



FSA TRANSFER OF ADMINISTRATION ADDENDUM

Group Information

Group Name: _____

Current plan year start date _____ End Date _____

**Will Further be taking over administrative services upon renewal or in the middle of the plan year?
Please complete Takeover at renewal date section or Takeover at mid-year section:**

Takeover at New Plan Year

Please select the administrator that will be processing the runout claims for the previous plan year.

Note: If you have a grace period on your current FSA account, it is recommended that Further take over at the renewal date to reduce duplicate claim submissions.

The prior administrator (recommended if grace period is not applicable). Continue to Prior Administrator Information Section.

Further:

Medical FSA –

Grace Period Yes No. Grace Period End Date: _____

Runout Period Yes No. Runout Period: _____ months

Rollover Yes No. Rollover Amount: _____

Dependent Care –

Grace Period Yes No. Grace Period End Date: _____

Runout Period Yes No Runout Period: _____ months

Please note: There will be a black out period between when the data is received and when SA will begin to process claims.

Takeover at midyear

What is the last date the prior administrator will process claims? _____

What is the date that the enrollment data and balances will be submitted to Further? _____

Further will begin processing claims on: _____

Please note: There will be a black out period between when the data is received and when Further will begin to process claims. The plan will be set up according to the plan design guide submitted to Further.

