

WageWorks Flex Administration

Step-by-Step Guide to Doing Business with WageWorks

Together, Aflac and WageWorks have prepared this “New Employer Guide” that will assist you during the selling process. This New Employer Guide can be found on the WageWorks website for Associates: www.GetWageWorks4Agents.com.

The entire “New Business” process from start to finish usually requires thirty (30) days to complete.

For assistance during the selling process WageWorks has established a dedicated team to support your efforts. WageWorks Sales Support Team: 855-299-4385.

Submitting “New” Business to WageWorks

Action Required	Resources and Tools
<input type="checkbox"/> Review the NEW Client Step-by-Step Guide (this document) <input type="checkbox"/> 1. Complete the WageWorks Account Authorization for NEW Employers (account application) <input type="checkbox"/> 2. Submit the Account Application Authorization to WageWorks for review and setup. WageWorks will review the application and will advise for need to verify any missing information	Go to www.getwageworks4agents.com , under the “New Client” tab, to find required documents and additional information.
<input type="checkbox"/> 1. Review the Order Form with your client and select the appropriate options for: <ul style="list-style-type: none"> a) Select the appropriate “Funding Method”. (A funding guide can be found on www.GetWageWorks4Agents.com under the “New Client” tab.) b) Electronically sign the Order Form (When signed electronically, the Order Form will be electronically submitted, automatically.) If the client does not electronically sign the Order Form, the Order Form must be printed, completed, signed and then sent to WageWorks.	After WageWorks receives the Account Application, an Order Form will be generated and sent directly to you to review with your client.
<input type="checkbox"/> 1. Enroll employees using the Salary Redirection Agreement (enrollment) forms 2. Submit enrollment forms to WageWorks for processing.	Download these open enrollment materials at getwageworks4agents.com or print from CAYS <ul style="list-style-type: none"> 1. Wageworks Salary Redirection Agreements 2. Employee Education Brochures
Optional	
<input type="checkbox"/> Attend Implementation call and website training	

Once the employer has determined which account(s) they want to implement for their company the following seven steps must happen in sequence:

Step 1

Complete WageWorks Account Authorization for NEW Employers (account application)

The employer must complete the appropriate Account Authorization for New Employers.

- u Flexible Spending Account (FSA)
- u Dependent Care Spending Account (DCA)
- u Commuter Spending Account (CSA)
- u Health Savings Account (HSA)
- u Health Reimbursement Arrangement (HRA)

Account applications can be found on the WageWorks website for Associates: www.GetWageWorks4Agents.com.

Step 2

Submit Account Application to WageWorks

Email: aflacsales@wageworks.com

Or

Fax: 866-672-1632

After WageWorks receives the Account Application, an Order Form will be generated and sent directly to you to review with your client.

Step 3

Complete the WageWorks RSA; have your client electronically sign and return to WageWorks

The employer must complete the following as part of the RSA:

1. Select the appropriate "Funding Method". (A funding guide can be found on www.GetWageWorks4Agents.com under the "New Client" tab.)
2. Electronically sign the RSA (When signed electronically, the RSA will be electronically submitted, automatically.)

If the client does not electronically sign the Order Form, the Order Form must be faxed with the cover sheet that is printed out with the Order Form.

Step 4

Implementation Call

Once the Order Form has been received and processed by WageWorks, an Implementations Specialist will schedule an initial welcome call with the employer within three to five business days of receiving the completed RSA. During the welcome call, the Implementations Specialist will review the implementation timeline, as well as additional required documents, including the Payroll Calendar and Insurance co-pay form, and verify the employer's plan requirements before building it in the WageWorks system.

Associate attendance is optional.

Please note: Plan documents and Summary Plan Description (SPD) will be emailed to the employer after the initial implementation call.

Step 5

Complete WageWorks Salary Redirection Agreement (enrollments) and return to WageWorks

The Associate/Employer are responsible for sending enrollments to WageWorks. The plan cannot go "live" until all enrollments and the completed RSA has been received in good order by WageWorks.

Enrollments will be processed and, if applicable, debit cards will be ordered.

Electronic copies of enrollment materials are available on the Associate website: www.GetWageWorks4Agents.com. Hard copies of materials can be ordered on the Aflac Web Ordering Site.

Step 6

Website training

Once the necessary paperwork has been received a website training will be scheduled to review website reporting options.

During this training session, the Implementation Specialist will verify the enrollment data with the employer. Associate attendance is optional.

Step 7

Transition to the WageWorks Client Services team.

At "go live" or plan start date, the group will be transitioned to the Client Services team.

Client Services contact information will be provided in an email from the implementation specialist.

www.GetWageWorks4Agents.com

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WageWorks is a preferred vendor for the administration of Aflac's Cafeteria Plans (Health FSA and Dependent Day Care), Commuter Spending Accounts, and Health Savings Account (HSA) products and services. WageWorks is a separate entity from Aflac, and WageWorks will guarantee and warrant any products and services they offer based upon their own service policies.