



Participant Quick Start Guide

Welcome to your spending account plan!

We're here to help you get set up quickly and easily.



ONLINE ACCOUNT

Set up your online account for easy access to your personal account dashboard with real time activity!



HOW TO ACCESS FUNDS

You have multiple options to access your available funds. Learn all the ways to use your account!



FSA DEBIT CARD

The FSA debit card offers a convenient method to access funds for eligible expenses!

**If offered by your employer.*



+800.659.3035



www.asiflex.com



asi@asiflex.com



ASIFlex Participant Portal

Access your online account
24/7/365!



Account Detail

Easy access to your personal dashboard with real-time account activity.



Secure Notifications

Access the secure message center with all notifications sent from ASIFlex.



Cardless Pay Shopping

Shop the FSAsore - payment is made from your FSA account! No claim filing required and the items ship directly to you.



Claim Options

Submit claims, substantiate debit card transactions, schedule/view recurring direct payment to providers.



Online Resources

We offer a range of online tools and features to help manage your account and stay informed.



Account Settings

Manage account settings including login credentials, notification preferences, and banking information.

Visit www.asiflex.com for additional resources and tools.

Online Account Set Up

www.asiflex.com

1



Go to ASIFlex.com

Click 'Employee (Participant) Login' in the top right corner
On the login screen, click 'Create An Account'.

2



Follow the Prompts

Enter your name, zip code, social security number or employee ID, and other information as prompted.

3



Create Login Credentials

Enter your preferred user name and password.
Select a security image.

4



Update Preferences

Enter your email address, cell phone number, and direct deposit information for quick reimbursement.

5



Explore the dashboard

Access real-time account detail and additional tools
24/7/365!



How to Access Your Funds

1

Shop the FSA Store

Purchase items online at www.FSAstore.com and we'll pay directly from your FSA account. Items are shipped to your home and no claim filing is required!



2

Request Reimbursement

Submit a claim online through the participant portal, mobile app, fax, or mail. Sign up for direct deposit for rapid reimbursement!



3

ASIFlex Debit Card

Use your FSA debit card to pay for eligible healthcare expenses at the point of purchase at approved merchants and stores.



4

ASIFlex Recurring Direct Pay - Dependent Care

Pay your daycare provider directly on a schedule you choose. Schedule recurring payments with no additional claim forms to submit.



5

ASIFlex Provider Direct Pay

Reserve a portion of your FSA annual amount for payment to a designated provider - recurring payment or one-time payment options.



No need to choose just one!

**You can use all the available options to access your funds -
whatever is most convenient for you.**



What Do I Need To Submit A Claim?

IRS guidelines require specific documentation to approve claim submissions requesting reimbursement.



Itemized statement from your healthcare provider

This document must show the provider name and address, patient name, date service was provided (**not date of payment**), description of service provided and dollar amount owed.



Prescriptions

Submit the pharmacy receipt showing an RX number, a printout from your pharmacy, or itemized mail order receipt.



Over-the-Counter healthcare products, drugs, and medicine

Submit the merchant's itemized cash register or vendor provided emailed receipt.



Orthodontia

Submit an itemized statement and proof of payment if claiming one up-front payment (if allowed by your employer's plan). For ongoing payments, submit the contract once and proof of each payment as made.



Explanation of Benefits (EOB)

An EOB is provided from your insurance plan. This document is sent to you after the plan processes your claim and shows the amount paid by the plan and the amount for which you are responsible.



Dependent care expenses

Submit an itemized statement of the services provided or have your provider sign the claim form to certify services were provided.

Please do not submit:

- ✓ Cancelled checks/bank statements
- ✓ Paid on account statements
- ✓ Balance forward statements
- ✓ Credit card receipts without itemization

Get your money faster! Submit your claim online or via mobile app and sign up for direct deposit.



FSA Debit Card

Access funds immediately -
no waiting for reimbursement!

How To Use Your Card



Activate Card

Your entire
available balance
will be loaded onto
the card.



Use Your Card

Use your card for
qualified health care
expenses at eligible
merchants.



Save Documents

If documentation is
required under IRS
rules, we will notify
you.



Check Your Account

Check balances to
ensure sufficient
funds for upcoming
expenses.



What To Do If You Receive a Documentation Request

We aim to auto-approve as many debit card transactions as allowed by the IRS. If documentation is requested, please follow these steps:

- ✓ Log in to view the secure message and see which transaction needs your attention.
- ✓ Provide the insurance plan Explanation of Benefits (EOB) or itemized statement provided by the provider.
- ✓ Submit the requested documentation online, via mobile app, fax or mail as soon as possible.



FSA Debit Card

How Does It Work?

What is the ASIFlex Card?

The ASIFlex card is a convenient, limited-use debit card that lets you pay out-of-pocket eligible healthcare expenses directly from your account - no need for cash or personal credit cards!

What Can I Use My Card For?

