provides a list of all plans that the client may offer and will through the Phase 1 employer plan selection process.
 - b. **Current & New Plan Options** provides a side by side comparison of all plans currently offered and the same plans if they are available in the new year.

Click **Begin** to continue.



At any time during your benefit election process, click **Benefits so Far** in the upper-right corner to open the drawer and review the elections you've made so far.



4. Begin your annual enrollment process on the checklist screen. Each step will mark complete and unlock the following steps. The first step in the process is to review and modify employee classes. Click **Start** to begin. At any time in this process, you can click **Save & Finish Later** to return at another time.

Annual Enrollment

We'll walk you through everything you need to choose and setup your benefit offerings for the next benefit period.

- Employee Classes **Start**
- Medical
- Dental
- Vision
- Group Term Life
- Voluntary Life
- Disability
- Voluntary Insurance
- Review & Submit

5. Let's begin with employee classes. Each step in the benefit election process has a completion meter at the top of the screen so you can tell what is left in this step. You can review your existing classes on this screen. Click the arrow next to the class to view or edit the class details, or click **Add** to create a new employee class.

Note: Class code changes are only required if the you know the employee(s) require a class change for the new benefit plan period.

Click **Continue** to review and assign employee classes.

Review and adjust classes

First, let's just ensure the way you group employees for benefits is up to date.

Classes	Name	Employees	Wait Period (days)	
	EMPLOYEES	19	30 days	>
	OWNERS	1	0 days	>

Add

Continue

To Checklist

6. To add a new class, enter a **Name** and a **Wait Period** in days. Click **Save**. Click **Continue** to assign employees to classes.

Add Class

Effective Date. Please note that any changes made will take effect when the next benefit period begins on Jan 1, 2020.

Details

Name *

Wait Period (days) *

Cancel Save

Review Classes

Review and adjust classes

First, let's just ensure the way you group employees for benefits is up to date

Name	Employees	Wait Period (days)
EMPLOYEES	19	30 days
OWNERS	1	0 days

To Checklist

Continue

7. A list of all employees displays, including current employee class. Select a **Future Class** next to the employee name, or if you need to assign multiple employees to a class at once, Click **Batch Assign**. Click **Continue** to complete this step once all class assignments are complete.

Review class assignments

Ensure that your employees' class assignments are correct for the next benefit period. Make any corrections or updates as needed.

Effective Date. Please note that any changes made will take effect when the next benefit period begins on Jan 1, 2020.

Search

All Employees

Batch Assign

Name ↓	Current Class	Future Class
AA Adams, Amber G ID 32	OWNERS	OWNERS
EA Adams, Emily W ID 73	EMPLOYEES	OWNERS ● PENDING
HA Adams, Helga K ID 32	EMPLOYEES	OWNERS ● PENDING

8. To batch assign, select the employee class with employees you wish to assign.

Batch Assign Class Codes ✕

Effective Date. Please note that any changes made will take effect when the next benefit period begins on Jan 1, 2020.

Details

Step 1: Choose Employees
Who is receiving the class code change?

Existing Classes	✕
EMPLOYEES	>
NEW EMPLOYEES	>
OWNERS	>

Confirm

9. Select the employees to assign and click **Apply**.

EMPLOYEES

Filter

<input type="checkbox"/>	All
<input type="checkbox"/>	Adams, Emily W ID 73
<input checked="" type="checkbox"/>	Adams, Helga K ID 32
<input type="checkbox"/>	Adams, Juliana B ID 96
<input type="checkbox"/>	Adams, Milton U ID 94
<input type="checkbox"/>	Adams, Thelma W ID 91
<input checked="" type="checkbox"/>	Allen, Deana W ID 20
<input type="checkbox"/>	Allen, Kristi Z ID 71
<input checked="" type="checkbox"/>	Allen, Noemi Y ID 58
<input type="checkbox"/>	Allen, Rafael B ID 99
<input checked="" type="checkbox"/>	Allen, Ron M ID 75
<input type="checkbox"/>	Allen, Rosetta E ID 89

4 selected

Cancel **Apply**

10. Select the new class code and click **Confirm**.

Batch Assign Class Codes

×

Effective Date.

