Participant Reference Guide

Welcome to FlexSystem and to the tax saving benefits of a Section 125 Cafeteria Plan. We hope you will find FlexSystem to be an efficient and valuable service. Our Participant website is **www.tasconline.com** and is referred to as MyTASC throughout this Manual. Before you access your MyTASC account for the first time, you will receive an e-mail with a link that will take you into MyTASC. (An email is required to access MyTASC.) You will be asked to set a **Password**. Once logged in, you may create your own **Username**. If you do not change your Username, it will remain as your 12-digit TASC ID, which you will find on your personalized **Request for Reimbursement Form** included with this Manual. (When entering your 12-digit TASC ID, you will need to enter the dashes.) This Manual will walk you through the initial login process, how to request a reimbursement, how to re-enroll, as well as how to use several other Participant web tools. Please retain this Manual for future reference. If you have additional questions, login to *MyTASC* and select Contact Us or call our Customer Care Center at 1-800-422-4661.

MyTASC requires a valid e-mail address to authenticate your account. If you have no email address, you will need to obtain one and call our Customer Care Center to have it entered in your profile before accessing your account online. *(Many email hosting services are free, such as Gmail, Hotmail, Yahoo, etc.)*

General MyTASC Website User Information

Instructions are based on using Internet Explorer IE 6 or IE 7 Browser. Due to the type of development software used to build MyTASC, your internet browser may see it as a "pop-up." First-time users may experience a "pop-up error" when attempting to login in to MyTASC. Typically, your browser allows you the opportunity to allow pop-ups for specific websites. Choose the option "Always allows pop-ups from this site" so you will not experience this pop-up error in the future. When launching MyTASC you will experience a "Please wait while MyTASC is loading" screen. This is normal as the system may take several seconds to load. Lastly, the first time you login to MyTASC you will encounter a dialog box containing a brief confidentiality and security message. Simply click OK to proceed to MyTASC. You should not encounter this dialog box again.

Please wait while MyTASC is loading ...

"**Breadcrumbs**" show the screens you have visited and how to return to the main screen. (see below)

Back To » Participant Manager Client Manager FlexSystem Participant List
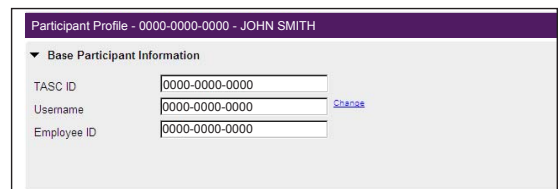
Navigation

When navigating through the MyTASC system you will notice there is no Back button on your internet browser. To navigate within MyTASC use the "**breadcrumbs**" (**Back to >> within the purple bar**) which appear in the upper right-hand corner of the screen. For example, to return to the MyTASC homepage, click on the **Back To >> Participant Manager** link. When viewing any screen, you can sort the table view by alphabetical/numerical ascending or descending order by clicking on any column "header."

▼ Participant Manager

🔵 **GENERAL**
⇨ Profile
⇨ Claims ConneX

🟢 **FLEXSYSTEM**
   SECTION 125 CAFETERIA PLAN
⇨ Account Management
⇨ Request for Reimbursement Wizard
⇨ Download Reimbursement Request Form
⇨ TASC Card Management
⇨ Enrollment
⇨ Direct Deposit Setup
⇨ Request a Request for Reimbursement Form
⇨ Participant Reference Guide

To change your Username

1. From the *Participant Manager*, click on *Profile*.
2. Click on *Change* next to the Username.
3. Enter a new Username.*
4. Click *Save*.

* Note: Usernames must be at least 10 characters and unique to our system. MyTASC will check to confirm if the new Username you request already exists. If so, an alternate Username is required. To avoid possible Username duplication, you may use your e-mail address for your new Username.

Participant Profile - 0000-0000-0000 - JOHN SMITH

▼ Base Participant Information

TASC ID	0000-0000-0000	
Username	0000-0000-0000	Change
Employee ID	0000-0000-0000	

To change your Password
1. Click on the *Profile* link
2. Enter your Password* under *Change Password*.
3. Confirm Password.
4. Click *Save*.

* Note: Passwords must be a minimum of eight characters and must contain at least one upper case letter, two lower case letters, and one number. Passwords will expire periodically.

Sign up to receive e-mail notifications and text messages
1. Click on the Profile link.
2. Enter your e-mail address and mobile number. (A valid e-mail address must be entered to receive text messages.) A message with a verification number will be sent to your e-mail address.
3. Enter the verification number in your Profile and select OK. The verification process must be completed to authenticate your settings.
4. Select from the Notifications listing how you want to be contacted (via e-mail or text message) for each option listed (check sent, direct deposit sent, Request For Reimbursement (RFR) Denied, RFR Received, Request RFR Kit, Veriflex Received).

