Your Benefits Questions Answered

To help you better understand US benefits at Salesforce, read through this FAQ. If you have further questions, log a case on Wayfinder.

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GENERAL

Q. Where can I find information about Salesforce benefits?
A. Check out our general benefits offerings on www.getsalesforcebenefits.com. Information specific to Tableau can be found at Tableau U.S. Benefits Transition.

Q. Who do I talk to about my benefits and enrollment options?
A. You have several resources to get your benefits questions answered. If you reach out before April 1, please identify yourself as a Tableau employee.

- **General Questions**: For general questions prior April 1, visit Wayfinder. On and after April 1, you can contact Employee Success by logging a case, live chat, or phone here. Note: Tableau employees will have access to the linked Concierge article after receiving their Salesforce device and/or are enabled on Salesforce systems.

- **Grand Rounds**: Grand Rounds Personal Healthcare Assistant (PHA) provides a robust suite of healthcare tools for Salesforce employees, whether you're looking for high-quality doctors, needing an expert second opinion, seeking assistance with your plan selection, or more. To connect with a care team specialist, call 1-800-233-6485 Monday - Friday, 8 a.m. – 9 p.m. PT. You'll be able to register starting April 6, by visiting www.grandrounds.com/ohana, or download the app.

- **Aetna**: For questions related to the Aetna medical plans, call the dedicated Aetna hotline at 1-888-512-3862, and reference “Salesforce” or the group # 883528. For specific questions such as transition of care, contact Aisha Mcgee, National Account Associate/Salesforce Dedicated Aetna Representative, at 1-888-272-4640 or McgeeA@aetna.com.

- **UnitedHealthcare (UHC)**: For questions related to UHC medical plans, please call 1-844-234-1202 and reference UHC group #911585.

- **Kaiser**: For questions related to the Kaiser plan, please call 1-800-464-4000 and reference group #602162.

- **CVS Caremark**: For questions related to CVS’s pharmacy plan, please call CVS Customer Care at 1-844-345-2824 and reference group RX0627.

- **Delta Dental**: For questions related to Delta Dental, please call 1-877-510-3502 and reference group #18842.

- **For help with choosing a medical plan**: Check out ALEX, your personal online and interactive benefits counselor. ALEX can help guide you through your Benefits Enrollment and help you decide which medical, dental, and vision options are right for you.

Q. When do the Tableau benefit plans terminate?
A. Effective midnight of March 31, 2020, the following Tableau employee benefits plans will terminate:

- Healthcare & Limited Purpose Flexible Spending Account: Discovery Benefits
- Health Savings Account: Discovery Benefits
- Dependent Care Flexible Spending Account: Discovery Benefits
- Dental: Delta Dental of Washington
- Vision: Vision Service Plan
- Life/AD&D: Unum Basic Life/AD&D, Unum Voluntary Life/AD&D, Unum Short Term and Long Term Disability
- Employee Assistance Program: ComPsych EAP
- Other Benefits: Care@Work, Health Advocate, GeoBlue, Aetna Expat, BTA and 401k Plan
Note that this information about the termination of the Tableau employee benefit plans that were offered to you in 2020 constitutes a Statement of a Material Modification in benefits in accordance with the Employee Retirement Income Security Act (ERISA).

ENROLLMENT

Q. How do I enroll in Salesforce’s benefit plans?
A. To ensure you have benefits coverage beginning April 1, 2020, you must take action and make your benefits elections after you have VDI access through our tool for HR systems and management, Workday from March 18 – April 30, 2020. If you do not enroll, you will not have coverage for the remainder of 2020. If you enroll by April 30, 2020, your insurance coverage will be retroactively effective April 1, 2020.

For step-by-step enrollment instructions, please review Benefits Enrollment/Making Changes to your Benefits (US).

Please note: If you are adding dependents to the medical, dental, or vision plans, you will need their SSN and date of birth for them to be added to the insurance coverage.

Tip: Print out or save your current Tableau benefit election via Tableau Workday by March 31st so you can reference it while enrolling in your new Salesforce plans. To view/print benefit elections:
1. Log into Workday
2. Click on the Benefits icon on the Home page
3. Click Benefit Elections in the View column
4. Click on the "Actions" box next to your name
5. Hover over Benefits > View My Benefit Election History
6. Click on the link under the Benefits Details column
7. Click on the printer icon on the top right corner to print your elections as PDF

Q. When can I enroll in Salesforce benefits?
A. You can enroll in benefits during your initial enrollment period which will begin on March 18, 2020 through April 30, 2020, and your benefits will be effective April 1, 2020. Your only other opportunities to make changes to your benefits are:
   - Open Enrollment – typically held in the fall; or
   - During a qualifying life event – such as getting married or divorced, having a baby, adopting a child, having a covered child turn age 26, or switching between part-time and full-time work.

