

NEOGOV

New Hire Benefits Enrollment

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Preface

Any modifications to this document, as the document exists within NEOGOV's body of documentation, are the sole responsibility of the entity modifying the document. By making any change to this document, you agree that modifications and unchanged portions of the document are your sole responsibility, comply with legal and regulatory requirements, comply with the terms of the Service Agreement between you and NEOGOV, and you further agree to update the document as product changes are released reflecting the author of the changes.

Overview

When your company hires employees, they elect their benefit plans through open enrollment. You begin this process at the Dashboard. Once started, NEOGOV keeps track of your selections through the entire process. If you log out and log back in, NEOGOV returns you to the last page you were on.

During enrollment, NEOGOV adds your elections and dollar amounts to a shopping cart. The shopping cart also displays the number of days left to enroll in benefits, and when your elections begin.

After making your elections, you can review and change them, or choose different options.

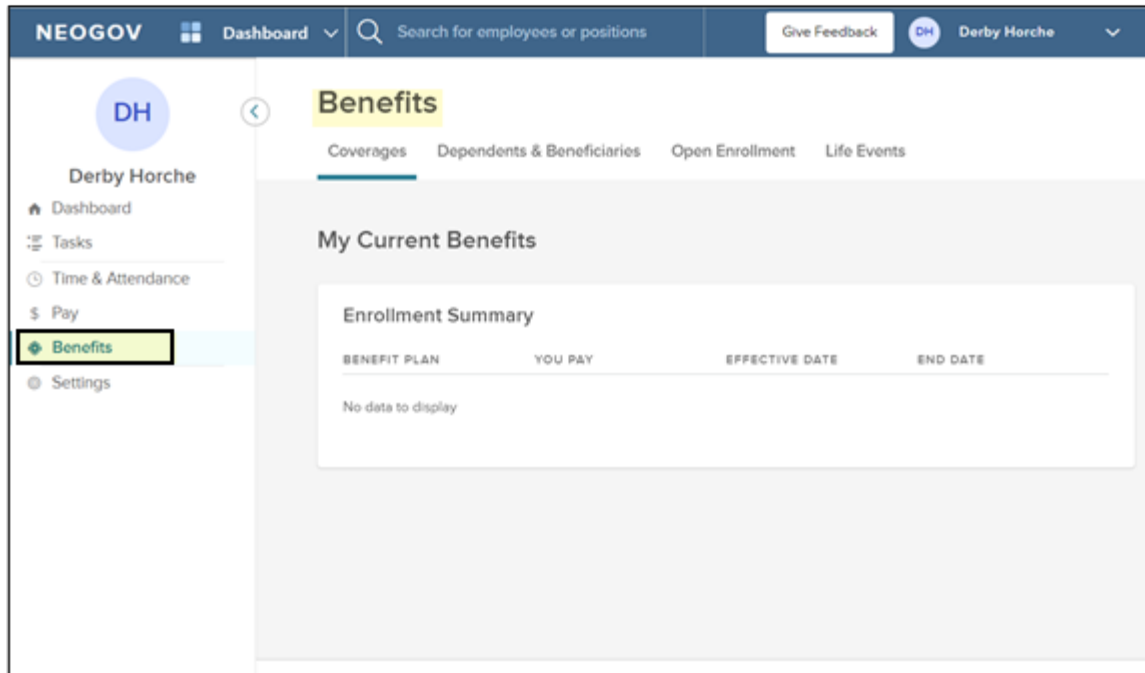


At any time during enrollment, click **Open Enrollment Overview** to return to the Dashboard.

