TASC

MyTASC

Employer Quick Start Guide

for FlexSystem

The Top 10 Most Common Functions

Welcome to MyTASC, Release 1.0!

MyTASC 1.0 is your new portal to the tools you need to manage your FlexSystem Cafeteria Plan. The features in MyTASC 1.0 greatly improve usability, functionality, security, and performance.

New features of MyTASC 1.0:

- System-generated unique twelve-digit TASC ID for enhanced security. Users may customize their Login ID for ease of use.
- One homepage that all users will logon from eliminates multiple website addresses.
- Real-time system updates eliminates need to wait to see changes.
- Data sorting capabilities via use of tables increases user viewing flexibility.
- Storage of multiple contact names and e-mail addresses increases access to Customer Service and plan communication.
- Option to eliminate "rounding down" of total election amounts for Participants.
- Ability to pre-set payroll changes into the future and automatically re-calculate future payroll deduction amounts increases efficiency.
- Ability to pre-set employee terminations into the future increases efficiency and reduces risk.
- Ability to pay your PVR (Payroll Verification Report) automatically through use of ACH debit system increases efficiency and reduces risk of your Plan being put in hold status due to unpaid PVRs.
- Ability for Participants to sign-up online to receive FlexSystem reimbursements via Direct Deposit.

Other features:

- Enhanced image and navigational design.
- Increased system speed.
- Information is more readily available to your FlexSystem Provider.
- Ability to select alternate Request for Reimbursement substantiation options.
- Capturing of Participant e-mail addresses so we can provide them with better communication.

This MyTASC 1.0 Employer Quick Start Guide offers assistance to perform the Top 10 most common functions. Refer to this Guide while you get to know your new MyTASC system! If you have additional questions please contact one of our friendly Customer Service Representatives for assistance at 1-800-422-4661, or via e-mail at service@tasconline.com.

Table of Contents

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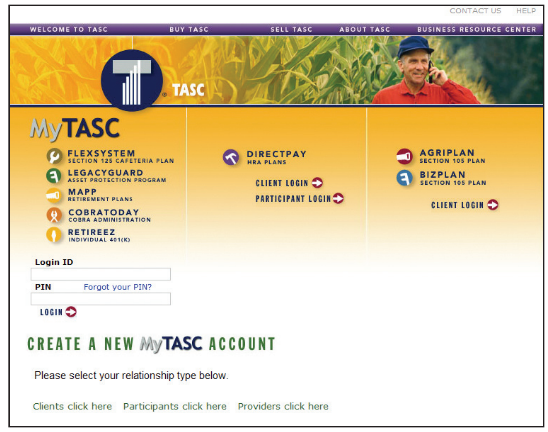
General User Information

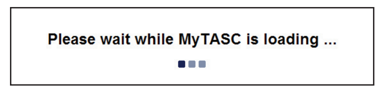
NOTE: Instructions are based on using Internet Explorer IE 6 or IE 7 Browser.

First Time Login: 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 to 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.

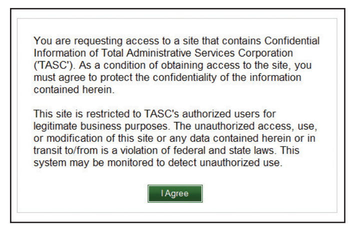


MyTASC requires a new unique twelve-digit TASC ID, this ID will be automatically generated the first time you login. Upon your first visit to MyTASC click on "Clients click here" under Create A New MyTASC Account. The system will walk you through the necessary steps to acquire your new TASC ID and PIN. (A valid e-mail address is required.)

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.



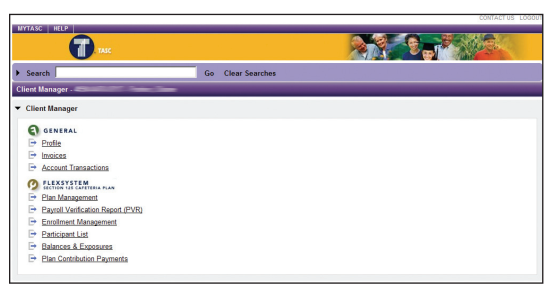
Navigation: When navigating through the MyTASC system you will notice there is no Back button on your internet browser. To navigate within MyTASC use the "**breadcrumbs**" that appear in the upper right-hand corner of the application screen.