Please note that any changes made will take effect when the next benefit period begins on Jan 1, 2020.

Details

Step 1: Choose Employees

Who is receiving the class code change?

Adams, Helga K

×

Allen, Deana W

×

Allen, Noemi Y

×

Allen, Ron M

×

+ Add More

Step 2: New Class Code

What will the class code for these selected employees be?

EMPLOYEES

NEW EMPLOYEES

OWNERS

Confirm

11. The Employee Classes step is marked complete and unlocks the benefit election steps in the process. You can revisit any previous steps by clicking **Revisit** or you can select any other step in the workflow by clicking **Start**. Depending on your completion of each step, you may also **Resume** or **Revisit** your selections. You must complete all steps before unlocking **Review & Submit** to finalize your elections.

The screenshot displays the 'Annual Enrollment' interface. At the top, a header section includes a circular icon with a checklist and a pencil, followed by the title 'Annual Enrollment' and a sub-header: 'We'll walk you through everything you need to choose and setup your benefit offerings for the next benefit period.' Below this, a progress bar shows the 'Employee Classes' step as complete, indicated by a green checkmark in a circle. To the right of this step is a 'Revisit' link. The main content area lists seven benefit categories, each with a radio button, an icon, and a name: Medical (blue plus icon), Dental (green tooth icon), Vision (purple eye icon), Group Term Life (pink heart icon), Voluntary Life (pink heart icon), Disability (green heart icon), and Voluntary Insurance (orange folder icon). To the right of each category is a blue 'Start' button. A red rectangle highlights the 'Start' buttons for all seven categories. At the bottom of the list is a 'Review & Submit' button, which is currently disabled and shown with a lock icon.

Step	Status	Action
Employee Classes	Complete	Revisit
Medical	Not Started	Start
Dental	Not Started	Start
Vision	Not Started	Start
Group Term Life	Not Started	Start
Voluntary Life	Not Started	Start
Disability	Not Started	Start
Voluntary Insurance	Not Started	Start
Review & Submit	Locked	Review & Submit

12. Select which medical plans you will offer during the next plan year. Any plan currently offered is labelled with a blue **Current** icon. If a prior-year plan with employees enrolled is no longer available, a message displays indicating the plan is no longer available and a new plan must be selected.

You can view a complete listing of all plans and benefits, including contribution rules and plan participation rules, by clicking the **Contributions & Participation Rules** link in the header. Certain plan combinations may not be available, and the system displays an error message if you select incompatible plans, but the Contribution & Participation Rules document will explain the plan combinations in more detail.

13. For clients whose plans offer benefits packages, select the package on the medical screen by clicking **Select** next to the desired package. Then, select the specific plans from that package like you would for any non-packaged plan.

Select medical plans
Select one of the plan option groupings below.
[Contribution & Participation Rules](#)

No Mixing and Matching. You may only select plans from the plan grouping you have selected.

Group Name	Monthly Cost	
A	\$756.60 - \$4,403.32	Selected
B	\$618.24 - \$3,258.20	Select

Select Group A Plans 20 plans to choose from

Service Area	Monthly Cost
FL Blue Tampa FL HMO 1	
<input checked="" type="checkbox"/> BCFL HMO 54 FL -TMP	\$756.60 - \$2,333.40
<input type="checkbox"/> BCFL HMO 55 FL - TMP	\$988.72 - \$3,053.00

14. Click the **Person icon** next to each service area to view employees eligible in the area.

Select medical plans
Choose which plans to offer to employees
[Contribution & Participation Rules](#)

Heads up! One or more plans you currently offer to employees is not available in the new plan year. Please select new plans so that all your employees are offered an option to enroll in.

