

**Group Name:** \_\_\_\_\_ **Further Group Number:** \_\_\_\_\_

It has been our pleasure to serve as your personal spending account administrator. We are sorry you will be terminating one or all of the products you have with us. The following information is required to disband your group or product. This information will ensure that claims are processed correctly and will provide you with the information your employees or new administrator will need going forward. It also identifies what steps you need to take and what you can expect from Further.

If you are disbanding more than one product with Further and the date of disband will be different for each, you must complete a separate disband form for each product. Example: FSA is disbanding effective 11/30 but the HRA is disbanding effective 7/1.

**Section I: Disband Information**

**Why are you leaving Further? (Check all that apply)**

- Participation is too low
- Changing health plans
- Merger or acquisition (Company Name): \_\_\_\_\_
- Pricing of products
- Service (please describe): \_\_\_\_\_
- Further does not offer a desired product or service (please describe): \_\_\_\_\_
- Other: \_\_\_\_\_

**Which Further Product(s) will you be disbanding? (Check all that apply)**

- Premium Only Plan (POP)
- Medical Flexible Spending Account (FSA)
- Dependent Care Spending Account (FSA)
- Transportation Accounts
- TaxSaver / Premium Reimbursement Account
- Health Reimbursement Arrangement (HRA)
- Health Savings Account (HSA)
- Voluntary Employee Benefits Arrangement (VEBA)

**FSA Grace Period:** The grace period is an extension of the date claims can be **incurred**. Choose below who will administer your FSA grace period claims:

- Further: the disband date chosen below must equal the grace period end date.
- New Administrator

**Disband Date:** The disband date is the last date a participant can incur expenses. If Further is administering the grace period, the disband date must equal the grace period end date.

Disband Date: \_\_\_\_\_

**A retro-active disband date will not be accepted.**

- **Mid plan year:** If you are disbanding during a plan year, the official disband date will be the date that Further processes the form. Administrative activities may occur between the dates you sent the form and the official date that the plan was disbanded. Example, if the form was faxed on 09/27 and processed on 10/04, you would be responsible for these activities and to pay the amounts prior to the disband process date.
- **Upon renewal:** If you are disbanding at the end of a plan year, the disband date will be the last date of the plan year. Example, if the form was faxed on 09/27 and processed on 10/04, the disband date will be 09/30 for a plan year that runs 10/01 through 09/30.

If you are disbanding more than one product, will the disband date be the same for all products?

- Yes
- No – please complete a disband form for each product.

**New Administrator:** To direct your employees to the new administrator, provide the new administrator’s name and phone number:

New Administrator Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

## Section II: Claims Processing Information

Members should be informed that Further will not forward claims to the new administrator.

If your only product with Further is an HSA or a VEBA plan, skip to Section III: Signature at bottom of page.

**Claims Runout Fee:** If you choose to have Further administer your runout period, additional fees may apply. Following receipt of this form, if fees apply, you will be sent an invoice for the administration of the claims runout period you choose below. The fee is **non-refundable** even if members have no claims activity and will be based on the following formula:

Number of participants with an account balance x the monthly participant fee x the number of runout months selected.

**Your group is required to pay the invoice prior to further claims being processed.**

**Claims Runout Period:** The runout period is the timeframe participants have to submit claims incurred on or prior to the disband date. Claims must be **received** by Further on or prior to the disband date or the runout period selected below.

Choose a claim runout period (Your ACH information will remain active and be billed for claims reimbursed during this period):

- No runout period (claims **received** after the disband date will not be paid)
- 1 month runout period (additional fees may apply)
- 2 months runout period (additional fees may apply)
- 3 months runout period (additional fees may apply)

**Claim Appeals:** Members have the right to appeal claim denials 180 days after the administrator processes their claim.

Select one option:

- New account administrator will process appeals/adjustments for members.
- Further will process appeals/adjustments for members. If appeals or adjustments are paid, we will process these claims and bill you for the claim reimbursements. Your ACH information will remain active until the end of the appeal deadline.

**Final Participant Balance Report is available on the Online Group Service Center**

## Section III: Signature

I have read and understand the choices within this form and the information is, to the best of my knowledge, correct and complete.

Group Contact Name (please print): \_\_\_\_\_

Group Contact's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Phone Number where you can be reached: \_\_\_\_\_

Questions? **Call Group Leader Services at 1-888-460-4013.**

**Send via secured email only:**  
further.documents@helloofurther.com

**Fax to:**  
866-231-0214

**Mail to:**  
P.O. Box 64193  
St. Paul, MN 55164-0193