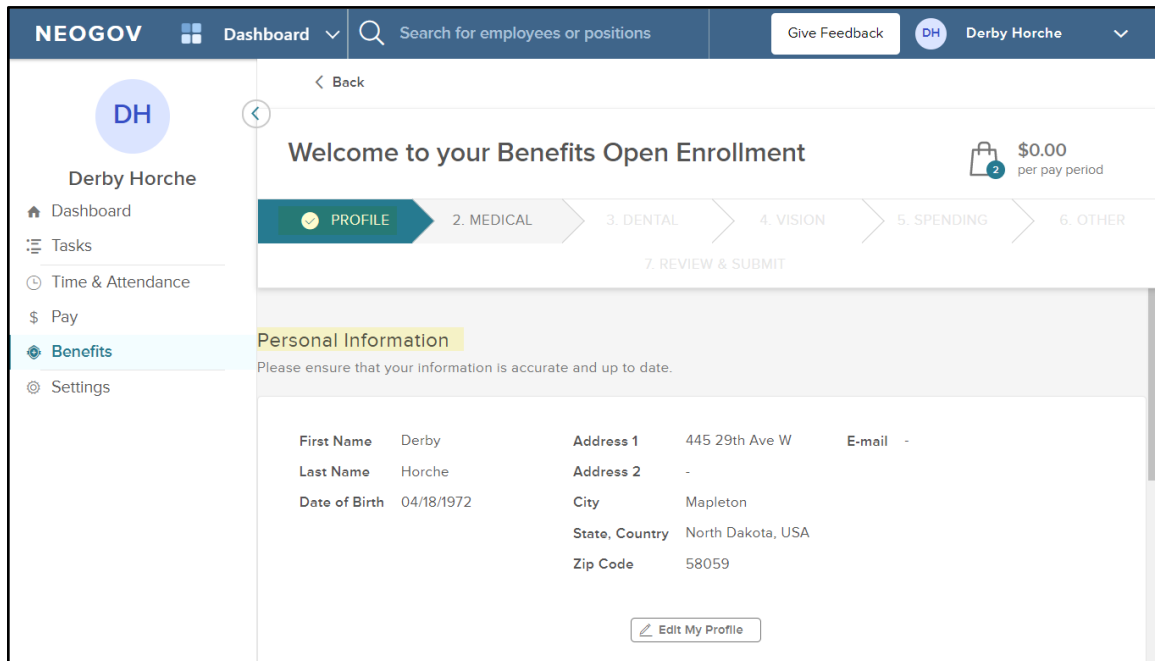
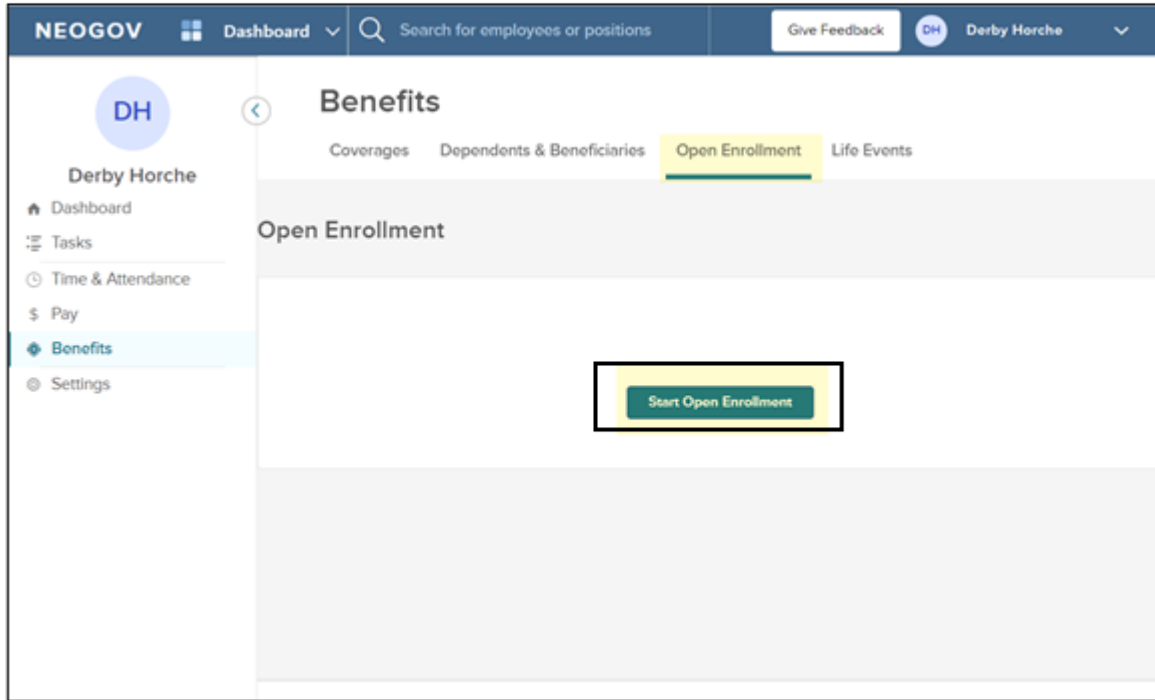
New Hire Benefits Enrollment

Maintain Your Profile

1. Access your dashboard and click the **Benefits** icon.



2. Select the **Open Enrollment** option and click **Start Open Enrollment**. The **Profile** tab is active and the **Personal Information** page displays.



3. If needed, click **Edit My Profile** to edit address information; click **Save Changes** when finished.

Update Your Personal Information

<< < 1 of 1 > >> 01/01/0001 - 12/31/3999

Address 1

Address 2

City

State, Country

Zip Code

Personal E-mail

Phone #

Address changes are only effective in the future. To make any past-dated changes, contact your HR department.

4. Scroll to **Dependents** and do one of the following:
 - Click **Remove** to remove the dependent from the employee record.
 - If applicable, click **Edit Dependent** to edit and specify the dependents' relationship.

- Benefits
- Settings

Dependents

Please ensure that your information is accurate and up to date.

| | | | | | |
|---------------|-------------------------------|----------------|---|----------|--------------------------|
| First Name | Marcy | Address 1 | - | Relation | Daughter |
| Last Name | Horche | City | - | Spouse | <input type="checkbox"/> |
| Gender | - | State, Country | - | Student | <input type="checkbox"/> |
| Date of Birth | - | Zip Code | - | Disabled | <input type="checkbox"/> |
| S.S.N. | <input type="text" value=""/> | | | | |

Important: Specifying relations determines the plans and coverages available to you. For example: if you have a spouse but no children, the only options available are employee only and employee + spouse. You will not see information about employee + child coverage on your medical, dental and vision plans.

5. Click **Next** or **Medical** to move forward in the election process.

Elect Your Medical Plan

NEOGOV filters medical plans based on your covered selection.

1. Click the **Medical** tab.
2. Select **Who Will Be Covered?**.
 - Employee Only
 - Employee & Spouse
 - Employee & Child(ren)
 - Family
3. Choose a medical plan, then click **Select**. The shopping cart records the medical plan and dollar amount.



To review the medical plans details, click **See More Details**. If you decide to choose the Medical High Deductible Health Plan (HDHP), you have the option of enrolling in a Health Savings Account (HSA). If you previously enrolled in a medical plan that is still available, you may choose the same plan or a different plan.

