FlexSystem®

Quick Start Guide

Follow these simple steps to set up your FlexSystem Plan.

(No internet access? Then refer to the Client Administrative Manual for instructions on alternative methods for enrollment.)

1) Confirm Plan Setup

- Log in to your MyTASC account at www.tasconline.com.
- Click *Manage FSA*.
- Click *Plan Management* and then *Details*. Review eligibility, payroll schedule, and benefit set-up for accuracy.
- If you find any needed changes, you can make and save the changes.

2) Participant Communication Materials

- Distribute to your eligible employees the *How to Enroll Online Flyer*, and any other applicable communication materials from the FlexSystem Documents web page: **www.tasconline.com/flexsystem-documents**.
- Encourage employees to enroll online at: **www.tasconline.com/tasconline/flexsystem/enroll**.
  Participants **new** to the Plan will need your Client ID to access the enrollment site. **Renewing** Participants log in using their existing username (12-digit TASC ID) and password.
- View the online enrollment presentation at: **http://portal.sliderocket.com/BOORR/FX_1021_102313-FlexSystem-Online-Enrollment**
- For employees without access to online enrollment, distribute a customized enrollment form (available in your MyTASC account under *Enrollment Management*).
- If needed, your employees may contact a FlexSystem Participant Customer Care Specialist for assistance with the enrollment process (1-800-422-4661).
- Employees who do not wish to participate must indicate zero and sign the form. Online enrollees may also elect zero.

3) Start Enrollment

- Employees may begin online enrollment. Paper enrollments may be entered.
- From the *Enrollment Quick Links* section on your Welcome page, click *Add New Employee* and follow the prompts to enroll.
- To re-enroll an existing Participant: use the Search box under *Enrollment Quick Links* to find the Participant, or click the *View All Employees* link.
  > Select the magnifying glass, then *Benefit Participation*.
  > Select the Plan, Renew, enter eligibility dates, elections, and click *Update*.
- Repeat this process until each employee's information is entered.

4) Finalize Enrollments

- From your Welcome page, click *Manage FSA*.
- Click *Enrollment Management* and select the new Plan Year from the dropdown to view the Unapproved Enrollment tab.
- Select the Enrollment Method (*All, Online Enrollment* or *Manual Enrollment*).
- Click *Approve All* to approve the enrollment of all employees for that view, or select employees individually with the Approve link next to their name.
- If employees were enrolled via multiple enrollment methods, be sure to select the Enrollment Method for each type and Approve the enrollments.
- Once the above steps are complete, click *Approved But Not Submitted Enrollment,* verify all approved employees are listed, and click *Submit*. This step must be completed for enrollments to be finalized.
- The enrollment is complete. You are now ready to review and pay your first Payroll Verification Report online!

5) Enrollment Complete!

- Your Participants are now enrolled and your FlexSystem Plan is operational. Remember that the PVR process must be reviewed for each payroll.
- FlexSystem will send materials to each Participant via email. If no email address exists, materials are sent to the Participant's mailing address.
- A Summary Plan Description is available under *Plan Management* following your Plan start date and should be distributed to all eligible employees.

6) Review Payroll Verification Report (PVR)

Immediately following submittal of your Enrollments, you will want to review the first PVR:

- From MyTASC (www.tasconline.com), click on **Payroll Verification Report** (PVR).
- Review employee deduction information. Adjust by benefit, if applicable.
- Add any new Participants and complete any terminations or changes.
- Based on your PVR dates TASC will collect your scheduled contributions by automatic ACH unless you have another Funding Agreement.
- To submit your payment manually, click Submit. A confirmation window will appear, verifying that the PVR payment was successfully submitted.

IMPORTANT: For manual payments, complete this process a day prior to each payroll date throughout the year.

For a complete description of FlexSystem, the enrollment process, and the features and benefits of Section 125, refer to the ***FlexSystem Client Administrative Manua***l. Download required forms and communication materials from www.tasconline.com/flexsystem-documents.

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