

**Santa Rosa County
School District**



"A Tradition of Excellence"

Karen Retherford
Coordinator of Risk Management and Benefits

5086 Canal Street
Milton, Florida 32570-6706

Phone: 850/983-4814

Facsimile: 850/983-5009

E-mail: retherfordk@mail.santarosa.k12.fl.us

November 3, 2014

To: Mr. Wyrosdick and School Board Members

RE: TASC Administrative Services Agreement

Total Administrative Services Corporation (TASC) has been the school district's flexible spending account (FSA) third party administrator for the past four years. We currently pay a \$4.95 per participant per month (PPPM) administrative fee. This fee includes services to the participants such as a TASC debit card and on-line account/reimbursement capabilities. TASC also ensures that FSA reimbursements meet IRS guidelines.

TASC has advised that in 2015, our PPPM fee will increase from \$4.95 to \$5.05, an increase of \$.10 per participant. We currently have 150 employees with an FSA so, based on the current enrollment, the overall cost increase to the school district is \$180.00 per year. This could change depending on the enrollment numbers once open enrollment for 2015 ends but, participation has remained fairly constant for the past four years.

I would like to request approval to renew our annual contract with TASC for 2015. Please let me know if you have any questions.

Sincerely,


Karen L. Retherford

Subject:

FW: Important FlexSystem Update

Dear TASC Client:

At TASC we continue to make significant investments in our infrastructure, systems, and team to provide more efficient service to you. We are committed to continual improvement and enhancement of technology and service offerings. We offer ongoing support, annual review of Plan compliance, and systematic updating of Plan documents. And unlike other administrators, we don't nickel and dime you for these services. Instead, the innovative and reliable performance of these service offerings increases average participation in TASC Plans by 10 percent. This increases your savings roughly \$100 a year, per Participant!

TASC Innovations

TASC continues to invest in FlexSystem. Ongoing enhancements increase ease, efficiency, and customer satisfaction. Some of the more recent innovations at TASC include the following:

- New FlexSystem Participant website provides a modern, visually appealing design with account balances featured on the home page.
- The TASC Card with the exclusive MyCash Account: allows ultimate flexibility with your account.
- Transportation benefit enhancement offers new features, including an automated rollover and 180 day reimbursement submission.
- Texting and emailing account balance on demand.
- Our Mobile App: use a smart phone to check balances and submit reimbursement requests, 24/7!
- And more!

There are costs associated with providing superior service offerings and continual enhancements. TASC customers have told us that they prefer an annual fee increase instead of a relatively larger fee increase every few years. To comply, TASC's small annual fee increase is re-calculated each year based on a *three-year average* of the [Consumer Price Index](#) (CPI), a figure calculated by the U.S. Bureau of Labor Statistics. This year's increase will be 2%. Here are your 2015 fees:

Client TASC ID	Client Name	PPPM Fee / Minimum Monthly Fee *	Billing Frequency	Annual Renewal Fee
4802-2274-9459	Santa Rosa County School Board	\$5.05 / \$3.33	Quarterly	

** A Per Participant (PPPM) administrative fee or a Minimum Monthly administrative fee will apply to your Plan.*

Want to stay informed about the changes and enhancements going on at TASC and with your FlexSystem Plan? Just visit our Client news website – the [TASC Tracker](#). We post all of the news about changes, enhancements, and other important items related to your Plan there, so visit the site and [subscribe](#) to receive

convenient email updates.

Thank you for your continued business! We're committed to providing you with the top-notch service you have come to expect from TASC. If you have any questions regarding our service offerings, please contact Customer Care at 1-800-422-4661 for assistance, or submit a MyService Request online at www.tasconline.com.

Sincerely,
TASC Customer Care

Total Administrative Services Corporation (TASC)

2302 International Lane
Madison, WI 53704-3140
www.tasconline.com