4. Review the shopping cart.

The screenshot displays the NEOGOV 'Benefits Open Enrollment' page for user Derby Horche. The page is divided into several sections:

- Navigation:** A top bar includes 'NEOGOV', 'Dashboard', a search bar, 'Give Feedback', and the user's name 'Derby Horche'. A left sidebar lists navigation options: Dashboard, Tasks, Time & Attendance, Pay, Benefits (selected), and Settings.
- Progress Indicators:** A horizontal bar shows the enrollment steps: PROFILE, MEDICAL (1), DENTAL, VISIT, and REVIEW & SUBMIT.
- Who Will Be Covered? (2):** Three radio button options are shown: 'Employee Only' (selected), 'Employee & Spouse', and 'Employee & Child(ren)'.
- Choose a Medical Plan (3):** A card for 'MEDICAL PPO' is highlighted. It includes details: Plan Description: Medical; Employer Pays: \$165.60 Per Pay Period; Who's Covered: Employee Only.
- Shopping Cart (4):** A summary box on the right shows a total of '\$36.19 per pay period'. Below it, a table lists selected items:

| | |
|-------------|---------|
| MEDICAL PPO | \$36.19 |
| DENTAL | \$0.00 |
| BASIC LIFE | \$0.00 |

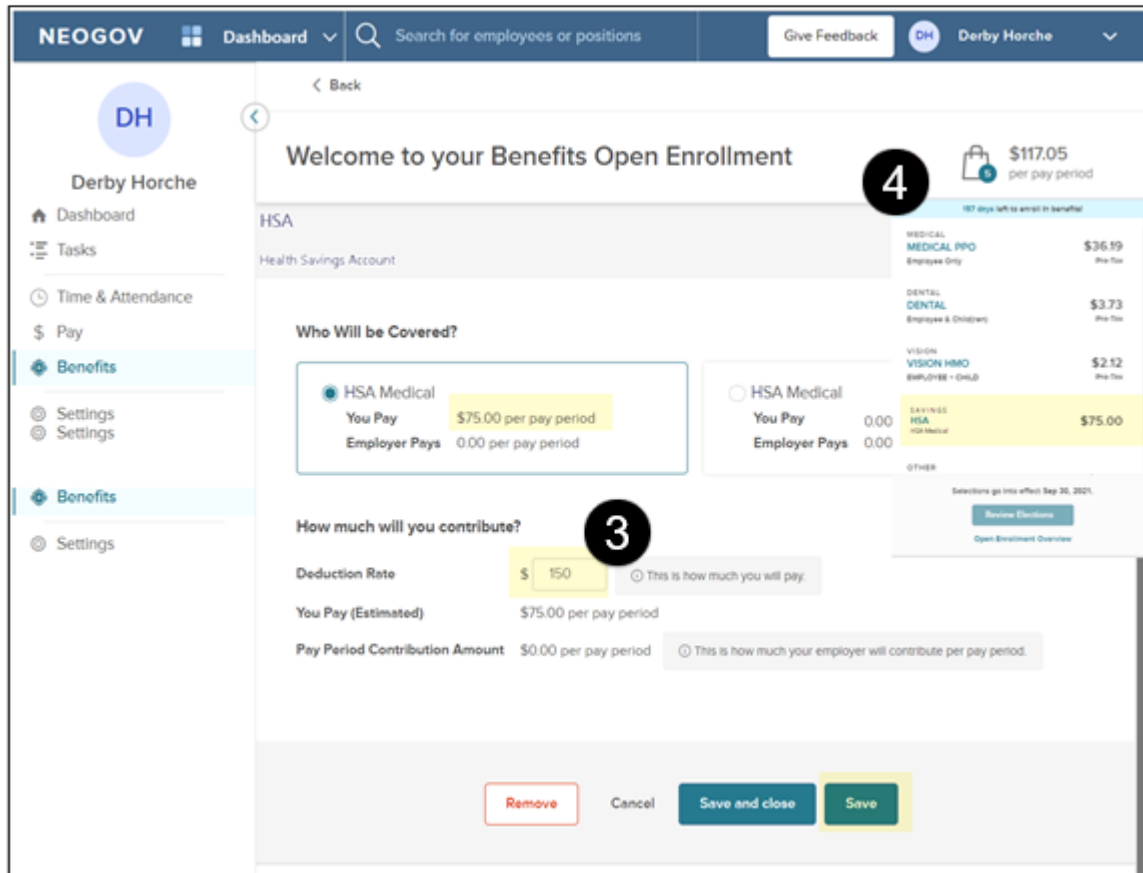


Important: When you make elections, NEOGOV subtracts the deductions from the shopping cart until a zero or positive balance displays. A negative balance means your employer has elected to contribute to your healthcare plan. A positive balance indicates that you must contribute to your healthcare plan.

5. Click **Next** or **Dental** to move forward in the election process.

Enroll in an HSA

1. Select the **HDHP** plan and click **Select**.
2. Select **Yes, Enroll in a HSA**. The **HSA** page displays.
3. Enter the **Deduction Rate** as a dollar amount.



4. Review the shopping cart.
5. Click **Save**. The HSA calculation displays on the HSA medical plan option.

Elect Your Dental Coverage

NEOGOV filters dental plans based on your covered selection.

