

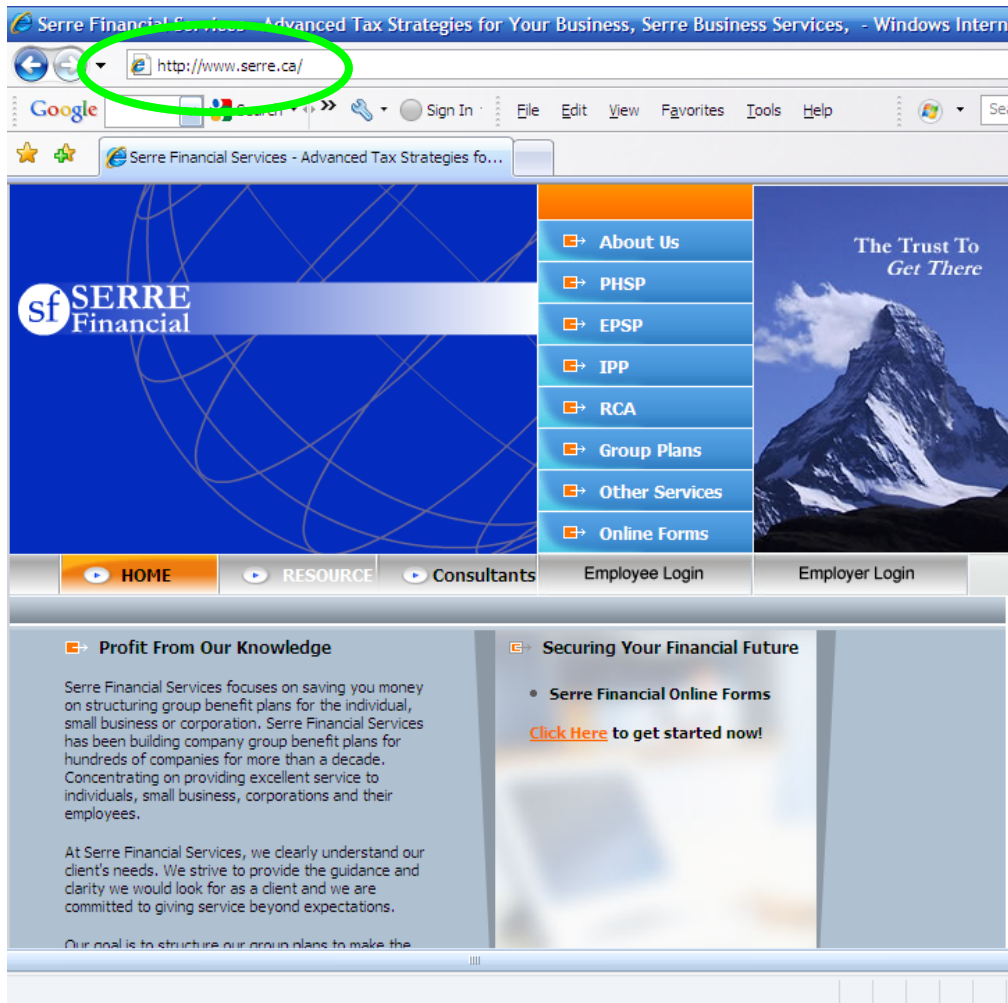
MedAfford Private Health Services Plan
Reference Guide

Serre Financial Website PHSP Demonstration

This section of the guide is intended to be both a tutorial and reference in the navigation of the Serre Financial website (www.serre.ca) in specific regards to the Private Health Services Plan.

Connect to Serre Financial Website

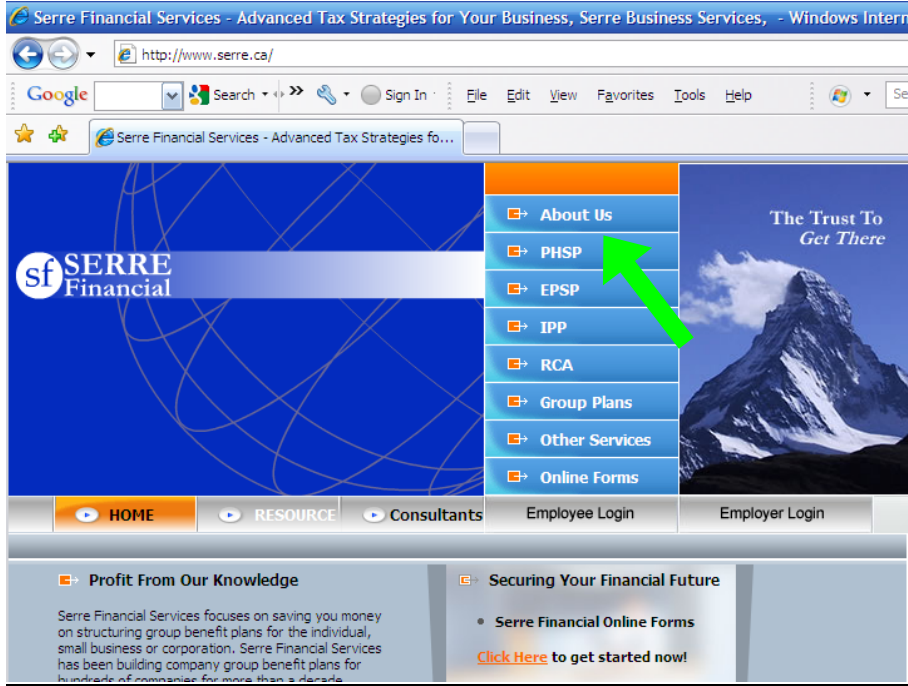
To connect to the Serre Financial website, simply enter www.serre.ca into the web browser. All following demonstrations will assume connection to the website has been completed.



