

The School District of Lee County Department of Procurement Services 2855 Colonial Blvd., Fort Myers, FL 33966-1012		Aetna PayFlex Systems USA, Inc. Attn: Domenic J. Ficco / Beth Ann Johnson 10802 Farnam Drive, Suite 100 Omaha, NE 68154		Ameriflex Attn: Michele Harms / Diego Prieto 2508 Highlander Way, Suite 200 Carrollton, TX 75006		Application Software, Inc. d/b/a ASIFlex Attn: John M. Riddick / Anita Spencer 201 West Broadway, Building 4C Columbia, MO 65203		Chard Snyder & Associates, Inc. Attn: John Gutzwiller / Deborah Meek 6867 Cintas Boulevard Mason, OH 45040	
ITN No. N187331DG FLEXIBLE SPENDING AND/OR HEALTH SAVINGS ACCOUNT ADMINISTRATION Friday, May 25, 2018		Phone: (860) 273-9575		Phone: (844) 423-4636		Phone: (800) 659-3035		Phone: (800) 982-7715	
		Fax:		Fax:		Fax:		Fax:	
		Email: dficco@payflex.com johnsonb7@payflex.com		Email: mharms@myameriflex.com dprieto@myameriflex.com		Email: marketing@asiflex.com		Email: salesoperations@chard-Snyder.com Deborah.Meek@chart-snyder.com	
ITEM NO.	DESCRIPTION								
1	Required Submittal Checklist	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
2	Attachment A - Questionnaire Form (14 Tabs)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3	Attachment B1 - B4 - Reference Forms (12 total)	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
4	Attachment C - Insurance Requirements Form	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
5	Attachment D - Addenda Acknowledgement Form	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
6	Attachment E - Debarment Form	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
7	Attachment F - Drug Free Workplace Certification	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
8	Attachment G - Public Entity Crimes Form (notarized)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
9	Attachment H - Waiver of Trade Secret	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
10	Sample of contract	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
11	Sample of employee communications materials	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
12	Sample of standard product proposal	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
11	Sample of performance guarantees	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
12	Sample of file format	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
13	Sample reporting	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
14	Letter of transmittal, corporate overview and account manager (Section 6)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
15	One (1) manually signed proposal and six (6) copies	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
16	Electronic version of completed proposal including Attachment A on flash drive	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

The School District of Lee County Department of Procurement Services 2855 Colonial Blvd., Fort Myers, FL 33966-1012		ConnectYourCare, LLC Attn: Reese Feuerman / John Dean 307 International Circle, Suite 200 Hunt Valley, MD 21030		Discovery Benefits, Inc. Attn: Suzanne Rehr / Zach Hanson 4321 20th Avenue SW Fargo, ND 58103		H S A Bank (A Division of Webster Bank, NA) Attn: James Kelly / Scott MacDonald 605 North 8th Street, Suite 320 Sheboygan, WI 53081		National Benefit Services Attn: Paul Lovell / Bill Pratt 8523 S Redwood Road West Jordan, UT 84088	
ITN No. N187331DG FLEXIBLE SPENDING AND/OR HEALTH SAVINGS ACCOUNT ADMINISTRATION Friday, May 25, 2018		Phone: (410) 891-1791 Fax: Email: Reese.Feuerman@ConnectYourCare.com John.Dean@ConnectYourCare.com		Phone: (701) 239-6256 Fax: Email: Zhanson@discoverybenefits.com		Phone: (414) 467-6764 Fax: Email: jkelly@hsabank.com smacdonald@hsabank.com		Phone: (800) 274-0503 Fax: Email: paul@nbsbenefits.com billp@nbsbenefits.com	
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10	Sample of contract	Yes		Yes		Yes		Yes	
11	Sample of employee communications materials	Yes		Yes		Yes		Yes	
12	Sample of standard product proposal	Yes		Yes		Yes		Yes	
11	Sample of performance guarantees	Yes		Yes		No (Open for Discussion)		Yes	
12	Sample of file format	Yes		Yes		Yes		Yes	
13	Sample reporting	Yes		Yes		Yes		Yes	
14	Letter of transmittal, corporate overview and account manager (Section 6)	Yes		Yes		Yes		Yes	
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16	Electronic version of completed proposal including Attachment A on flash drive	Yes		Yes		Yes		Yes	

The School District of Lee County Department of Procurement Services 2855 Colonial Blvd., Fort Myers, FL 33966-1012		Optum Health Financial Services Attn: Mark Johns / Amy Bledsoe 11000 Optum Circle Eden Prairie, MN 55344	P & A Administrative Services, Inc. Attn: Michael Rizzo / Vincent Caruso 17 Court Street Buffalo, NY 14202	Total Administrative Services Corporation (TASC) Attn: Nisha Weyker / Derrick Daniel 2302 International Lane Madison, WI 53704	WageWorks, Inc. Attn: Ed Taffet / Tasha Coar 1100 Park Place, 4th Floor San Mateo, CA 94403
ITN No. N187331DG FLEXIBLE SPENDING AND/OR HEALTH SAVINGS ACCOUNT ADMINISTRATION Friday, May 25, 2018		Phone: (952) 205-6441 Fax: Email: mark.johns@optum.com amy.bledsoe@optum.com	Phone: (800) 688-2611 Fax: Email: rizzom@padmin.com carusov@padmin.com	Phone: (800) 422-4661 Fax: Email: Nisha.Weyker@tasconline.com Derrick.Daniel@tasconline.com	Phone: (212) 329-2001 Fax: Email: ed.taffet@wageworks.com tasha.coar@wageworks.com
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OVERALL BEST RESPONSE MEETING SPECIFICATIONS.



APPROVED BY: _____
 Doug Gupton, Procurement Agent
 Department of Procurement Services
 August 8, 2018

12 PROPOSERS WERE NOTIFIED OF ITN
 12 PROPOSERS SUBMITTED A PROPOSAL
 0 PROPOSERS DID NOT RESPOND

Flexible Spending and/or Health Savings Account Administration

ITN No. N187331DG

Flexible Spending Account

Evaluation Committee
Scoring of Proposals

RANK

Ameriflex	347.5	6
ASIFlex	316.5	11
Chard Snyder & Associates, Inc.	329.0	9
ConnectYourCare, LLC	404.0	1
Discovery Benefits, Inc.	357.5	4
HSA Bank	324.0	10
National Benefit Services (NBS)	388.5	2
OptumHealth Financial Services	329.0	9
P&A Administrative Services, Inc.	346.5	8
PayFlex Systems USA, Inc.	367.5	3
Total Administrative Services Corporation (TASC)	347.0	7
WageWorks, Inc.	348.5	5

12 PROPOSERS WERE NOTIFIED OF ITN
12 PROPOSERS SUBMITTED A PROPOSAL
0 PROPOSERS DID NOT RESPOND

APPROVED BY: *Doug Huxton* DATE: July 23, 2018

Flexible Spending and/or Health Savings Account Administration

ITN No. N187331DG

Evaluation Committee
Scoring of Interviews

RANK

ConnectYourCare, LLC	441.0	1
Discovery Benefits, Inc.	309.0	4
National Benefit Services (NBS)	401.0	2
PayFlex Systems USA, Inc.	368.0	3

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12 PROPOSERS SUBMITTED A PROPOSAL
0 PROPOSERS DID NOT RESPOND

APPROVED BY: *Doug Huxton* DATE: August 8, 2018