Q. Can I make changes to my health benefits coverage at any time?
A. The benefits you select when joining Salesforce are effective through the end of the calendar year. Your only other opportunities to make changes to your benefits are during Open Enrollment, or if you have a qualifying life event. More information can be found here: Making Changes

Q. Are there any incentives or penalties for waiving participation in the medical plan?
A. There are no incentives or penalties for waiving participation.
Q. I enrolled in benefits and made a mistake. How can I make a correction?
A. Prior to April 1, 2020, please go to Wayfinder. On or after April 1, 2020, please contact Employee Success via Concierge. Note: Tableau employees will have access to Concierge after receiving their Salesforce device and/or are enabled on Salesforce systems.

Q. Both my spouse and I work for Tableau. Do we need to enroll in the medical plan separately, or can one of us be a dependent on the other’s plan?
A. You have the option to enroll into one medical plan or separately. Should you decide to enroll into one plan, you still must login to Workday to waive your coverage and complete your enrollment. Check out the plan costs here.

MEDICAL

Q. When will I get my medical ID card?
A. Allow 2-3 weeks after you complete your enrollment for your ID card to arrive via mail. Within 1 week of submitting your enrollment in Workday, you can go online and download a temporary ID card from each carrier. Note that if you are currently enrolled in Premera, and you elect to continue in the Premera plan for the remainder of 2020, you will not receive a new medical ID card.

Q. I have a doctor’s appointment. Can my doctor verify my insurance eligibility and what info should I provide to them?
A. Since there can be a lag time (usually around 48 hours) between when you make your benefit election in Workday and when our benefit carriers will receive your enrollment information, please expect a short delay for your chosen carrier to recognize you in their system. You will still be able to see a doctor prior to being active in the carriers’ systems, but you may be required to pay out-of-pocket for your visit or prescription drugs upfront, and then get reimbursed once your enrollment has been uploaded to the new carrier’s system.

- **If you are enrolling in Aetna or UHC** and you have an appointment scheduled or need to pick up a prescription prior to you being in their system, you may need to pay out-of-pocket and file a claim ([UHC Claims Reimbursement Form](https://myuhc.com) or [Aetna Claims Reimbursement Form](https://www.aetna.com)) to be reimbursed for the cost of services after your enrollment is processed. When you go to the doctor, you can also inform the office that you are in the process of signing up for new benefits under Salesforce that will be retroactively effective April 1, 2020. The physician may choose to bill you at a later date.

- **If you are enrolling in Kaiser**, and you have an appointment scheduled or need to pick up a prescription prior to you being in Kaiser’s system, explain that you are going through an employer transition. You may potentially be asked to sign a form stating that if you are not covered under a Kaiser plan effective April 1, 2020, you will be responsible for the cost of treatment.

- **If you maintain your enrollment in Premera**, there will be no lapse as your coverage will be maintained until you make an active election to choose another plan or coverage.

Once you are in the carrier’s system, you can print out your medical ID card by registering on [www.Aetna.com](https://www.aetna.com) if you elected Aetna as your medical carrier, or [www.myuhc.com](https://www.myuhc.com) for UnitedHealthcare.
(UHC). Also, you can access a digital ID card by downloading Aetna/UHC’s mobile app and logging in using the same registration credentials.

**Q. How can I check if my provider is in-network?**

**A.** Check to ensure that your current providers are in the Aetna or UHC network. You can check the status of your provider through Grand Rounds on their “Find Care” section after you’ve registered your account. Or, you can click here to find out if your doctor is in-network.

**Q. What if I or one of my dependents is undergoing a course of treatment or is pregnant at the time benefits become effective and my doctor is out-of-network?**

**A.** If you switch your medical plan to Aetna or UHC and you or your dependent is in the middle of a treatment and your doctor is not in the Aetna or UHC network, you must complete a Transition of Care Form. To make sure that you can continue your care at the highest level of benefits, submit the Aetna’s Transition of Care form within 90 days, or UHC’s Transition of Care form within 30 days of enrollment for review and approval.

**Q. What if I experience a medical emergency, or if I am scheduled for a doctor’s appointment or outpatient surgery that will occur after my coverage begins with Salesforce?**

**A.** Make sure to complete your enrollment in Workday as soon as possible if you have pending surgery, appointments, or prescriptions to fill. You can make your enrollment starting on March 18, 2020 and your benefits coverage will be effective April 1, 2020.