MedAfford Private Health Services Plan Reference Guide

Add New PHSP Group

- Select **PHSP**.



- Select **PHSP Setup Form**.



MedAfford Private Health Services Plan
Reference Guide

- Fill in all applicable information that is available. Select **Continue**.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

PRIVATE HEALTH SERVICES PLAN Set-up Form

Corporate Information

Company Name:	Demo
Address:	
Address2:	
City:	
Province:	Select
Postal Code:	

Director/Officer Information

Name:		Title:	Select Title	Add Director
-------	--	--------	--------------	--------------

No Directors Added

Date Information

Date of Incorporation:		Calendar	yyyy-mm-dd
Fiscal Year End:		Calendar	yyyy-mm-dd
Desired Plan Start Date:		Calendar	yyyy-mm-dd

Main Contact Information

Contact Name:	
Phone:	
Fax:	
Email:	
Referral:	
How did you hear about us:	[Select an option]

Next

- Verify Information. If correction required, select **Go back**, and make corrections on previous screen. If correct, select **Ok!**.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

PHSP Set-up Form Submission Preview

Corporate Information

Company Name:	Demo
Address:	
Address2:	
City:	
Province:	
Postal Code:	

Date of Incorporation:
Fiscal Year End:
Desired Plan Start Date:

Main Contact Information

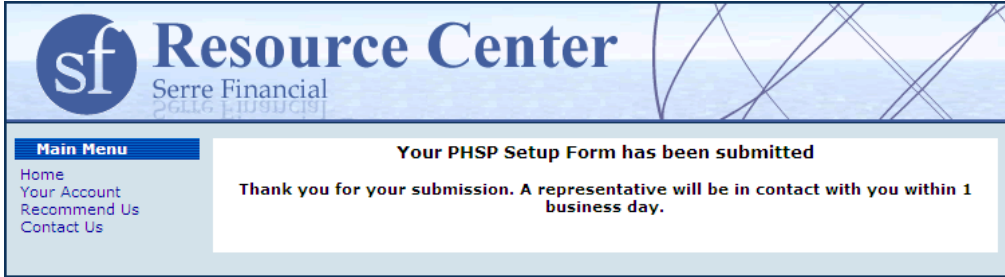
Contact Name:	
Phone:	
Fax:	
Email:	
Referral:	

Director/Officer Information

Go back Ok!

MedAfford Private Health Services Plan
Reference Guide

- This will automatically appear for approximately 4 seconds.



- This screen will then appear. Simply close this screen to exit.

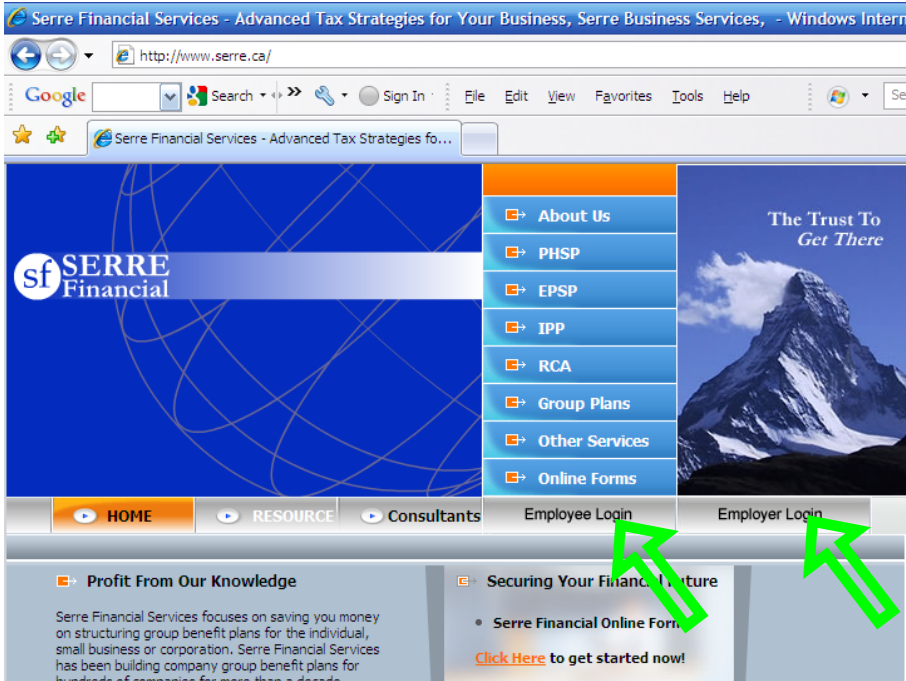


- The information that has been entered is sent to Serre Financial PHSP administrators who will prepare the group set up and send the Welcome Package.

MedAfford Private Health Services Plan Reference Guide

How to Log In

- If you are the administrator of the plan, select **Employer Login**. If you are an employee, select **Employee Login**.



- Enter your username and password (please note that both are case sensitive). Enter in the security code as it appears on your screen. Select **Login**.



