



Participant Checklist: Healthcare FSA

Welcome to TASC!

This checklist helps you get started with your new TASC benefits. Follow these simple steps to set up your account and the features that make plan management easy.

For more information about your account, please refer to your Participant Reference Guide.

Blackout Period

As we transition your FSA, you will experience a brief blackout period in which you will not be able to submit reimbursement requests. If you incur eligible expenses during this time, please save your receipts and submit them once your plan is active.

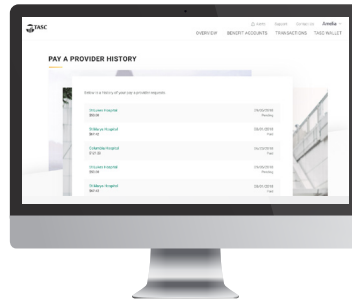
Blackout dates:



Receive Welcome Email

We will send an email with your 12-digit TASC ID and instructions on how to set up your TASC account. Please save the email for future reference. (Your TASC Card also contains your TASC ID.)

If you did not provide an email address during enrollment and/or do not receive this welcome email, call Customer Care at 800-422-4661.



Sign in to your account

Go to **www.tasconline.com** and click Sign in to Universal Benefit Account.

First-time users must sign up for an account. Click the green Sign Up link to establish access to your new account. Enter your email address used for enrollment and create a password.

Once signed in, you can manage your accounts online at your convenience.

- Receive email and text alerts
- View account balances
- Submit reimbursement requests
- Upload verification
- Lock/unlock TASC Card
- Manage MyCash reimbursements



Monitor Email and Text Alerts

Proactive service alerts keep you informed of what's happening with your account and your funds.

- Reimbursement request received
- Reimbursement request completed
- Reimbursement request denied
- Verification required
- Support request received
- Support request completed
- Profile updated
- Bank account updated
- TASC Card issued
- TASC Card locked/unlocked
- And many more!



Receive your TASC Card



Your TASC Card is issued to your home address in a plain white envelope with a TASC return address.

- One card works across all your benefit accounts
- Fastest way to access funds
- Eliminates need to submit reimbursement requests
- Card decline protection helps you avoid embarrassing card declines
- Temporarily lock misplaced card
- Report card lost or stolen
- Request additional cards



Use Your TASC Card

The TASC Card allows you to pay for eligible expenses when the service is provided or when an eligible product is purchased.

When you incur an eligible benefit expense, simply swipe your TASC Card. The card pays for and substantiates most eligible expenses at the point of purchase—eliminating the need to submit reimbursement requests.

All TASC Card transactions and services must occur within the plan year.

Your TASC Card is good for four years—so hang onto it even if your funds are depleted. Your card will be reloaded at the beginning of each plan year.



Download TASC Mobile App

Access your account information and submit reimbursement requests from anywhere at any time with the TASC mobile app.

- Secure two-factor authentication
- Sign-in memory for fast access
- View real-time account balances
- Submit reimbursement requests
- Submit substantiation using device camera
- Report lost or stolen card
- Lock a misplaced TASC Card
- Request a dependent card
- Pay a service provider

FREE download (search for TASC)



Incur Eligible Expenses

Examples of Medical Expenses:

Acupuncture
 Birthing classes/Lamaze
 Blood pressure monitor
 Braces and orthodontics
 Chiropractic services
 Contact lenses and solutions
 Crutches
 Dental cleanings, fillings, dentures
 Eye exams and eye glasses
 Flu shots
 Hearing aids
 Insulin
 Laser eye surgery
 Medical supplies
 Physician's fees and hospital services
 Prescription drugs and medications
 Vaccinations

Examples of Dependent Care Expenses:

Day camp (primary purpose must be custodial care and not educational in nature)
 Dependent care expenses that are necessary for you (and your spouse) to work, actively look for work, or attend school full-time
 Dependent care expenses for a child under age 13
 FICA/FUTA taxes of day care provider
 Nanny expenses attributed to dependent care
 Nursery school (pre-school)
 Registration fees
 (when allocated to dependent services that have been provided)



Submit a Request for Reimbursement

On those rare occasions when you do not use your TASC Card to pay for an eligible employee benefits expense, simply submit a request for reimbursement from the website or mobile app.

Requests are processed daily. Your approved reimbursement will be deposited directly into your MyCash account—usually within 12 hours.

MyCash is an account that holds your reimbursement funds. Your funds are available via your TASC Card or website until you spend or transfer them.



Manage MyCash Funds

To access your MyCash funds:

- Swipe your TASC Card at any merchant that accepts Mastercard
- Withdraw at an ATM (with a PIN) using your TASC Card
- Transfer to a personal bank account via website
- Donate to your favorite charity through your individual giving account

It's easy to manage your MyCash funds from the website or mobile app.

- View recent activity
- Save your bank account details so you can easily schedule transfers
- Set up one-time or recurring transfers to bank account



Need help? Contact Customer Care



Customer Care advisors are available 8-5, M-F, all time zones

- About 100 Customer Care advisors
- Automatic user-recognition when phone number is on file
- Advanced phone technologies

Interactive Voice Response system, available 24/7

- Obtain account balances
- Check request status

Support requests, 24/7

- Answers to FAQs
- Directs requests to subject matter experts
- Addressed within 24-48 hours

