



SAN FRANCISCO HEALTH SERVICE SYSTEM

Affordable, Quality Benefits & Well-Being

ADDENDUM NO. 3

Flexible Spending Account, Dependent Care Spending Account, COBRA, and AB528 Administration for Plan Year 2027 Request For Proposal

(RFPQHSS2025.B1)

October 9, 2025

REQUEST FOR PROPOSALS FOR

Flexible Spending Account, COBRA, and AB528 Administration PY2027 (RFPQHSS2025.B1)

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This Addendum is being issued to modify the requirements in the above-referenced Request for Proposals (RFP) and to respond to questions and requests for clarification received by or before October 30, 2025 at 12:00 PM (PDT) (the “Deadline for RFP Questions”).

Please review the terms of the RFP and this Addendum carefully. If there are any inconsistencies between the RFP (issued September 16, 2025) and the terms of this Addendum No. 3, then the terms of this Addendum No. 3 shall prevail.

Section references below are to the RFP and are provided for convenience of reference only.

A. Modifications to the RFP

1. SFHSS has uploaded a new Questionnaire file titled *“FSA_COBRA RFP 2025-Vendor Questionnaire_NEW 10.9.25.xlsx”* to the respective SecureShare folder of each Respondent that has submitted an executed Mutual Confidentiality and Nondisclosure Agreement (MCA).

This new file replaces the file formerly titled *“FSA_COBRA RFP 2025-Vendor Questionnaire.xlsx”* and now renamed *FSA_COBRA RFP 2025-Vendor Questionnaire_OLD.xlsx”*. Respondents are to use this new file version of the Questionnaire for their *Submission of Proposals* (see RFP Sec. 3.4).

See Addendum 3.1 (Summary of Changes to RFP Questionnaire) of this Addendum No. 3 for a summary of the modifications. Please note that the substance of the Questionnaire has not been modified, and this new file updates the ordering and numbering of line items for the sheets labeled “FSA Questions” and “COBRA-AB528 Questions”.

B. Questions & Answers

1. **Our firm has started the City’s Local Business Enterprise (LBE) certification process through the City’s Contract Monitoring Division (CMD). I am curious if there are particular certification categories that CMD is looking for as it relates to this specific RFP and Scope of Services. Who might be best to provide this information?**

SFHSS Response:

Per the City’s CMD guidance to SFHSS, vendors may apply for LBE certification online at <https://www.sf.gov/get-certified-lbe>. CMD’s Certification Unit will assist vendors in determining the appropriate certification size and category based on the documentation provided by the vendor.

2. **Some Questionnaire items (e.g., regarding transition or implementation services) may not be directly applicable to certain Respondents. How should such Respondents address such questions??**

SFHSS Response:

All Respondents are advised to respond to every item in the Questionnaire. If a question does apply to your organization, SFHSS recommends that a Respondent include a brief explanation as to why it is inapplicable.

For questions related to transition, implementation, or similar services or functions, Respondents – including any incumbent or prior vendor partner of SFHSS for these or similar services – should respond as if they were a new vendor assuming responsibility for these services including implementation, testing and go-live, as a result of this RFP..