MedAfford Private Health Services Plan
Reference Guide

- This welcome screen appears. The options you can choose below the Period Limit, Period Activity, and Current Balance depends on whether you are an administrator or an employee. The options for each are as follows:
 - Employee
 - Your Information (Employee Level)
 - Transaction History (Employee Level)
 - Submit Claim (Employee Level)
 - Logout Exit
 - Administrator
 - Your Information (Employee Level)
 - Transaction History (Employee Level)
 - Submit Claim (Employee Level)
 - Reports Sections (Company Level)
 - Manage Employees (Company Level)
 - Logout Exit

The screenshot shows the 'Resource Center' header for Serre Financial. Below the header is a 'Main Menu' on the left with links for Home, Your Account, Recommend Us, and Contact Us. The main content area displays a personalized welcome message for 'John Doe' and provides key account information: Contract ID #: 520, Company Name: Demo Plan, Period Limit: \$5000, Period Activity: \$100.00, and Current Balance: \$4900.00. A navigation bar contains links for 'Your Information', 'Transaction History', 'Submit Claim', 'Reports Section', 'Manage Employees', and 'Logout Exit'. At the bottom, it indicates the user's status as 'Online' and notes they are not subscribed to the newsletter.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

John Doe, Welcome to Serre Financial!

Contract ID #: 520
Company Name: Demo Plan

Period Limit: \$5000 | Period Activity \$100.00 | Current Balance \$4900.00

Your Information Transaction History Submit Claim Reports Section Manage Employees Logout Exit

Actual User Status: **Online**
You're not subscribed to our Newsletter

MedAfford Private Health Services Plan
Reference Guide

Your Information

- After logging in (see How to Log In), select **Your Information**.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

John Doe, Welcome to Serre Financial!

Contract ID #: 520
Company Name: Demo Plan

Period Limit: \$5000 | Period Activity \$100.00 | Current Balance \$4900.00

[Your Information](#) | [Transaction History](#) | [Submit Claim](#) | [Reports Section](#) | [Manage Employees](#) | [Logout Exit](#)

Actual User Status: **Online**
You're not subscribed to our Newsletter

- Whether logged in as an administrator or an employee, this screen displays all your current information at your employee level. To update any information, enter the information in the applicable field(s). Select **Save Changes** to update the information entered.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Personal Information
[Return to Your Account Page]

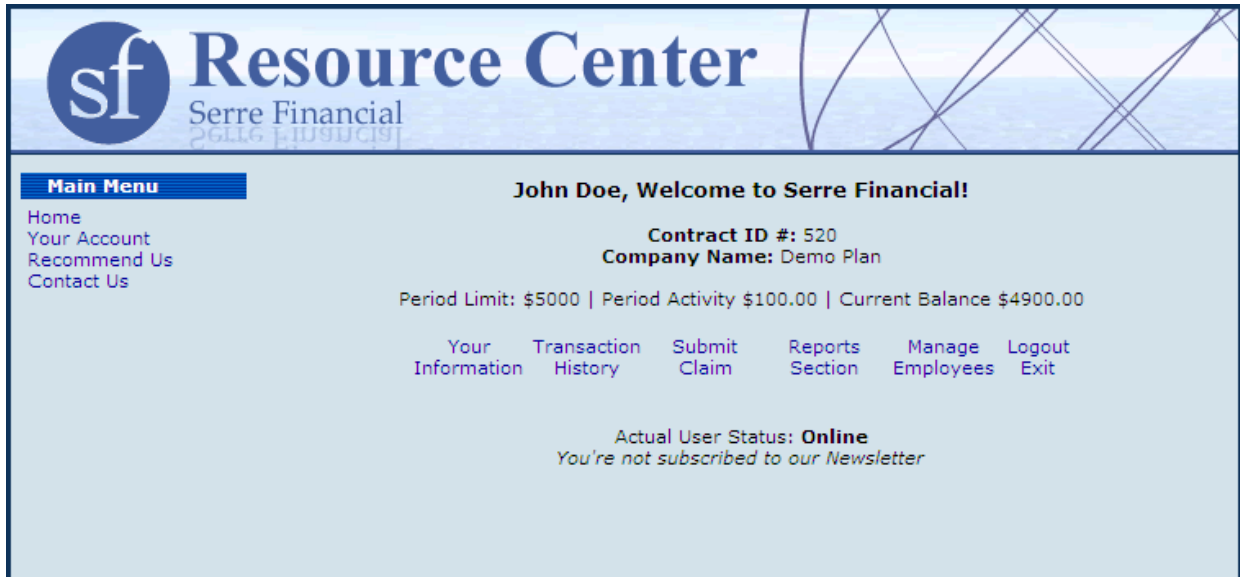
Username: JDoe520
Full Name: John Doe
Company Name: Demo Plan
Contract ID#: 520
User Type: Plan Administrator
Email: optional 42342342342342342
Address: 123 Abc St.
Address2:
City: Toronto
Province: ON
Postal Code: X0X 0X0
Telephone:
Business Telephone:
Receive Newsletter by Email? Yes No
Password: (type a new password twice to change it)

Dependants for John Doe

Dependant Name	Relationship	Birthdate (yyyy-mm-dd)
Jane Doe	Spouse	1960-01-01

MedAfford Private Health Services Plan
Reference Guide

- The welcome screen then appears. Simply close this screen to exit.



The screenshot shows the Serre Financial Resource Center interface. At the top left is the 'sf Serre Financial' logo. The main header reads 'Resource Center'. Below this is a 'Main Menu' with links for Home, Your Account, Recommend Us, and Contact Us. The central area displays a personalized welcome message for 'John Doe' and provides account details: Contract ID # 520, Company Name Demo Plan, and a summary of Period Limit (\$5000), Period Activity (\$100.00), and Current Balance (\$4900.00). A navigation bar includes links for Your Information, Transaction History, Submit Claim, Reports Section, Manage Employees, and Logout. At the bottom, it shows the user's status as 'Online' and a note that they are not subscribed to the newsletter.

sf Serre Financial Resource Center

Main Menu
Home
Your Account
Recommend Us
Contact Us

John Doe, Welcome to Serre Financial!

