

□ Two week blackout period

- The blackout period typically occurs the last two weeks before Ameriflex takes over
- Advise your employees they are not able to use their cards during this period
- Let your Client Success Specialist (CSS) know when the blackout period will occur
- Let your prior TPA know the day before the blackout starts – this is the very last day they should be processing claims

□ Current Election Spreadsheets

- This should list full elections, not remaining balances

□ Send the Enrollee Account Balance Report once received by the prior TPA after the Black Out period

- Send in Excel with full Social Security Numbers

□ Contribution/Payroll File (IH File)

- Under Deposit Type, use C for any funds they have already used. The Employee Contribution column should list the total amount disbursed.
- Under Deposit Type, use A to add in the employee's year-to-date amounts
- Under Deposit Type, use RI to add in their previous rollover balances (if they have rollover balances of the prior plan year)
- Account Transaction File can be found in the Employer Portal (SPA) within the Participant tab. Click the ellipsis and download the blank account transaction file.

□ Information regarding current account setup

- What is the current start date with the prior TPA?

- Do your prior benefits with the original TPA have a rollover or grace period?
 - _____
 - Rollover
 - Grace period

- How long is your current run out period?

- _____