

## Sample of Welcome Email after Employer Decides to go ahead with TAAP ICHRA from Ameriflex

Hello!

We're so excited to be partnering with you!

We want to provide you with the highest quality of service during the onboarding process. Here are a few, easy steps to get you started:

1. First, review the order form with COMPANY. If this is your first time accessing the Ameriflex website, please use the First Time User link on the login page. Otherwise, you can [log in here](#). If everything looks good, you will want to accept the **terms & conditions**. If you have any questions regarding the form, please reach out to COMPANY or Christopher Estep.
2. Once that is complete, the remaining employer and plan information may begin to be configured in the system. A **Client Success Specialist (CSS)** will also be in touch to schedule a time to review everything with you. Just a reminder that our Client Success Team communicates through our secure Ameriflex Support Portal. For more information on how to access our secure email portal, [click here](#). Your CSS will be with you through every step of this process!
3. When setup is complete, **enrollments** may be processed as soon as they are available.

Do you have an **Outside Plan Representative**? An Outside Plan Representative (OPR) is any individual outside of your organization, usually your broker, that has been granted permission to act on your company's behalf regarding your Ameriflex plans. With an OPR he or she can digitally sign agreements, access reports, review invoices, and more. An OPR can save you time by taking some of the more time-consuming responsibilities off of your plate.

Setting up an OPR is easy and only takes a few minutes.

1. From your employer dashboard, click company profile.
2. Click Manage OPR Agreements.
3. Fill in Company name.
4. Fill in agent name.
5. Accept the Terms and Conditions.
6. Authorize the Representative to access and make changes in the Employer Dashboard.

If you have any questions, please don't hesitate to reach out to your Ameriflex Sales Rep.

Thank You,

Ameriflex