



Request for Service Form

Please check only the boxes that apply.

GENERAL INFORMATION

Company Name: _____

Employee Name: _____ Telephone: _____ SSN: _____

Employee Address: _____

City: _____ State: _____ Zip: _____ Email: _____

Is this person now, or has this person ever been enrolled in Medicare?* YES NO

If "Yes," you must provide this person's Medicare Claim Number (HICN):

*Section 111 of the Medicare, Medicaid, and SCHIP Extension Act of 2007 (MMSEA) (P.L. 110-173) requires Ameriflex to report certain HRA enrollment data to the Centers for Medicare and Medicaid Services.

NAME ADDRESS CHANGE

New Name*: _____ New Telephone: _____

*Must be accompanied by supporting legal documentation (i.e. marriage certificate, legal name change certificate)

New Address: _____

City: _____ State: _____ Zip: _____

CHANGE TO BENEFIT AND/OR ELECTION AMOUNT

Please briefly explain the requested change. Examples include: add single health coverage; drop family health coverage; change from single to family health coverage; increase/decrease FSA by \$20/pay. Note that the explanation in "Other" may not qualify as an acceptable change in family status under IRS regulations. The requested change must be necessitated by the Family Status Change indicated.

Marriage Divorce Legal separation from my spouse Death of spouse Birth of Child

My spouse has: Terminated employment Commenced employment

Switched from part to full-time (or opposite) Taken an unpaid leave of absence Changed shifts

Had a significant change in family health coverage attributable to his/her employment

I have: Changed shifts Switched from part to full-time (or opposite) Moved from my HMOs service area Taken an unpaid leave of absence Other Briefly explain change in family status:

CHANGE DETAIL:

Benefit Type: _____ Payroll Date of Change: _____

Change From: _____ Change To: _____ (annual)

Change From: _____ Change To: _____ (per pay)

Benefit Type: _____ Payroll Date of Change: _____

Change From: _____ Change To: _____ (annual)

Change From: _____ Change To: _____ (per pay)



RFS_AF_2015v.1

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Request for Service Form *continued—please check only the boxes that apply.*

ADDITIONAL CARD REQUEST/CARD TERMINATION *(only applicable if your employer has chosen this option)*

If you wish to have an Ameriflex Convenience Card® issued for a spouse or dependent, please be sure your spouse or dependent meets the IRS eligibility guidelines below:

(1) For federal tax purposes, a spouse includes all legally married same-sex or opposite-sex spouses, regardless of state residence.

(2) A dependent generally includes any relative of the participant for whom the participant provides over half of their support for the calendar year. A relative includes children, parents, stepchildren, siblings, aunts, uncles, cousins, and in-laws of the participant. Relatives do not need to reside with the participant in order to be dependents, nor do they need to be a certain age or infirmity; they need only to be persons for whom the participant has provided over half of their support.

Add | Term Spouse Name: _____ | SSN: _____ | Date of Birth: _____

| Address to issue card *(if different than participant)*: _____

_____ | Telephone _____

Is this person now, or has this person ever been enrolled in Medicare?* YES NO

All Dependents must be over the age of 18 in order to receive the Ameriflex Convenience Card.®

Add | Term Dependent Name: _____ | SSN: _____ | Date of Birth: _____

| Address to issue card *(if different than participant)*: _____

_____ | Telephone _____

Is this person now, or has this person ever been enrolled in Medicare?* YES NO

Dependent Name: _____ | SSN: _____ | Date of Birth: _____

Add | Term Address to issue card *(if different than participant)*: _____

| _____ | Telephone _____

Is this person now, or has this person ever been enrolled in Medicare?* YES NO

*Section 111 of the Medicare, Medicaid, and SCHIP Extension Act of 2007 (MMSEA) (P.L. 110-173) requires Ameriflex to report certain HRA enrollment data to the Centers for Medicare and Medicaid Services.

Please Note: Only Benefit/Election amount changes require Employee AND Employer approval.

Employee Signature

Date

Employer Signature

Date

This agreement is subject to the terms of my Company's Flexible Benefits Plan, as amended from time to time, and as governed under applicable laws. This amendment revokes any prior election and agreement relating to such plan(s). By signing this form, I agree to the terms and procedures of my Company's Flexible Benefits Plan.

Mail to: Ameriflex 7 Carnegie Plaza, Suite 200, Cherry Hill, NJ 08003

Email to: forms@myameriflex.com **Fax to:** 800.282.9818



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