NMCAA New Employee Onboarding Instructions
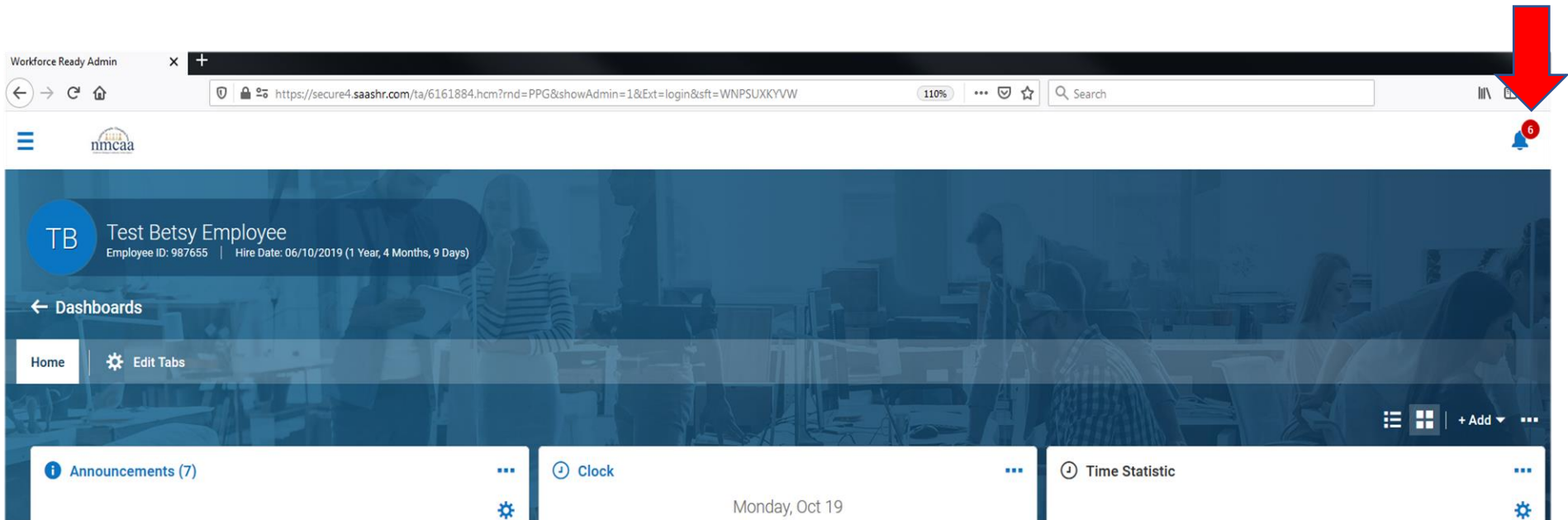
To begin the new employee onboarding process, log in to UKG; click on the bell in the upper righthand corner.

The next screen will show 3 tabs on the top left of the screen; click on the "My Checklists" tab, and then "GO TO CHECKLIST" in the lower right of the screen.

The checklist will look like this with 16 – 19 items to complete depending on the position that you are hired for. Work through each item: **Follow the directions on each page, taking your time to finish the task completely**. Some of the items that are a bit trickier are highlighted in this document. In most cases, as you move through the items to complete, your checklist will be checked off. If not, the instructions will advise you as to when the item will be completed.

Items with a red "*****" are required to be completed. Some pages will require you to "save" the screen first and then also "submit." Be sure to do both to complete your task, if required.

For the **Personal Information Update** task, you will verify your information and then be asked to add contact information. You **MUST** add an emergency contact, and may want to add information on dependents and beneficiaries if you are eliglble for benefits. Select the appropriate boxes across the top of the entry screen for each contact added. The contact's SSN and DOB will also need to be added for dependents that will be added to medical, dental, and/or vision policies.

Once the information is completed, save and submit the contact. Add additional contacts as required. When entry is complete, "SAVE" and "SUBMIT" your information. Navigate back to the checklist by selecting the blue back arrow. The checklist item "Personal Information Update" will not show completed until HR has approved the submission. Select "CONTINUE" to move to the next checklist item.

Completing the I-9 Form: When selected to complete, the top of the I-9 will populate with your personal information. You should check to make sure that the information is correct and adjust as necessary. **Please note: All personal information fields require an answer, so you will need to type N/A even if a field like Maiden Name or Apt Number does not apply to you. If you are unsure which fields are required, click the "Submit" button and they will be highlighted with a red exclamation point.** Once the information has been completed, click "SUBMIT I9" to sign the form electronically.

To electronically "sign" the I-9, enter the UKG password. Then select "I Agree."

The Federal W-4 will be completed by clicking on the "Start Federal Withholding Form" hyperlink as indicated below.

The form will populate with your personal information, name, SSN, address, marital status. You no longer indicate a number of allowances to claim on the Federal W-4. You can indicate if you would like additional dollars withheld. When finished, click on "submit withholding form" and you will be asked to sign to document electronically by entering your UKG password.

← Federal: W-4

SAVE   DOWNLOAD PDF   SUBMIT WITHHOLDING FORM

Employee: Test Betsy Employee (987655)   Status: New

Form **W-4**

Department of the Treasury
Internal Revenue Service

Employee's Withholding Certificate

► Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.
► Give Form W-4 to your employer.
► Your withholding is subject to review by the IRS.