1. Click the **Dental** tab.
2. Select **Who Will Be Covered?**.
 - Employee Only
 - Employee & Spouse
 - Employee & Child(ren)
 - Family
3. Choose a dental plan, then click **Select**. The shopping cart records the dental plan and dollar amount.



If you previously enrolled in a dental plan that is still available, you may choose the same plan or a different plan.

4. Review the shopping cart.

The screenshot displays the 'Benefits Open Enrollment' page for user Derby Horche. The page is divided into several sections:

- Navigation:** Includes a sidebar with 'Dashboard', 'Tasks', 'Time & Attendance', 'Pay', 'Benefits', and 'Settings'. The top navigation bar shows 'NEOGOV', 'Dashboard', a search bar, 'Give Feedback', and the user's name 'Derby Horche'.
- Progress Bar:** Shows four steps: 1. DENTAL, 2. WHO WILL BE COVERED?, 3. CHOOSE A DENTAL PLAN, and 4. SHOPPING CART. Step 4 is highlighted with a shopping cart icon and a total of \$39.92 per pay period.
- Who Will Be Covered? (Step 2):** Three radio button options are shown: 'Employee Only', 'Employee & Spouse', and 'Employee & Child(ren)'. The 'Employee & Child(ren)' option is selected.
- Choose a Dental Plan (Step 3):** Two plan options are listed:
 - Plan 1:** DENTAL, Plan Description: Dental, Employer Pays: \$0.46 Per Pay Period, Who's Covered: Employee & Child(ren). The 'YOU PAY' is \$0.46. A 'Select' button is visible.
 - Plan 2:** DENTAL, Plan Description: Dental, Employer Pays: \$1118 Per Pay Period, Who's Covered: Employee & Child(ren). The 'YOU PAY' is \$3.73. A 'Selected' button is visible.
- Shopping Cart (Step 4):** A table lists the selected items:

| Item | Amount |
|--|-------------------------------|
| MEDICAL: MEDICAL PPO Employee Only | \$36.19 Per Pay Period |
| DENTAL: DENTAL Employee & Child(ren) | \$3.73 Per Pay Period |
| OTHER: BASIC LIFE Employer paid Basic Life Insurance | \$0.00 |
| Total | \$39.92 per pay period |
- Bottom:** 'Save & Exit' button, 'Back' button, and 'Next' button.

5. Click **Next** or **Vision** to move forward in the election process.

Elect Your Vision Coverage

NEOGOV filters vision plans based on your covered selection.

1. Click the Vision tab.
2. Select **Who Will Be Covered?**.
 - Employee Only
 - Employee + Child
 - Family
3. Choose a vision plan and click **Select**. The status changes to **Selected**, and the shopping cart records the vision plan.



If you previously enrolled in a vision plan that is still available, you may choose the same plan or a different plan.

4. Review the shopping cart.

The screenshot displays the NEOGOV Benefits Open Enrollment page for user Derby Horche. The navigation bar includes 'NEOGOV', 'Dashboard', a search bar, 'Give Feedback', and the user's name 'DH Derby Horche'. The main content area is titled 'Welcome to your Benefits Open Enrollment' and features a progress indicator with steps: PROFILE, MEDICAL, DENTAL, and 4. VISION (highlighted in green). Below the progress bar, there are three main sections: 'Who Will Be Covered?' with radio buttons for 'EMPLOYEE ONLY' and 'EMPLOYEE + CHILD' (selected); 'Choose a Vision Plan' with a 'VISION HMO' plan selected; and a shopping cart on the right showing a total of \$42.05 per pay period. The selected plan details include: VISION HMO, Plan Description: Vision, Employer Pays: \$8.19 Per Pay Period, and Who's Covered: EMPLOYEE + CHILD. The cost for the selected plan is \$2.12 per pay period. A 'Waive Vision' button is visible at the bottom.

5. Click **Next** or the **Spending** tab to move forward in the election process.


Waive Your Coverage

If you do not want to enroll in coverage, do the following.

1. Click the **Medical, Dental, Vision** tab.
2. Scroll to **Don't need coverage?** and click **Waive Medical, Dental, Vision**. The status changes to **Waived Medical, Dental, Vision**.

Don't need coverage?

If you wish to decline coverage, you may be required to provide proof of insurance.



Button names change based on your selection.

3. Select the **Reason for waiving coverage**.
 - Not Specified
 - Insufficient Funds
 - Have Alt Coverage

Don't need coverage?

If you wish to decline coverage, you may be required to provide proof of insurance.