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

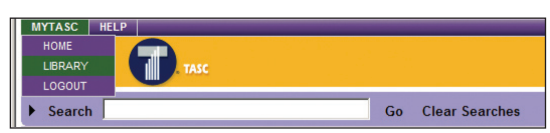
Sorting: Previously, when viewing your Participant or PVR data you were limited by what data you could sort. MyTASC is optimized to allow you the flexibility to sort by almost any data you wish. Sortable data is contained in tables which are sorted by the column heading. Simply click on any underlined column heading to sort the data.

Name			TASC Id
Eric Employee	Profile	Account	4800-0000-0011
Sarah Staff	Profile	Account	4600-0000-0012
Paul President	Profile	Account	4600-0000-0013

Client Manager: Your Client Manager "homepage" contains all the links needed to manage your FlexSystem plan. **There is more information on this page in the Client Manager (Viewing Plan Information) section below.**



Library: With MyTASC you have instant access to your most commonly used documents. All the material you need to administer your FlexSystem Plan are easily accessed in the Library, including the Client Administrative Manual. To access the Library click on MyTASC, then click on Library.



TOP 10 MOST COMMON FUNCTIONS

1a. Your Login ID

Previously, users logged into FlexSystem using different website addresses - the employer used www.exploretasc.com, and the employees used www.accesstasc.com. In addition, the user ID was their Social Security Number, which caused some identify theft concerns and was an out-of-date practice.

To login in to the new MyTASC system all users will go to: www.tasconline.com. Click on **Login** and follow the steps to receive a new secure twelve-digit login ID and six-digit PIN.

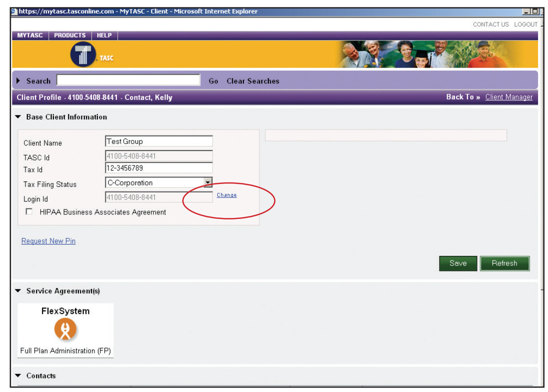
www.tasconline.com

Once you are logged in to MyTASC, you may create a personalized Login ID at any time by performing the following steps:

1. Click on the **Profile** link on your homepage.
2. In the **Base Client Information** component find the words "Login ID" and click on the **Change** link. A browser dialog box will open.
3. Enter a unique personal Login ID of your choice. A dialog box will open confirming the change. Click OK.*
4. To return to your MyTASC homepage click on the **Client Manager** link in the top right-hand corner.

* Your Login ID must be at least 10 characters and be unique to you. We recommend using your e-mail address as your Login ID.

Change Login ID



1b. Your PIN (Personal Identification Number)

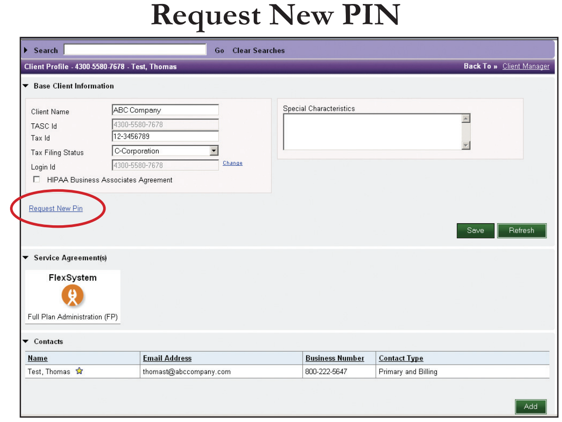
The first time you login in to MyTASC a new, unique system-generated six-digit PIN will be assigned and sent to you via e-mail. *You must remember this PIN in order to login to the system.*

