

Participant Experience – Order Debit Card

Card Agreement

Catch a Cold?



Swipe the Card.

Now, you've got a way to pay qualified plan expenses. It's the take care card. With it, you won't have to pay qualified expenses out of your pocket and then wait for reimbursement. The take care card is optional and for your convenience.

- ▶ Why is the take care card so convenient?
- ▶ Is the take care card IRS compliant?
- ▶ Where is the card accepted?
- ▶ How do I learn how to use the card?
- ▶ The card is to be used only for qualified expenses. How is this verified?
- ▶ What happens if the card is used to pay for services that are NOT IRS qualified?
- ▶ Can I still file claims when the card isn't used to pay qualified expenses?



YES

I want to order a take care card for the convenience of paying qualified plan expenses. I understand that the annual card fee of \$29.00 will be deducted from my flex account. I understand that the annual card fee includes one extra card for a spouse or dependent. I agree to provide a personal e-mail address (at either home or work) so that my plan service provider may request copies of certain receipts for verification purposes. I understand that the annual card fee is \$59.00 if I do not provide a valid e-mail address and my plan service provider must request receipts by U.S. Postal Service.

Select one:

- Annual card fee is \$29.00 with e-mail [receipt verification](#).
- Annual card fee is \$59.00 with US Mail [receipt verification](#).

NO

At this time, I do not want to use the take care card for the convenience of paying qualified expenses from my flex account. I understand that I must first pay qualified expenses from my personal funds and then file a claim for reimbursement.

Landing page when Card can be
ordered for Current Year

Participant Experience – Order Debit Card



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Card Agreement

Catch a Cold? Swipe the Card.

Now, you've got a brand new way to pay qualified plan expenses. It's the **take care**® card. And with it, you won't have to pay qualified expenses out of your personal funds and then wait for reimbursement. The **take care** card is optional and for your convenience.

- ▶ Why is the **take care** card so convenient?
- ▶ Is the **take care** card IRS compliant?
- ▶ Where is the card accepted?
- ▶ How do I learn how to use the card?
- ▶ The card is to be used only for qualified expenses. How is this verified?
- ▶ What happens if the card is used to pay for services that are NOT IRS qualified?
- ▶ Can I still file claims when the card isn't used to pay qualified expenses?