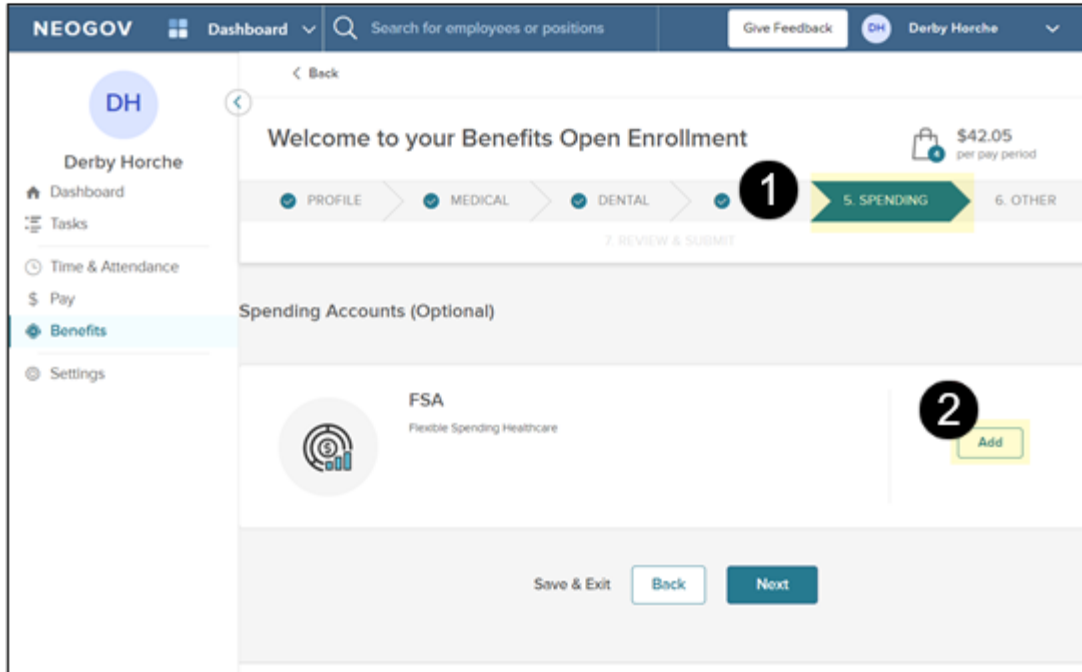
Reason for waiving coverage

Have Alt Coverage
▼

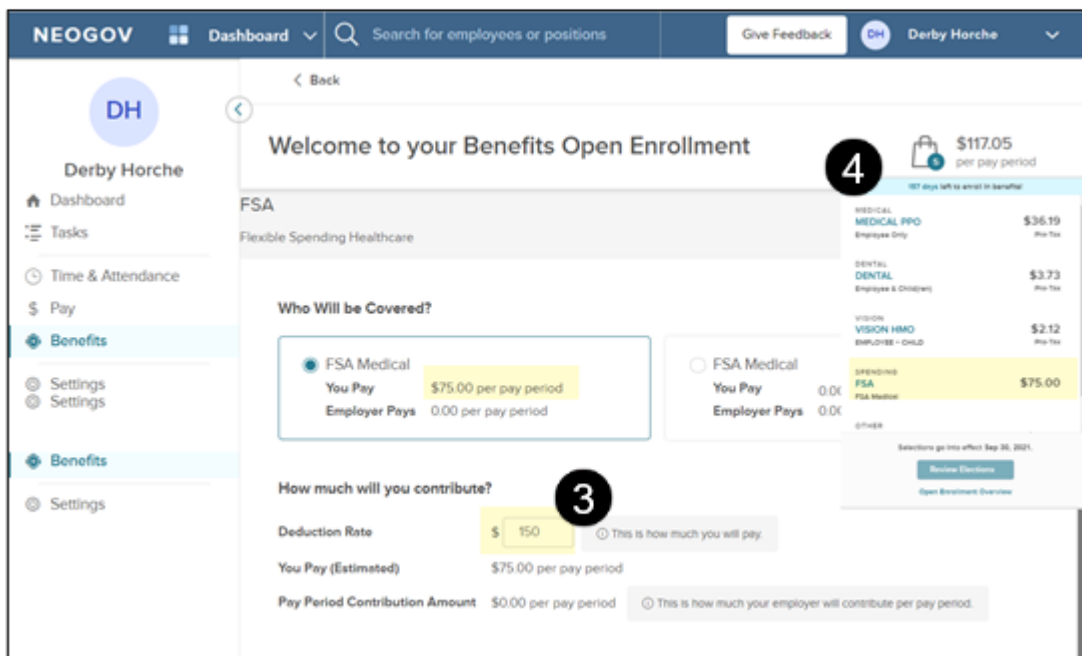
4. Click **Next**. The next enrollment option displays.

Choose an Optional Spending Account

1. Click the **Spending** tab.
2. Click **Add**.



3. Enter the **Deductible Rate** and click **Save**. The deductible rate amount displays in the **YOU PAY** field and shopping cart.
4. Review the shopping cart.