Once you are logged in to MyTASC, you may request a new PIN at any time by performing the following steps:

1. Click on the **Profile** link on your homepage.
2. In the **Base Client Information** component click on the **Request New PIN** link. A dialog box will open confirming a new PIN has been e-mailed to you. Your new PIN is auto matically generated and e-mailed to the e-mail address stored in your Contact Information. The PIN can not be personalized. *
3. To return to your MyTASC homepage click on the **Client Manager** link in the top right-hand corner.

* MyTASC requires a valid e-mail address to generate a new PIN.

Request New PIN



If you have forgotten your PIN, click on the "Forgot your PIN" link. Enter your e-mail address, click Submit, and a new PIN will be e-mailed to you.

2. Client Manager (Viewing Plan Information)

Upon logging in to MyTASC using your new TASC ID and PIN you will have access to several links. Each of these links is a component to help you manage your FlexSystem Plan. There are general links to:

a. **Profile** - View basic Client Information, and Client Contacts

b. **Invoices** - View Administration Fee Invoices

And there are Plan specific links to:

c. **Plan Management** - View the Plan Details, Summary Plan Description, Status, and Plan Dates of your FlexSystem Plans

d. **Payroll Verification Report** (PVR) - Depending on the status of your Plan you will be able to view the following:

i. Payroll Schedule Dates

ii. Posted, Not Posted, and Current Payroll Contribution Dates

iii. Participant Contributions

iv. Client Contributions (if applicable)

v. Participant List by Name including ID Number and links to individual Profiles and Account Information*.

* By clicking on **Account** you have access to detailed Participant information such as:

- Account Summary
- Reimbursements
- Contributions
- Special Transactions
- Terminate
- Move

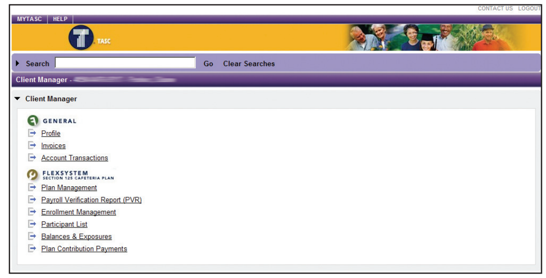
e. **Enrollment Management** - Manage new and renewal enrollment functions, as well as mid-year entries. (Enter FX-3597 in the Search bar to retrieve the Enrollment Quick Reference Guide.)

f. **Participant List** - View your complete Participant listing.

g. **Balances & Exposures** - View Plan totals to date.

h. **Plan Contribution Payments** - View past dates of payroll contribution payments including total posted, total paid, and any remaining difference.

New MyTASC Homepage



3. Adding and Updating Contact Information

Previously, to update or add contact name information you had to call or e-mail us with this information. In addition, only one e-mail address was stored on file for e-mail communication with you.

MyTASC enables you to enter multiple contacts, different contact types, and e-mail addresses for each contact.

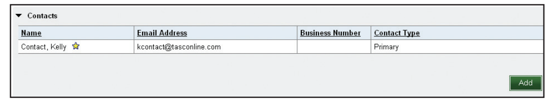
To add contact information in MyTASC:

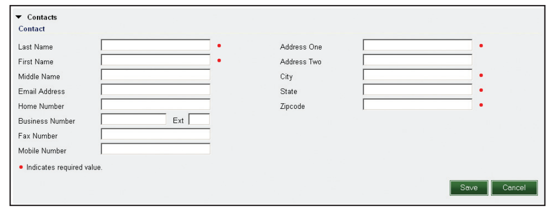
1. Click on the **Profile** link on your homepage.
2. In the Contacts component click on **Add**.
3. Choose Primary or General for the contact type. Click **Select**.
4. Enter the contact information, and click **Save**.

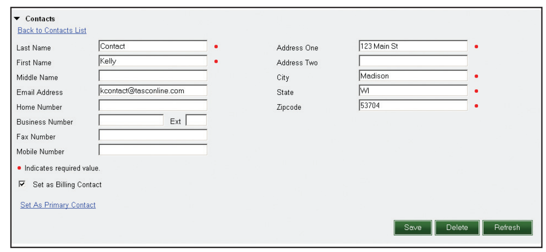
To edit contact information in MyTASC:

1. Click on the **Profile** link on your homepage.
2. In the Contacts component, click on the name of the contact person you wish to edit.
3. Make the necessary edits to the contact information. You may set this contact name using the choices provided. Click **Save**.
4. To delete a contact name simply click **Delete**.

Contacts







For more information use the Help function in MyTASC, reference the Client Administrative Manual in the Library, or contact a Customer Service Representative at 1-800-422-4661, or via e-mail at service@tasconline.com.

4. Enrolling Individual New Employees in the Plan

For mass enrollment enter FX-3597 in the Search bar to retrieve the separate Guide to Enrollment document.

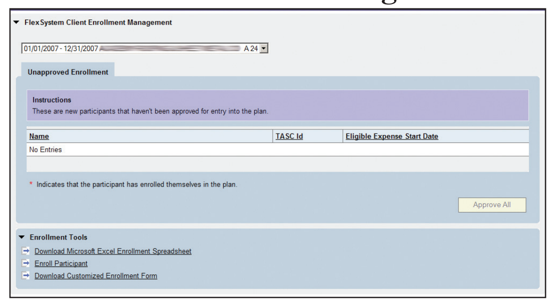
Previously, to enroll new employees in the Plan you would use the Payroll Verification Report management area.

To enroll new employees in the Plan in MyTASC follow these steps:

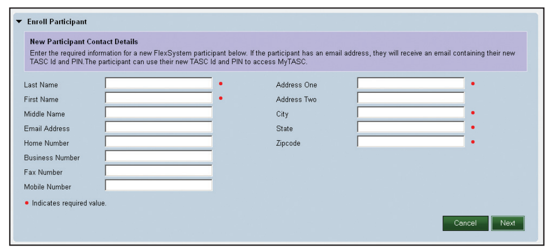
1. Click on the **Enrollment Management** link
2. In the FlexSystem **Client Enrollment Management** component select a Plan from the drop down menu.
3. Beneath the Enrollment boxes, scroll down to Enrollment Tools component, open it and click on the **Enroll Participant** link on the bottom of the screen.
4. Enter the employee's information including Last Name, First Name, Address, City, State, and Zip. Click **Next.**
5. Elect the benefits the employee has chosen and enter the annual election amount. Click **Next.**
6. Verify the elections and the information entered is correct Click **Submit.**
7. Click **Finish.**
8. Participant is put in the "Unapproved Enrollment" tab. Once all the Participants have been enrolled you may click on the **Approve** link to move them to the "Approved" state. Or, you may click on the **Approve All** button to submit all.

For mid-year enrollments enter the Eligibility Date of that employee during the enrollment process.

Client Enrollment Management



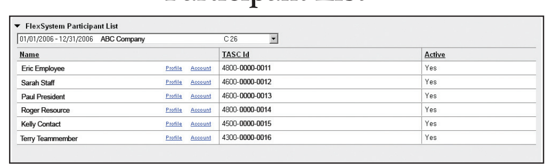
Enroll Participant



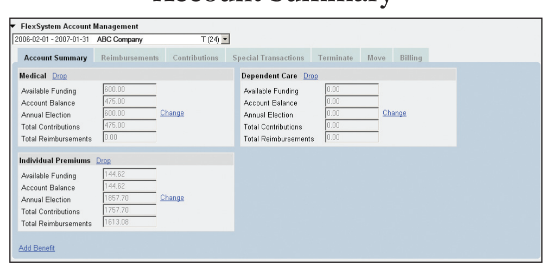
Once your Plan has been submitted, to confirm the Participant has been added to the Plan:

1. Click on the **Client Manager** link in the upper right-hand corner
2. Click on the **Participant List** link
3. From the drop down box select the Plan into which the employee has been enrolled.
4. In the Name column locate the added Participant
5. Click on the **Account** link next the Participant's name. You are now in the Participant's Account Summary view.
6. To return to your MyTASC Client Manager homepage, click on the **Client Manager** link in the top right-hand corner.