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Addendum 3.1

Summary of Changes to RFP Questionnaire

Sheet Title: FSA Questions

#	General Company Information	Response Options / Format
1	Please describe why you are a match for City's Section 125/FSA Administration and the primary reasons you should be selected over your competitors.	Comment - 500 words
2	Please provide information regarding your business plan including any major restructuring, changes in ownership, or physical moves anticipated within the next three years.	Comment - 500 words
3	What percentage of your business is related to Section 125 Administration and how many employees are dedicated to these services? How long have you been administering FSA Benefits?	Comment - 500 words
4	Please provide a summary of the number of clients and covered membership for whom you are providing FSA services.	Comment - 500 words
135	Customer Service for FSA Services	
246	Provide a complete list of customer service and account management services you provide for FSA administration	Comment - 500 words
257	Do you provide a dedicated toll free number for City employee questions?	Yes No
268	<u>What are the proposed days and hours of operation staffed by live customer service representatives for the customer service unit?</u> <u>Please note: Minimum is 7am-7pm PST.</u>	Comment - 500 words
269	<u>How do you handle calls from outside the country?</u> <u>Do you anticipate any changes in your customer service operations (consolidations, new centers, enhancements, etc.) during the next two years? If yes, please describe.</u>	<u>Yes</u> <u>No</u>
2710	<u>What are the proposed days and hours of operation staffed by live customer service representatives for the customer service unit?</u> <u>Please note: Minimum is 7am-7pm PST.</u>	<u>Comment - 500 words</u>
2711	<u>Does your customer service staff support other languages and the hearing impaired? If so, please indicate which languages.</u>	<u>Yes</u> <u>No</u>
2812	<u>Describe the training your CSRs receive at new hire and on an ongoing basis.</u> <u>What policies and procedures are in place to accommodate these needs?</u>	Comment - 500 words
3013	<u>Please describe your call recording capabilities (i.e. 100% of all calls recorded).</u> <u>What other quality assurance methods are in place?</u>	<u>Comment - 500 words</u> <u>Online</u> <u>portal</u> <u>Phone</u> <u>Text</u> <u>Other</u>
3013	<u>Does your customer service staff support other languages and the hearing impaired? If so, please indicate which languages.</u> <u>Please describe your call recording capabilities (i.e. 100% of all calls recorded).</u> <u>What other quality assurance methods are in place?</u>	<u>Yes</u> <u>No</u> <u>Comment - 500 words</u>

3114	What policies and procedures are in place to accommodate these needs? Describe how you measure participant satisfaction.	Comment - 500 words
3215	Describe the training your CSRs receive at new hire and ongoing. Please describe the methods in which participants can access up-to-the-minute status of their account.	Online portalPhoneTextOtherComment -500 words
3316	Describe how you measure participant satisfaction. Do you anticipate any changes in your customer service operations (consolidations, new centers, enhancements, etc.) during the next two years? If yes, please describe.	Comment - 500 wordsYes No
3417	Logistics	
3518	Confirm your compliance with HIPAA and other applicable privacy regulations. Do you have a backup (secondary) processing center?	Confirmed Not confirmedYes No
3519	Describe your backup procedures data encryption and briefly describe your disaster recovery plan security for servers and computers where employer and participant data is stored.	Comment - 500 words
3620	Confirm that you will accept City's eligibility and contribution data using the attached file format.	Confirmed Not confirmed
3721	Describe your standard process for receiving eligibility/contribution data and your preferred timeframes. What are your security/encryption capabilities for receiving and loading data files? Is your FSA administration automated? If so, please explain, including claims, customer service, etc.	Comment - 500 wordsYes No
3822	How long does it take to load the file after you receive it from City? Describe your standard process for receiving eligibility/contribution data and your preferred timeframes. What are your security/encryption capabilities for receiving and loading data files?	Comment - 500 words
3923	Do you have a backup (secondary) processing center? How long does it take to load the file after you receive it from City?	Yes NoComment - 500 words
4024	Describe your backup procedures and briefly describe your disaster recovery plan. Confirm that you have the ability to establish an account structure that will support administration and reporting by the separate City locations and sub locations. Are there any limits to the number of reporting locations you allow?	Comment - 500 wordsConfirmed Not confirmed
4125	Confirm that you have the ability to establish an account structure that will support administration and reporting by the separate City locations and sub locations. Are there any limits to the number of reporting locations you allow? How often do you need to be notified of terminations?	Confirmed Not confirmedComment - 500 words
4226	Is your FSA administration automated? If so, please explain, including claims, customer service, etc. How do you determine the account balance after a contribution change (please describe capabilities)?	YesNoComment - 500 words
4327	Describe your online employer information system. What information is provided and is it real-time? If not real-time, how often is data updated? Confirm your compliance with HIPAA and other applicable privacy regulations.	Comment - 500 wordsConfirmed Not confirmed
4428	Is there a single login if an employer has multiple plans with your organization? Describe your data encryption and security for servers and computers where employer and participant data is stored.	Yes NoComment - 500 words