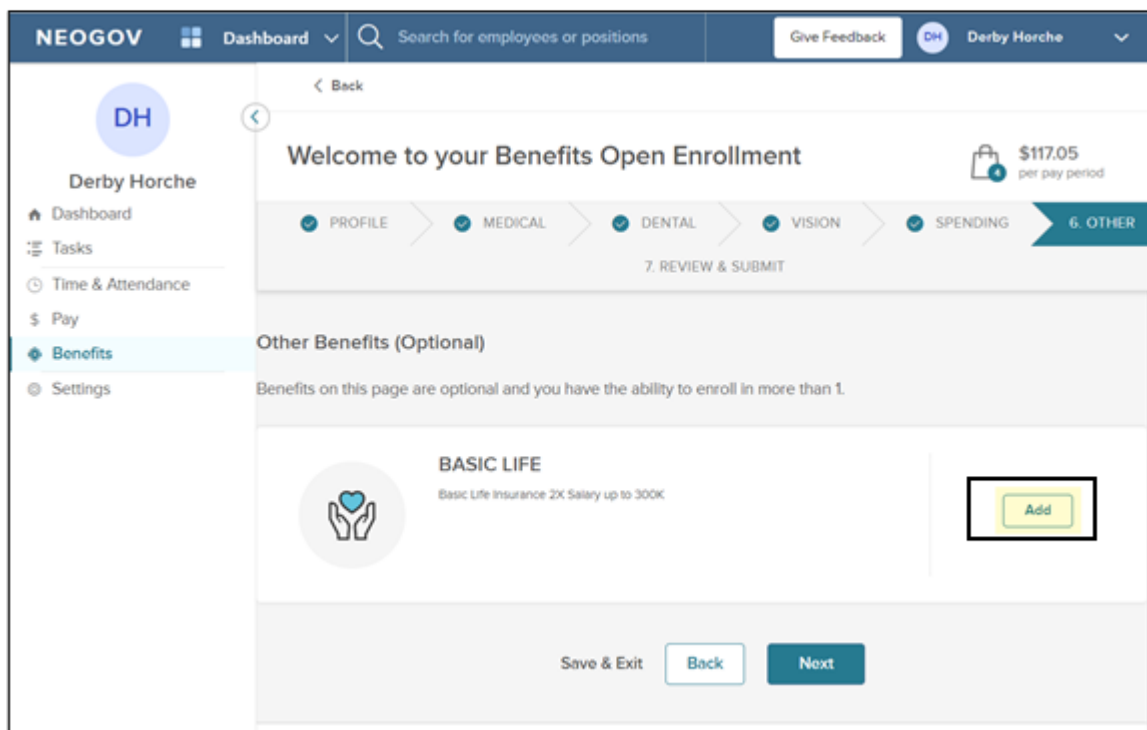


5. Do one of the following.
 - Click **Save** to record your FSA deductions and send them to the shopping cart.
 - Click **Remove** to clear all FSA information and set the dollar amount to zero.
 - Click **Save & Close** to record your FSA deductions and return to the FSA main page.
6. Click **Next** or the **Other** tab to move forward in the election process.

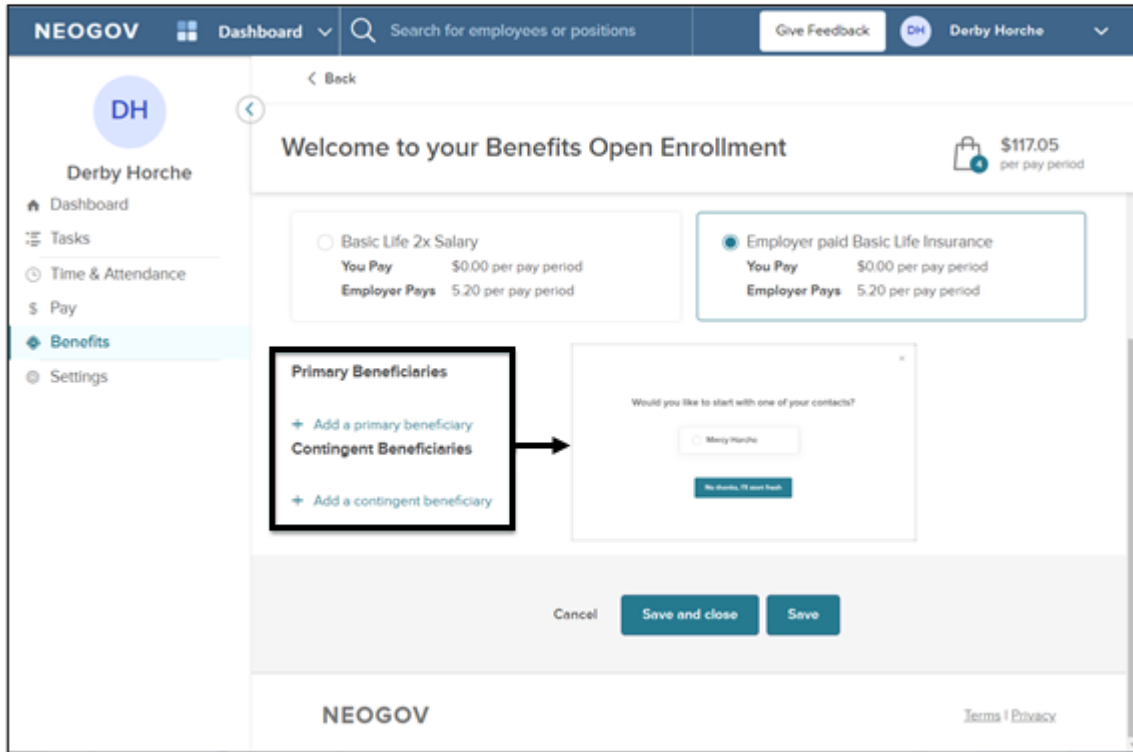
Choose Supplementary Options

Supplementary options are additional third-party plans that your company offers to employees. If a plan requires a beneficiary, you may add them on any benefit election tab (Medical, Dental, Vision) or the **Review & Submit** tab.

1. Click the **Other** tab.
2. Select the option and click **Add**.
 - If the plan requires a beneficiary, the option to add primary and contingent beneficiaries displays.
 - If there are beneficiaries or contacts associated with an employee, the option to select an associated beneficiary displays. You can also add a new beneficiary.