Participant List



Account Summary



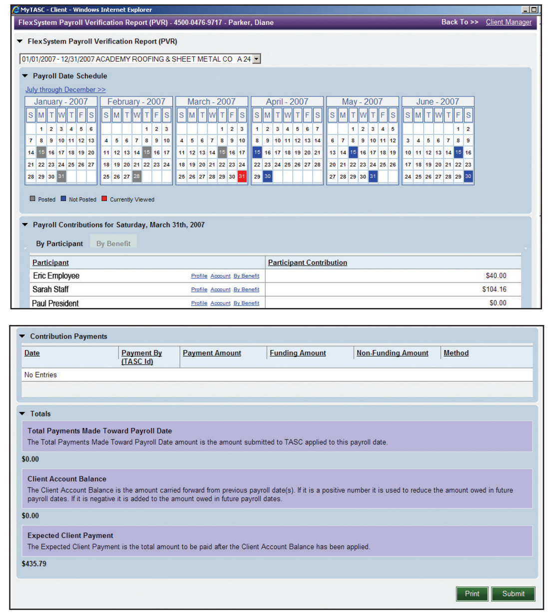
5. Changing Participant Payroll Contribution Amounts

The process for changing Participant Payroll Contribution Amounts in MyTASC is very similar to how it was accomplished previously.

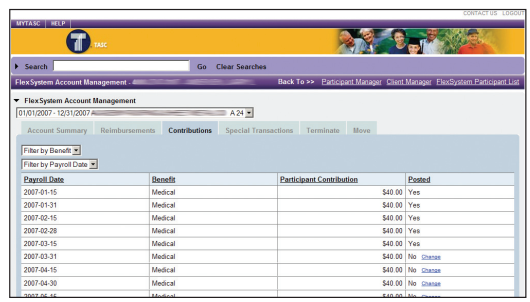
To change Participant Payroll Contribution amounts:

1. Click on the **Payroll Verification Report (PVR)** link
2. In the FlexSystem Payroll Verification Report component select a Plan from the drop down menu.
   Notice the calendar and highlighted dates appear in three colors.
   i. Gray indicates Posted Payroll Dates (past)
   ii. Red indicates any currently viewed Payroll Date(s) (present)
   iii. Blue indicates Payroll Dates Not Yet Posted (future)
3. Scroll down to view the contributions associated with the current payroll date. You may view contributions by Participant or by Benefits using the tabs.
4. To make changes to Participants' contributions prior to paying the PVR click on the **Account** link next to the applicable Participant name. This takes you directly into the Participant's Manager Account Summary.
5. Click on the Participant's **Contributions** tab.
6. In the Posted column, click on the **Change** link for the date and benefit you wish to modify. This will open all remaining un-posted contributions for this Participant.
7. Edit the payroll amount for the specific date (or dates). You may make payroll changes for future PVRs here as well. Notice the **"Auto Adjust"** check box in the lower left-hand corner of the screen. MyTASC will automatically re-calculate remaining, un-posted contributions for the Participant to match the original annual election amount. *To manually adjust the amounts you may uncheck this box.* Click the **Next** button.
8. You must select a **Qualifying Event** to account for the change. Select the appropriate Event from the drop down list. Click the **Save** button.
9. Return to your PVR payment screen by clicking on the **FlexSystem Payroll Verification Report (PVR)** link in the upper right-hand corner of the screen. You will need to select your Plan from the drop down menu again.