Contract ID #: 520
Company Name: Demo Plan

Period Limit: \$5000 | Period Activity \$100.00 | Current Balance \$4900.00

Your Information Transaction History Submit Claim Reports Section Manage Employees Logout Exit

Actual User Status: **Online**
You're not subscribed to our Newsletter

MedAfford Private Health Services Plan
Reference Guide

Transaction History

- After logging in (see How to Log In), select **Transaction History**.



- This screen appears. It is simply allowing you to verify you are the correct individual (employee). Select **Next**.



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Reference Guide

- This screen displays all your transactions up to the latest approved receipt since being active with Serre Financial. To exit from the Transaction History window, select **Return to Your Account Page**

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Transaction History Details
[Return to Transaction History] | [Return to Your Account Page]

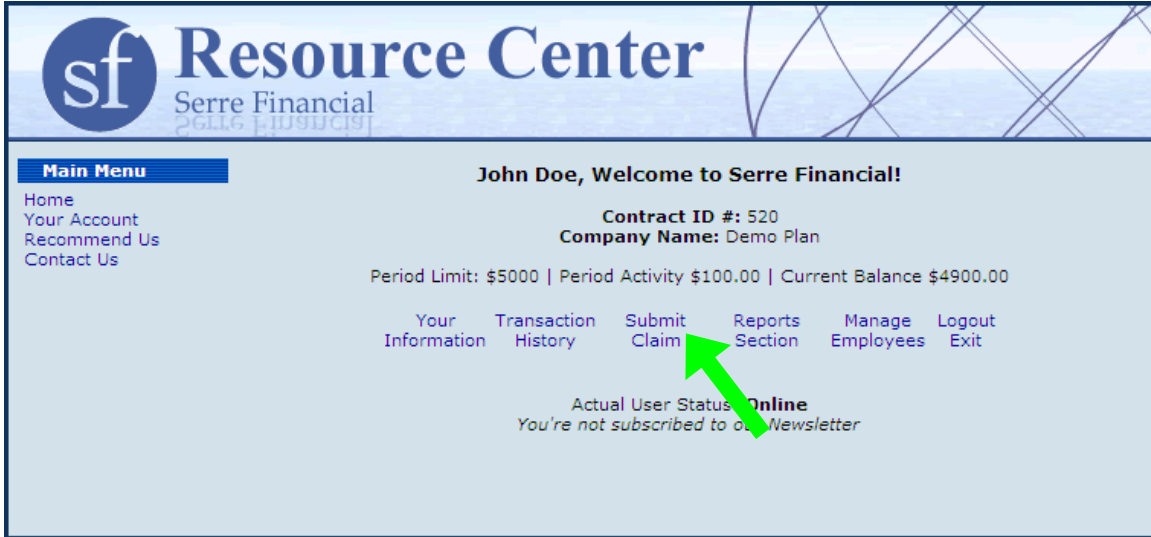
For Contract ID 520 Employee **John Doe** During the Period 03/01/2004 - 03/01/2005

Transaction Date	Activity	Details	Approved Amount
2004-07-06	Claim	CL1003-21 Jane Doe Physiotherapist 2004-05-01 (expense date) \$ 65.00 (expense amount)	\$ 65.00 Approved Paid
2004-07-06	Claim	CL1003-21 John Doe Dental 2004-04-01 (expense date) \$ 185.00 (expense amount)	\$ 185.00 Approved Paid
2009-02-06	Claim	B2412 Jane Doe Dental 2009-01-07 (expense date) \$ 800.00 (expense amount)	\$ 800.00 Approved Paid
2009-02-06	Claim	B2412 John Doe Chiropractor 2009-01-08 (expense date) \$ 75.00 (expense amount)	\$ 75.00 Approved Paid
2009-02-06	Claim	B2412 John Doe Physiotherapist 2009-02-05 (expense date) \$ 80.00 (expense amount)	\$ 80.00 Approved Paid
2009-08-28	Claim	B2638 John Doe Dental 2009-08-28 (expense date) \$ 200.00 (expense amount)	\$ 100.00 Approved Paid

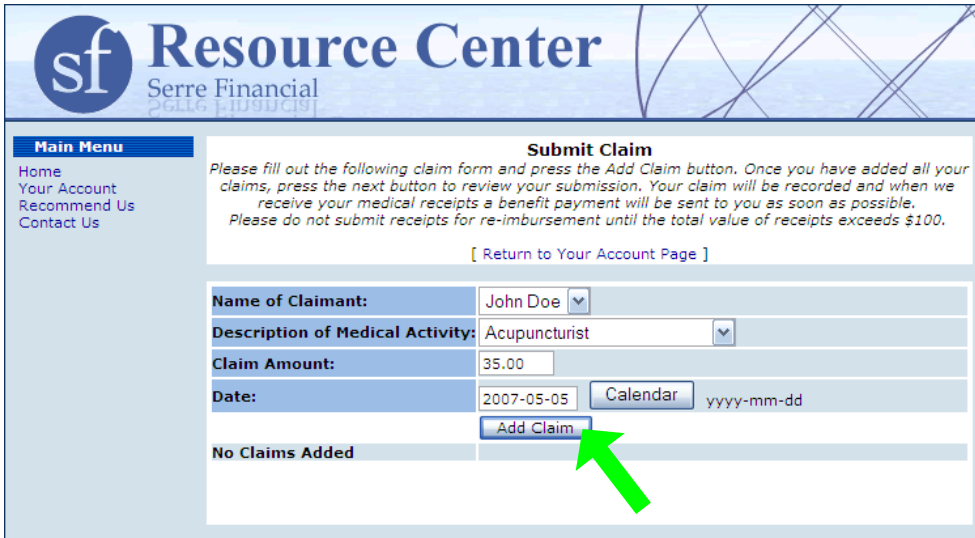
MedAfford Private Health Services Plan
Reference Guide

Submit Claim

- After logging in (see How to Log In), select **Submit Claim**.



- Fill in the fields, or choose the appropriate selection in the field regarding your claim and receipt. Select **Add Claim**.



MedAfford Private Health Services Plan
Reference Guide

- The claim details just entered are now displayed below the entry area, and the claim information fields have reset. To submit another claim, fill in the fields, or choose the appropriate selection in the field regarding your next claim and receipt. Select **Add Claim**. Continue doing this until all your claims have been entered. If all claims have been entered, proceed to the next step in this guide.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Submit Claim
Please fill out the following claim form and press the Add Claim button. Once you have added all your claims, press the next button to review your submission. Your claim will be recorded and when we receive your medical receipts a benefit payment will be sent to you as soon as possible. Please do not submit receipts for re-imbursement until the total value of receipts exceeds \$100.
[Return to Your Account Page]

Name of Claimant: John Doe
Description of Medical Activity: Care Facilities
Claim Amount: 135.00
Date: 2009-06-04 Calendar yyyy-mm-dd
Add Claim
1) John Doe 2007-05-05 Amount: \$ 35.00 Activity: Acupuncturist
Next

- You will notice that a delete button becomes available for each claim detail entered after the first. If you have entered the claim in by mistake and should not be claimed, select **Delete**. If you notice an error in the claim, simply select **Delete** and reenter the correct information.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Submit Claim
Please fill out the following claim form and press the Add Claim button. Once you have added all your claims, press the next button to review your submission. Your claim will be recorded and when we receive your medical receipts a benefit payment will be sent to you as soon as possible. Please do not submit receipts for re-imbursement until the total value of receipts exceeds \$100.
[Return to Your Account Page]

Name of Claimant: John Doe
Description of Medical Activity: Choose Description
Claim Amount:
Date: Calendar yyyy-mm-dd
Add Claim
1) John Doe 2007-05-05 Amount: \$35.00 Activity: Acupuncturist
2) John Doe 2009-06-04 Amount: \$135.00 Activity: Care Facilities DELETE
Next

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Reference Guide

- Once all claims have been entered, select **Next**.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Submit Claim
Please fill out the following claim form and press the Add Claim button. Once you have added all your claims, press the next button to review your submission. Your claim will be recorded and when we receive your medical receipts a benefit payment will be sent to you as soon as possible. Please do not submit receipts for re-imbursement until the total value of receipts exceeds \$100.
[Return to Your Account Page]

Name of Claimant: John Doe
Description of Medical Activity: Care Facilities
Claim Amount: 135.00
Date: 2009-06-04 [Calendar] yyyy-mm-dd
[Add Claim]

1) John Doe	Amount: \$ 35.00
2007-05-05	Activity: Acupuncturist

[Next]

- The Claims Submission Preview screen appears. If an error is noted select **Go Back** and make the necessary corrections (follow from two steps previous). After reviewing your claims and all is correct, select **Submit**.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Claim Submission Preview
Please review your claim details:

John Doe	Date: 2007-05-05	Amount: \$ 35.00	Activity: Acupuncturist
		Total: \$ 35.00	

[Go Back] [Submit]

MedAfford Private Health Services Plan
Reference Guide

- The Claims Ticket screen appears. Select **Print This Page**.

[Return to Your Account Page] | [Submit More Claims]

Thank you for using the MedAfford claim system.

Please print this claim ticket and send a copy of your medical receipts to Serre Financial Insurance Services Inc.

CLAIM TICKET NUMBER
CL23800

John Doe **Date:** 2007-05-05 **Amount:** \$ 35.00 **Activity:** Acupuncturist

Admin Fee: 3.50
PST + PPT: 3.85
GST: 0.18

Cheque Amount: \$42.53

[Print This Page](#)

- Your Claim Ticket appears. Select **Print Page** to print. Exit from this screen. Attach all receipts that were entered to the printed Claim Ticket Page.

CLAIM TICKET - CL23800

Thank you for using the MedAfford claim system. Please send a copy of your medical receipts to Serre Financial Insurance Services Inc. and attach a copy of this claim ticket as a cover page.

To: MedAfford	From: John Doe
Fax: 519-927-0222	Phone: 519-927-0111
# of Pages: []	Date: 03-Sep-2009
RE: Receipts for CL23800	Contract: 520
Company: Demo Plan	

Claimant	Expense Date	Amount	Activity
John Doe	2007-05-05	35.00	Acupuncturist
	Total Amount:	\$ 35.00	
	Admin Fee:	\$ 3.50	
	PST & PPT:	\$ 3.85	
	GST:	\$ 0.18	
	Cheque Amount:	\$ 42.53	

Documents may also be sent by mail to:

Serre Financial Insurance Services Inc.
16765 Mississauga Road
Caledon, Ontario
L7K 1M8

GST #: 83630 2323

[Print Page](#)

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Reference Guide

Reports Section

- After logging in (see How to Log In), select **Reports Section**. Note that you must be a company administrator to access the Reports Section.



For Employee Claim Activity Report

- Choose the appropriate Period for Claim Activity (Benefit Year) and select **Next** directly underneath.



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Reference Guide

- The total period activity for each employee is displayed. Select **Print This Page** to print report. Select **Return to Reporting** to return to the reports screen. Select **Return to Your Account Page** to return to your welcome screen. If you wish to exit, simply close the window.

The screenshot shows the 'Resource Center' interface for Serre Financial. The main content area is titled 'Reports' and includes a 'Demo Plan' section. A table displays the following data:

Employee	Starting Balance	Period Activity	Final Balance
Bob Smith	2000	0.00	2000.00
Daniel Harris	0	0.00	0.00
Dr. Frank	10000	0.00	10000.00
Jenifer Cooke	10000	0.00	10000.00
John Doe	5000	100.00	4900.00
Sky Blue	2000	0.00	2000.00
Tony Man	2000	0.00	2000.00
Totals	31,000.00	100.00	30,900.00

Navigation links include 'Print This Page', '[Return to Reporting]', and '[Return to Your Account Page]'. A 'Main Menu' is visible on the left side.

For Account Activity Report

- Choose the appropriate from and to dates, and select **Next** directly underneath.

The screenshot shows the 'Resource Center' interface for Serre Financial. The main content area is titled 'Reports' and includes a '[Return to Your Account Page]' link. The 'Employee Balances' section is active, showing a 'Period for Claim Activity' dropdown set to '03/01/2004 - 02/28/2005' and a 'Next' button. The 'Account Activity' section is also visible, showing a 'Select a Period Range:' with 'FROM' and 'TO' date pickers set to '2007-03-01' and '2007-08-01' respectively, and a 'Next' button highlighted with a green arrow.

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Reference Guide

- The Edit Dependant Submission Preview screen appears. If there is incorrect information, select **Go Back** and continue from the previous step. If the information is correct, select **Submit**.

Please review the dependant details:	
Name of Employee:	Bob Smith
Name of Dependant:	Susan Smith
Relationship:	Child
Birthdate:	2000-07-07
End Date:	

[Go Back] Submit

- This screen appears next. Select **Return to Your Account Page** to return to your welcome screen. Select **Edit More Dependants** to return to the Manage Employees screen. If you wish to exit, simply close the window.

The Dependant change has been received...

You will see dependant changes in the system after they have been reviewed by Serre Financial.

Thank you for your submission!

[Return to Your Account Page] | [Edit More Dependants]

MedAfford Private Health Services Plan
Reference Guide

To Add Dependant

- Select **Add Dependents**.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Edit Employee
[Return to Select Employee] | [Return to Your Account Page]

Please edit or review this employee's details:

Title:	
Employee Name:	Bob Smith
Address:	1234 Any St.
Address2:	
City:	Toronto
Province:	ON
Postal:	X0X 0X0
Telephone:	
Business Telephone:	
Start Date:	
End Date:	
Period Limit:	2000

Submit

Dependants for Bob Smith

Dependant Name	Relationship	Birthdate (yyyy-mm-dd)
Mary Smith	Spouse	1970-01-01 Edit
Susan Smith		2000-01-01 Edit

[Add Dependents](#) for Bob Smith

- The Add New Dependents screen appears. Enter the appropriate information and select **Add Dependant**.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Add New Dependents
[Return to Managing Employees] [Return to Your Account Page]

Please fill out the following form to add a new dependant.

Name of Employee:	Bob Smith
Relationship of Dependant:	Child
Dependant Name:	Robert Smith
Birthdate:	2009-07-01 Calendar yyyy-mm-dd
End Date:	Calendar yyyy-mm-dd

[Add Dependant](#)

No Dependents Added

[Preview](#)

MedAfford Private Health Services Plan
Reference Guide

- The dependant just entered is now displayed below the entry area, and the dependant information fields have reset. To add another dependant, fill in the fields, or choose the appropriate selection in the field regarding the dependant. Select **Add Dependant**. Continue doing this until all your dependants have been entered. If all dependants have been entered, select **Preview**.

Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Add New Dependants
[Return to Managing Employees] [Return to Your Account Page]
Please fill out the following form to add a new dependant.

Name of Employee: Bob Smith
Relationship of Dependant: Select Relationship
Dependant Name:
Birthdate: Calendar yyyy-mm-dd
End Date: Calendar yyyy-mm-dd

Added Dependants	Relationship
1) Robert Smith	Child

- If you would like to go back to the previous screen an step, select **Go Back**. If you have completed adding dependants, select **Ok!**.

Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

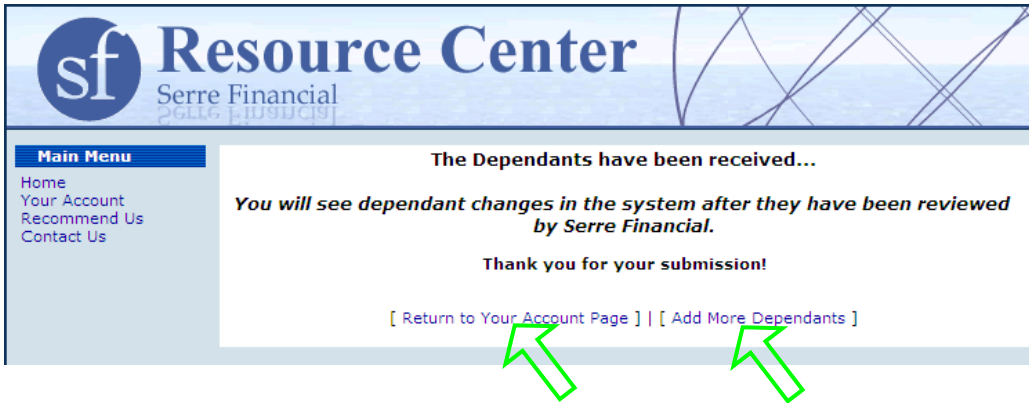
Dependant Submission Preview
Please review the dependant list:

Added Dependants	Relationship
Robert Smith	Child

[Go Back]

MedAfford Private Health Services Plan
Reference Guide

- This screen appears next. Select **Return to Your Account Page** to return to your welcome screen. Select **Add More Dependants** to return to the Add More Dependants screen. If you wish to exit, simply close the window.