OMB No. 1545-0074

20**20**

Step 1:
Enter
Personal
Information

(a) First name and middle initial   Last name

Test   **Betsy Employee**

(b) Social security number

999-99-9989

Address

Change address

► Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

City or town, state, and ZIP code

Traverse City   **MI** ∨   **49696**

(c) ○ Single or Married filing separately
○ Married filing jointly (or Qualifying widow(er))
○ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the online estimator, and privacy.

Step 2:
Multiple Jobs
or Spouse
Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do **only one** of the following.

(a) Use the estimator at *www.irs.gov/W4App* for most accurate withholding for this step (and Steps 3–4); **or**

(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; **or**

(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld . . . . . ► ☐

TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)

Step 3:
Claim
Dependents

If your income will be $200,000 or less ($400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by $2,000 ► $ _____

Multiply the number of other dependents by $500 . . . . ► $ _____

Add the amounts above and enter the total here . . . .   **3** $ _____

Step 4
(optional):

(a) **Other income (not from jobs).** If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may

Enter your UKG password and then click "I Agree."

Federal: W-4

Employee: Test Betsy Employee (987655)   Status: New

(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld . . . . . . ▶ ☐

TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents	If your income will be $200,000 or less ($400,000 c
	Multiply the number of qualifying children under a
	Multiply the number of other dependents by $5
	Add the amounts above and enter the total here .
Step 4 (optional): Other Adjustments	(a) **Other income (not from jobs).** If you want tax this year that won't have withholding, enter the a include interest, dividends, and retirement incom
	(b) **Deductions.** If you expect to claim deduction and want to reduce your withholding, use the D enter the result here . . . .
	(c) **Extra withholding.** Enter any additional tax you

Submit Withholding Form

Please read all information below. Populating required fields and clicking 'I Agree' button below will submit this withholding form to HR department for further verification.

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Signature	Test Betsy Employee	Your Full Name*
Password		Please type password you (TestEEBetsy) used for login to confirm
Date	10/23/2020	

[Cancel]   [I Agree]

Step 5: Sign Here	Under penalties of perjury, I declare that this certificate, to the b
	▶ _____
	Employee's signature (This form is not valid unless you sign it.) ▶ **Date**
Employers Only	Employer's name and address	First date of employment	Employer identification number (EIN)

Once completed, click on the blue back arrow at the top left to move on to the Michigan Withholding Form.

Michigan State Withholding Form: To start the Michigan State Withholding Form, read the screen instructions and click on "View Your Withholding Forms."

☰   nmcaa   MY HR

← **New Hire Checklist Full Time**

Started on 10/19/2020

Employee To-Dos (10)   30% complete   **Michigan State Withholding Form**

✓ **Personal Information Update**

✓ **Complete Form I-9**

✓ **Complete Federal Withholding Form**

Michigan State Withholding Form

Complete Direct Deposit Information

Review Employee Personnel Policies

Complete Handbook Acknowledgment

E-Mail Encryption Policy

Email Use Instructions

Cell Phone Policy

Benefit Information (3)   0% complete

OMB Full Time

Sec 125 Summary Plan Description

New Employee Benefit Enrollment

1. Click on the blue hyperlink; you will be navigated away from this checklist to complete your State withholding form.
2. Click on the "Add New" button in the upper right hand corner of your screen, then choose the Michigan State form.
3. Once you have filled out the required fields, you must sign and date by clicking the "Submit" button in the upper right hand corner.
4. Once finished, please click the blue back arrow twice to return back to this page.
5. Mark this item complete.

View Your Withholding Forms ❯

Due Date   10/21/2020 (Overdue)   Waiting On

The next screen shows the already completed Federal form.

To complete the Michigan State Withholding form, click on "ADD NEW."

Click on "+ Add' next to Michigan.

The Michigan form will be displayed and populated with your personal information. Complete the form by adding your Date of birth, Driver's License number, completing box 5, and entering the number of personal and dependent exemptions. Click on "SAVE."

Click on "SUBMIT WITHHOLDING FORM" to complete the form by signing it electronically.

Complete the form by using your UKG password to sign the document electronically. Then click on "I Agree."

Once completed, click on the blue back arrow (twice) at the top left to move back to the checklist. Click on "Mark as Complete" on the checklist item to proceed to the next item.

Complete Direct Deposit Information: After reviewing the instructions on the screen, click on "Direct Deposit Update."

To add your direct deposit information, please review the instructions on this screen and click "+ Add."

≡   nmcaa   MY HR   🔔⁴ ⓘ

← **Direct Deposit Update**

1. If you plan to add multiple accounts, please ensure any "flat amount" or "% of" accounts are added before the Entire Remainder. The Entire/Remainder Account should always be added last.
2. Click on the "+ Add" button to add account information.
3. Please use today's date for the Active From.
4. Once you are finished adding your account(s), please click the blue Continue button.
5. On the 2nd tab, click the Upload Document button and attach a supporting document from your bank.
6. Click Submit. Your account information will be sent to the Payroll team for verification.