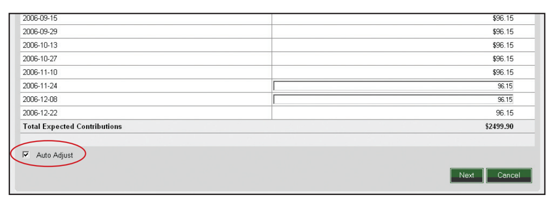
Payroll Verification Report (PVR)



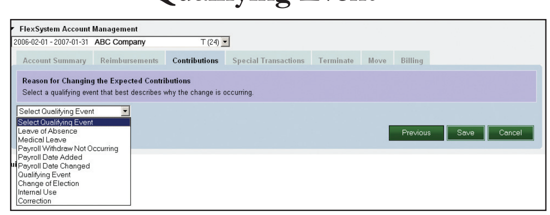
Contributions Tab



Auto Adjust Checkbox



Qualifying Event



6. Paying Your Payroll Verification Report (PVR)

Previously, to pay your Payroll Verification Report you would submit your payment using the Pay On-Line button where you were required to enter your business bank account and routing information each time.

MyTASC's online payment for your PVR offer a new, extra convenient option. You may provide your business bank account and routing information to FlexSystem and we will automatically pull the appropriate amount of funds on the appropriate payroll date.

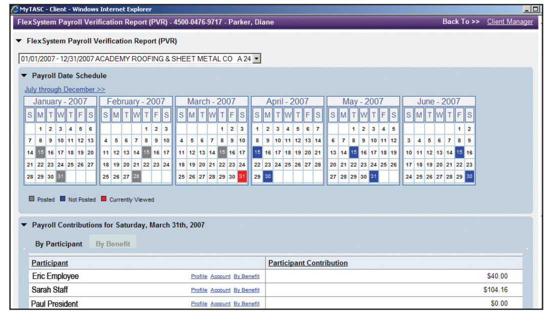
This automation ensures that your PVR payments are always current which eliminates the risk of your Plan going into "On Hold" status due to unpaid PVRs. *Contact a Customer Service Representative at 1-800-422-4661 or via e-mail at service@tasconline.com to set up this simple and valuable option!*

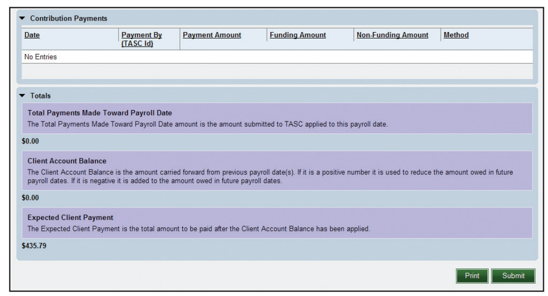
To pay your PVR online in MyTASC:

1. In the FlexSystem **Payroll Verification Report** component, you may need to select your Plan again.
2. Go to the **Totals** section and confirm the 'Total' value is accurate. Click the **Submit** button.
   To view prior total payments click on any dates in the calendar, or go to **Plan Contribution Payments.**
3. On the next screen you have the option to pay using Automatic Cash Handling (ACH) services or to Pay By Check.
   a. To pay using ACH, an Account Type, Bank Routing Number, and Account Number are required fields.
4. Click the **Confirm** button. In the calendar area you will notice the dates change colors to reflect the PVR that has been posted and the next available PVR.

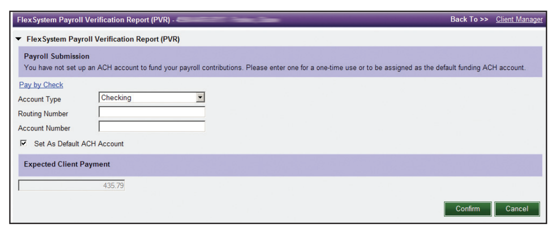
To pay by check you must Print the PVR and mail it in with your check.

