UNIVERSITY OF WISCONSIN SYSTEM

Navigating Flexible Spending Account (FSA) and Health Savings Account (HSA) Inquiries

The Flexible Spending Account (FSA), Health Savings Account (HSA) and Parking & Transit Account vendor changed effective January 1, 2020 to ConnectYourCare (CYC) from Total Administrative Services Corporation (TASC). Mid-2021, CYC became part of Optum Financial resulting in updated materials and resources to reflect the Optum Financial name/branding. Information on how to navigate FSA and HSA inquiries based on these changes is outlined below.

Employees should work directly with Optum Financial regarding:

- CYC or Optum Financial payment card inquiries (Health care FSA, HSA and Parking Account)
- Eligible expense inquiries (FSA, HSA and Parking & Transit)
- Claims filing on/after January 1, 2020 (FSA and Parking & Transit)
- Unsubstantiated claims (Health care FSA)
- Carryover inquiries (Health care FSA, HSA and Parking & Transit Accounts)
- Beneficiary Form inquiries (HSA)
- Customer Identification Process (CIP) (HSA)

Employees: Contact Optum Financial at: (833) 881-8158 or www.myoptumfinancial.com/ETF

Employees should work directly with TASC regarding:

- Account transfers to CYC/Optum Financial (HSA) – TASC HSA Distribution Request Form. Information for the **Transfer** section:
    - Name of Receiving Administrator/Trustee/Custodian – ConnectYourCare/Optum Financial FBO
    - Address of Receiving Administrator/Trustee/Custodian – PO Box 851287, 6300 Wayne Road, Westland, MI 48185

Employees: Contact TASC at: (844) 786-3947 or 1customercare@tasconline.com or www.partners.tasconlin.com/ETFemployee

Institutions should use HRS to answer employee questions regarding:

- Employee enrollments (FSA, HSA and Parking & Transit)
- Employee account status (FSA, HSA and Parking & Transit)
    - *Enrollment files are sent from UW System biweekly the night of the payroll confirm. The file is generally processed within 1-2 business days. This means that a participants account is active 1-2 business days following the date the file is sent. A payment card is sent (if applicable) from Optum to the mailing address on file in HRS 7-10 business days following the date the UW System sends the file to Optum.*
    - ***Note:** HSA activation could be delayed if an employee fails the customer identification process.*
- Employee demographic information (FSA, HSA and Parking & Transit)
    - *Demographic information updated in HRS (such as SSN, address and phone number) is sent to Optum Financial on a biweekly basis.*
- Employee annual pledge amounts (FSA, HSA and Parking & Transit)
- Employee per paycheck and year-to-date contribution amounts (FSA, HSA and Parking & Transit)
    - *If you are providing these amounts to an employee, remind them HRS only includes what they have contributed from their UW System paychecks (FSA, HSA and Parking & Transit). It does not include contributions they have made with a previous employer (FSA, HSA and Parking & Transit) or by sending after-tax contributions directly to Optum Financial (HSA). For an accurate reflection of their year-to-date contributions, employees should login to the Optum Financial portal or contact Optum Financial directly. It is an employee's responsibility to ensure they abide by the annual maximum contribution limits established by the IRS.*
    - *Personnel Transfer Record (PTR) Form (FSA, HSA and Parking & Transit)*

Institutions and employees should use the UW System web pages for:

- Spending & Savings Accounts
    - Overview
    - Eligibility
    - Maximum contribution amounts
    - Forms & resources
- Health Care FSA Unsubstantiated Claims
    - Basics
    - How to resolve claims
    - Communications
    - Payroll withholding process

Institutions should submit the following type of questions to:

UW System HR (uwshr@uwsa.edu)

- Policy related inquiries (clarification regarding policies, handbooks)

UW-Shared Services, Service Operations (serviceoperations@uwss.wisconsin.edu):

- Operational related inquiries (enrollments, deductions, processes, file feeds)
- Situations that need to be escalated if a participant cannot get their questions answered by the vendor or the resources listed above.