Effective From *

| 10/23/2020 | 📅 |

💬 | SAVE | CONTINUE

| **Direct Deposit Information** | **Direct Deposit Information** |
| Upload Supporting Documentation Such as Voided Check or Bank Letter | Direct Deposits |

+ Add

ⓘ   No Direct Deposits Defined

SAVE   CONTINUE

← **Direct Deposit Update**

1. If you plan to add multiple accounts, please ensure any "flat amount" or "% of" accounts are added before the Entire Remainder. The Entire/Remainder Account should always be added last.
2. Click on the "+ Add" button to add account information.
3. Please use today's date for the Active From.
4. Once you are finished adding your account(s), please click the b
5. On the 2nd tab, click the Upload Document button and attach a
6. Click Submit. Your account information will be sent to the Payro

Effective From *

10/23/2020

Direct Deposit Information	Direct Depo
Upload Supporting Documentation Such as Voided Check or Bank Letter	Direct Depo

ⓘ   No

Add New Direct Deposit   ✕

Name

[Enter Name]

Description

[Enter Description]

Active From *

10/23/2020   📅

Active To *

12/31/2099   📅

Deposit Type

Direct Deposit   ▼

Bank Account Type *

Checking   ▼

Calculation Method *

Entire/Remainder   ▼

Account # *

[   ]

Reenter Account # *

[   ]

ABA # / Bank Routing # *

[   ] ⓘ

CANCEL   **SAVE**

Complete the required information, then click "SAVE."   Additional accounts may be added by repeating the process.

When all accounts are entered, click "CONTINUE."

You then move to the second section to upload your account information using a voided check or a document from your bank. Click on "Upload Document."

≡   nmcaa   MY HR   🔔

← **Direct Deposit Update**

1. If you plan to add multiple accounts, please ensure any "flat amount" or "% of" accounts are added before the Entire Remainder. The Entire/Remainder Account should always be added last.
2. Click on the "+ Add" button to add account information.
3. Please use today's date for the Active From.
4. Once you are finished adding your account(s), please click the blue Continue button.
5. On the 2nd tab, click the Upload Document button and attach a supporting document from your bank.
6. Click Submit. Your account information will be sent to the Payroll team for verification.

Effective From *

| 10/23/2020 | 📅 |

💬 | SAVE   **SUBMIT**

| ✅ **Direct Deposit Information** | **Upload Supporting Documentation Such as Voided Check or Bank Letter** |

Upload Supporting Documentation Such as Voided Check or Bank Letter

⬆ Upload Document

⌄	Name	Document Type	Uploaded On	Uploaded By	Expiration Date	Actions
ⓘ	No Data to Display					

Select the document type as "Direct Deposit Void check copy" and select a document to upload.
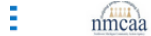
nmcaa

MY HR

← **Direct Deposit Update**

1. If you plan to add multiple accounts, please ensure any "flat amount" or "% of" accounts are added before the Entire Remainder. The Entire/Remainder Account should always be added last.
2. Click on the "+ Add" button to add account information.
3. Please use today's date for the Active From.
4. Once you are finished adding your account(s), please click the blue Continue button.
5. On the 2nd tab, click the Upload Document button and attach a supporting document from your bank.
6. Click Submit. Your account information will be sent to the Payroll team for verification.

Effective From *

10/23/2020

SAVE   SUBMIT

| | Upload File | X |

File *
⬆ Choose No file chosen

✔ Direct Deposit Information

Upload Supporting Documentation Such as Voided Check or Bank Letter

Document Type *

⬆ Upload Document

∨	Name			loaded By	Expiration Date	Actions
ⓘ	No Dat					

COLA Raise Letter
Direct Deposit Void check copy
document visible to all access levels
Emergency Safety & Prepardness Plans
ICHAT & SOR
Job Offer Letter
Resume

SAVE   SUBMIT

Once the document is uploaded, click on "UPLOAD."

MY HR

t amount" or "% of" accounts are added before the Entire Remainder. The Entire/Remainder Account should always be added last.

he blue Continue button.
ach a supporting document from your bank.
ayroll team for verification.

SAVE   SUBMIT

Upload File   ✕

Supporting Docume

File *
⬆ Choose   blank file.pdf

Document Type *
Direct Deposit Void check copy   ▼   ⬆ Upload Document

Name	loaded By	Expiration Date	Actions
No Data to Display			

Display Name

CANCEL   **UPLOAD**

SAVE   SUBMIT

Click "SUBMIT" to complete the direct deposit update.

Direct Deposit Update

4. Once you are finished adding your account(s), please click the blue Continue button.
5. On the 2nd tab, click the Upload Document button and attach a supporting document from your bank.
6. Click Submit. Your account information will be sent to the Payroll team for verification.

Effective From *

10/23/2020

SAVE   SUBMIT

✓ Direct Deposit Information

Upload Supporting Documentation Such as Voided Check or Bank Letter

Upload Supporting Documentation Such as Voided Check or Bank Letter

⬆ Upload Document

	Name	Document Type	Uploaded On	Uploaded By	Expiration Date	Actions
⌄ General (1)						
	blank file.pdf	Direct Deposit Void check copy	Oct 23, 2020	Test Betsy Employee		...

SAVE   SUBMIT

Once completed, click on the blue back arrow at the top left to move back to the checklist.

Click on ✓ Mark as Complete on the "Direct Deposit Update" checklist item. You will be asked to Confirm Item Completion by signing electronically with your UKG password. When your password is entered, then click "I Agree" to proceed to the next item.

MY HR

Complete Direct Deposit Information

1. Click on the hyperlink below. You will be take[n] ... account(s). Please make sure you have a v[...]
   bank available.
2. After you click Submit, click the back arrow to [...]
3. Click "Mark As Complete" and use your passw[...]
4. Continue working on the remaining tasks on t[...]