Plan Options	Monthly Cost
Georgia Atlanta HMO 7	
<input type="checkbox"/> AET CORE HMO GA - ATL	\$648.04 - \$2,061.12
<input type="checkbox"/> AET DELUXE HMO GA - ATL	\$707.76 - \$2,508.00

Service Area

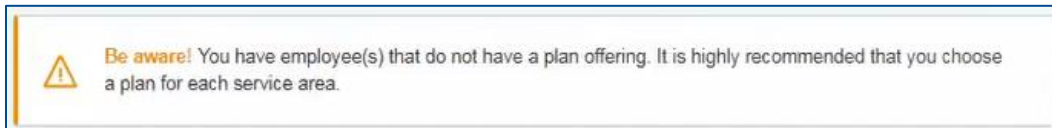
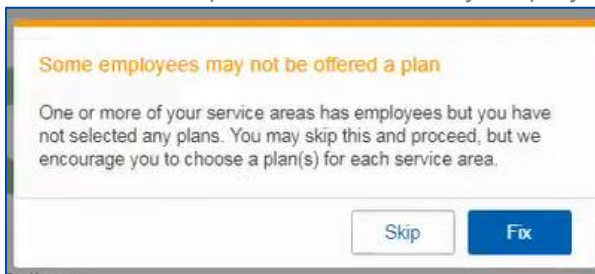
Employees eligible in this area

- KA Adams, Kara P ID 9
- LA Anderson, Lourdes A ID 16
- SA Anderson, Samuel F ID 15
- RH Hall, Ronnie F ID 19
- CH Hernandez, Clyde L ID 11
- JJ Jones, Jordan R ID 2
- RT Taylor, Rose U ID 5

15. Click the **dropdown arrow** next to any plan cost to view a breakdown of plan costs. This section also contains a PDF of the Benefits Summary for each plan.

Plan Options				17 plans to choose from	
Service Area			Monthly Cost		
Georgia Atlanta HMO  7					
<input type="checkbox"/>	AET CORE HMO GA - ATL			\$648.04 - \$2,061.12 	
Deductible	\$2,500/\$5,000		Employee	\$648.04	
Primary Co-pay	\$40		Employee + Spouse/Domestic Partner	—	
Emergency Room	\$200		Employee + Child(ren)	—	
RX	\$15/35/55/25% up to 250		Family	I	
—					

16. If you have employees who are not covered by any selected plan, an error message displays. Click **Skip** to continue or **Fix** to return to the plan selections and correct the error. This message may display even if all employees are covered, depending on the combination of plans selected. Verify employee coverage and continue as needed.



17. If you do not wish to offer medical plans, check the **Don't offer any medical plans** box at the bottom of the screen. A warning displays to make sure you are removing medical coverage.

☐ Don't offer any medical plans
 Continue

Remove All Plans

By not selecting medical plans, your worksite employees will not be offered medical coverage through the PEO. Our business rules prohibit the self-retention of medical coverage by our PEO clients without prior approval.

Please contact your HR Generalist if you have questions about self-retaining policy guidelines or are interested in offering coverage in 2021 through the PEO.

Are you sure you do not want to offer plans in 2020?

Cancel
Yes

18. Click **Continue** after you have selected your health offerings.
19. Assign your plans to your employee classes by checking the applicable **employee class checkboxes** for each plan offered. Click **Continue** to set contribution amounts.

Plans

Classes

Contributions

Offer medical to which classes?

For each plan, choose which classes it will be offered to.

Contribution & Participation Rules

Assign class(es) to each plan

Service Area	Monthly Cost
Georgia Atlanta HMO 7	
AET CORE HMO GA - ATL	\$648.04 - \$2,061.12
<input type="checkbox"/> EMPLOYEES <input type="checkbox"/> NEW GUYS <input type="checkbox"/> OWNERS	

20. Set your **contribution amounts**. You can set these individually per plan, per employee class, or you can also set contributions across the board by Employee Class or Coverage Level by clicking **Select** next to the contribution type you wish to use.