Request for Reimbursement

Along with this Manual you received a personalized Request for Reimbursement Form. Make additional copies of the Request for Reimbursement Form for future requests or go on-line to print additional copies using the Download Reimbursement Request Form link. On the back of the Form are some valuable Reimbursement Tips (for faxed and mailed Requests for Reimbursement). For a fast, easy way to submit your requests, try our on-line Reimbursement for Request Wizard. From your Participant Manager page, simply select the Request for Reimbursement Wizard link and follow the instructions to enter your request.

Please note, if your employer has elected Claim ConneX and you are enrolled in Claim ConneX for your Medical Out-of-Pocket Flex Plan, your medical insurance provider automatically submits the unpaid portions of your medical claims to TASC for processing. Those claims will be automatically reimbursed to you from your Medical Out-of-Pocket Flex Plan. No action is required from you to receive reimbursement for those claims. In addition if your employer's FlexSystem Plan has Reimbursement Ordering and you have a Medical Out-of-Pocket Flex Plan and a DirectPay Plan, requests submitted via the on-line Request for Reimbursement Wizard or via your medical insurance provider (Claim ConneX feature) will automatically be routed to your Plan that reimburses first and then to the Plan that reimburses second for processing.

You may request reimbursement any time a qualified expense has been incurred. The service related to the expense needs only to have taken place; it need not be paid before requesting reimbursement. Only request reimbursements (a) for eligible expenses incurred during the applicable Plan Year, (b) for eligible Plan Participants, and (c) for expenses that have not been previously reimbursed under this or any other benefit plan or claimed as an income tax deduction. It is your responsibility to comply with these guidelines and to avoid submitting duplicate or ineligible Requests for Reimbursement.

FlexSystem processes requests for reimbursement daily. Once a request is reviewed and approved, a reimbursement is issued. For dependent care and non-employer sponsored insurance premium reimbursements, the account must contain sufficient funds for the full request to be reimbursed. If there are insufficient funds in the account, reimbursement will be limited to that particular account's balance amount only. The outstanding balance of the request will remain as an open item until additional deposits are received, at which time an additional reimbursement will be initiated. Out-of-pocket medical expenses will be reimbursed for the full amount of the request, provided the total of the request does not exceed the total Plan Year election.

Most approved requests received by FlexSystem before noon CST will be processed that day, with reimbursements initiated the following day. **Actual receipt of the reimbursement depends on your available balance, the mail and banking systems.** To receive your reimbursement faster, sign up for direct deposit. To sign up online, access your account and select the Direct Deposit Link.

On-Line Requests for Reimbursements

Submitting Requests for Reimbursement on-line is easy! Here are the simple steps you should follow:

1. Go to **www.tasconline.com**, logon to access your account and click on '**Request for Reimbursement Wizard.**'
2. Enter all required information (Service Date, Service Type, Amount Paid, Service Description, Service Provider, etc). Each expense incurred must be submitted individually. Do not combine several expenses into one total.
3. Before submitting the request, review your request carefully and correct any errors.
4. Be sure to review your contact and direct deposit information to confirm it is correct.
5. Remember to submit your receipts! To submit a receipt after submitting your on-line Request for Reimbursement, you may print a Veriflex Coversheet by selecting the Veriflex Coversheet link from your Reimbursements tab. Select the link associated with the appropriate Request ID.
6. After printing the VeriFlex Coversheet, assemble your documents. Copy your original receipts to an 8 1/2 x 11 sheet of paper. (Retain originals for your records.) Place the receipts for each expense on the VeriFlex Coversheet directly behind the Coversheet. If sending multiple Coversheets, each Coversheet must have it's receipts placed directly behind the applicable VeriFlex Coversheet. If one receipt covers expenses on multiple VeriFlex Coversheets, make a copy of the receipt to submit behind each VeriFlex Coversheet. Remember to date and sign your forms. Unsigned forms will be declined.
7. Fax or mail the Coversheet and receipt(s) to FlexSystem. If faxing, please fax each Coversheet and it's receipts separately.

Account Management

To view your Requests for Reimbursements you have already submitted:

1. From the Participant Manager, click on **Account Management**.
2. Open the Reimbursements component.

Listed in the Submitted Request for Reimbursement table are all of the reimbursement requests submitted associated with your account. This high level summary table shows the Submitted Date, the Request ID, the total Request Amount, the Benefit type, the Veriflex Status, Paid Status, and Received Via (indicating how the request came into TASC).

To view reimbursements for one specific benefit, or to see all benefit reimbursements, use the sorting drop down box above the Submitted Request for Reimbursement table.