To Edit Employee Detail

- To update or edit any employee information, enter the information in the applicable field(s). Select **Submit** once complete.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Edit Employee

[Return to Select Employee] | [Return to Your Account Page]

Please edit or review this employee's details:

Title:

Employee Name: Bob Smith

Address: 1234 Any St.

Address2:

City: Toronto

Province: ON

Postal: X0X 0X0

Telephone: 416-333-3333

Business Telephone:

Start Date:

End Date:

Period Limit: 2000

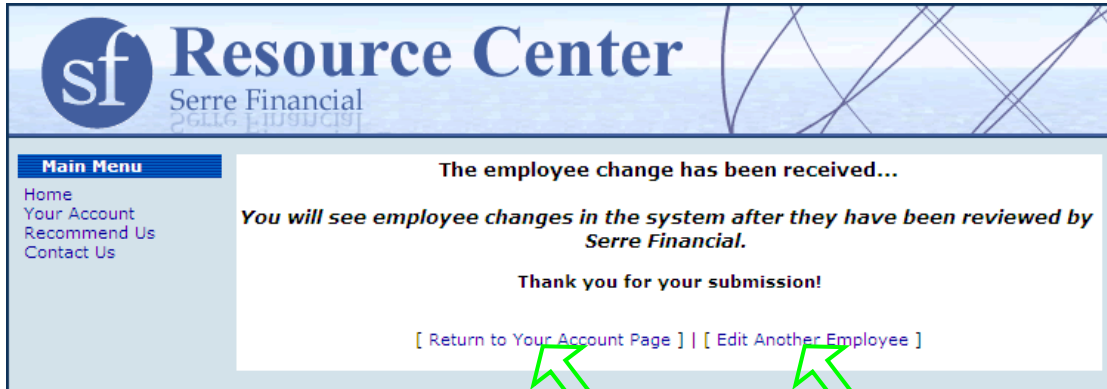
Dependants for Bob Smith

Dependant Name	Relationship	Birthdate (yyyy-mm-dd)
Mary Smith	Spouse	1970-01-01 <input type="button" value="Edit"/>
Susan Smith		2000-01-01 <input type="button" value="Edit"/>

for Bob Smith

MedAfford Private Health Services Plan
Reference Guide

- This screen appears next. Select **Return to Your Account Page** to return to your welcome screen. Select **Edit Another Employee** to return to the Manage Employee screen. If you wish to exit, simply close the window.



To Add Employees

- Choose the appropriate employee, and select **Next** directly underneath.



MedAfford Private Health Services Plan
Reference Guide

- Enter the employee information into the applicable fields. When complete, select **Add Employee**.

Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Add New Employees
[Return to Managing Employees] [Return to Your Account Page]
Please fill out the following form to add a new employee.

Title: Mr.
Employee Name: Rick Rogers
Employee Number: 222
Address: 1 Maple St.
Address2:
City: Winnipeg MB - Manitoba
Postal: Y0Y 0Y0
Telephone:
Business Telephone:
Coverage to begin on: 2009-09-01 Calendar yyyy-mm-dd
Period Limit: (\$) 500.00
Number of Dependents 0-3

#1
Relationship of Dependant: Select Relationship
Dependant Name:
Birthdate: (Children only) Calendar yyyy-mm-dd
Coverage to end on: Calendar yyyy-mm-dd

#2
Relationship of Dependant: Select Relationship
Dependant Name:
Birthdate: (Children only) Calendar yyyy-mm-dd
Coverage to end on: Calendar yyyy-mm-dd

#3
Relationship of Dependant: Select Relationship
Dependant Name:
Birthdate: (Children only) Calendar yyyy-mm-dd
Coverage to end on: Calendar yyyy-mm-dd

Add Employee

MedAfford Private Health Services Plan
Reference Guide

- The added employee will be displayed at the bottom of the screen and the Add New Employees screen fields will reset. To add another employee, select **Add Employee**.
To edit an employee that has been added, select the corresponding **edit**. This will bring you to the previous screen and step.
To delete an added employee, select the corresponding **delete**. If you select **delete**, you will be prompted with a pop up question asking “Are you are sure you want to delete this person?”. Select **OK** if you wish to delete this person and the employee will be deleted returning you to the Add New Employees screen. Select **Cancel** if you do not wish to delete the employee and you will return to the below screen.
If you have finished adding employees, select **Submit**.

sf Resource Center
Serre Financial

Main Menu
Home
Your Account
Recommend Us
Contact Us

Add New Employees
[Return to Managing Employees] [Return to Your Account Page]
Please fill out the following form to add a new employee.

Title:
Employee Name:
Employee Number:
Address:
Address2:
City: Select Province
Postal:
Telephone:
Business Telephone:
Coverage to begin on: Calendar yyyy-mm-dd
Period Limit: (\$)
Number of Dependents 0-3

#1
Relationship of Dependand: Select Relationship
Dependant Name:
Birthdate: (Children only) Calendar yyyy-mm-dd
Coverage to end on: Calendar yyyy-mm-dd

#2
Relationship of Dependand: Select Relationship
Dependant Name:
Birthdate: (Children only) Calendar yyyy-mm-dd
Coverage to end on: Calendar yyyy-mm-dd

