

RFP#19053 - Health Savings Account Admin

HSA - Group Scorecard

Group Evaluators:

Todd Gaston
Ashley Jacobs
Lisa Norris

Group Evaluators: Todd Gaston Ashley Jacobs Lisa Norris			Value of Total	Rating	24 Hour Flex	Connect Your Care, LLC	Discovery Benefits (Recommended)	EECU	Employee Benefits Corporation	PayFlex Systems, Inc.	Total Admin Services Corp	Wage Works
Fees, Renewals & Guarantees (see below)	50%	5=best; 1=worst; 0=No Quote	2.0	2.6	3.9	4.5	3.0	2.9	3.0	2.4		
Account Mgmt and Service	10%		4.5	3.4	4.3	4.0	1.6	3.5	4.3	2.4		
Debit Card/Claim Capabilities	30%		3.4	3.4	4.2	3.4	3.4	4.2	5.0	3.4		
References	5%		1.0	2.0	4.0	1.0	1.5	3.5	3.0	5.0		
Local Preference	5%		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
			5 = Maximum Score		2.51	2.76	3.86	3.74	2.77	3.23	3.56	2.69

"Fees, Renewals & Guarantees" Score Subset										
PEPM (City Paid Fees) over 5 Yrs	60%	5=Best; 1=Worst	1.5	2.0	4.0	5.0	3.0	3.0	2.0	1.0
Employee Paid Fees (Misc)	40%	5=Best; 1=Worst	2.7	3.5	3.9	3.9	3.1	2.7	4.4	4.4
Total Fees Score (Average)			2.0	2.6	3.9	4.5	3.0	2.9	3.0	2.4

