

# FSA Client Renewal Information

We're very excited about the new WageWorks FSA and we hope you are too!

The purpose of this communication is to provide you with a step-by-step approach to renewing your full flex client to the WageWorks FSA.

We have designed a simple and easy-to-follow process that will ensure you have completed all the necessary tasks with your upcoming renewals.

## What you need to do

### Step 1

Review the new resource center that has been created for you at [www.GetWageWorks4agents.com](http://www.GetWageWorks4agents.com) where you can:

- ▶ Learn about WageWorks and the plan offerings
- ▶ Print an employer FSA Brochure
- ▶ Print an employee FSA Educational Brochure
- ▶ Print a WageWorks Employee Enrollment Form
- ▶ Learn how to sign up new full flex clients for the WageWorks FSA

### Step 2

Schedule an appointment with your Flex client to discuss the upcoming renewal and introduce the WageWorks FSA.

- ▶ Discuss the upcoming renewal and present the new WageWorks FSA program. Help your client understand the added convenience and service enhancements that WageWorks brings, which will equate to more tax savings for participants and your client. Review any documentation that you received from the Aflac Leadership Team and State Training Coordinators as to the best ways to present the benefits of this partnership to your Employer groups.
- ▶ Review the funding options in the "FSA Funding Options Quick Guide" document. Determine the best fit for your client, based upon your client's current "Aflac" funding method and make a recommendation to transition to the standard method. If you have questions regarding the funding options, contact your local State Training Coordinator.
- ▶ Review the full WageWorks Reimbursement Services Agreement (RSA) flex contract with your client and obtain your client's signature. Approximately 60 days before the contract renewal date, you will receive an email with instructions on how you can access and complete the WageWorks RSA with your Employer.

### Step 3

Complete the enclosed WageWorks FSA Client Renewal Checklist *for each of your renewing clients* and send it to WageWorks to ensure the client and contacts are setup properly with WageWorks. (WageWorks' fax number is at the bottom of the checklist.)

### Step 4

Enjoy the benefits now offered to your clients through the WageWorks FSA!

If you have questions, go to [www.GetWageWorks4Agents.com](http://www.GetWageWorks4Agents.com) – the WageWorks' Aflac Associate support website – or contact your local State Training Coordinator.

# FSA Client Renewal Checklist

Part 1	Action Required	Resources, Forms, Brochures and Tools	Where to Find Resources
<input type="checkbox"/>	Review the Renewing Clients to WageWorks documents	<ul style="list-style-type: none"> <li>▶ Step-by-Step Guide to Renew</li> <li>▶ Employer Renewal Letter</li> <li>▶ Applicable Employee Transition Letter</li> </ul>	www.GetWageWorks4Agents.com Click on Renewing Clients tab
<input type="checkbox"/>	Present the features and benefits of WageWorks program to your client	<ul style="list-style-type: none"> <li>▶ Employer Brochure</li> <li>▶ Employee Educational Brochure</li> <li>▶ Employer Renewal Letter</li> <li>▶ Applicable Employee Transition Letter</li> </ul>	www.GetWageWorks4Agents.com Click on Renewing Clients tab
<input type="checkbox"/>	Recommend the WageWorks funding method that best fits your client	▶ FSA Funding Options Quick Guide	www.GetWageWorks4Agents.com Click on Renewing Clients tab
<input type="checkbox"/>	Review the WageWorks Reimbursement Services Agreement (RSA) with your client	Approximately 60 days before the contract renewal date, you will receive an email with instructions on how you can access and complete the WageWorks RSA with your Employer.	www.GetWageWorks4Agents.com Click on Renewing Clients tab
<input type="checkbox"/>	Obtain client's signature on the WageWorks Reimbursement Services Agreement (RSA)	Your client must sign and fax the RSA to WageWorks using the fax number on the RSA coverage page. Must be returned 30 days before the new plan start date.	www.GetWageWorks4Agents.com Click on Renewing Clients tab
<input type="checkbox"/>	Review Employee WageWorks forms with client	<ul style="list-style-type: none"> <li>▶ WageWorks Enrollment Form</li> <li>▶ Pay Me Back Claim Form</li> <li>▶ Change In Status Form</li> </ul>	www.GetWageWorks4Agents.com Click on Renewing Clients tab
<input type="checkbox"/>	Review renewing clients tip sheets	Refer to the Aflac tips sheet	Aflac Associate Services
<input type="checkbox"/>	Complete Co-pay Form if employer has selected the payment card option	▶ Insurance Co-pay Form	www.GetWageWorks4Agents.com Click on Renewing Clients tab
<input type="checkbox"/>	Enroll employees in FSA using the WageWorks enrollment form - if enrollments are submitted using the SRA, the forms will be received and processed	<ul style="list-style-type: none"> <li>▶ WageWorks Enrollment Forms</li> <li>▶ Employee Educational Brochure</li> </ul>	www.GetWageWorks4Agents.com Click on Renewing Clients tab
<input type="checkbox"/>	<b>Submit this form and required documents. See Part 4 below. Documents must be received 30 days prior to the Plan start date.</b>		

## Part 2 - Associate and Employer Contact Information (Please provide information below)

Aflac Servicing Associate Name:	Associate #:	Phone:	
	Associate Email:		
Employer Name:	Federal ID#:	Aflac Account #:	
	WageWorks Customer #:		
Employer Address:	City	State:	Zip:
	Employer Phone:		Employer Fax:
Name of Employer's Primary Contact:	Phone:	Email:	
Name of Employer's HR Contact:	Phone:	Email:	
Name of Employer's Funding Contact:	Phone:	Email:	
Name of Employer's Invoice Contact:	Phone:	Email:	

## Part 3 - Employer FSA Plan Changes (Please provide information below)

Please indicate here if there are any significant plan changes for the new plan year (ex: plan election maximum / minimum, adding payment card option, adding grace period, etc.):

## Part 4 - Fax the following documents to WageWorks: 855-501-4833. Documents must be received 30 days prior to the Plan start date.

- ▶ Completed FSA Client Renewal Checklist (above)
- ▶ Completed WageWorks Salary Redirection Agreements (enrollments)
- ▶ Insurance Co-pay form (if payment card option has been selected by employer)