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 starting January 1, 2026 from Optum Financial to Total Administrative Services Corporation (TASC). Information on how to handle FSA and HSA inquiries based on this change is outlined below.

Employees should work directly with TASC regarding:

- TASC payment card inquiries
- Eligible expense inquiries
- Claims filing for eligible expenses incurred on/after January 1, 2026 (Health care FSA, HSA and Parking & Transit Accounts)
- Claims substantiation for eligible expenses incurred on/after January 1, 2026 (Health care FSA, and Parking & Transit Accounts)
- Carryover inquiries (Health care FSA, HSA and Parking & Transit Accounts)
- Beneficiary form inquiries (HSA)
- Identity Verification (IDV); formerly known as Customer Identification Process (CIP) (HSA)
    - ***Note:*** *HSA activation will be delayed until an employee verifies their identity. If an employee does not verify their identity timely, their HSA enrollment will be cancelled.*
- Email address updates

Employees: Contact TASC at: (888) 276-3147 or www.etf-tasc.com

Employees should work directly with Optum regarding:

- HSA transfers from Optum to TASC (HSA) – HSA Transfer Form. The form can be submitted to Optum by:
    - Uploading securely at https://forms.optumfinancial.com, or
    - Sending via U.S. Mail to Optum Financial at P.O. Box 85960, 6300 Wayne Road, Westland, MI 48185
- HSA inquiries for employees that did not move their Optum HSA to a different HSA administrator
- Claims filing/substantiation for eligible expenses incurred prior to January 1, 2026 (Health care FSA, and Parking & Transit Accounts)

Employees: Contact Optum at: (833) 881-8158 or service@optumfinancial.com

Benefits Counselors should use the UW HR system (Workday) to answer questions about:

- Employee demographic information (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 Workday only includes what they have contributed from their UWs 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 TASC (HSA). For an accurate reflection of year-to-date contributions, employees should login to the TASC portal or contact TASC directly. It's an employee's responsibility to ensure they abide by the annual maximum contribution limits established by the IRS.*

Benefits Counselors should use the benefits enrollment system (My Insurance Benefits) to answer questions about:

- Employee demographic information (FSA, HSA and Parking & Transit)
  - Employee enrollments (FSA, HSA and Parking & Transit)
    - *Enrollment files are generally sent from My Insurance Benefits to TASC every Thursday. An employee can anticipate receiving their welcome email and payment card roughly 2-3 weeks from the date they enroll through My Insurance Benefits.*
  - Employee annual pledge amounts (FSA, HSA and Parking & Transit)

Benefits Counselors and employees can use the Universities of Wisconsin Employee Benefits 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

Benefits Counselors should submit the following types of questions to:

- Universities of Wisconsin Office of Human Resources (uwshr@wisconsin.edu)
  - Policy related inquiries that do not involve a specific employee (clarification regarding policies, handbooks)

- UW-Shared Services, Service Operations (GetHelpUW@support.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