**Q. Will Salesforce honor my 2020 deductible and out-of-pocket accumulated prior to April 1, 2020?**

**A.** Aetna, UHC, and CVS (for prescriptions) will honor previous deductible and out-of-pocket accumulation to date under the Tableau plan in 2020. If you remain enrolled with Premera as of April 1, your deductible and out-of-pocket expenses from January through March 2020 will also be honored for the remainder of 2020.

Deductibles and out-of-pocket balances will not be loaded until after April 30, 2020, once benefits enrollment for Salesforce plans have ended. Depending on the carrier, it may take some time for your deductible/out-of-pocket accumulation to transfer. We highly recommend you make your benefit elections as soon as possible during your enrollment period to reduce any challenges with retroactive coverage.

**Q. Why did I receive a COBRA notification?**

**A.** As a new participant in the Salesforce benefit program, we are required to provide employees with an Initial Notification of COBRA rights. This is your notification that in the event of a qualifying event, COBRA may be available to you and your dependents.

**PHARMACY**

**Q. When will I get my prescription drug ID card?**

**A.** CVS Caremark is the prescription drug provider for employees enrolled in the Aetna or UHC medical plans.
You will receive a separate CVS Prescription Drug ID card. Allow 2-3 weeks after you complete your enrollment in Workday for your ID card to arrive via mail.

Please note, if you are choosing Kaiser, there is no separate pharmacy provider, and you can pick up your prescriptions at a Kaiser pharmacy.

If you are currently enrolled in Premera, and you elect to continue in the Premera plan for the remainder of 2020, you will not receive a new medical/prescription drug ID card.

Q. If I enroll in an Aetna or UHC medical plan, how do I pick up my prescription?
A. Be sure to present your CVS Prescription Drug ID card when you pick up a prescription at the pharmacy. Once you receive your ID card, register on the CVS site and download their mobile app if you want a digital copy of your ID card.

If you submitted your benefit elections in Workday but have not received your CVS ID card yet and need to pick up your prescription(s), you can use this temporary ID card (must be on Salesforce network) to process your prescription.

In an event that your enrollment is not yet recognized in the CVS Caremark system and you need to pick up your prescription(s), you will need to pay out-of-pocket and submit a claim for reimbursement to CVS Caremark.

Please note, if you are choosing Kaiser, there is no separate pharmacy provider and you can pick up your prescriptions at a Kaiser pharmacy.

Q. How can I find out which pharmacies are in the CVS network?
A. To check if your pharmacy is in network, use one of the below mentioned links to the Check Drug Cost tool, selecting the “Change my pharmacy” link for searching your current pharmacy.

- Aetna or UHC HDHP Premium - Single
- Aetna or UHC HDHP Standard - Single
- Aetna or UHC HDHP Premium - Family
- Aetna or UHC HDHP Standard - Family
- Aetna or UHC EPO
- Aetna or UHC PPO

Alternatively, call CVS Customer Care at 1-844-345-2824. Additional information can be found in the CVS Caremark FAQ.

Q. I’m on a specialty medication. If I enroll in an Aetna or UHC medical plan, how do I obtain this under the CVS plan?
A. To see if your prescription is a specialty medication, check out the specialty pharmacy listing of medications.

On the initial fill of a specialty medication, you may fill your prescription anywhere in the CVS network. After your initial fill, you must fill all future prescriptions through the CVS Specialty Pharmacy. You will need to re-verify your insurance coverage, and you can get started by contacting the CVS Specialty
Pharmacy at the number below. Due to the complex nature of these medications, you may find additional limits on the availability of these medications. Call the CVS Caremark Specialty Pharmacy toll-free at 1-866-846-3095 or visit www.cvsspecialty.com.

Q. What changes will I experience with my prescriptions if I move to the Salesforce Aetna or UHC medical plans?
A: It will depend on what type of plan you elect into. For example, generic drugs in select categories, such as diabetes, asthma, high blood pressure, and high cholesterol are offered at no cost today and would continue to be no cost in both the PPO and HDHP plans. However, certain brand drugs in these categories would take the usual brand copay if you are in the PPO plan, but would be $0 if in the HDHP.

If you move into the Aetna or UHC medical plans, there will be a different formulary (listing of preferred drugs). With that, some of the drugs that are preferred today may be non-preferred starting April 1, 2020. If so, you will be required to pay a higher cost. Many will stay the same, and some will cost less than what you may be paying today. You can contact CVS Customer Care at 1-866-846-3095 to check on the status of your prescription or online by clicking the plan you elected on the CVS Caremark FAQ.