3. If applicable, select **+ Add a primary/contingent beneficiary**.



4. Enter the percentage amount that will go to the beneficiary.



5. If needed, click **+ Add another primary/contingent beneficiary** and enter the percentage amount.

6. Click **Save and close**. The deductible rate amount displays in the **YOU PAY** field and shopping cart.

7. Review the shopping cart.
8. Click **Next** or the **Review & Submit** tab to move forward in the election process.

NEOGOV Dashboard Search for employees or positions Give Feedback DH Derby Horche

Welcome to your Benefits Open Enrollment

PROFILE MEDICAL DENTAL VISION 7. REVIEW & SUBMIT

Other Benefits (Optional)
Benefits on this page are optional and you have the ability to enroll in more than 1.

| | |
|------------------|---------|
| DENTAL | \$3.73 |
| VISION | \$2.12 |
| SPENDING | \$75.00 |
| OTHER BASIC LIFE | \$0.00 |

YOU PAY
\$0.00
Per Pay Period
Added
Manage

BASIC LIFE
Basic Life Insurance 2X Salary up to 300K
Employer Pays \$5.20 Per Pay Period
Who's Covered Employer paid Basic Life Insurance
Primary Beneficiaries Horche, Marcy (100%)
Contingent Beneficiaries

Save & Exit Back Next

To change your options or beneficiary information, click **Manage**.

Review and Submit Your Elections

If you clicked **Review Elections** in the shopping cart or the **Review & Submit** tab, you go to the final page of the open enrollment process. This page displays your elections and who is covered. If you need to make a change, click the step that contains the plans you wish to change. NEOGOV records your elections, and you can view them on the **Open Enrollment Overview** page upon submission. At any time, click the **Open Enrollment** link on your dashboard to review your coverage and print a summary.

If you did not add or select beneficiaries in the previous steps, you can select or add them here before submitting.

1. Click the **Review & Submit** tab. The list of enrollment elections and other options displays.
2. Review the elections. To edit an election, click the election or tab and adjust as needed (see [Manage Your Shopping Cart and Elections](#)).
3. To add a beneficiary to an election, click **Edit** on the desired election.

Back

Welcome to your Benefits Open Enrollment

2

1

PROFILE MEDICAL DENTAL VISION SPENDING REVIEW & SUBMIT

Review and submit your benefit selections

Benefits will go into effect on September 30, 2021.

You are enrolling in the following benefits

| | | |
|-------------------------------|---|---|
| MEDICAL MEDICAL PPO | Who's Covered: You | \$36.19 / \$165.60 You Pay / Employer Pays – Pre-Tax |
| DENTAL DENTAL | Who's Covered: You Edit | \$3.73 / \$11.18 You Pay / Employer Pays – Pre-Tax |
| VISION VISION HMO | Who's Covered: You, Marcy Horche Edit | \$2.12 / \$8.19 You Pay / Employer Pays – Pre-Tax |
| SPENDING FSA | Deduction Rate: \$150.00 Who's Covered: You | \$75.00 / \$0.00 You Pay / Employer Pays |

\$117.04 / \$184.97
You Pay / Employer Pays – Per Pay Period

- Select the beneficiary and click **Save**. The election changes to indicate the selected beneficiary.

Review and submit your benefit selections
Benefits will go into effect on September 30, 2021.

You are enrolling in the following benefits

| | | |
|--|--|--|
| MEDICAL MEDICAL PPO Who's Covered: You | | \$36.19 / \$165.60 You Pay / Employer Pays – Pre-Tax |
| DENTAL DENTAL Who's Covered: <input checked="" type="checkbox"/> You <input checked="" type="checkbox"/> Marcy Horche <input type="button" value="Save"/> | | \$3.73 / \$11.18 You Pay / Employer Pays – Pre-Tax |
| VISION VISION HMO Who's Covered: You, Marcy Horche Edit | | \$2.12 / \$8.19 You Pay / Employer Pays – Pre-Tax |
| SPENDING FSA Deduction Rate: \$150.00 Who's Covered: You | | \$75.00 / \$0.00 You Pay / Employer Pays |
| | | \$117.04 / \$184.97 You Pay / Employer Pays – Per Pay Period |

| | |
|--|--|
| DENTAL DENTAL Who's Covered: You, Marcy Horche Edit | \$3.73 / \$11.18 You Pay / Employer Pays – Pre-Tax |
|--|--|

5. Click **Submit Enrollment**. NEOGOV records your elections; you can view them on the **Open Enrollment Overview** page.

Beneficiaries

Please ensure that your Beneficiary information is accurate and up to date.

| | | | | | |
|-------------------|--------|-----------------------|---|-----------------|----------|
| First Name | Marcy | Address 1 | - | Relation | Daughter |
| Last Name | Horche | Address 2 | - | E-mail | - |
| Gender | - | City | - | Phone # | - |
| DOB | - | State, Country | - | | |
| | | Zip Code | - | | |

[Remove](#) [Edit Beneficiary](#)

[+ Add Another Beneficiary](#)

Save & Exit [Back](#) **Submit Enrollment**



Important: Once you submit your elections, you cannot make changes unless your benefits administrator reopens your enrollment.

6. Click one of the following:
 - **My Dashboard** to return to your dashboard.
 - **My Benefits** to review your coverage.
 - **Print Your Summary** to print a summary of your benefits.

The screenshot shows a web interface for 'Benefits Open Enrollment'. At the top, there is a navigation bar with 'ashboard', a search bar, 'Give Feedback', and a user profile for 'Darby Horche'. Below the navigation bar, a 'Back' button is visible. The main heading is 'Welcome to your Benefits Open Enrollment'. A central message states 'Your benefit selections have been submitted!' and provides details about the effective date (September 30, 2021) and a deadline (December 31, 2021). Below this message are three buttons: 'My Dashboard', 'My Benefits', and 'Print Your Summary'. A red circle with the number '4' is overlaid on the 'Print Your Summary' button. Underneath, a section titled 'You are enrolling in the following benefits' contains a table of selected benefits. At the bottom of this section, the total cost is shown as '\$117.05 / \$190.17'. A 'Beneficiaries' section follows, containing a table of beneficiary information.