✓ Plans — ✓ **Classes** — ○ Contributions

Assign medical contributions

Enter percentage or dollar amount for each class. It will be applied to all plans and coverage levels for that class. You can also edit contribution amounts for each class code, plan, and coverage level individually.

[Contribution & Participation Rules](#)

Select Contribution Type

By Employee Classes
Select

By Coverage Level
Select

EMPLOYEES Class	Contributing \$0
Service Area	Monthly Cost
Georgia Atlanta HMO 7	
AET CORE HMO GA - ATL	\$0 of \$648.04 - \$2,061.12 ▼

Georgia Atlanta HMO 7

AET CORE HMO GA - ATL
\$291.44 of \$648.04 - \$2,061.12 ▲

	Carrier Premium (Monthly)	Company Contribution	Employee Cost (Monthly)
Employee Only	\$648.04	\$ 291.44	\$356.60

The system has built-in logic to help meet the minimum contributions for each plan type and will display an error if you enter a lesser amount.

21. The Apply Contributions wizard displays. You can set contributions by a dollar amount or percentage. Click the **\$ icon** to contribute a dollar amount, or the **% icon** for percentage.

Select Contribution Type

By Employee Classes ✓ Selected

By Coverage Level Select

Apply Contributions By Classes ⓘ

Contribute \$ % towards EMPLOYEES Class

Contribute \$ % towards NEW GUYS Class


Contribute \$ % towards OWNERS Class

Apply

22. After you've set your contribution amounts, click **Continue** to complete this step. The Annual Enrollment checklist displays. Click **Start** on each next step to continue through the checklist. Repeat the steps above to select each additional benefit offering in the checklist.


<input checked="" type="checkbox"/>	Employee Classes	Revisit
<input checked="" type="checkbox"/>	Medical	Revisit
<input type="checkbox"/>	Dental	Start
<input type="checkbox"/>	Vision	Start
<input type="checkbox"/>	Group Term Life	Start
<input type="checkbox"/>	Voluntary Life	Start
<input type="checkbox"/>	Disability	Start
<input type="checkbox"/>	Voluntary Insurance	Start
	Review & Submit	

23. Certain benefit offerings are 100% employer paid, such as short- or long-term disability, while others are employee paid, such as group life or voluntary insurance. In these steps, the mandatory offerings are automatically selected. These steps do not require employer contributions to be set.



Select group term life plans

Choose which plans to offer to employees.

 Contribution & Participation Rules

Plan Options 11 plans to choose from

Plan Name	Monthly Cost
<input type="checkbox"/> AETNA LIFE INS \$100,000	\$16.12
<input type="checkbox"/> AETNA LIFE INS \$15,000	\$2.44
<input type="checkbox"/> AETNA LIFE INS \$25,000	\$4.04
<input type="checkbox"/> AETNA LIFE INS \$250,000	\$40.20
<input type="checkbox"/> AETNA LIFE INS \$400,000	\$64.40
<input checked="" type="checkbox"/> AETNA LIFE INS \$50,000	\$3.08
<input type="checkbox"/> AETNA LIFE INS 1X SALARY	Rates vary based on age/salary
<input type="checkbox"/> AETNA LIFE INS 2X SALARY	Rates vary based on age/salary
<input type="checkbox"/> AETNA LIFE INS 3X SALARY	Rates vary based on age/salary
<input type="checkbox"/> AETNA LIFE INS 4X SALARY	Rates vary based on age/salary
<input type="checkbox"/> AETNA LIFE INS 5X SALARY	Rates vary based on age/salary

[To Checklist](#) ☐ Don't offer any group term life plans [Continue](#)



Select voluntary insurance plans


Voluntary plans are pre-selected, cannot be declined and are 100% employee paid.