Step 1

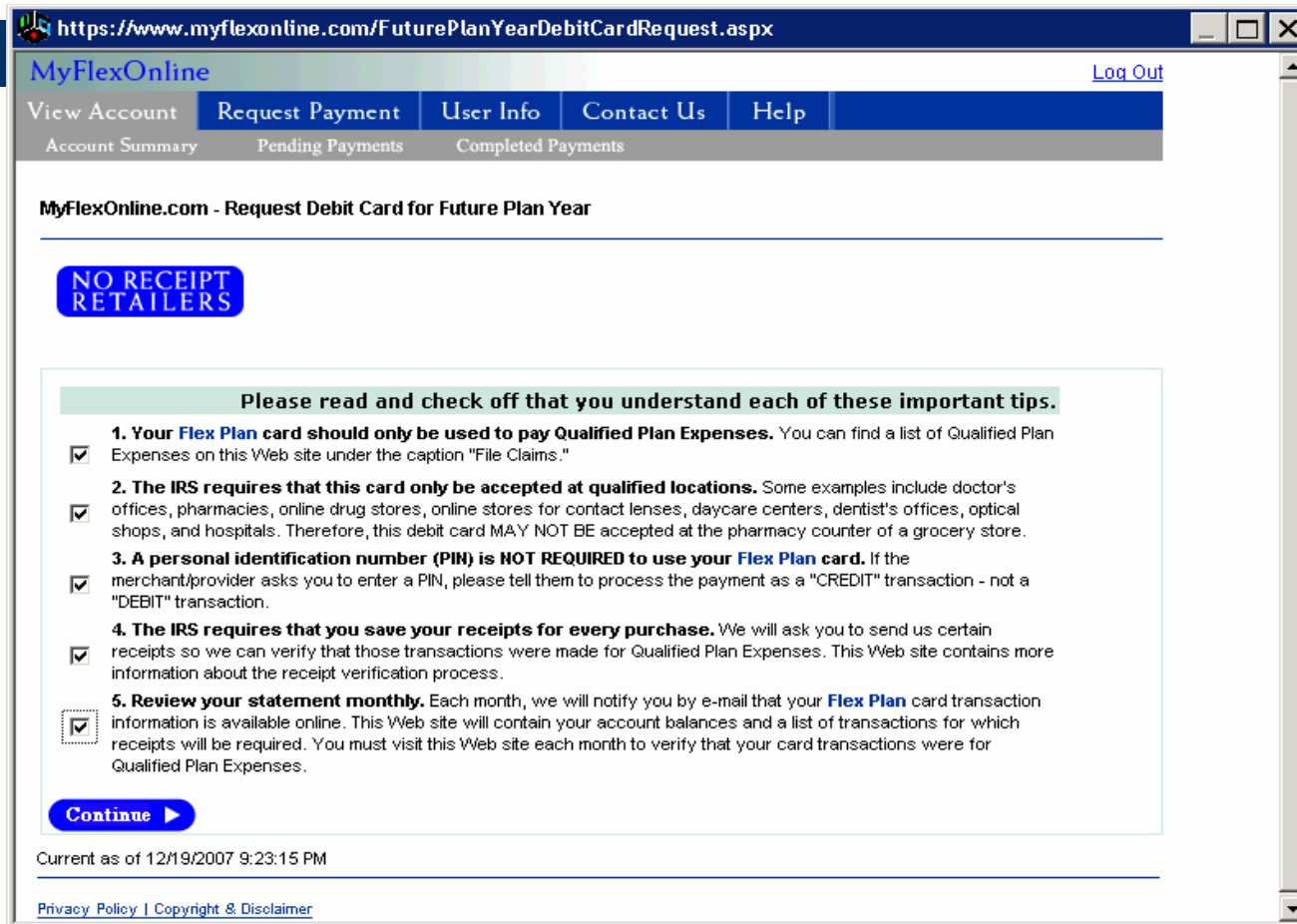
By requesting a **take care** card, you are indicating your agreement to the "TERMS AND CONDITIONS" applied to the use of the c

Please view the [TERMS AND CONDITIONS](#) and make your selection before continuing.

▶ I accept the take care card agreement.

▶ I decline the take care card agreement.

Read and Check Off Each Tip



https://www.myflexonline.com/FuturePlanYearDebitCardRequest.aspx

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MyFlexOnline.com - Request Debit Card for Future Plan Year

NO RECEIPT RETAILERS

Please read and check off that you understand each of these important tips.

- 1. Your Flex Plan card should only be used to pay Qualified Plan Expenses.** You can find a list of Qualified Plan Expenses on this Web site under the caption "File Claims."
- 2. The IRS requires that this card only be accepted at qualified locations.** Some examples include doctor's offices, pharmacies, online drug stores, online stores for contact lenses, daycare centers, dentist's offices, optical shops, and hospitals. Therefore, this debit card MAY NOT BE accepted at the pharmacy counter of a grocery store.
- 3. A personal identification number (PIN) is NOT REQUIRED to use your Flex Plan card.** If the merchant/provider asks you to enter a PIN, please tell them to process the payment as a "CREDIT" transaction - not a "DEBIT" transaction.
- 4. The IRS requires that you save your receipts for every purchase.** We will ask you to send us certain receipts so we can verify that those transactions were made for Qualified Plan Expenses. This Web site contains more information about the receipt verification process.
- 5. Review your statement monthly.** Each month, we will notify you by e-mail that your Flex Plan card transaction information is available online. This Web site will contain your account balances and a list of transactions for which receipts will be required. You must visit this Web site each month to verify that your card transactions were for Qualified Plan Expenses.

[Continue](#)

Current as of 12/19/2007 9:23:15 PM

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Ordering Additional Card

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**NO RECEIPT
RETAILERS**

Step 2

Your order includes two cards, one for you and one for a dependent.

Please provide the name of a dependent for the second card:

First Name

Middle Initial

Last Name

On the next page you will
confirm mailing address to
complete process.

Please note that all card names will have all punctuation removed and will be displayed in the format "LastName, FirstName, MI."

[Continue ▶](#) [No Additional Card ▶](#)

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