



Prepared For:

City of Anthony

April 1, 2025

By: HUB – Wichita

February 2025

It sure is easy.



800-264-9462
surency.com

WHY SURENCY?



FLEXIBILITY results in IDEAL SOLUTIONS

It sure is easy.

Surency plans help employers control rising health care costs while enabling employees to still take control of their health care expenses. Surency has flexible and easy-to-use products and has a proven track record of excellent account administration and seamlessly transitioning clients mid-year who have complex and varied plans.

- **FSA** / FLEXIBLE SPENDING ACCOUNT
- **DC FSA** / DEPENDENT CARE FLEXIBLE SPENDING ACCOUNT
- **LP FSA** / LIMITED PURPOSE FLEXIBLE SPENDING ACCOUNT
- **ADOPTION ASSISTANCE FSA**
- **HSA** / HEALTH SAVINGS ACCOUNT
- **HRA** / HEALTH REIMBURSEMENT ARRANGEMENT
- **QSEHRA** / QUALIFIED SMALL EMPLOYER HEALTH REIMBURSEMENT ARRANGEMENT
- **LSA** / LIFESTYLE SPENDING ACCOUNT
- **COMMUTER BENEFITS**
- **POP** / PREMIUM ONLY PLANS
- **TRAVEL BENEFITS**
- **VISION INSURANCE**
- **COBRA**
- **DIRECT BILLING**

Combination Accounts and Plans are also available!

WHY PARTNER?

- Dedicated Service Team
- Hassle-Free Member & Employer Experience
- Compliant Solution
- EASY Implementation

EMPLOYER PERKS WITH SURENCY



FLEXIBILITY results in IDEAL SOLUTIONS

It sure is easy.

Surency recognizes that once a product has been implemented, the work of the active benefits administrator is far from over. Next are the steps of ongoing administration, accountability and continuous review. Surency is here to help.

Surency handles:

- Plan set-up and administration
- Plan document and employee summary plan description
- Key Employee Discrimination Test with results provided to employer
- Employee salary reduction agreement
- IRS Form 5500 information
- Ability to choose from multiple reimbursement schedules

Surency provides:

- Customized employee election forms
- Full suite of easy-to-understand employee education materials
- Online and mobile app access to manage benefits and view bills
- Monthly employer reports including disbursement details
- And depending on group size:
 - Onsite employee benefit meeting enrollment assistance
 - Custom, co-branded employee education materials
 - Custom, co-branded group-specific website

96% OF CLAIMS ARE SUBMITTED ELECTRONICALLY (DEBIT CARD, MEMBER ACCOUNT, MOBILE)

97% OF ALL CALLS ARE RESOLVED ON THE FIRST CALL

86.54% OF ALL CLAIMS ARE AUTO-SUBSTANTIATED

REDUCE ADMINISTRATIVE TIME AND COST



EASY TO USE MEMBER TOOLS

It sure is easy.



Benefits Card

The Surency Benefits Card is a special-purpose Visa® Card that gives members an easy, automatic way to pay for eligible expenses. These transactions may be automatically substantiated, meaning you don't have to file a claim and may not have to submit a receipt.



Mobile App

The Surency Mobile App allows members to have access to their accounts 24/7. With real-time Benefits Card integration, members can view the actual amount in their account at any time. Members can also use the app to submit claims, receive alerts, upload receipts, and view account history.



Member Account

The Member Account allows members 24/7 access to account information, including enrollment, billing, claims status, account history, election information and forms. For those with HSAs, members can also set up investments and investment sweeps.



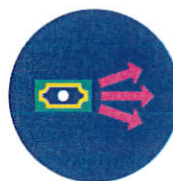
Education Materials

Surency provides the most comprehensive set of member education materials available. We know that people learn differently, so education is available online, in paper format, and via videos.



Member Notifications

Surency allows members to choose the notification option that best suits their lifestyle, including email, text, or mail.



Member Reimbursement

Members can use the Surency Benefits Card to pay for eligible expenses or choose to set up direct deposit, receive a mailed check, or set up bill pay.



Customer Service

Surency customer service representatives are available by phone, email, or online inquiry. Phone calls are answered on average within 10 seconds.



Health Reimbursement Arrangement Administrative Fees

Note: Carryover maximum cannot exceed \$4999.00. Also, only Comprehensive, or Limited Purpose HRA plan designs may utilize a debit card.

Fee	Details	Amount
Set-up Fee (Initial Implementation)	<ul style="list-style-type: none">-Plan Document & Summary Plan Description draft/review.-Set up all plan parameters.-Consumer Website.-Employer Website.-Dedicated account management team.-Enrollment and communication material.-Form 5500 data.	\$200
Annual Renewal Fee	-Beginning Year 2+	\$100
HRA Monthly Administration Fee (PPPM*)	<ul style="list-style-type: none">-Pre-enrollment material.-Educational videos.-Electronic and paper account summaries.-Ongoing electronic eligibility.-2 Benefits Cards per participant.-Consumer direct deposits.-Attend Enrollment Meetings and Benefit Fairs.-Fee requires enrollment be received electronically. If it is not, then a \$0.25 PPPM increase will apply.	\$5.00 PPPM Rate Guarantee: 3 Years Minimum Participation/Administration Fee (Monthly): \$50
Annual Non-discrimination Fee	-Comprehensive testing package (9 tests performed) with guaranteed results.	Request Rate
Run-in/Run-out Claims Administration (per enrolled participant)	<ul style="list-style-type: none">-One month's worth of administration fees will be charged for "run-in" claims administration if current carrier is not providing "run-out" administration.-Same applies if Surency provides "run-out" claims processing if agreement is terminated by the Client.	1 Month's Admin Fees
Additional/Replacement Surency Benefits Cards (per set)		Waived

*PPPM = Per Person Per Month

Note: This proposal is based on a funding model in which Surency initiates an ACH pull from the employer's account to fund claims payments. If the employer elects to initiate the ACH rather than Surency, then an additional fee PPPM will apply.

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WE ARE HERE TO HELP!

It sure is easy.

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WELCOME, WARMTH & HOSPITALITY

The pineapple is symbolic for welcome, warmth, friendship, and hospitality.

Indigenous to South America, Colonial America embraced the pineapple as a symbol of hospitality and luxury. When visitors were received, a pineapple was placed at the center of the feast table to represent a sense of welcome, good cheer, warmth and affection.

At Surency, the pineapple represents a similar symbol. Our goal is to be welcoming, warm and hospitable to the people and families that use our plans. Surency provides flexible and straightforward reimbursement accounts, vision insurance and COBRA options. We are proud to offer plans that are easy to use and easy to understand.