

**APPENDIX A – TECHNICAL SPECIFICATIONS
ITN 99066 – FSA/HSA/HRA MANAGEMENT SERVICES**

Scope of Work

JEA is seeking the services of a Flexible Spending Account (FSA), Health Savings Account (HSA) and Health Reimbursement Account (HRA) Administration. The administration Company’s primary service shall be to provide professional, customer focused, timely and accurate FSA/HSA/HRA services to employees. JEA intends for the contract term for this Solicitation to begin on October 1, 2020.

FSA (Health & Dependent Care)/HSA/HRA Administration Services

Services to be provided:

- Debit Cards (Cards for spouse/dependents at no additional charge)
- Daily Processing of claim submissions (as applicable)
- Direct deposit (as applicable)
- Statements provided with each reimbursement check, emailed monthly and mailed annually (as applicable)
- Email notifications when claims are submitted and paid (as applicable)
- Two business day claim processing turnaround (as applicable)
- Employee portal (Submit claims and upload receipts, pay the provider, view account balances/claims status/claim & payment history, update profile, add dependents, order additional debit cards, report lost/stolen debit card, update banking info, initiate repayments, Expense Tracker, sign up for mobile text alerts)
- Employer portal (On-demand reporting, real-time updates, upload files, view employee claim detail/contributions/current available balance)
- Real-time Employer Portal
- Enrollment materials (available in Spanish)
- Interactive Voice Response system available 24/7/365
- Toll-free customer service 8:00 a.m. – 6:00 p.m. EST Monday – Friday
- Mobile App (File a claim, upload receipts, check balances, view final filing dates, view claim detail, report lost or stolen debit card, reset password, contact Customer Service)
- Discrimination Testing (as applicable)
- Plan Document/Summary Plan Description (Non-ERISA) (To included updates as required.)
- Automated Employer reporting provided daily/weekly/monthly
- Secure file transmission for employee information
- Grace period extension of 2 ½ months
- Educational webinars
- Printed materials (FSA Guide/Handout, Debit Card Guide, Substantiating Debit Card Transactions Guide, Filing Claims Guide, Mobile Application Handout)
- Ability to accept online file feeds for eligibility/enrollment
- Archive records for eight (8) years

Current Enrollment/Participation

Program	Participation
FSA – Health Care Reimbursement Account	25
FSA – Dependent Care Reimbursement Account	26
HSA	736
HRA	143