

**Charlotte County Board Of County Commissioners
Agenda Item Summary**

Item Number: F- 20

1 DEPARTMENT MAKING REQUEST

Purchasing

2 MEETING DATE

9/9/2014 9:00:00 AM

3 REQUESTED MOTION/ACTION

- a) Approve Novation for name change to Contract #2012000382, HRA & Flex Account-Third Party Administration from EflexGroup, Inc. to Total Administration Services Corporation (TASC); and
- b) Authorize the Chairman to sign the Novation.

4 AGENDA

Consent

5 IS THIS ITEM BUDGETED (IF APPLICABLE) - Yes

Budget Action

No action needed.

Financial Impact Summary Statement

No additional impact.

Detailed Analysis Attached -

Budget Officer-

6 BACKGROUND (Why is this Action Necessary, and What Action will be accomplished)

EflexGroup, Inc. has merged with TASC effective May 1, 2014 and will now be operating under the name of TASC. Therefore, a novation is being requested for their existing contract.

ATTACHMENTS:

Name:

Description:

Type:

[novation-eflex.pdf](#)

Memo of merger

Backup
Material



eflex and eCOBRA Merge with TASC

Month Day, 2014

Hello,

We are excited to announce that eflexgroup (eflex) and eCOBRA have joined forces with Total Administrative Services Corporation (TASC), effective May 1, 2014. **We welcome this new affiliation as an opportunity to expand and improve our services to you!**

We--and the entire eflex and eCOBRA teams--truly appreciate your business. As always, we're serious about providing you with outstanding services now and far into the future. We remain absolutely committed to delivering speedy payments and solutions, along with the innovative web self-service you've come to expect from eflex. As part of a larger national organization, we will have access to greater resources and new offerings that we look forward to sharing with you.

Located in Madison, Wisconsin, TASC is the nation's largest, privately held, third-party administrator, providing benefit account management, benefit continuation, compliance, workplace giving, and payroll services for more than 60,000 businesses. TASC aims high with innovative, award-winning technology platforms. Over the next few months, the eflex and TASC service teams will be working to plan and transition our administrative services onto TASC's platforms.

Having been competitors and neighbors for the past 15 years, we know TASC and its CEO, Dan Rashke well. We continue to be impressed! Dan's personal commitment--to TASC employees, clients, and brokers--has proven to be an ideal foundation for TASC's continued growth and success.

Along with continued superior administrative services, you can be confident that we will do everything possible to ensure a smooth transition to the TASC platform. In the meantime, if you have questions, feel free to contact your eflex Sales Associate or Client Services Manager. Additionally, we have prepared a frequently asked questions document that you can [download here](#).

With Best Regards,

Tom Jacobs
CEO/Co-Founder
eflexgroup.com

Ric Joyner
CEO/Co-Founder
eflexgroup.com

By joining forces with TASC, eflex can deliver additional service offerings, innovative features, and greater resources for you and your employees. Please review the following Frequently Asked Questions regarding the upcoming transition. We look forward to an exciting future together!

Q: What will the transition be like?

You are our highest priority during this transition, and we are committed to your best interests. You will retain your current fee structure and continue to access the eflex contact people you've come to know and enjoy the great service you've come to expect.

As part of TASC, you will transition to a new administration software platform and debit card. Watch for more information soon.

Q: Will our plan administrative fees change?

No. Plan administrative fees will not be affected.

Q: Will we be assigned a new Client Services Manager and Sales contact?

No. Your Client Services Manager and sales associate will remain in place during the transition.

Q: How does the money in eflex participant accounts get to TASC? Do we need to do anything?

No. eflex will automatically move the funds and account information to TASC. Details will be provided when we're ready to transition your plan.

Q: Where should participants send their Requests for reimbursement?

For the time being, reimbursement requests will continue to go to eflex. Prior to your transition, TASC will send Participants a notice with instructions for sending reimbursement requests to TASC and a start date.

Q: Will Participants receive a new debit card?

Yes, all plan participants will receive a new TASC card after the transition is complete. In the interim, continue using your eflex Card. When the new TASC card arrives, the eflex card will be automatically deactivated.

Q: Who can I call with questions?

Please contact your eflex Sales Associate or Client Services Manager with questions.

TASC SERVICES AT-A-GLANCE

Areas of Expertise

- ✓ Flexible Spending Accounts: Medical, Dependent Care, Transit, and Parking
- ✓ Health Savings Accounts
- ✓ Health Reimbursement Arrangements and Funded HRA
- ✓ COBRA Administration
- ✓ Leave of Absence and FMLA Administration
- ✓ Compliance Services: ERISA, Form 5500 Preparation, PCORI, Non-Discrimination Testing
- ✓ Payroll Administration
- ✓ Workplace Charitable Giving Service
- ✓ Tuition Reimbursement

Competitive Attributes

- ✓ National market coverage with 800+ employees in 60 cities
- ✓ Reliable and sustainable company growth with 40 years of industry experience
- ✓ Compliance expertise and assurance
- ✓ Customer service excellence with transparency, accountability, and a personal approach
- ✓ Affordable pricing options
- ✓ Online administration with self-service options
- ✓ Multiple distribution channels
- ✓ Industry-exclusive Governmental Affairs staff
- ✓ Consumer Protection Program
- ✓ Annual SSAE 16 Type II Audit

Service Innovations

- ✓ TASC Card with two accounts: MyBenefits and MyCash
- ✓ Mobile Tools for Participants (MyTASC Mobile App and text messaging)
- ✓ Claim ConneX™ Automated Reimbursements
- ✓ MyService Center Online
- ✓ MyTASC Online Account Management



Questions? Let's talk.

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