Payroll Verification Report (PVR)





PVR Payment Submission



7. Changing a Participant's benefit election amount outside of open enrollment (mid-year)

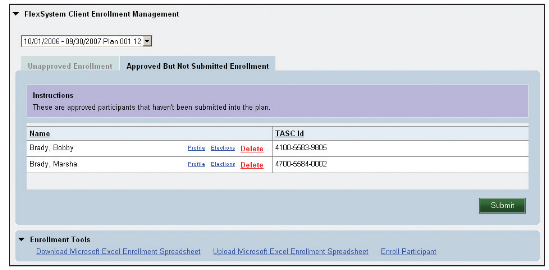
Previously, to change a Participant's benefit election amount outside of open enrollment (mid-year) you would use the PVR Management and change the applicable benefit within the grid on the PVR. Doing so changed the annual election for that particular benefit.

To change a Participant's benefit election amount outside open enrollment:

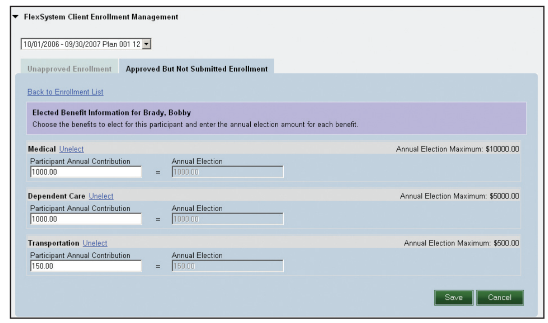
1. Click on the **Account** link (which is located in several areas of MyTASC including the Participant List, Payroll Verification Report, and Balances and Exposures.) This takes you directly into the Participant's Manager Account Summary tab.
2. In the 'Annual Election' row, next to the benefit you wish to change, click the **Change** link.
3. Enter the 'New Annual Election' amount.
4. Select the 'Reason for Change' from the drop down list of options. Click **Save.**

To view any previous changes to the Participants Account or Profile click on the **History** link.

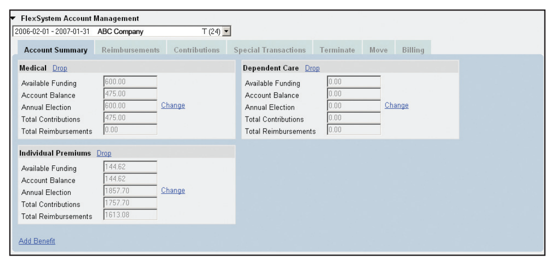
Enrollment Management - Approved Tab



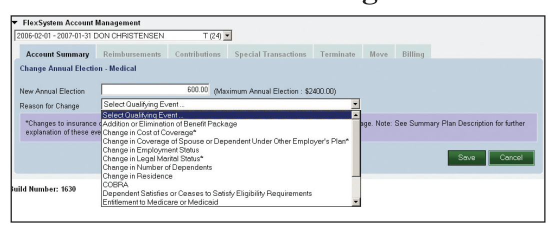
Elections



Account Summary



Reason for Change



8. Terminating a Participant from the Plan

(This function should not be used to MOVE a Participant from one group to another. To move a Participant go to the "Move Plan Participant" component.)

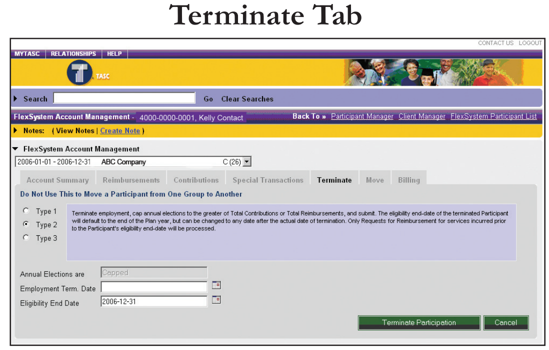
Previously, to terminate a Participant from the Plan, you would visit the Payroll Verification Report screen and complete the termination by entering the appropriate code, then submitting the PVR. The termination process is the same as before.

