

Ameriflex EASE Checklist:

Please refer to the Ameriflex EASE Guide to see each of these steps broken down in detail. If you prefer a video format, we also recommend watching the EASE Portal tutorial.

COBRA

- Mark Plans as COBRA Eligible
- Link Ameriflex to Client so that the connection is enabled
- Provide Client ID
 - Uncheck “End Plans at the end of the month”
- Provide Initial Notice
- Provide Qualifying Events
- Disable any plans for which data exchange is not desired.
- Confirm with Ameriflex that the connection has been established

Flex:

**Please keep in mind that EASE currently does not have the ability to send employer contribution amounts.*

- Mark Plans as COBRA Eligible
- Link Ameriflex to Client so that the connection is enabled
- Provide Client ID
 - Policy Number must be changed to Ameriflex’s assigned “AMF Code” - please request this, if it has not already been provided to you.
- Provide Annual Open Enrollment
- Provide Ongoing Eligibility.
- Disable any plans for which data exchange is not desired.
- Confirm with Ameriflex that the connection has been established

There are also additional resources available at:

EASE Connection Support: You must submit a help ticket to receive assistance from Ease.

EASE Support Site (please note, you must login to access this link):

<https://eascentral.force.com/s/article/Broker-Third-Party-Administrator-TPA-Connection>