- ✓ Office Visit Copays
- ✓ Prescriptions
- ✓ Over-the-counter health products
- ✓ Deductibles, co-insurance and out-of-pocket expenses

Quick Facts



Reasons the card may not work

- Insufficient funds
- Deactivated/Inactive Card
- Invalid merchant e.g. gas station
- Merchant card reader issue



Additional Information

The card is valid for five years and is reloaded with new funds each plan year. Additional or replacement cards can be ordered through the participant portal.



Request for Documentation

Respond as soon as possible to avoid card deactivation. Submit documentation through your online account or via the mobile app.



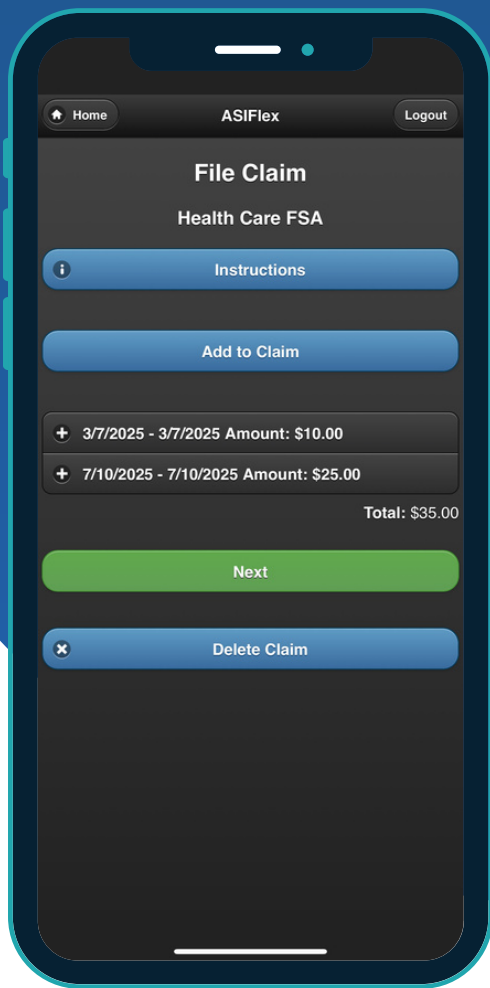
Acceptable Documentation

- Insurance EOB (Explanation of Benefits)
- Provider statements with itemization
- Rx receipt and pharmacy print outs
- OTC items - copy of the itemized receipt

Keep all receipts! Use of the FSA debit card is not paperless. The IRS requires documentation for certain transactions.



Instant purchase approval at IAS stores and no claim filing required!
IAS Store locator: <https://www.sig-is.org/storelocator>



CONVENIENT ACCOUNT ACCESS IN YOUR HANDS

Manage your account anytime, anywhere with the ASIFlex app!



VIEW ACCOUNT DETAILS

Easily check your balances, payments, and claims.



SUBMIT DOCUMENTS

Upload a photo or PDF anytime for quick and easy submission.

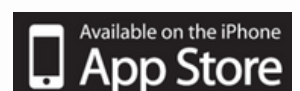


READ SECURE MESSAGES

Access messages on claims, payments, and account activity.

Download the free app today!

Scan the QR code with your mobile device or search for ASIFlex Self Service.



Healthcare already costs so much, why pay tax on it?

Outsmart rising inflation during Open Enrollment — flexible spending accounts (FSAs) give you the ability to spend pre-tax dollars on everything from out-of-pocket medical costs to guaranteed eligible health products.



A simple way to save



30% or more in tax savings on eligible healthcare items and services



Spend beyond the doctor: There are literally thousands of FSA eligible products



Spend on day 1. FSAs are funded in full on the first day of your plan year



Shop exclusively eligible products with your FSA card or any major credit card at FSA Store

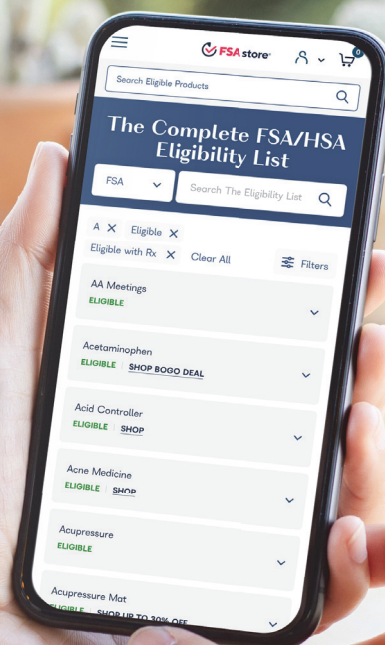
Shop Worry-Free

Guesswork stops here

With the **Eligibility List** — the web's most comprehensive list of products and services eligible for **tax-free spending**.

Start Searching

*No receipts needed when you shop with your FSA card.



Learn more about FSA Store:

