

FSA Client Mid-Year Transition Checklist

The purpose of this communication is to provide you with a step-by-step process for transitioning 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 for your clients' upcoming transitions.

What you need to do

Step 1

Go to www.GetWageWorks4agents.com and click on "Mid-Year Transition Client" tab to:

- ▶ Learn about WageWorks and the plan offerings
- ▶ Print an employer transition letter
- ▶ Print an employee transition letter
- ▶ Learn how to sign up new full flex clients for the WageWorks FSA

Look for an email from WageWorks, sent to your "us.aflac.com" email address, that provides key information and reminders about what you and your client must do to complete the transition to WageWorks.

Step 2

Schedule an appointment with your Flex client to discuss the upcoming transition to WageWorks.

- ▶ **Discuss the upcoming transition 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 client.
- ▶ **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. Our recommendation is to transition all clients to the standard funding method. If you have questions regarding the funding options, contact your local State Training Coordinator.
- ▶ **By July 25, you will receive an email, that will be sent to your "us.aflac.com" email address, with instructions on how you can access and complete the WageWorks RSA with your Client. Review the full WageWorks Reimbursement Services Agreement (RSA) flex contract with your client and obtain your client's signature.**

Step 3

Complete the enclosed WageWorks FSA Client Mid-Year Transition Checklist *for each of your mid-year transitioning 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 and click on the "Mid-Year Transition Clients" tab, – the WageWorks' Aflac Associate support website – or contact your local State Training Coordinator.

FSA Client Mid-Year Transition Checklist

Part 1	Action Required	Resources, Forms, Brochures and Tools	Where to Find Resources
<input type="checkbox"/>	Review the Mid-Year Transitioning Clients documents	<ul style="list-style-type: none"> ▶ Step-by-Step Guide for transitioning clients ▶ Employer Mid-Year Transition Letter ▶ Employee Mid-Year Transition Letter 	www.GetWageWorks4Agents.com Click on Mid-Year Transition Clients tab
<input type="checkbox"/>	Present the features and benefits of the WageWorks program to your client	<ul style="list-style-type: none"> ▶ Employer Brochure ▶ Employee Educational Brochure ▶ Employer Mid-Year Transition Letter ▶ Employee Mid-Year Transition Letter ▶ Open Enrollment Kit - if applicable 	www.GetWageWorks4Agents.com Click on Mid-Year Transition 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 Mid-Year Transition Clients tab
<input type="checkbox"/>	Review the WageWorks Reimbursement Services Agreement (RSA) with your client	You will receive an email with instructions on how you can access and complete the WageWorks RSA with your client.	Email will be sent to your "us.aflac.com" email address
<input type="checkbox"/>	Obtain client's signature on the WageWorks Reimbursement Services Agreement (RSA)	Your client must sign and fax the RSA to Wagemworks using the fax number on the RSA cover page. Must be returned 30 days before the transition date.	www.GetWageWorks4Agents.com Click on Mid-Year Transition Clients tab
<input type="checkbox"/>	Review WageWorks Employee forms with client	<ul style="list-style-type: none"> ▶ Pay Me Back Claim Form ▶ Change In Status Form (Note: Mid-Year transition to WageWorks is NOT a qualified change in status or an event that would allow election changes.) 	www.GetWageWorks4Agents.com Click on Mid-Year Transition Clients tab
<input type="checkbox"/>	Submit this form and required documents. See Part 4 below. Documents must be received 30 days prior to the Plan start date.		

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

REQUIRED INFORMATION

Aflac Servicing Associate Name:	Writing #:	Phone:	
	Associate Email (required):		
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 (required):	
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 - Open Enrollment Readiness

If your client has an upcoming open enrollment, present and review the open enrollment kit and discuss key requirements and dates. The open enrollment kit can be found at www.getwageworks4agents.com on the Mid-Year Transition tab.

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

- ▶ Completed FSA Client Renewal Checklist (above)