Direct Deposit Update >

Due Date   g On

Workflow Status

Confirm Item Completion   ✕

ⓘ   Please type your (Test Betsy Employee) password to
        confirm.

Password *

••••••••

I authorize my employer to deposit my wages/salary and/or
expense reimbursement to my bank account(s).

CANCEL   I AGREE

Review the Personnel Policies: Review the instructions on the screen and then click on [✓ Mark as Complete] when finished. This document is available in UKG by going to My Company > Documents.

Handbook Acknowledgement Form 2020: Follow the instructions on the screen.

☰ nmcaa

💬 Live Chat (Offline)   💬 Community Help   Feedback   ✉️⁰   🔔²

← **Checklist**

BH Brittney Hopkins (2985) 👤 | Checklist: New Hire Checklist HS EHS Staff Part Time - No Benefits (New Hire Checklist)

⚠️ Incomplete (0 out of 17)

▬▬▬▬▬▬▬▬▬▬▬ 0%

Started on 12/12/2019

...   **CONTINUE**

Employee To-Dos (10)   0% complete

Personal Information Update

Complete Form I-9

Complete Federal Form Withholding

Complete State Form Withholding

Complete Direct Deposit Information

HEPATITIS B VACCINATION FORM

Review Employee Handbook

Complete Handbook Acknowledgment

Complete Handbook Acknowledgment

Click on the hyperlink below to sign your handbook acknowledgment form. Once complete, be sure to click "Submit" to submit your form. This item will mark itself as completed once successfully submitted.

Handbook Acknowledgement Form ❯
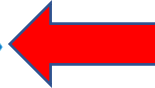
Due Date   09/10/2002 (Overdue)   Waiting On   Brittney Hopkins

💬

Sign the form electronically using your UKG password. Click on "SAVE," click on "SUBMIT," and then click on the blue back arrow at the top left to move back to the checklist.

MY HR

← Handbook Acknowledgement Form

SAVE SUBMIT DOWNLOAD PDF

SIGN

Personnel Policies
Introduction to Agency
Explanation of Payroll Deductions

I acknowledge that I have received a copy of the NMCAA Personnel Policies and/or have access to the Personnel Polices through NMCAA's payroll provider online. I understand that it is my responsibility to read, understand, become familiar with, and comply with the Personnel Policies that have been established, including the Conflict of Interest, Policy on Suspected Misconduct and Dishonesty and Whistleblower Protection, and Information Technologies Policies and Procedures.

I understand that it is my responsibility to ask questions about any policies or issues I do not understand.

As an employee of NMCAA, I support the chief function of the community action movement and the Promise of Community Action to serve the best interests of the poor, thereby serving the best interests of all people, and will do my best to advance the purpose, programs, services and Mission of the Agency.

I understand and acknowledge that my employment with the Agency is indefinite and for no specified length of time, and that my employment can be terminated at-will by me or by the Agency at any time and for any or no reason, with or without previous notice.

I further understand that the Personnel Policies do not constitute a contract of employment, and that the provisions are subject to change when, in the judgment of the NMCAA Board of Directors, circumstances so require.

I acknowledge that I have received an Agency Orientation that includes the history, mission and philosophy of our organization.

Payroll is completed through NMCAA's payroll provider. I understand that I am responsible for the information on the NMCAA's payroll provider's payroll stub and it is my responsibility to notify the Business Office or the Human Resources Manager of any discrepancies.

| 12/03/2019 | Sign |
| Date | Employee's Signature |

E-Mail Encryption Policy: Review the instructions on the screen and sign the form electronically using your UKG password. Click on [✓ Mark as Complete] when finished and sign electronically with your UKG password. This document is available in UKG by going to My Company > Documents.

Started on 12/15/2019

Employee To-Dos (10)	0% complete

Personal Information Update

Complete Form I-9

Complete Federal Withholding Form

Complete State Form Withholding

Complete Direct Deposit Information

Review Employee Handbook

Complete Handbook Acknowledgment

E-Mail Encryption Policy

E-Mail Encryption Policy

✓ Mark as Complete

Click on the blue hyperlink to download a copy of the E-Mail Encryption Policy. Please review the document in its entirety, and check this item as complete once finished.

The document is available to you at anytime by logging into your employee portal and going to My Company > Documents

Due Date	07/26/2005 (Overdue)	Waiting On	Mary Rees

Documents

E-mail Encription

E-Mail Use Instructions: Review the instructions on the screen and then click [✓ Mark as Complete] when finished and sign electronically with your UKG password. This document is available in UKG by going to My Company > Documents.

Employee To-Dos (10)	0% complete

Personal Information Update

Complete Form I-9

Complete Federal Withholding Form

Complete State Form Withholding

Complete Direct Deposit Information

Review Employee Handbook

Complete Handbook Acknowledgment

E-Mail Encryption Policy

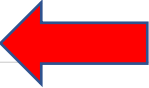**Email Use Instructions**

Email Use Instructions

✓ Mark as Complete

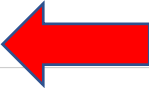Click on the blue hyperlink to download a copy of Email Use Instructions. Please review the document in its entirety, and check this item as complete once finished.

The document is available to you at anytime by logging into your employee portal and going to My Company > Documents.

Due Date	07/26/2005 (Overdue)	Waiting On	Mary Rees

Documents

Email Instructions

Cell Phone Policy: Review the instructions on the screen and click on the "Cell Phone Policy" hyperlink.