4529	How often do you need to be notified of terminations? Describe your online employer information system. What information is provided and is it real-time? If not real-time, how often is data updated?	Comment - 500 words
4630	How do you determine the account balance after a contribution change (please describe capabilities)? Is there a single login if an employer has multiple plans with your organization?	Comment - 500 words Yes No
4731	Confirm your ability to support subsidized premium/cost sharing to accommodate any special employee termination agreements.	Confirmed Not confirmed
4832	FSA Financial Operations	
4933	Describe your FSA account funding options, including all pre-funding options. Please note City does not permit drawing from a bank account.	Comment - 500 words
5034	Are there additional charges in the event of insufficient funds to cover ACH or if invoices are not timely paid? If so, describe.	Yes No
5535	When do fees start to apply for a participant that enrolls during the plan year?	Comment - 500 words
5636	When do fees cease for a participant who terminates from the plan during the year?	Comment - 500 words
5737	Compliance	
5838	How do you track and implement changes under federal/state law (e.g., ACA, BBB, IRS updates)?	Comment - 500 words
5939	What is your process for advising employers of new or updated legislation or regulations that affect FSA plans? Describe how you've helped clients adapt benefit caps or contribution rules over time.	Comment - 500 words
6040	Have you implemented strategies with other large public employers to increase dependent care participation among non-HCE employees?	Yes No
6141	Describe how you've helped clients adapt benefit caps or contribution rules over time. Describe your methodology for IRS §129 non-discrimination testing for Healthcare FSA and Dependent Care FSA benefits.	Comment - 500 words
6242	Describe your methodology for IRS §129 non-discrimination testing for Healthcare FSA and Dependent Care FSA benefits. What is your process for advising employers of new or updated legislation or regulations that affect FSA plans?	Comment - 500 words
6343	Plan Design	
6444	Can you administer City's FSA plans without any design deviations?	Yes No
6545	Do you accept fiduciary liability for FSA administration? Please explain. Do you agree to have discretionary authority to decide claims and appeals and to accept all liability resulting from your claim decisions?	Yes No
6646	City allows coverage for non-tax dependents in its health and welfare plans. Confirm your process for handling these family members who may not be tax dependents in your FSA administration.	Confirmed Not confirmed
6747	Claims Administration	
6848	Please provide the location(s) of the claims unit that would be dedicated to City (please note differences between HCSA and DCSA).	Comment - 500 words
6949	Please explain your process that occurs internally when a COBRA participant elects to continue their FSA coverage, assuming you administer both services. Describe the training your claim processors receive at new hire and ongoing.	Comment - 500 words

7050	Please identify all methods for participants to submit claims (i.e. mail, e-mail, online, fax). Do you anticipate any changes in your claim operations (consolidations, new centers, enhancements, etc) in the next two years? If so, please describe:	Mail E-mail Secure online portal Fax Other Yes No
7151	Can employees submit additional documentation online? What is the current ratio of claims processors to participants?	Yes No Number
7252	Can employees track claim status online? What is the turnaround time (in days) on completed claim forms?	Yes No Number
7453	How many claims are completed within 24 hours from receipt? Please identify all methods for participants to submit claims (i.e. mail, e-mail, online, fax):	Number Mail E-mail Secure online portal Fax Other
7554	What is your average claim turnaround time in days? Describe the process for tracking the receipt and handling of claims:	Number Comment - 500 words
7655	What is your average claim the turnaround time (in days) on completed claim forms?	Number
7756	How many What is the current ratio of claims are completed within 24 hours from receipt processors to participants?	Number
7857	Describe the process for tracking the receipt and handling of claims. How are incomplete or denied claims communicated to participants?	Comment - 500 words
7958	Please explain your over-the-counter healthcare reimbursement process. How are incorrect claims handled after initial payment has been processed? How are payments exceeding the correct reimbursement amount recouped?	Comment - 500 words
8059	How are incomplete or denied claims communicated to participants? How do you safeguard against reimbursement of duplicate submissions?	Comment - 500 words
8160	How are incorrect claims handled after initial payment has been processed? How are payments exceeding the correct reimbursement amount recouped? How will you know who is an eligible dependent for reimbursement?	Comment - 500 words
8261	How will you know who is an eligible dependent for reimbursement? When a grace period is allowed, what is the order of crediting expenses to the prior year and the current year for expenses incurred during the grace period?	Comment - 500 words
8362	Describe the steps and timing of processing a claim form when you are not able to verify the participant's eligibility require additional verification of services, payment, etc.	Comment - 500 words
8463	Describe the steps and timing of processing a claim form when you require additional verification of services, payment, etc are not able to verify the participant's eligibility.	Comment - 500 words
8564	How do you safeguard against reimbursement of duplicate submissions? Can employees submit additional documentation online?	Comment - 500 words Yes No