If you are using a specialty medication, please review the question above regarding specialty medication so that you can continue to receive your therapy without interruption. Please be sure and check all your medications against the specialty listing to find out if any of them are designated as specialty. Some key specialty medication categories include: Rheumatoid Arthritis, Multiple Sclerosis, Cancer, Ulcerative Colitis, Crohn’s Disease, HIV, Hepatitis C, and rare genetic conditions.

**DENTAL**

Q. When will I get my dental ID card?
A. You will not receive an ID card from Delta Dental of California. Everything is digital and available online. Register on Delta Dental’s website [here](#).

Q. What happens to my dental deductible and annual maximums accumulated under my Tableau plan?
A. Your dental deductible and annual maximums will reset under the Salesforce plan.

Q. Will Salesforce’s dental insurance cover orthodontia?
A. Delta Dental covers orthodontia. Details can be found [here](#).

Q. My dependent is receiving orthodontic treatment under my current dental coverage; will Salesforce provide coverage for the remainder of the orthodontic treatment period?
A. Work in progress coverage is offered for anyone undergoing active orthodontic treatment. Be sure to notify your dentist that your insurance has updated to Delta Dental of California for any dental services on or after April 1, 2020.

Q. Is treatment-in-progress covered?
A. We will cover claims for procedures started and completed after the enrollee’s coverage effective date.
Procedures started prior to April 1, 2020 should be covered by your previous carrier (Delta Dental of Washington).

**VISION**

**Q.** Will I get a separate vision card?
**A.** VSP does not issue vision insurance cards. Your VSP provider can verify your eligibility using your social security number (or the last 4 digits of your social security number, in combination with your first and last names and date of birth).

**Q.** What happens to my allowances and frequencies accumulated under my Tableau plan?
**A.** Your vision allowances and frequencies will reset under the Salesforce plan.

**FLEXIBLE SPENDING ACCOUNTS (FSA)**

**Q.** I am enrolled in the 2020 Tableau FSA plan. When is the last day I can incur eligible expenses and when is the last day to submit my claims for reimbursement?
**A.** You have until March 31, 2020 to incur and submit eligible healthcare and dependent care expenses through Discovery Benefits. After a 2 week blackout period, your unused funds (up to $500) will carry over to your new account at ConnectYourCare.

**Q.** I am enrolled in the 2020 Tableau FSA plan for healthcare and dependent care. Can I make a new election under the Salesforce FSA plans?
**A.** No, all FSA elections under the Tableau plans will be carried over into the Salesforce FSA plans. No changes can be made until the next open enrollment period or during a qualifying life event.

**Q.** What happens if I have a Tableau FSA and want to elect a HDHP/HSA with Salesforce?
**A.** Your current FSA election with Tableau will be carried over to Salesforce. If you are currently enrolled in a traditional Health Care FSA, you CANNOT enroll in a HDHP with HSA. You can choose between the Premera PPO, Aetna/UHC PPO, Aetna/UHC EPO, or Kaiser CA/OR medical plans.

**Q.** How much can I contribute in my Health Care FSA or Limited Purpose FSA for 2020?
**A.** Your current Tableau FSA elections will remain in effect at Salesforce through the end of 2020. You will not be able to make any changes to your FSA elections during this Benefits Enrollment.

**Q.** Does Salesforce have Limited Purpose FSA?
**A.** Yes, the Limited Purpose FSA is available for employees enrolled in a HDHP. If you are currently enrolled in a Limited Purpose FSA with Tableau, that election will remain in effect with Salesforce for the remainder of 2020.

**Q.** Why is the Dependent Care FSA maximum election capped at $2,500 when the IRS limit is $5,000 per household for employees that have OTE greater than $250,000?
A: The limit is lower than the IRS maximum due to Salesforce not passing the nondiscrimination testing. This is common for companies like ours, whose employees earn compensation significantly more than the national average.

If you are currently enrolled in the Dependent Care FSA with Tableau, that election will remain in effect, unchanged with Salesforce for the remainder of 2020. You will be subject to the Salesforce limit when making new elections for 2021 during Open Enrollment.

Q. Does Salesforce’s FSA provide a debit card or should all purchases be submitted for reimbursement?
A. ConnectYourCare (CYC) is Salesforce’s spending account (FSA & HSA) provider. The Health Care FSA HSA plan comes with a debit card that you can use at the doctor’s office, pharmacy, or other medical facility. If you have a Limited Purpose FSA and a HSA plan you can use the same payment card for expenses. For the Dependent Care FSA, you file claims to get reimbursed.

After systems enablement, you can manage your FSA account by logging in to ConnectYourCare via Salesforce Aloha Single Sign On (SSO) or download the CYC mobile app.

HEALTH SAVINGS ACCOUNT (HSA)

Q. Do I have to enroll in the HDHP plans to open an HSA with ConnectYourCare?
A. You must be enrolled in the Premera HDHP, Aetna/UHC Premium HDHP, or Aetna/UHC Standard HDHP in order to continue to contribute to an HSA.

Q. If I enroll in the Aetna/UHC Premium HDHP or the Premera HDHP, will I receive the full $750/individual and $1,500/family per calendar year HSA employer contribution?
A. You will only receive an employer contribution if you are enrolled in the Aetna/UHC Premium HDHP or Premera HDHP. The Aetna/UHC Standard HDHP is not eligible for an employer contribution. The HSA employer contribution is prorated based on your start date and is deposited on the first pay administratively possible following your enrollment. Due to your transition from Tableau to Salesforce, the prorated employer contributions for the rest of 2020 will be $562.50 for individual coverage or $1,125 for family coverage.

When you make your HSA elections in Workday, be sure to account for any contributions previously made into your Tableau HSA (employer and employee contributions) as you cannot contribute over the IRS maximum limit - $3,550 for employee only coverage and $7,100 for employee + family coverage. If you are 55 or older, the IRS allows an increase in annual contributions up to an additional $1,000 per year.

Q. What happens to my existing HSA funds?
A. If you have existing HSA funds and enroll in an HSA in Workday, you will be able to transfer your existing Tableau HSA funds into the new Salesforce HSA.

Unless you notify us that you want to opt-out of the transfer of your HSA from Discovery Benefits to ConnectYourCare (CYC), your funds will be liquidated and moved to ConnectYourCare in May 2020.
● You will not be able to use your Tableau HSA funds between May 1 – June 15, 2020 as this is when the transfer process is occurring from Discovery Benefits to CYC. You can access and use your new Salesforce HSA through CYC during most of this time period.

● When your account is opened at CYC, you might need to provide additional information to confirm your identity before your account can be opened. Look out for communications from CYC’s bank trustee, BNY Mellon, about the information you need to provide. If your account is not successfully opened when the transfer occurs, your balance will remain at Discovery Benefits and will be subject to a monthly administrative fee.

● Your funds will be available to use or invest in your new Salesforce HSA on June 15, 2020. Minimum balance required to invest is $500.

If you do NOT want your balance at Discovery Benefits transferred to CYC, you must complete the opt-out form and return it to humanresources@tableau.com by April 30, 2020. You will be responsible for paying the monthly administrative fee to keep your account open through Discovery Benefits starting in June 2020, if you elect to opt-out.

Q: I received a letter from BNY Mellon requesting personal information from me. Is this legitimate?
A: Yes, this is legitimate. When you enroll in an HSA, you will be subject to an HSA verification requesting personal information (Customer Identification Process (CIP)), which is a similar automated process to when you’re opening a new bank account. In the event that you failed the identification process, you will receive a letter from BNY Mellon to inform you of an action you’ll need to take. You should respond quickly to ensure your account is opened before the account transfer occurs.

COMMUTER

Q. What happens to my Tableau commuter allowance?
A. April 2020 will be the last month that you will receive your monthly commuter allowance under the Tableau benefit. This will be paid out to you through Tableau’s payroll. Starting in May 2020, you will be eligible to receive up to $125 per month for eligible transit or up to $125 per month for parking expenses as part of the Salesforce Commuter Benefit, administered by WageWorks. In addition, you will also be eligible to make a pre-tax contribution for any additional eligible transit and parking expenses through Salesforce’s Commuter benefit.

Q. What is the deadline to place a commuter order?
A. All commuter orders for the following month must be placed by the 10th of the current month. Example: Orders submitted by May 10 will be placed for June; orders submitted between May 11 and June 10 will be placed for July.

Q. How do I make my May commuter election?
A. You will not have access to WageWorks until you complete your Benefits Enrollment in Workday and have access to our single sign-on tool, Salesforce Aloha Single Sign On (SSO). If you complete your benefits enrollment in Workday by March 31, you will be able to make your commuter election in WageWorks starting on April 3, and you must place your commuter transit and/or parking order by April 10 to take advantage of the May commuter benefit.
Q. What happens if I do not submit my May commuter order by April 10?
A. You will not be able to take advantage of the commuter benefit for May. You are unable to retroactively make any commuter elections, so any orders placed after April 10 through May 10 will be for the month of June.

Q. What happens to my Tableau toll allowance?
A. The Tableau toll allowance will not continue at Salesforce. April 2020 will be the last month you will receive a toll allowance.

LIFE INSURANCE

Q. Will my elected beneficiaries carry over from Tableau?
A. Your beneficiary info will not carry over to Salesforce. You must enter your beneficiary information in Workday during your benefits enrollment. Be sure to designate your Life and AD&D beneficiary. Check out How to Add a Beneficiary for step-by-step instructions. Note: Tableau employees will have access to the linked Concierge article after receiving their Salesforce device and/or are enabled on Salesforce systems.

Q. Do I need to fill out an Evidence of Insurability form to receive supplemental life coverage with Salesforce?
A. You will be eligible for the Salesforce Guaranteed Issued (GI) amount of $750,000 for supplemental employee life insurance and $100,000 for supplemental spouse life insurance.

This means that you can elect up to $750,000 or 5x your on-target earnings (OTE), whichever is less, for yourself without completing an Evidence of Insurability (EOI) form or completing a medical review. You can elect up to $100,000 for your spouse without completing an Evidence of Insurability (EOI) form or completing a medical review.

Any election over the GI will be subject to medical review. Please note that the GI is only available during your initial enrollment period from March 18, 2020 through April 30, 2020. Any election amount after your initial enrollment will be subject to medical review.

Q. Where is the Evidence of Insurability form located?
A. If the amount you elect in Workday is over the Guaranteed Issue amount, you are required to submit an Evidence of Insurability (EOI) form. You will receive an email directly from MetLife a couple weeks after you complete your enrollment with directions on how to submit your EOI. MetLife will let you know if the additional life insurance coverage is approved.

TIME OFF

Q. How many company holidays does Salesforce recognize?
A. Salesforce recognizes 9 US company holidays and 4 floating holidays (floating holidays only apply to employees on our PTO plan). You can find the holiday schedule and list of floating holidays here.
Q. If I am a non-exempt (hourly) employee moving to Salesforce’s PTO plan, will I start with a zero balance?
A. We recognize that time off is important to you. In your transition to a PTO accrual schedule, we’re carrying over up to 40 hours of your current available Tableau vacation time. In addition, you can borrow up to 40 hours against your PTO balance.

Q. I am moving to Salesforce’s PTO plan but I already scheduled vacation for after April 1. What should I do?
A. You will be starting with a balance of up to 40 hours. In addition, you are allowed to borrow up to 40 hours of PTO to support employees through their pre-planned vacations while you begin to grow your PTO balance.

Q. What will happen to the current Tableau Floating Holiday, Volunteer Day, and MCTO programs?
A. The Tableau Floating Holiday, Volunteer Day, and MCTO programs will end on March 31, 2020. Employees will move forward with the Salesforce Floating Holiday, Volunteer, and Medical Leave benefits on April 1, 2020.

Q. What is Salesforce’s sick leave policy?
A. For U.S. non-exempt (hourly) employees who accrue PTO, your sick time is included in your PTO accrual amounts.

For Tableau non-exempt employees, Salesforce will provide 160 hours of paid sick time. In 2021 and beyond, you will continue to carry over your unused sick time hours (not to exceed 72 hours) until your sick time is exhausted.

For U.S. exempt (salaried) employees with flexible time off (FTO), Salesforce provides 72 hours of paid sick time.

For Tableau exempt employees coming over April 1, 2020, Salesforce will provide 160 hours of paid sick time. In 2021 and beyond, Salesforce will provide 72 hours annually at the start of each fiscal year (February 1).

Q. How do I initiate a leave of absence after April 1, 2020?
A. Matrix Absence Management is Salesforce’s leave of absence administrator. Starting April 1, 2020, they will be your front-line source of contact to initiate your leave of absence process. You can reach Matrix at 1-855-354-6937 or online at www.matrixabsence.com.

401(k) PLAN AND ESPP

Q. When can I enroll in the Salesforce 401(k) Plan?
A. You will be able to enroll once your information is added to Fidelity’s system. It is sent from Workday, after your complete information is provided and reviewed. More specific information can be found here.

Q. How much can I contribute to the Salesforce 401(k) Plan?

Last updated: January 31, 2020
A. You can contribute 1%–50% of your eligible compensation (base salary + bonuses + commissions), up to the IRS limits ($19,500 in 2020). If you will be at least age 50 in 2020, you can make an additional catch up contribution ($6,500 in 2020). For every $1 you contribute, Salesforce contributes $1 up to 6% of your earnings each pay period, or a maximum $5,000 per calendar year.