··· CONTINU

Employee To-Dos (10)   0% complete

Personal Information Update

Complete Form I9

Complete Federal Form Withholding

Complete State Form Withholding

Complete Direct Deposit Information

HEPATITIS B VACCINATION FORM

Review Employee Handbook

Complete Handbook Acknowledgment

Cell Phone Policy

Cell Phone Policy

Click on the hyperlink below; a new page will open. Complete all necessary fields, and click "submit" once finished. HR will receive an email to approve this item and then your checklist item will automatically be marked as completed.

Navigate back to your checklist by selecting the blue back arrow.
This checklist item will not show as completed until HR has approved your submission. Select "Continue" to move to your next checklist item.
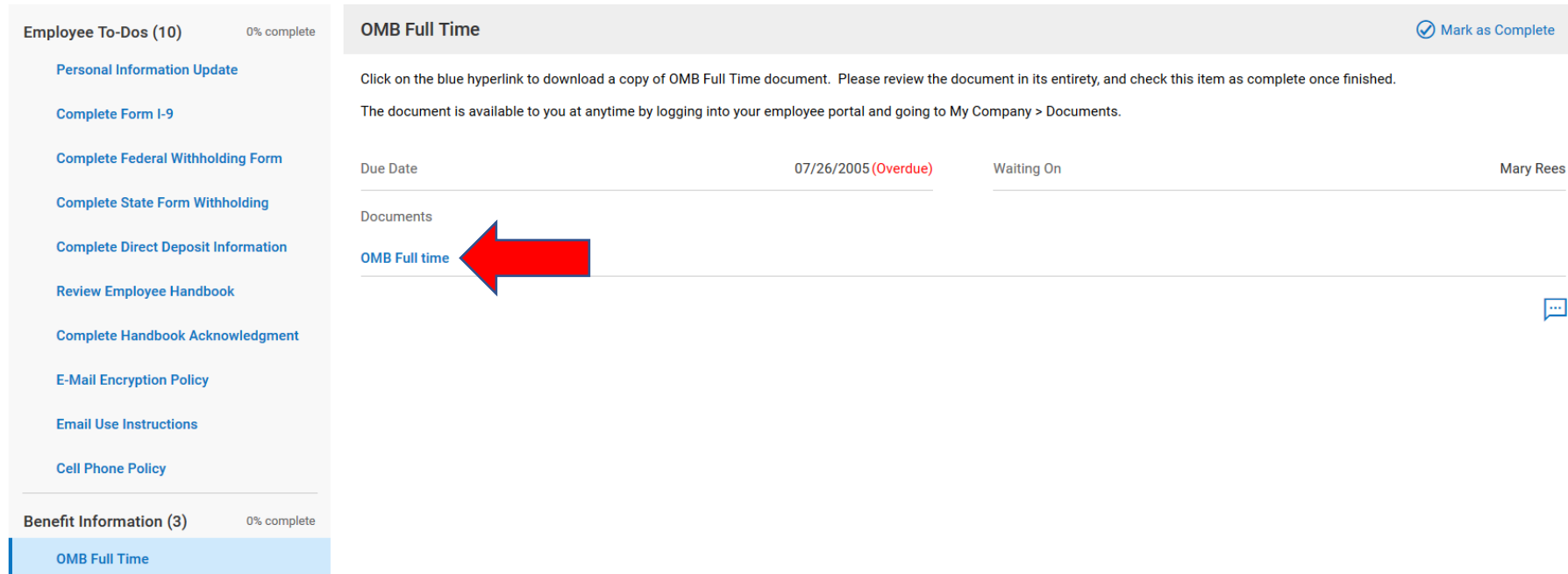
Cell Phone Policy >

| Due Date | 12/20/2019 | Waiting On | Morgan Boudrie |

Sign the form electronically using your UKG password. Click on "I Agree." Then click on "SAVE" and "SUBMIT". Click on the blue back arrow at the top left to move back to the checklist.

← **Cell Phone Policy**   [SAVE] [SUBMIT] [DOWNLOAD PDF]

MB **Morgan Boudrie** (4644)

Date Submitted

12/15/2019

Sign *

[SIGN]

CELL PHONE POLICY

The Cell Phone Policy shall pertain to Agency provided cell phones and personal cell phones when such personal cell phones are being used for NMCAA business purposes. Employees must adhere to all federal, state, local and/or NMCAA rules and regulations regarding the use of cell phones and texting.

Unless otherwise authorized, company provided cell phones must be used only for business purposes. Cell phone usage includes unlimited talk minutes and limited data usage. The employee MAY BE responsible for any personal data usage in excess of the data plan limit. Please see your supervisor to obtain data limits if applicable.

The use of a cell phone while driving may present a hazard to the driver, other employees and the general public. This policy is meant to ensure the safe operation of company and/or private vehicles while an employee is on NMCAA time and conducting business for NMCAA.

Agency issued cell phones are NOT TO BE USED for any purpose at any time WHILE DRIVING. Personal cell phones are NOT TO BE USED for any purpose (personal or business) WHILE EMPLOYEE IS DRIVING ON AGENCY TIME.

Should an employee need to make a business call, he/she will locate a lawfully designated area to park and make the call. For incoming calls, let the voice mail portion of the phone service answer. When convenient, pull into a lawfully designated parking area and retrieve your message(s), making a return call, if necessary, before returning to the road.

