

Surency is excited to partner with \_\_\_\_\_ to administer their \_\_\_\_\_ for the upcoming Plan Year.

We will be providing run-in services from your current Plan Year. As such, if you have a remaining balance with your current administrator, your account balance will be transferred to Surency. See below for more information on your Plan Year and when to start filing claims with Surency.

Current Plan Year: \_\_\_\_\_

Current Administrator: \_\_\_\_\_

## Frequently Asked Questions

### Q. Do I have a balance from last year?

A. Check to see if you have funds remaining in your account with your current administrator.

### Q. If I have a balance what do I do?

A. You will have two options:

1. You may incur and submit claims for reimbursement to your current administrator through the "current administrator final filing date" listed below.
2. You may incur and hold your claims and turn in to Surency for reimbursement after the "begin filing with Surency date" listed below.

Current Administrator Final Filing Date: \_\_\_\_\_

Begin Filing with Surency Date: \_\_\_\_\_

### Q. What should I do between the two dates listed above?

A. This time is known as a "claims freeze window." Claims can still be incurred but cannot be filed with either administrator between these dates: \_\_\_\_\_. You can file claims with Surency after the "claims freeze window" ends.

### Q. Do I still have the Rollover or Grace Period and Filing Limit for my previous Plan Year?

A. Yes, between the two dates listed above your former administrator will send Surency your remaining balances from your current plan year and after the "begin filing with Surency date" these funds will be available. Surency will then administer your Rollover or Grace Period and Filing Limit for the current Plan Year.

### Q. What will happen with my debit card from my current administrator?

A. Your final date to utilize your current debit card will be: \_\_\_\_\_

You will be issued a new Surency Flex Benefits Card in order to access your Surency account.

**Additional questions? Call Surency at 866-818-8805.**

**Return completed form back to Surency at email: [flex@surency.com](mailto:flex@surency.com) - fax: 316-272-4841  
or mail: P.O. Box 789773, Wichita, KS 67278-9773**

**866-818-8805 | [Surency.com](https://www.surency.com)**