If you contributed to another 401(k) plan in 2020, you can report the amount so that contributions to the Salesforce 401(k) Plan will be limited by Payroll so as to not exceed the IRS limit. This option will be part of your on-boarding process.

Q. When will Salesforce’s matching contributions apply to my contributions in the Salesforce 401(k) Plan?
A. Salesforce’s matching contributions will apply once you are on Salesforce payroll, starting for the pay period beginning April 1, 2020.

Q. Will Salesforce match the contributions I made to my Tableau 401(k) Plan?
A. No, the Salesforce 401(k) Plan match will apply starting with any contributions withheld from your pay once you are on the Salesforce payroll, beginning April 1, 2020.

Q: If I make Roth contributions to the 401(k), will the Salesforce matching contribution be treated as a Roth contribution?
A: No. Only employee contributions can be treated as Roth contributions. Fidelity maintains the funds that come into your account based on the source. Pre-tax are shown as Employee Deferral, then there’s Roth Deferral, After-tax Deferral and Employer Match.

Q. Will my 401(k) deferral election percentage and investment elections roll over from the Tableau 401(k) Plan to the Salesforce 401(k) Plan?
A. The Tableau 401(k) Plan will merge into the Salesforce 401(k) Plan. More information on what that means will be provided as we finalize the process.

Q. I am over age 50 and eligible to contribute catch-up contributions to the 401(k). Will my catch-up contribution rate election roll over to the Salesforce 401(k) Plan?
A. The Tableau 401(k) Plan will merge into the Salesforce 401(k) Plan. More information on what that means will be provided as we finalize the process.

Q. Will my beneficiary information carry over from the Tableau 401(k) Plan to the Salesforce 401(k) Plan?
A. The Tableau 401(k) Plan will merge into the Salesforce 401(k) Plan. More information on what that means will be provided as we finalize the process.

Q. What will happen to my account balances invested in the Tableau 401(k) Plan once Tableau is a part of Salesforce?
A. The Tableau 401(k) Plan will merge into the Salesforce 401(k) Plan. More information on what that means will be provided as we finalize the process.

Q. Can I continue to contribute to the Tableau 401(k) Plan?
A. No, the Tableau 401(k) Plan will be merged into the Salesforce 401(k) Plan.

Q. Will there be a 401(k) Plan blackout period?
A. No, there will not be a blackout period.

Q. Am I required to roll over my Tableau 401(k) Plan to the Salesforce 401(k) Plan?
A. The Tableau 401(k) Plan will merge into the Salesforce 401(k) Plan. More information on what that means will be provided as we finalize the process.

Q. Can I take a loan from the Salesforce 401(k) Plan?
A. Yes. If you have questions about the Salesforce 401(k) loan program, please see the 401(k) FAQ, or contact Fidelity at 1-800-835-5097. Information is also available on the Fidelity website at 401k.com.

Q. What if I have an outstanding loan from the Tableau 401(k) Plan?
A. The Tableau 401(k) Plan will merge into the Salesforce 401(k) Plan. More information on what that means will be provided as we finalize the process, including information to assist those with outstanding loans.

Q. I enrolled in ESPP November 2019. When is the purchase??
A. The purchase for employees already enrolled is June 15, 2020. Details around E*TRADE account setup will take place in April.

Q. When can I enroll in the Employee Stock Purchase Plan (ESPP)?
A. The next ESPP Open Enrollment period is May for the June 15, 2020 1-year offering. Eligible employees will receive more details on the enrollment process in early May.

More information about the 401(k) Plan and the ESPP program can be found here.

EDUCATION REIMBURSEMENTS

Q. When am I eligible for the Education Reimbursement program?
A. Courses started prior to April 1, 2020 are not eligible for tuition reimbursement. Courses must be started on or after April 1, 2020 as a permanent (full and part-time) Salesforce employee.

Q. What conditions must be met to qualify for education reimbursement?
A. To be eligible for reimbursement, you must either receive a final grade of ‘C’ or better, a ‘Pass’ if the course is Pass/Fail, a Certificate of Completion, and be actively employed with Salesforce at the course completion through receipt of reimbursement.

Q. Do I need my manager’s approval?
A. Yes, you must have a discussion with your manager and request their approval via email prior to signing up for courses.

Q. What courses are eligible?
A. Courses taken at a University or Accredited institute. Courses must be aligned with current role or future role within the company. Examples of eligible courses include, but are not limited to, qualified accounting programs for accountants, recognized certifications in programming languages for IT
professionals, CIPD or SHRM for HR professionals, Prince 2 for project managers, and Language schools are also approved and do not need to be accredited.