8665	<u>Describe your process for manually substantiating claims that you are unable to auto-substantiate. How will City or the participant request a claim to be reviewed? How will you communicate the outcome to City and the participant?</u>	Comment - 500 words
8766	<u>When a grace period is allowed, what is the order of crediting expenses to the prior year and the current year for expenses incurred during the grace period? Please explain your over-the-counter healthcare reimbursement process.</u>	Comment - 500 words
8867	<u>Are there restrictions on frequency of claims submissions? If yes, please describe. How frequently are payments processed by your organization?</u>	Yes No Comment - 500 words
8968	<u>How will City or the participant request a claim to be reviewed? How will you communicate the outcome to City and the participant?</u> Are there restrictions on frequency of claims submissions? If yes, please describe.	Comment - 500 words Yes No
9069	<u>Do you anticipate any changes in your claim operations (consolidations, new centers, enhancements, etc) in the next two years? If so, please describe. What is the minimum amount of FSA reimbursement you will process? What is your process for handling claims less than the minimum?</u>	Yes No Number
9170	<u>How frequently are payments processed by your organization?</u> Can FSA reimbursements be direct deposited into participant's bank accounts?	Comment - 500 words Yes No
9271	<u>What is the minimum amount of FSA reimbursement you will process? What is your process for handling claims less than the minimum?</u> Please explain how your organization handles direct deposits for a participant who has no banking information provided on the FSA application or entered invalid banking information. What is the process to reimburse the participant?	Number Comment - 500 words
9372	<u>Can FSA reimbursements be direct deposited into participant's bank accounts?</u> Will separate reimbursement checks be used for healthcare versus dependent care reimbursement? If so, will these be processed in the same or different locations?	Yes No
9473	<u>Please explain how your organization handles direct deposits for a participant who has no banking information provided on the FSA application or entered invalid banking information. What is the process to reimburse the participant?</u> Describe your process for manually substantiating claims that you are unable to auto-substantiate.	Comment - 500 words
9574	<u>Will separate reimbursement checks be used for healthcare versus dependent care reimbursement? If so, will these be processed in the same or different locations?</u> Can employees track claim status online?	Yes No
9675	<u>Describe the training your claim processors receive at new hire and ongoing. Please explain your process that occurs internally when a COBRA participant elects to continue their FSA coverage, assuming you administer both services.</u>	Comment - 500 words
9776	FSA Communications	
9877	<u>Describe your initial log in process for participants.</u> Are individual account statements routinely provided or available upon request? ♦How frequently are they provided? ♦What is the turnaround time for requested statements?	Comment - 500 words Yes No
10078	<u>Can you set up and administer a single sign-on with City's benefits portal?</u> Describe your initial log in process for participants.	Yes No Comment - 500 words

10179	Please provide a demo log-in to your site for both employers and participants. Can you set up and administer a single sign-on with City's benefits portal?	Comment - 500 words Yes No
10280	What materials are customarily sent to new members? Please provide a demo log-in to your site for both employers and participants.	Comment - 500 words
10381	Are individual account statements routinely provided or available upon request? What is the turnaround time for requested statements? What materials are customarily sent to new members?	Yes No Comment - 500 words
10482	How frequently do you provide account statements? How is an employee notified of an ineligible claim?	Weekly Monthly Quarterly Annually Other Comment - 500 words
10583	Can employees receive communications via email? How and when are employees warned of potential FSA forfeitures? How are actual forfeitures identified and reported to City and participants?	Yes No Comment - 500 words
10684	What Can employee request paper communications and outreach does your organization do to encourage participants to use up their balance?	Yes No Comment - 500 words
10785	How do you educate participants regarding the use of their FSA accounts (i.e. eligible expenses, etc.)? Please provide samples of all standard participant communications (explanation of reimbursement, account statements, etc.).	Comment - 500 words As attachment
10886	Please provide samples of customer service scripts used What communications and outreach does your organization do to communicate with encourage participants to use up their balance?	Comment - 500 words As attachment
10987	How is an employee notified of an ineligible claim? Please identify which communications can be customized for City (i.e. paper and web) at no cost. If there are additional costs, please provide	Comment - 500 words
11088	How and when are employees warned of potential FSA forfeitures? How are actual forfeitures identified and reported to City and participants? How do you educate participants regarding the use of their FSA accounts (i.e. eligible expenses, etc.)?	Comment - 500 words
11189	Please provide samples of all standard participant communications (explanation of reimbursement, account statements, etc.). Describe your transition process and communications if you are selected as the administrator.	As attachment Comment - 500 words
11290	Please provide samples of customer service scripts used to communicate with participants. Reporting	-As attachment
11391	Please identify which communications can be customized for City (i.e. paper and web) at no cost. If there are additional costs, please provide What reports are included in your standard reporting package? Are there additional fees associated with these reports?	Comment - 500 words
11492	Describe your transition process and communications if you are selected as the administrator. What are your ad hoc reporting capabilities? Are there additional fees?	Comment - 500 words
11593	Reporting In what file formats can reports be downloaded as?	Comment - 500 words
11694	What reports are included in your standard reporting package? Are there additional fees associated with these reports? Do you have the ability to track and report employees in separate City locations?	Comment - 500 words Yes No
11795	Can you provide the following reporting for FSA on Weekly, Monthly, Quarterly, Annual basis: • Enrollment Reporting	Yes No As attachment

