



Ameriflex Participant Presentation

Agenda

- Benefit Plan Overview
- Substantiation
- Portal Features
- Documentation Requests
- Participant Service Assistance



Benefit Plan Overview

Ameriflex Benefit Plan Offerings

- **Flexible Spending Plan** - pre-tax savings plan to help cover the cost of medical expenses
- **Dependent Care** - pre-tax savings plan to help pay for child care expenses

Dependent Care Account

- Daycare or elder care
- Before-school and after-school care
- Preschool and nursery school
- Private sitter
- Summer day camp
- Nanny service

Contribution Limits

\$2,500 - Married couples filing separately

\$5,000 - Single taxpayer OR married couples filing jointly

Flexible Spending Account

2025 Limit - \$3,300

- Deductibles
- Copays
- Prescriptions
- Orthodontia
- Teeth cleaning
- Sunscreen
- Feminine menstrual care
- Over-the-counter medicine
- Band-aids
- Glasses & contact lenses

www.FSAstore.com

Ameriflex Debit Card

- New cards arrive within 7-10 business days
- Mailed in a plain white unmarked envelope
- Cards can be requested for Dependents up to the age of 18. If any additional cards are needed for younger participants please contact the Ameriflex Participant Services team.



A blue-tinted background image of a forest waterfall. The waterfall is the central focus, with water cascading down a rocky ledge into a pool of water below. The surrounding forest is dense with trees, and the overall scene is serene and natural. The text 'Documentation Requests' is centered in a white box over the middle of the image.

Documentation Requests

Automatic settings to help reduce requests for additional documentation

- Copay matching
- IIAS - set at the provider level
 - Rx
 - Over-the-counter
 - Health Care Eligible expenses
- Recurring Expenses - same provider, same amount charged



Frequently requested documents

- **Itemized Receipt or Explanation of Benefits (EOB)**
- **Letter of Medical Necessity** - Ameriflex approves therapy claims when they appear on an EOB since not all types of "therapy" are considered medically necessary. Therapy or counseling used for the general improvement of mental health without a medical diagnosis is not eligible.
- **Orthodontic Contract**
- Set up a recurring dependent day care claim

An itemized receipt must include the following information:

1 — Jane Smith, MD
Medical Practice, LLC

Receipt

2 John Doe
202 Main Street
Anywhere, NJ 08000

3 Services Rendered: Outpatient Office Visit	Co-Pay
4 Date of Service: 5/17/21	<u>\$70.00</u>
5 Total:	\$70.00

1800 Medical Rd., Suite 100 * Anywhere, NJ 08000 * Phone (856) 555-5555 *
Fax (856) 555-1234 * jsmith@medicalpractice.com

A blue-tinted photograph of a forest waterfall. The water is cascading down a rocky ledge into a pool below. The background is filled with trees, some with bare branches and some with green leaves. The overall scene is serene and natural. A white rectangular box is centered horizontally and vertically, containing the text "Portal Features" in a white, sans-serif font.

Portal Features

FREE Mobile App Available



Ameriflex 12+

Health & Savings

AmeriFlex

Designed for iPhone



FSA		\$2612.44
FSA 2020		
All Transactions		
Description	Amount	
03/20/2020 FSA Scheduled deposit EmployeeDeposit - Approved	\$105.77	▼
03/06/2020 FSA Scheduled deposit EmployeeDeposit - Approved	\$105.77	▼
02/29/2020 FSA PILLPACK LLC Card - Approved	(\$33.88)	▼
02/21/2020 FSA Scheduled deposit EmployeeDeposit - Approved	\$105.77	▼
02/19/2020 FSA PILLPACK LLC Card - Approved	(\$75.00)	▼
02/07/2020 FSA Scheduled deposit EmployeeDeposit - Approved	\$105.77	▼
02/02/2020 FSA PILLPACK LLC Card - Approved	(\$19.82)	▼
01/22/2020 FSA TOM THUMB STORE 2581 Card - Approved	(\$13.88)	▼

Getting the most out of your Ameriflex Account...

- View your balance
- Track your spending
- Submit documentation
- Get reimbursed for out-of-pocket expenses
- Access FAQs
- Order replacement cards
- and more

The screenshot displays the Ameriflex user interface. At the top, the Ameriflex logo is on the left, and navigation links for HOME, FILE A CLAIM, HELP, SHOP FSA STORE, and MORE are in the center. A LOG OUT link is on the right. Below the navigation, a personalized greeting 'Hello Benny Fitz' is shown next to a sun icon. The main content area features three account summary cards, each with a 'More Details' button:

Account Type	Balance	Action
Health Reimbursement Account	\$1100.00	More Details
Dependent Care Account	\$200.00	More Details
Flexible Spending Account	\$2850.00	More Details

Below the account cards are three filter dropdown menus: 'All Accounts', 'Recent', and 'Cards and Claims'. Underneath these filters is a table with columns for Date, Account, Description, and Amount. The table currently displays the message: 'There are no transactions for this period.'



Participant Service Assistance

Service Operational Hours

- Ameriflex Portal - 24/7/365
- Ameriflex Mobile App - 24/7/365
- COBRAPoint - 24/7/365 (COBRA QB & Retiree self service)
- Online Chat & Call Center (live representative)
 - Monday - Friday, 8:30 AM-9:00 PM (EST)
 - Saturday - 10:00 Am - 2:00 PM (EST)



Thank you!