Q. What courses are not eligible?
A. Privately run courses, seminars, workshops and conferences that do not provide you educational credits or a certification. Examples of private training not eligible for reimbursement include, but are not limited to, personal or professional coaching, public speaking, and whiteboard training, courses from General Assembly, Udacity.com, Sans.org (unless tied to a certification). Classes offered by individuals of any sort are not eligible under this Policy.

Q. How do I submit my education reimbursement?
A. You'll be able to submit your claim via the Education Reimbursement - Program and Process article in Concierge, our self-service tool. You'll have access to Concierge after you receive your Salesforce device and/or are enabled on Salesforce systems.

WELLBEING REIMBURSEMENTS

Q. When am I eligible for the Wellbeing Reimbursement program?
A. Employees are eligible to submit wellbeing reimbursements after April 1, 2020. You can claim up-to 6 months retroactively. You can submit expenses for up to 6 months back as long as you were a full time Salesforce employee at the time of expense. For example, you can submit claims retroactively from April 1, 2020 through September 2020 in October 2020. If you do not submit your wellbeing reimbursement claim within 6 months, your remaining balance for those months will be forfeited.

Q. How do I know if I’m eligible to participate in the Wellbeing Reimbursement program?
A. You must work 20 hours or more a week to be eligible to participate in the Wellbeing Reimbursement program.

Q. What is the maximum amount I can claim?
A. You can claim up to a total of $100 per month.

Q. Can I share my wellbeing reimbursement with my dependents?
A. Yes, you can share your monthly wellbeing reimbursement among you and/or your dependents.

Q. How do I submit my wellbeing reimbursements?
A. You must file a claim AND submit a receipt through WageWorks on your desktop or mobile app to receive your reimbursement. Get step-by-step instructions. For more information, please visit the Global Wellbeing Reimbursement Program article in Concierge. Note: Tableau employees will have access to the linked Concierge article after receiving their Salesforce device and/or are enabled on Salesforce systems.

EMPLOYEE DISCOUNTS

Q. When can I access Salesforce’s employee discounts?
A. You can access employee discounts that are hosted on Fond starting on April 1, 2020.

Q. Does Salesforce offer veterinary pet insurance?
A. While Salesforce does not offer veterinary insurance for your pets as part of our medical benefits, please review our list of pet discounts available via Fond. If you have voluntary pet insurance with
Nationwide today, you may port your policy and continue your coverage on a direct bill basis. To port your coverage, please call 800-872-7387.

SUPPLEMENTAL PROGRAMS

Q. How do I access back-up child care and adult/elder care?
A. You have access to the Bright Horizons Back-up Care Advantage Program, which includes 10 days of back-up care per calendar year for back-up child care and adult/elder care.

We recommend that you register for back-up care even if you don't need care right now. Once you’re registered with Bright Horizons, you can schedule care up to one month in advance. When you use back-up care, you pay a co-pay of $15 per child or $25 per family for the center-based care option; in-home care is $6 per hour, with a four-hour minimum. To schedule care, please call 1-877-BH-CARES (1-877-242-2737) or go here.

Click "Create Your Profile" and enter the information below.
User Name: salesforce
Password: employee1

Q. Am I eligible for the Riding the Wave (service anniversary award) program?
A. If you hit a 3-, 5-, 10-, and 15-year anniversary on or after April 1, 2020, we will be sending you a desktop surfboard and the Salesforce.org grant. Employees who are expecting an award will receive the anniversary surfboard at their work location within a month of their service anniversary date. You can view your total years of service and service anniversary date in Workday. Click into your profile in the top right corner of the screen, select Overview from the left nav, then select the 'Tenure Recognition' tab.

A Salesforce.org grant is a one-time donation to a qualified nonprofit of your choice. Here’s what you’ll receive at each of the milestones for your years of employment (amounts are in USD or local equivalent):
- 3 Years – $50
- 5 Years – $100
- 10 Years – $200
- 15 Years – $200
- 20 Years – $300

If you hit an anniversary before April 1, 2020, we will not be sending you a “make up” desktop surfboard and Salesforce.org grant.

More information about Riding the Wave, including what you’ll receive at each of the milestones can be found here. Note: Tableau employees will have access to the linked Concierge article after receiving their Salesforce device and/or are enabled on Salesforce systems.
ADDITIONAL SUPPORT

On April 1, 2020, you can contact Employee Success by logging a case, live chat, or phone here. Note: Tableau employees will have access to the linked Concierge article after receiving their Salesforce device and/or are enabled on Salesforce systems.