Written acknowledgement of receipt of this company policy will be required of all employees using cell phones for NMCAA business, whether Agency issued or personal.

Violation of this policy will subject an employee to disciplinary action up to and including immediate termination.

The use of cell phones to receive or place personal phone calls or text messages should be limited to personal time only and not take place during work time. For emergency situations, employees may be contacted through the main office or appropriate site numbers. The use of cell phones in the classrooms during class time is not allowed.

Business use of cell phones by non-exempt employees must be confined to normal working hours unless approved in advance by their supervisor.

NMCAA may in its discretion provide a cell phone to employees or reimburse employees for on-the-job use of their personal cell phones.

I HAVE RECEIVED A COPY OF NORTHWEST MICHIGAN COMMUNITY ACTION AGENCY'S CELL PHONE POLICY. I THOUROUGHLY UNDERSTAND THAT IF I USE A CELL PHONE WHILE ON NMCAA TIME AND BUSINESS, I MUST ADHERE TO THIS POLICY OR FACE DISCIPLINARY ACTION UP TO AND INCLUDING IMMEDIATE TERMINATION OF EMPLOYMENT.

| Sign | 12/15/2019 |
| SIGNATURE | DATE |

OMB Full Time: This information is provided to all employees upon hire. It advises you on how to answer questions that are asked of you if you are applying for health insurance through the marketplace. Click on the hyperlink "OMB Full Time," review the document, and then click [✓ Mark as Complete] when finished. This document is available in UKG by going to My Company > Documents.
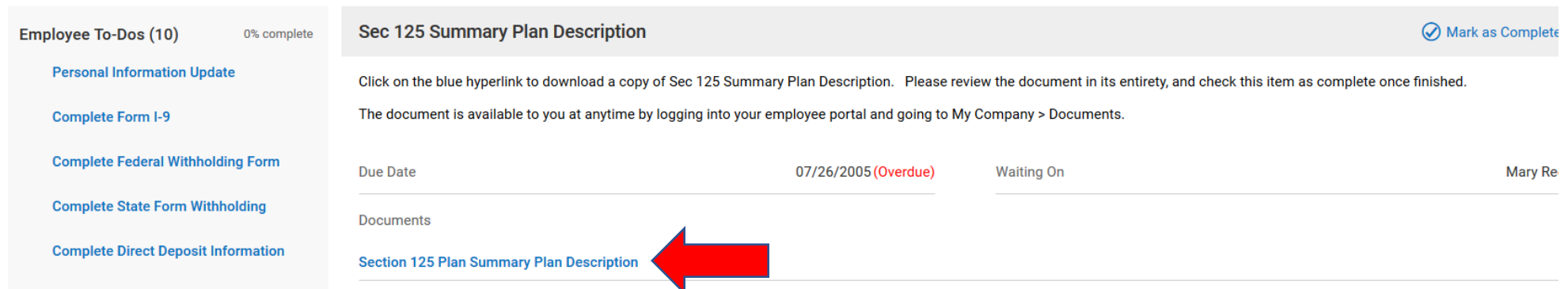
Employee To-Dos (10) 0% complete	OMB Full Time	✓ Mark as Complete
Personal Information Update	Click on the blue hyperlink to download a copy of OMB Full Time document. Please review the document in its entirety, and check this item as complete once finished.	
Complete Form I-9	The document is available to you at anytime by logging into your employee portal and going to My Company > Documents.	
Complete Federal Withholding Form		
Complete State Form Withholding	Due Date	07/26/2005 (Overdue) Waiting On	Mary Rees
Complete Direct Deposit Information		
Review Employee Handbook	Documents	
Complete Handbook Acknowledgment	OMB Full time	
E-Mail Encryption Policy		
Email Use Instructions		
Cell Phone Policy		
Benefit Information (3) 0% complete		
OMB Full Time		

Section 125 Summary Plan Description: This information is provided to all employees upon hire giving you the benefit information in the NMCAA Section 125 Plan (FSA information). Click on the hyperlink "Sec 125 Plan Summary Plan Description," review the document, and then click [✓ Mark as Complete] when finished. This document is available in UKG by going to My Company > Documents.

Employee To-Dos (10) 0% complete	Sec 125 Summary Plan Description	✓ Mark as Complete
Personal Information Update	Click on the blue hyperlink to download a copy of Sec 125 Summary Plan Description. Please review the document in its entirety, and check this item as complete once finished.	
Complete Form I-9	The document is available to you at anytime by logging into your employee portal and going to My Company > Documents.	
Complete Federal Withholding Form		
Complete State Form Withholding	Due Date	07/26/2005 (Overdue) Waiting On	Mary Re...
Complete Direct Deposit Information		
	Documents	
	Section 125 Plan Summary Plan Description	

New Employee Benefit Enrollment: Click on the hyperlink "Start Your Benefit Enrollment Process." All eligible employees will need to complete this even if they are waiving participation in a particular benefit plan.

Review the instructions and click on the "Go To External Page" link.

You will be routed to this page to verify your personal information.

Once you have reviewed the information, click on "Next: Review My Family" at the bottom of the page.