To see more details about a specific submitted request, click on the Details link in the 'Request ID' column. This detail link provides you specific information about the individual request, including: Submitted Date, Request Id, Amount Requested, Benefit, Payment Status, Date of Service, Date Audited, Audit Status, Audit Cause, Audited By, Date Verified, Veriflex Status, Receipts Received, Verified By, Date Declined, Decline Cause, Declined By, Date Reversed, Reason for Reverse, and Reversed By information.

Reimbursement Disbursements

Details

Direct Deposit

To receive your reimbursement sooner, use our Direct Deposit option. A service fee of $30 is charged to the Participant for the reissue of lost, stolen, or expired paper-copy checks. (Note: This fee can be avoided with the election of Direct Deposit.) With Direct Deposit, funds are forwarded to your bank within 48 to 72 hours of a complete submission. Visit MyTASC to set up your Direct Deposit on-line. Remember to verify receipt of payment before writing checks against any expected payment. TASC is not responsible for any bank fees associated with overdraft charges.

To setup or change your direct deposit information, in the Participant Manager screen:

1. Click on the Direct Deposit Setup link.
2. Open the FlexSystem Participant ACH component.
3. Enter or Edit your Automatic Cash Handling (ACH) account information.
4. Click Save.

If your employer offers the TASC Card, simply use your TASC Card like a credit card at the point of sale. Your TASC Card will allow purchases up to the maximum amount available from your Flexible Spending Account (less already paid out reimbursement requests), as long as the purchase is made at an approved vendor. To view your current available funds for using your TASC Card, in the Participant Manager screen:

1. Click on the Account Management link
2. Open the Account Summary component

Listed in the Account Summary table are all of the benefits elected at the time of your open enrollment. Available Funds appear in the 'Available Funding' column of the Account Summary table.

Change of Elections

You may change your election during the Plan Year only under certain circumstances and only within 30 days of the qualifying event. For example, if you get married or divorced, have a child, or experience a change in work status you may make a change of elections. (See your employer for a complete list of circumstances and the appropriate form to use.) In addition, each Plan Year anniversary provides an opportunity to change elections when re-enrolling.

To check which benefits you are enrolled in, from the Participant Manager screen:

1. Click on the Account Management link.
2. View the Account Summary component.

Listed in the Account Summary page are all of the benefits elected at the time of your open enrollment. You will see a separate table for each elected benefit.

To determine what has been contributed for your benefit elections to date, from the Participant Manager screen:

Direct Deposit Setup

Direct Deposit Setup	
Account Type	Checking
Routing Number	*****9076
Account Number	******9501
Change	

Account Summary

FlexSystem Account Management
01/01/2007 - 12/31/2007 MYTASC TEST GROUP 3   A 26

Account Summary | Reimbursements | Contributions

The participant will be eligible for benefits starting on 2007-04-01. Their eligibility will end on 2007-12-31.

Medical

Available Funds	1000.00
Annual Election	1000.00
Total Contributions	0.00
Total Reimbursements	0.00

TASC Card Management

TASC Card Management

Allowed Benefits

Medical (Out-of-Pocket) Expenses

TASC Cards

Name on Card	Card Number		Status
SMITH, JOHN	0000-0000-0000		Active
SMITH, JOHN	0000-0000-0000	Reissue Deactivate	Active

Contributions

FlexSystem Account Management
12/01/2006 - 11/30/2007 TASC - ADMIN   P 26

Account Summary | Reimbursements | **Contributions**

Filter by Benefit
Filter by Payroll Date

Payroll Date	Benefit	Participant Contribution	Posted
2006-12-08	Medical	$38.46	Yes
2006-12-22	Medical	$38.46	Yes
2007-01-05	Medical	$38.46	Yes

1. Click on the Account Management link
2. Open the Contributions component

Listed in the Contribution Schedule table are all of the posted and scheduled contributions associated with each of your benefits elected at the time of your open enrollment. You may sort by one benefit and the associated contributions, or by all benefits and the associated benefit contributions. You may also sort by one payroll and the associated contributions, or by all payrolls and the associated benefit contributions. To sort by benefit type and/or payroll date, click in the drop down box(es) in the top section of the Contributions component. If the "Posted" column indicates "No" the contribution amount has not yet been applied. If the "Posted" column indicates "Yes" the contribution amount has been applied.
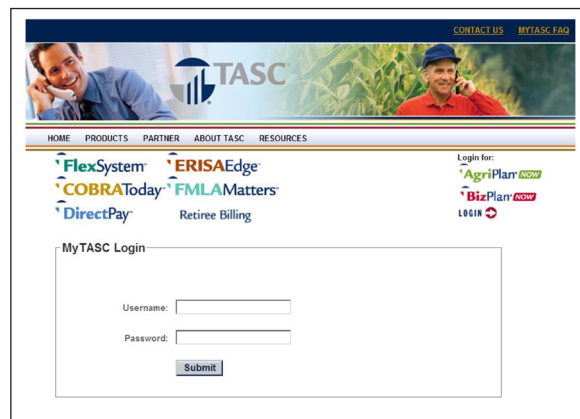
Plan Year End