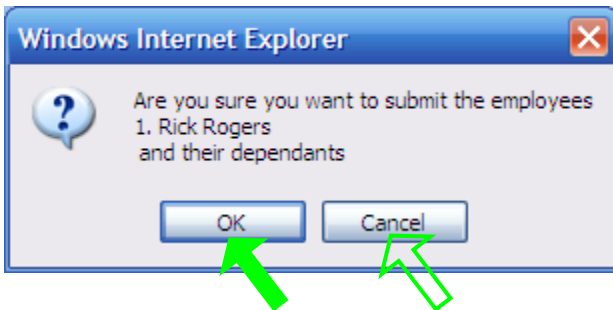
#3
Relationship of Dependand: Select Relationship
Dependant Name:
Birthdate: (Children only) Calendar yyyy-mm-dd
Coverage to end on: Calendar yyyy-mm-dd

Add Employee
Clicking the below submit button will forward a request to add the new employee(s) listed below.
Submit

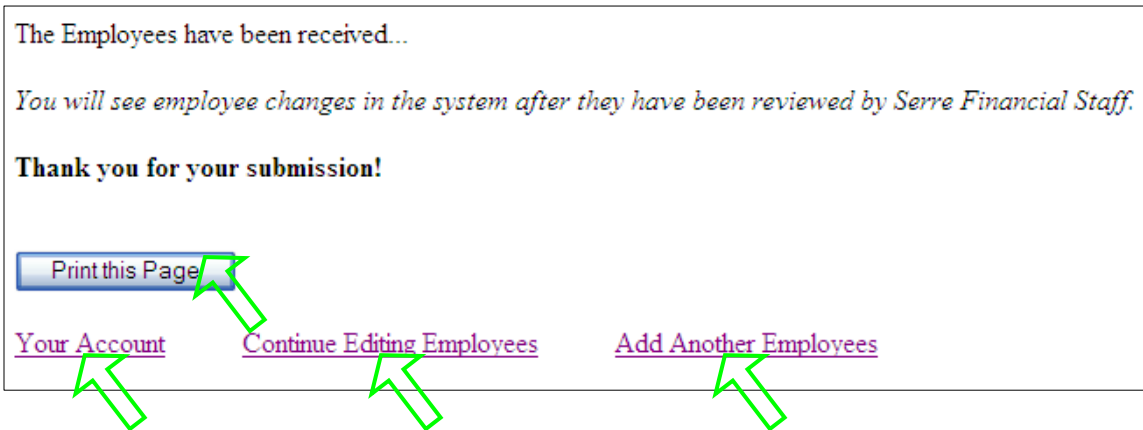
Rick Rogers
222

MedAfford Private Health Services Plan
Reference Guide

- The following pop up window will appear asking if you are sure you want to add the employee(s).
If you do not want to submit the employees, select **Cancel**. This will bring you back to the previous screen and step.
If you do want to submit the employees, select **OK**.



- This screen appears next. Select **Print this Page** if you wish to print. Select **Your Account** to return to your welcome screen. Select **Continue Editing Employees** to return to the Manage Employee screen. Select **Add Another Employees** to return Add New Employees screen. If you wish to exit, simply close the window.

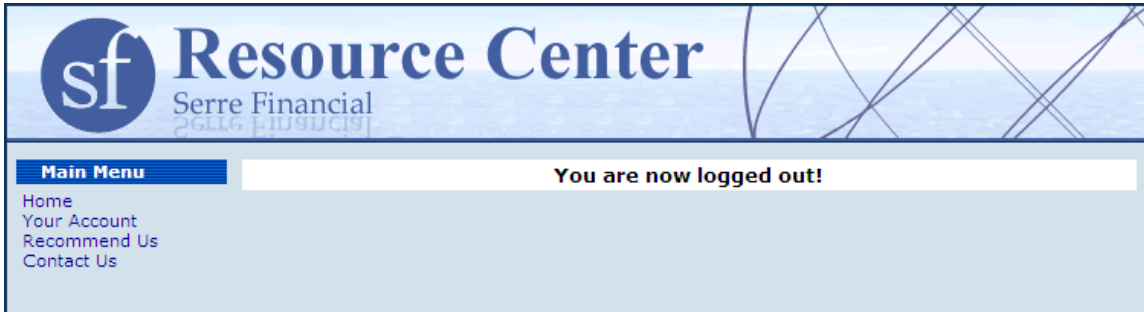


Logout Exit

- When in the Your Account, or welcome screen, select **Reports Section**. Note that you must be a company administrator to access the Reports Section.



- This screen will appear next for approximately 4 seconds.



- This screen will then automatically appear.



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Reference Guide

2009 PHSP Pricing for STRATA Benefits Consulting Inc.

		Fees / Prices / Commissions effective January 1, 2009	
		Regular Schedule	STRATA Benefits
PHSP - MedAfford (New Plans)			
Plan Establishment & Set-up (up to and including 5 employees)		\$275	\$300
<i>Commission</i> Plan Establishment & Set-up		\$0	\$150 to Agent
Each Additional Employee on Plan		\$25	\$22.50
Plan Administration Fees for Online Claim Entry	% of expense claims	10%	10%
Plan Administration Fees for Manual Claim Entry	% of expense claims	12%	
<i>Commission</i> Plan Administration Claim Entry		5%	5%
Plan Non-use Maintenance Fee for Year		\$50	
	Plan In Existence		
	On / Before Date	N/A	6/30/2009
PHSP - MedAfford (Transfer of Currently Existing Plans)			
Plan Establishment & Set-up (up to and including 5 employees)		\$275	\$0
Each Additional Employee on Plan		\$25	\$15
Plan Administration Fees for Online Claim Entry	% of expense claims	10%	8% (for 2 years from plan transfer)
Plan Administration Fees for Manual Claim Entry	% of expense claims	12%	
<i>Commission</i> Plan Administration Claim Entry		5%	4% (for 2 years from plan transfer)
Plan Non-use Maintenance Fee for Year		\$50	