Back   Next: Review My Family
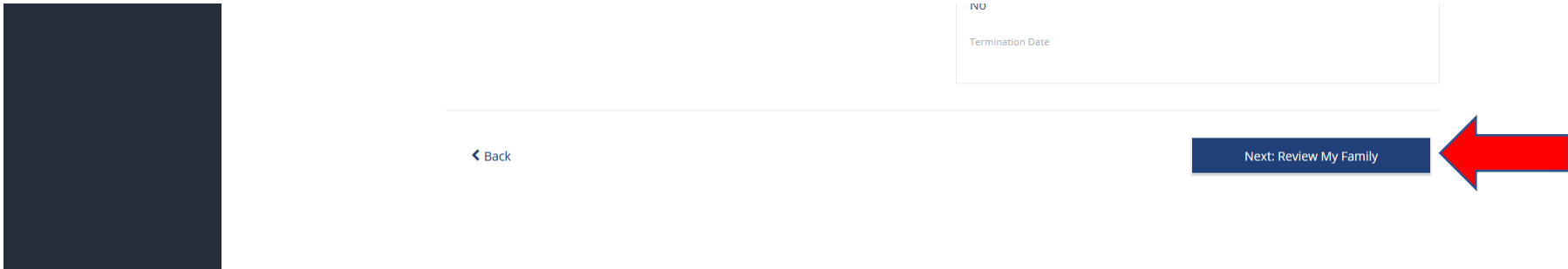
The next section will have you add information regarding any dependents that need benefits. Click on the "+ Add Family Member" to add the family member. Once the information is entered, click "SAVE." Repeat as needed to add additional family members. When complete, click on "Next: Shop for Benefits."

Home

nmcaa   Welcome Jennifer $0.00
                                                                                                         Per Pay Period

Profile   Review the Dependent Information on file below

My Profile
                                 Dependents must be listed on this page to be enrolled in coverage.
My Family
                                 You may:
My ID Cards   • Add New Dependents
                                    • Edit Existing Dependent Information
Contacts   • Remove Existing Dependent

                                 By adding a dependent, you are confirming that this a legal dependent, eligible for benefits under one or more of your available plans.
Benefits

New Hire Benefits
                                 Current Family Members

                                             + Add Family Member

                                 Back   Next: Shop for Benefits

The next screen shows your available benefits. Click on the "Shop Plans" for medical to start reviewing the plan options.

Current Benefits Plan Year Effective from 08/01/2020 to 07/31/2021

Medical

| | No Plan Selected | Shop Plans |

Dental

| | No Plan Selected | Shop Plans |

Vision

| | No Plan Selected | Shop Plans |

Basic Employee Life

| | No Plan Selected | Shop Plans |

| Employer Contribution | $0.00 |
| Your Cost Per Pay Period | $0.00 |

Benefits
Incomplete

GuideMe

The top of the next screen allows you to review the medical plans that are available. Click the plan links to view details about the plan coverages.

The bottom of the screen shows you who is eligible for coverage that may be included in the plan. Coverage for yourself is automatically checked off. To add other family members, click on "+ Add Family Member" and follow the step to add the family member. Once the family member(s) are added, you may check off the ones that you want to include in the plan.

Next, click on "View Plan" for the plan that you want to purchase.

You must click on "Decline Medical Benefits" if you have other coverage and do not want to participate in the NMCAA medical plans.

The next screen shows the costs for the selected plan based on how many people you may want to cover. If this is the plan that you want to click on "Update Cart."

Next you will be asked to enter in the information for the Primary Care Physician(s) for each person to be covered. You can go to bcbsm.com to look up this information. First click on the blue box on the left "Find a Doctor." Click on the blue link "Search without logging in" under "not yet a member?". Choose a location by entering in a zip code. Click on "doctors by name." Enter the last name of the doctor. The doctor should come up or a list to select from.   Another screen comes up with the doctor's name and information about them. Click on the doctor's name and the additional information is posted. The Provider ID number is in the lower left area of the page. This is the number you will need to enter with your doctor's name.

Once you have the information for each family member enter it on this screen. When complete, click on "continue".

Enter your Primary Care Provider information

Primary Care Provider designation is required for your Medical plan selection. Enter the required information for yourself and for all enrolled dependents (if any).

Primary Care Information

Your PCP selections can only be modified in this enrollment system when initially enrolling in a plan. If you want to make a change later, you will need to contact Blue Care Network of Michigan directly.

Member	Provider Name*	Provider Network or Code*	Existing Patient ⓘ
Betsy Employee, Test			☐
Test, Child			☐

‹ Back   Continue

If you have selected the low or high HSA medical plan, you will next see this screen about HSA accounts. Review the information. Click on the blue hyperlinks for more information or to get the Chemical Bank form which can be taken to Chemical Bank (now TCF Bank) to open your account.

Also note that the shopping cart now contains the costs for your benefits, and this will adjust as you select additional plans.

On the bottom of the screen, you may add contributions that you want to add to your HSA bank account. Any money designated to go to your account will be taken on a pretax basis.   Review the instructions, enter the annual amount to contribute and update cart or Decline Health Savings Account Benefits.
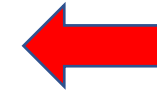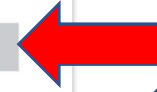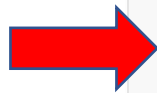
Continue the same process for dental and vision coverage options.
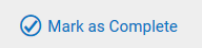
For fulltime employees, there is a life insurance policy that you should sign up for. This plan is at no cost to the employee. You will be asked to add a beneficiary (or multiple ones) to your policy.