Plan Options 7 plans to choose from

Plan Name	Monthly Cost
<input checked="" type="checkbox"/> METV ACCIDENT HI PLAN CURRENT	\$16.00 - \$39.36
<input checked="" type="checkbox"/> METV ACCIDENT LO PLAN CURRENT	\$8.48 - \$20.64
<input checked="" type="checkbox"/> METV CRITICAL HI PLAN CURRENT	Rates vary based on age
<input checked="" type="checkbox"/> METV CRITICAL LO PLAN CURRENT	Rates vary based on age
<input checked="" type="checkbox"/> METV HOSPITAL HI PLAN CURRENT	\$30.52 - \$78.84
<input checked="" type="checkbox"/> METV HOSPITAL LO PLAN CURRENT	\$15.20 - \$38.84
<input checked="" type="checkbox"/> MET LAW LEGAL PLAN CURRENT	\$16.62

















[To Checklist](#) [Continue](#)

24. Once you've selected plan offerings in each category of the checklist, you can **Review & Submit** to complete Phase 1 enrollment. Click **Start** to begin review.




Annual Enrollment

We'll walk you through everything you need to choose and setup your benefit offerings for the next benefit period.


	Employee Classes	Revisit
	 Medical	Revisit
	 Dental	Revisit
	 Vision	Revisit
	 Group Term Life	Revisit
	 Voluntary Life	Revisit
	 Disability	Revisit
	 Voluntary Insurance	Revisit
	Review & Submit	Start

25. Review your selections for each plan offered. Use the **View By Class** dropdown to filter the view to read the classes more easily. Click **Print Summary** to open a printable PDF of your elections. If you need to make changes to any benefit, click **Make Changes** next to the benefit category to go back to that step in the checklist. If you made class code changes, a section displays to review any changes.




Review your selections

Carefully review your selections before submitting for final approval by the carriers.

 **Print Summary**

View By Class

All Classes

 Medical

Make Changes

Plan Name

Monthly Cost

EMPLOYEES 19

AET CORE HMO GA - ATL \$551 - \$1,752 of \$648 - \$2,061

KAI HMO HIGH DED LOW GA \$277 - \$747 of \$326 - \$879

Client Name: UATpeoPhase1 8257

Client #: 0741/91260294

Effective Date: 2020-01-01

These elections are **not final** until you submit them electronically

*Rates vary based on age/salary

Medical - AET CORE HMO GA - ATL

EMPLOYEES Class	Carrier Premium (Monthly)	Company Contribution	Employee Cost (Monthly)
Employee	\$648.04	\$550.83	\$97.21
Employee + Child(ren)	\$1,226.12	\$1,042.20	\$183.92
Employee + Spouse/Domestic Partner	\$1,290.36	\$1,096.81	\$193.55
Family	\$2,061.12	\$1,751.95	\$309.17

Medical - AET CORE HMO GA - ATL

NEW GUYS Class	Carrier Premium (Monthly)	Company Contribution	Employee Cost (Monthly)
Employee	\$648.04	\$500.00	\$148.04
Employee + Child(ren)	\$1,226.12	\$500.00	\$726.12
Employee + Spouse/Domestic Partner	\$1,290.36	\$500.00	\$790.36
Family	\$2,061.12	\$500.00	\$1,561.12

Medical - AET CORE HMO GA - ATL

OWNERS Class	Carrier Premium (Monthly)	Company Contribution	Employee Cost (Monthly)
Employee	\$648.04	\$648.04	\$0.00
Employee + Child(ren)	\$1,226.12	\$1,226.12	\$0.00
Employee + Spouse/Domestic Partner	\$1,290.36	\$1,290.36	\$0.00
Family	\$2,061.12	\$2,061.12	\$0.00

26. When you are sure of your selections, click **Submit**.

MET LAW LEGAL PLAN

0% undefined \$17

Submit

27. A confirmation page displays, including a transaction number for your submission and the option print the confirmation for your records. If your Phase 1 window has not ended, the option to make changes displays.