To terminate a Participant from the Plan:

1. Click on the **Account** link (which is located in several areas of MyTASC including the Participant List, Payroll Verification Report, and Balances and Exposures.) This takes you directly into the Participant's Manager Account Summary tab.
2. Click on the **Terminate** tab.
3. Select the Termination Type that applies to the Participant Plan termination.
4. Enter the Employment Termination Date
5. Verify last payroll date.
6. Enter the Eligiblity End Date (not available for Termination Type 3)
7. Click the **'Terminate Participation'** button. A dialog box will open asking you to confirm this termination. Click **OK**. Notice the employee's Termination data is grayed out and can no longer be edited.

NOTE: Annual elections are either capped or retained based on the Termination Type selected.

Terminate Tab



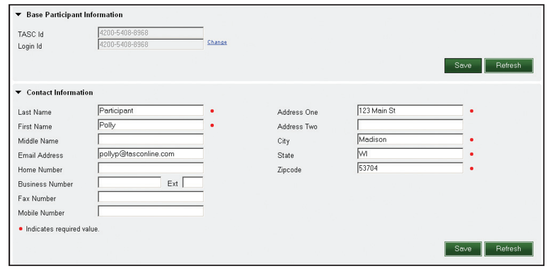
9. Editing an Employee's Demographic Information

Previously, to edit an employee's demographic information you were required to do so using the Manage Enrollment tab and selecting the Participant (during open enrollment), or select the Participant from the PVR Management tab (within the Plan Year).

To edit an employee's demographic information in MyTASC:

1. Click on the **Account** link (which is located in several areas of MyTASC including the Participant List, Payroll Verification Report, and Balances and Exposures.) This takes you directly into the Participant's Manager Account Summary tab.
2. Make edits to your employee's demographic information.
3. Click **Save**. You will receive a confirmation box indicating that contact information you changed or added has been saved. Click **OK**.

Profile

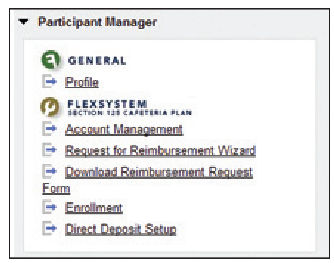


10a. Participant Manager

MyTASC provides you with more accessibility to your participating employee information with the Participant Manager screen. This is the same screen your participating employees see when they use MyTASC.

The **Participant Manager** screen contains links to:

a. **Profile** - View and edit Participant Information
b. **Account Management** - The same information you have access to in any of the Account links in the Client Manager.
c. **Request for Reimbursement Wizard**
d. **Download Reimbursement Request Form** - Print custom reimbursement forms.
e. **Enrollment** - Your participating employees would use this to self-enroll during their open enrollment period.
f. **Direct Deposit Setup** - your participating employees can enter their Direct Deposit information on-line anytime.

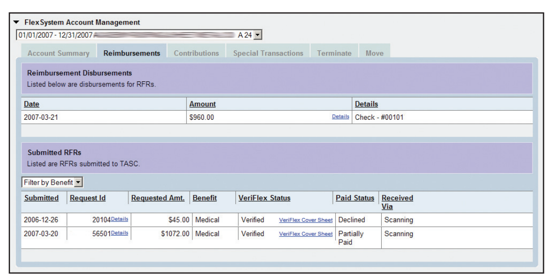


10b. Reviewing Participant Requests for Reimbursement

As part of your increased access to Participant information you may review Participant Requests for Reimbursement. To do so in MyTASC:

1. Click on the **Account** link (which is located in several areas of MyTASC including the Participant List, Payroll Verification Report, and Balances and Exposures.) This takes you directly into the Participant's Manager Account Summary tab.
2. Click on the **Reimbursements** tab.
3. Here you have access to review each Request for Reimbursement and the amount of each transaction. *Some information is unavailable to you due to HIPAA Privacy Rules.*

Reimbursements Tab



For more information use the Help function in MyTASC, reference the Client Administrative Manual in the Library, or contact a Customer Service Representative at 1-800-422-4661, or via e-mail at service@tasconline.com.

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