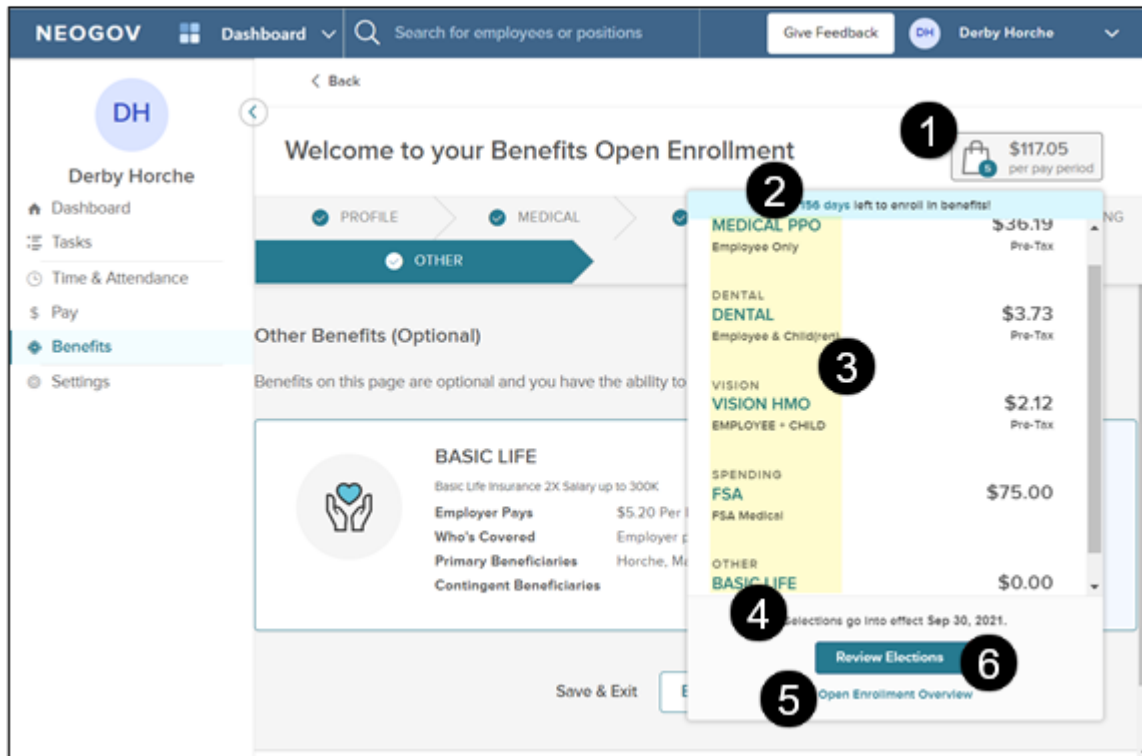
| MEDICAL | | MEDICAL PPO | | \$36.19 / \$165.60 | |
|-----------------------|---------------------|-------------|--|--|--|
| What's Covered | You | | | You Pay / Employer Pays - Pre-Tax | |
| DENTAL | | DENTAL | | \$3.73 / \$11.18 | |
| What's Covered | You, Marcy Horche | | | You Pay / Employer Pays - Pre-Tax | |
| VISION | | VISION HMO | | \$2.12 / \$8.19 | |
| What's Covered | You, Marcy Horche | | | You Pay / Employer Pays - Pre-Tax | |
| SPENDING | | FSA | | \$75.00 / \$0.00 | |
| Deduction Rate | \$150.00 | | | You Pay / Employer Pays | |
| What's Covered | You | | | | |
| OTHER | | BASIC LIFE | | \$0.00 / \$5.20 | |
| Primary Beneficiaries | Marcy Horche (100%) | | | You Pay / Employer Pays | |
| | | | | \$117.05 / \$190.17 | |
| | | | | You Pay / Employer Pays - Per Pay Period | |

| Beneficiaries | | | | | |
|---------------|--------|----------------|---|----------|----------|
| First Name | Marcy | Address 1 | - | Relation | Daughter |
| Last Name | Horche | Address 2 | - | E-mail | - |
| Gender | - | City | - | Phone # | - |
| Date of Birth | - | State, Country | - | | |
| | | Zip Code | - | | |

Manage Your Shopping Cart and Elections

When you make elections, NEOGOV subtracts the deductions from the shopping cart until a zero or positive balance displays. A negative balance means your employer has elected to contribute to your healthcare plan. A positive balance indicates that you must contribute to your healthcare plan.

1. Click the shopping cart icon to view your elections.
2. Review the timer to know the number of days left to enroll in benefits.
3. Review the list of elections. To edit, click the election and make the needed adjustments. NEOGOV adds the new election to the shopping cart.
4. Make note of the date in **Selections go into effect**.
5. Click **Open Enrollment Overview** to review your elections.



6. If needed, click the **Review Elections** to confirm or adjust your elections. The **Review & Submit** page displays.
7. If needed, review or update your final selections, then click **Submit Enrollment**.



Warning: Once you click **Submit Enrollment**, NEOGOV records your elections, and the shopping cart is inactive.