Near the end of the Plan Year you will have the opportunity to re-enroll in your Flex Plan. Please check with your employer on your specific re-enrollment procedure. If your employer uses FlexSystem for re-enrollment, please follow the instructions provided below to re-enroll in your Flex Plan. During the re-enrollment period, your employer has the opportunity to change Plan options and settings. Typically there is a transitional period at the end of your Plan Year during which time you may be able to incur and/or submit expenses. Check with your employer for complete details on your Plan. The Plan Year is officially closed following the transitional period at the end of the Plan Year, or sooner if directed by your employer. Once closed, any unused funds are returned to your employer.

Complete Your Enrollment

Benefit Election
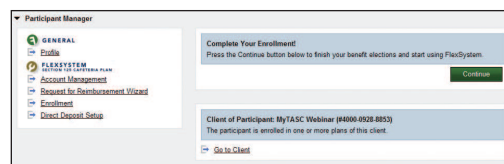
How to re-enroll (If your employer allows on-line enrollment.)

1. Open your internet browser and go to this website:
   www.tasconline.com
2. Enter your **Username** and **Password**. On the left hand side of your MyTASC homepage, a '**Complete Your Enrollment**' message appears.
3. Click **Continue**
4. Open the **FlexSystem Participant Enrollment** component (This component may be defaulted 'open' already.)
5. Under the '**Choose Plan to Enroll**' message, select the Plan in which you are enrolling. If your employer has multiple Plans, you will see more than one Plan listed in this drop down box.
6. Elect the benefits which have been made available to you for this Plan by entering the dollar amounts you would like. (If you are declining benefit election, check the box indicating this and click on the ' Submit' button.)
7. Enter your e-mail address (to receive e-mails on the status of your reimbursements), direct deposit information, mailing address and click **"Submit"**.
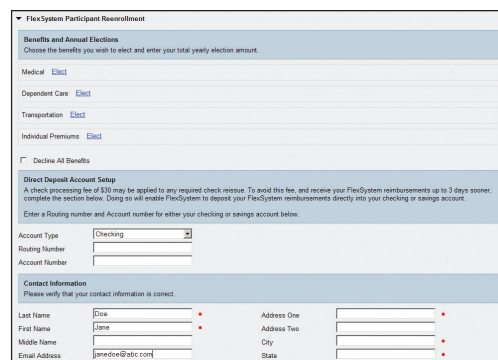
To return to your MyTASC homepage, click on the
Back To >> Participant Manager link

*Note: Maximum Annual Elections that appear were set by your employer at the time of plan set up. If you attempt to enter a value greater than the allowed Maximum Annual Election, you will receive a pop-up dialog box indicating one of your elections entered is too high.

Additional TASC Card Request
for Spouse or Dependent

If your employer offers the TASC Card, why not give your dependent the flexibility of their own TASC Card. The additional TASC Card offers your spouse or dependent the same convenience and advantages you enjoy! To request a TASC Card for your spouse or dependent, just complete sections 1, 2, and 3 below, sign and date the application and **fax to 608-245-3623** for processing.

How is the TASC Card issued?
The TASC Card and a standard Cardholder Agreement will be mailed directly to your mailing address within 7–15 business days.

Can I have more than one additional TASC Card?
Each participant receives one additional card for their spouse or dependent free of charge. A $10.00 fee will apply for each subsequent TASC Card generated. This fee will be deducted from your FlexSystem account upon the creation of the card(s). Each application may be used to request one additional card; subsequent requests will require additional applications.

Section 1: Participant Information

_____   _____
Employee Name (Last, First, MI)   Employee 12-digit TASC ID #

_____   _____
Employer Name   Employer 12-digit TASC ID #
                                                         (Optional)

Section 2: Spouse or Dependent Information

_____
Spouse or Dependent Name (Last, First, MI)

Participant Authorization for an Additional Card
I understand that the above named individual will have access to my flexible spending account(s). I accept all responsibility for all TASC Card transactions incurred by the above named individual and for submitting the supporting documentation, as requested, for those TASC Card transactions. I acknowledge and agree that upon any inappropriate or fraudulent use of the TASC Card, or termination of employment, I will immediately return all TASC Cards issued for use against the account to my Employer.

Section 3: Agreement

❍   I hereby request an **Additional TASC Card** for the above named spouse or dependent. I understand and agree to the above authorization terms.

_____   _____
Participant Signature   Date

FX-3991-071111