	• <u>Invoice Reporting</u> • <u>Detailed Account Activity Reporting</u> • <u>Contribution and Payments Reporting</u> • <u>Forfeiture Reporting</u> • <u>Funding Reporting</u> • <u>Performance Guarantees and Customer Satisfaction Surveys</u> • <u>Ad Hoc/Custom Reporting</u> • <u>Debit Card Utilization Reporting</u> Please include sample copies of all reports in your standard reporting package.	
11896	What are your ad hoc reporting capabilities? Are there additional fees? How frequently do you provide account statements?	Comment - 500 words Weekly Monthly Quarterly Annually Other
11997	In what file formats can reports be downloaded as? Can employees receive communications via email?	Comment - 500 words Yes No
12098	Do you have the ability to track and report employees in separate City locations? Can employee request paper communications?	Yes No
12199	Please include sample copies of all reports in your standard reporting package. Can you provide the following reporting for FSA on Weekly, Monthly, Quarterly, Annual basis: • Enrollment Reporting • Invoice Reporting • Detailed Account Activity Reporting • Contribution and Payments Reporting • Forfeiture Reporting • Funding Reporting • Performance Guarantees and Customer Satisfaction Surveys • Ad Hoc/Custom Reporting • Debit Card Utilization Reporting	As attachment Yes No

Sheet Title: COBRA-AB528 Questions

#	General Company Information	Response Options / Format
51	Please describe why you are a match for City's COBRA Administration and the primary reasons you should be selected over your competitors.	Comment - 500 words
82	What percentage of your business is related to COBRA Administration and how many employees are dedicated to these services? How long have you been administering COBRA?	Comment - 500 words
93	Please provide a summary of the number of clients and covered membership for whom you are providing COBRA services.	Comment - 500 words
104	Please describe your experience in administering AB528 administration for public entities in California.	Comment - 500 words
145	Account Management	
246	Provide a complete list of customer service and account management services you provide for COBRA and AB528 administration.	Comment - 500 words
267	What are the proposed days and hours of operation staffed by live customer service representatives for the customer service unit? Please note: Minimum is 7am-7pm PST	Comment - 500 words
278	How can participants access up-to-the-minute status of their account? Does your customer service staff support other languages and the hearing impaired? If so, which languages?	Online portal Phone Text Other Yes No
279	Does your customer service staff support other languages and the hearing impaired? If so, which languages? What policies and procedures are in place to accommodate these needs?	Yes No Comment - 500 words
281 0	What policies and procedures are in place to accommodate these needs? How can participants access up-to-the-minute status of their account? Web? 800#?	Comment - 500 words Online portal Phone Text Other
291 2	Please provide the prior two years' results for the customer service office that will be administering City'S account: • Average speed of answer • Call abandonment rates • Total number of calls received • Customer Satisfaction • Turnover of customer service representatives	Comment - 500 words
301 1	Please describe your call recording capabilities (i.e. 100% of all calls recorded). What other quality assurance methods are in place?	Comment - 500 words

