

# *DirectPay* Enrollment Form

**For enrollment assistance call 1-800-422-4661 for customer service. Have your enrollment form, group number and company name ready. Ask for a DirectPay Enrollment Specialist.**

P L E A S E  P R I N T	Group Number	Employer Name	Social Security Number	
	Employee Last Name	First Name	Middle Initial	Enrollment Check One: <input type="checkbox"/> New <input type="checkbox"/> Renewal
	Employee Address		City	State      Zip Code
	Date of Birth	Date of Hire		
	Initial Date of Coverage	Name of Insurance Carrier		

**For Dependent Coverage:**

Married?    Yes     No      Dependent children?    Yes     No

*If yes, list your spouse and dependent children below:*

Last Name	First Name	Relationship to Employee	Date of Birth
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**AUTHORIZATION:** I certify the above information to be true to the best of my knowledge and that the children for whom I will be claiming expenses either reside with me in a parent-child relationship or are legally dependent on me for their support. I understand that any amounts remaining in my account(s) not used for qualified expenses incurred during the plan year will be forfeited in accordance with current plan provisions and tax laws.

Signature \_\_\_\_\_ Date \_\_\_\_\_

# Frequently Asked Questions by Employees

## 1. What is DirectPay?

It is an innovative method to self-fund a medical, dental or vision benefits program. The employer reimburses employees for qualified expenses (rather than a third party insurer). With DirectPay, employees benefit from the flexibility; they can customize the plan according to their needs. This Plan is simple and easy to understand and is a cost effective benefit for both the employer and employee.

## 2. Any cost to me?

Generally, there is no cost to the employee. Your employer usually pays the fees; you only have to invest some effort in record keeping.

## 3. Do I need to change insurance providers to participate?

Because DirectPay is not tied to an insurance plan or company, there is no need to change insurance providers.

## 4. What are qualified expenses?

These are expenses such as dental care, prescriptions, eyeglasses and out-of-pocket medical expenses that may not be covered by insurance premiums. Eligible expenses are based on the Explanation of Benefits (EOB) were applicable or as determined by the Internal Revenue Code Section 213. The list of eligible expenses is based on IRS determinations, and may vary from year-to-year.

## 5. Who determines the rules and regulations of DirectPay?

DirectPay is a Section 105 Plan, and Section 105 is regulated by the IRS. Our documentation guidelines are intended as a means to ensure eligibility of your claims for reimbursement. It is the Participant's responsibility to comply with these guidelines and to avoid duplication of claims or submission of ineligible charges. Failure to adhere to the above requirements could lead to payment delays or denial of expenses.

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