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
- Bandaids
- · 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.





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

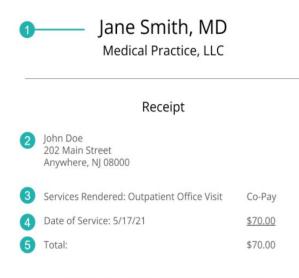




Frequently requested documents

- 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 <u>must</u> include the following information:



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



Portal Features

FREE Mobile App Available



Ameriflex 12+ Health & Savings AmeriFlex Designed for iPhone





FSA

\$2612.44 0

F5A 2020		٠
All Transactions		٠
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	~
02/11/2020 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 , 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

Ameriflex HOME	FILE A CLAIM HELP SHOP FSA STORE 👻 MO	RE 🕶	Ê LOG OUT
Hello Benny Fitz	:		
Health Reimbursement	Account	\$1100.00 Mor	re Details
Dependent Care Accoun	ıt	\$200.00 Mor	re Details
Flexible Spending Acco	unt	\$2850.00 Mor	re Details
All Accounts	✓ Recent	✓ Cards and Claims	~
Date Account		Description	Amount
There are no transact	tions 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)