311 3	Describe how you measure participant satisfaction.	Comment - 500 words
321 4	Describe the training your CSRs receive at new hire and ongoing.	Comment - 500 words
331 5	Do you anticipate any changes in your customer service operations (consolidations, new centers, enhancements, etc.) during the next two years?	Comment - 500 words
341 6	Logistics	
351 7	<u>Confirm your compliance with HIPAA and other applicable privacy regulations.</u> Do you have a backup (secondary) processing center?	<u>Confirmed</u> <u>Not confirmed</u> <u>Yes</u> <u>No</u>
351 8	Describe your backup procedures <u>data encryption</u> and briefly describe your disaster recovery plan <u>security for servers and computers where employer and participant data is stored.</u>	Comment - 500 words
361 9	Confirm that you will accept City's eligibility data using the attached file format.	Confirmed Not confirmed
372 0	<u>Describe your standard process for receiving eligibility data from City and your preferred timeframes. What are your security/encryption capabilities for receiving and loading data files?</u> Is your COBRA administration automated? Explain, including claims, customer service, etc.	<u>Comment - 500 words</u> <u>Yes</u> <u>No</u>
382 1	<u>How long does it take to load the file after you receive it from City?</u> Please describe your process for submitting electronic eligibility to vendors. City has 3 medical vendors (Blue Shield of CA, Health Net, and Kaiser), 2 dental vendors (Delta Dental/DeltaCare and UnitedHealthcare), 1 vision vendor, and FSA administration.	Comment - 500 words
392 2	Describe <u>Please describe your standard process for receiving</u> submitting electronic eligibility data from to vendors. City has 3 medical vendors (Blue Shield of CA, Health Net, and your preferred timeframes. What are your security/encryption capabilities for receiving Kaiser), 2 dental vendors (Delta Dental/DeltaCare and loading data files? UnitedHealthcare), 1 vision vendor, and FSA administration.	Comment - 500 words
402 3	<u>Do you have a backup (secondary) processing center?</u> How long does it take to load the file after you receive it from City?	<u>Yes</u> <u>No</u> Comment - 500 words
412 4	<u>Describe your backup procedures and briefly describe your disaster recovery plan.</u> Confirm that you have the ability to establish an account structure that will support administration and reporting by the separate City locations and sub locations. Are there any limits to the number of reporting locations you allow?	<u>Comment - 500 words</u> <u>Confirmed</u> <u>Not confirmed</u>
422 5	<u>Confirm that you have the ability to establish an account structure that will support administration and reporting by the separate City locations and sub locations. Are there any limits to the number of reporting locations you allow?</u> Confirm your compliance with HIPAA and other applicable privacy regulations.	Confirmed Not confirmed
432 6	<u>Is your COBRA administration automated? Explain, including claims, customer service, etc.</u> Describe your data encryption and security for servers and computers where employer and participant data is stored.	<u>Yes</u> No Comment - 500 words
442 7	Describe your online employer information system. What information is provided and is it real-time? If not real-time, how often is data updated?	Comment - 500 words

452 8	Is there a single login if an employer has multiple plans with your organization?	Yes No
462 9	Confirm your ability to support subsidized premium/cost sharing to accommodate any special employee termination agreements.	Confirmed Not confirmed
473 0	COBRA Financial	
483 1	<u>Can you remit COBRA premiums to vendors on behalf of participants? If so, please thoroughly describe the process.</u> How are premiums collected and deposited?	<u>Yes</u> No Comment - 500 words
493 2	<u>How are premiums collected and deposited?</u> Please describe your process for billing the participant.	Comment - 500 words
503 3	<u>Please describe your process for billing the participant.</u> If you normally charge an implementation fee, will you consider waiving this fee?	<u>Comment - 500 words</u> <u>Yes</u> No
513 4	<u>What, if any, are the additional charges to participants in the event of insufficient funds to cover ACH or if invoices are not timely paid? If so, describe.</u> Describe your COBRA participant payment options. Include any fees charged for payment methods (such as fee to use credit card).	Comment - 500 words
523 5	<u>Describe your COBRA participant payment options. Include any fees charged for payment methods (such as fee to use credit card).</u> What, if any, are the additional charges to participants in the event of insufficient funds to cover ACH or if invoices are not timely paid? If so, describe.	Comment - 500 words
533 6	<u>Please</u> Can you remit COBRA premiums to vendors on behalf of participants? If so, please thoroughly describe the <u>your reconciliation process when the invoice to City does not match the backup provided.</u>	<u>Comment - 500 words</u> <u>Yes</u> No
543 7	<u>If you normally charge an implementation fee, will you consider waiving this fee?</u> Please describe your reconciliation process when the invoice to City does not match the backup provided.	<u>Yes</u> No Comment - 500 words
553 8	Compliance	
563 9	Describe your process for monitoring internal compliance with COBRA notification requirements, including timelines, language, etc.	Comment - 500 words
574 0	<u>With respect to changes in the law, how do you notify employers? How do you notify participants?</u> Describe your process when a COBRA error occurs, including employer notification, penalties, error correction, QA testing, etc.	Comment - 500 words
584 1	What is your process for advising employers of new or updated legislation or regulations that affect COBRA administration?	Comment - 500 words
594 2	COBRA Administration <u>With respect to changes in the law, how do you notify employers? How do you notify participants?</u>	Comment - 500 words
604 3	<u>Describe how your COBRA solution adapts to complex organizational structures.</u> COBRA Administration	<u>Comment - 500 words</u>