Once this benefit selection is complete, return to the UKG checklist and mark the "New Employee Benefit Enrollment" task as complete by clicking on

403(b) Information
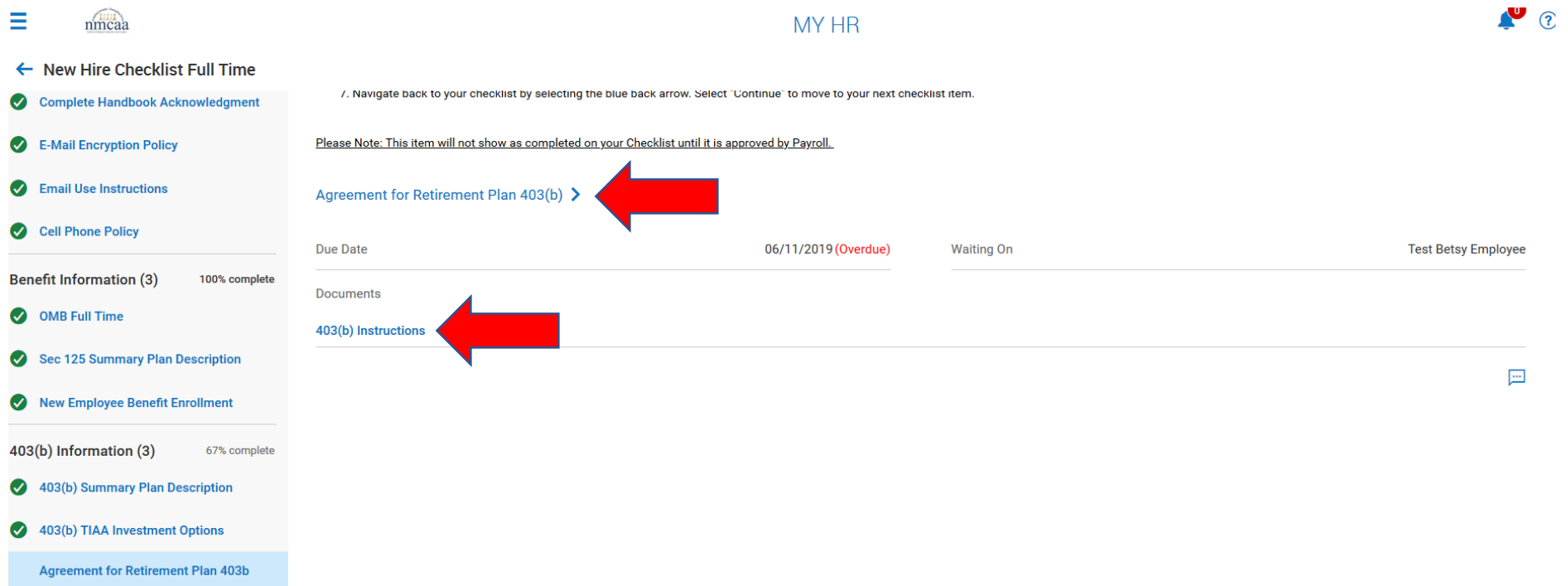
403(b) Summary Plan Description: Click "403(b) Summary Plan Description" to review the document. Once the review is complete, close the document and click on [✓ Mark as Complete] to move on to the next item. This document is available in UKG by going to My Company > Documents.

403(b) TIAA Investment Options: Click "403(b) TIAA Investment Options" to review the document. Once the review is complete, close the document and click on [✓ Mark as Complete] to move on to the next item. This document is available in UKG by going to My Company > Documents.

Agreement for Retirement Plan 403(b): All employees must either waive participation or sign up to participate in the NMCAA 403(b). By waiving it at the time of hire does not mean that you cannot change to participation in the future. There is no waiting period to participate and ALL employees (substitutes and seasonal employees included) are eligible to participate. To start, click on the hyperlink "Agreement for Retirement Plan 403(b)."

Instructions for setting up your 403(b) account through TIAA are also included here. If you are going to participate in the 403(b), you MUST set up an account with TIAA so you will need these instructions. Click on "403(b) Instructions" to review.

These documents are available in UKG by going to My Company > Documents.

To complete this form, review the instructions on the page and complete the appropriate boxes to the right. DO NOT try to fill in the light blue boxes on the form itself. If you are waiving participation, click the box next to "Choose Not to Participate." Click on "SIGN" when the boxes are completed. Click on "Save & Sign". Electronically sign the document using your UKG password and click "I Agree." Click on "SAVE" and then "SUBMIT." Use the blue back arrow at the top of the screen to return to the checklist.   This item will **NOT** be marked complete on the checklist until approved by payroll. Click continue to move on to the next checklist item.

NMCAA Orientation

NMCAA Introduction Video: This is a short video about the services offered through NMCAA. Click on "Go to External Page." Once the viewing is complete, click on [⊘ Mark as Complete] to move to the next item.

NMCAA Orientation includes a history of NMCAA and Community Action, general Board information, and department services information. Click on the hyperlink "NMCAA Orientation," review the document, and check this item as complete on the checklist by clicking on [⊘ Mark as Complete]. This document is available in UKG by going to My Company > Documents.
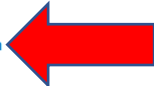

This completes your onboarding checklist. Thank you, and if you should have questions please contact Julie McNally at jmcnally@nmcaa.net or Betsy Rees at brees@nmcaa.net. Thank you and welcome aboard!