614 4	Please thoroughly explain the process when a qualifying event occurs. Describe how your COBRA solution adapts to complex organizational structures.	Comment - 500 words
624 5	Please thoroughly explain the process when a How are secondary qualifying event occurs.events administered?	Comment - 500 words
634 6	Please thoroughly explain the process when COBRA is elected. How are COBRA notification materials sent to qualified beneficiaries? How do you document notification? What documentation do you provide to City?	Comment - 500 words
644 7	Please thoroughly explain theyour process that occurs internally when a COBRA is elected participant elects to continue their FSA coverage, assuming you administer both services.	Comment - 500 words
654 8	How is Medicare eligibility monitored? How are secondary qualifying events administered?	Comment - 500 words
664 9	Can employees submit additional documentation online? How is Medicare eligibility monitored?	Yes No Comment - 500 words
675 0	What documentation do you provide to employers regarding confirmation of mailing of COBRA notices? How are incorrect payments handled? How are payments exceeding the correct premium handled?	Comment - 500 words
685 1	How are COBRA notification materials sent to qualified beneficiaries? How do you document notification? What documentation do you provide to City? Can employees submit additional documentation online?	Comment - 500 words Yes No
695 2	How are incorrect payments handled? How are payments exceeding the correct premium handled? Provide a description of your document management protocol for COBRA administration and how long you maintain records.	Comment - 500 words
705 3	Provide a description of your document management protocol for COBRA administration and how long you maintain records. What documentation do you provide to employers regarding confirmation of mailing of COBRA notices?	Comment - 500 words
715 4	Please explain Describe your process that occurs internally when a COBRA participant elects to continue their FSA coverage, assuming you administer both services error occurs, including employer notification, penalties, error correction, QA testing, etc.	Comment - 500 words
725 5	COBRA & AB528 Communications	
73	Do you provide online access for participants and plan sponsors to access the status of accounts? If so, please explain what information a participant and a plan sponsor can view.	Yes No
74	Describe your initial log-in process for participants.	Comment - 500 words
75	Can you set up and administer a single sign-on with City's benefits portal?	Yes No
76	Please provide a demo log-in to your site for both employers and participants.	Comment - 500 words
77	What materials are customarily sent to new COBRA participants?	Comment - 500 words
78	Please provide samples of all participant correspondence including initial notification letters, election forms, open enrollment letters, termination letters and monthly invoices.	As attachment
79	Please provide samples of customer service scripts used to communicate with participants.	As attachment

80	Please identify which communications can be customized for City (i.e. paper and web) at no cost. If there are additional costs, please provide.	Comment - 500 words
81	Describe your transition process and communications if you are selected as the administrator.	Comment - 500 words
82	Reporting	
83	What reports are included in your standard reporting package? Are there additional fees associated with these reports?	Comment - 500 words
84	What are your ad hoc reporting capabilities? Are there additional fees?	Comment - 500 words
85	In what file formats can reports be downloaded?	Comment - 500 words
87	Please include sample copies of all reports in your standard reporting package.	Comment - 500 words
90	Can you provide the following reporting for COBRA on Weekly, Monthly, Quarterly, Annual basis: • Enrollment Reporting • Participant Reporting • Detailed Account Activity Reporting • Performance Guarantees and Customer Satisfaction Surveys • Ad Hoc/Custom Reporting	Yes No
91	If so, please provide up to three (3) sample reports that cover multi-department breakouts, custom or ad hoc requests, and year-over-year benchmarking. Please limit to no more than ten (10) pages per report.	Attachment(s)

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