HSA - Initial Group Scoring Details

Evaluators: Ashley Jacobs Todd Gaston Lisa Norris		Account Mgmt and Service	Debit Card/Claim Capabilities	References	Local Preference		PEPM (City Paid Fees) over 5 Yrs		Employee Paid Fees (Misc)
24 Hour Flex	4.5	Customer Service Hours - 3 Investment Options / Threshold - 5 Claims Integration / Roll Over - 5 Open Enrollment Support - 5	3.4 Offer Initial Debit Card - 5 Offer Cash Withdrawals at ATM - 1 Limits places where Debit Card can be used - 5 Offer Online Check writing - 5 Offer Auto Pay to providers - 1	1.0 # of Current Employer Clients - 100+	0.0	0.0	1.5	\$40,425	2.7 Acct Closure Fee - (\$15) 4 Stop Check Fee - (\$25) 2 Distribution/Refund Fee - (\$25) 1 Overdraft Fee - (\$25) 3 Paper Statement Fee - (\$2) 1 Investment Fee - 3 Min Mthly Billing Fee - (\$0) 5
Connect Your Care, LLC	3.4	Customer Service Hours - 1 Investment Options / Threshold - 2.5 Claims Integration / Roll Over - 5 Open Enrollment Support - 5	3.4 Offer Initial Debit Card - 5 Offer Cash Withdrawals at ATM - 1 Limits places where Debit Card can be used - 5 Offer Online Check writing - 1 Offer Auto Pay to providers - 5	2.0 # of Current Employer Clients - 414	0.0	0.0	2.0	\$32,175	3.5 Acct Closure Fee - (\$20) 3 Stop Check Fee - (\$3) 4 Distribution/Refund Fee - (\$15) 3 Overdraft Fee - (\$20) 4 Paper Statement Fee - (\$1) 4 Investment Fee - 2 Min Mthly Billing Fee - (\$0) 5
Discovery Benefits	4.3	Customer Service Hours - 4 Investment Options / Threshold - 3 Claims Integration / Roll Over - 5 Open Enrollment Support - 5	4.2 Offer Initial Debit Card - 5 Offer Cash Withdrawals at ATM - 1 Limits places where Debit Card can be used - 5 Offer Online Check writing - 5 Offer Auto Pay to providers - 5	4.0 # of Current Employer Clients - 2,600	0.0	0.0	4.0	\$24,750	3.9 Acct Closure Fee - (\$25) 2 Stop Check Fee - (\$0) 5 Distribution/Refund Fee - (\$0) 5 Overdraft Fee - (\$0) 5 Paper Statement Fee - (\$1.50) 3 Investment Fee - 2 Min Mthly Billing Fee - (\$0) 5
EECU	4.0	Customer Service Hours - 5 Investment Options / Threshold - 1 Claims Integration / Roll Over - 5 Open Enrollment Support - 5	3.4 Offer Initial Debit Card - 5 Offer Cash Withdrawals at ATM - 5 Limits places where Debit Card can be used - 1 Offer Online Check writing - 1 Offer Auto Pay to providers - 5	1.0 # of Current Employer Clients - 151	0.0	0.0	5.0	\$0	3.9 Acct Closure Fee - (\$0) 5 Stop Check Fee - (\$34) 1 Distribution/Refund Fee - (\$0) 5 Overdraft Fee - (\$34) 1 Paper Statement Fee - (\$0) 5 Investment Fee - (\$0) 5 Min Mthly Billing Fee - (\$0) 5
Employee Benefits Corporation	1.6	Customer Service Hours - 2 Investment Options / Threshold - 2.5 Claims Integration / Roll Over - 1 Open Enrollment Support - 1	3.4 Offer Initial Debit Card - 5 Offer Cash Withdrawals at ATM - 1 Limits places where Debit Card can be used - 5 Offer Online Check writing - 1 Offer Auto Pay to providers - 5	1.5 # of Current Employer Clients - 238	0.0	0.0	3.0	\$28,875	3.1 Acct Closure Fee - (\$25) 2 Stop Check Fee - (\$25) 2 Distribution/Refund Fee - (\$0) 5 Overdraft Fee - (\$25) 2 Paper Statement Fee - (\$1.25 QTRLY) 4.5 Investment Fee - 1 Min Mthly Billing Fee - (\$0) 5
PayFlex Systems, Inc.	3.5	Customer Service Hours - 1 Investment Options / Threshold - 3 Claims Integration / Roll Over - 5 Open Enrollment Support - 5	4.2 Offer Initial Debit Card - 5 Offer Cash Withdrawals at ATM - 1 Limits places where Debit Card can be used - 5 Offer Online Check writing - 5 Offer Auto Pay to providers - 5	3.5 # of Current Employer Clients - 1,973	0.0	0.0	3.0	\$28,875	2.7 Acct Closure Fee - (\$25) 2 Stop Check Fee - (\$25) 2 Distribution/Refund Fee - (\$0) 5 Overdraft Fee - (\$25) 2 Paper Statement Fee - (\$1.50) 3 Investment Fee - 0 Min Mthly Billing Fee - (\$0) 5
Total Admin. Services Corp.	4.3	Customer Service Hours - 2 Investment Options / Threshold - 5 Claims Integration / Roll Over - 5 Open Enrollment Support - 5	5.0 Offer Initial Debit Card - 5 Offer Cash Withdrawals at ATM - 5 Limits places where Debit Card can be used - 5 Offer Online Check writing - 5 Offer Auto Pay to providers - 5	3.0 # of Current Employer Clients - 1,089	0.0	0.0	2.0	\$33,000	4.4 Acct Closure Fee - (\$0) 5 Stop Check Fee - (\$0) 5 Distribution/Refund Fee - (\$0) 5 Overdraft Fee - (\$0) 5 Paper Statement Fee - (\$0) 5 Investment Fee - (\$0) 5 Min Mthly Billing Fee - (\$100) 1
Wage Works	2.4	Customer Service Hours - 4.5 Investment Options / Threshold - 3 Claims Integration / Roll Over - 1 Open Enrollment Support - 1	3.4 Offer Initial Debit Card - 5 Offer Cash Withdrawals at ATM - 1 Limits places where Debit Card can be used - 5 Offer Online Check writing - 1 Offer Auto Pay to providers - 5	5.0 # of Current Employer Clients - 75,000	0.0	0.0	1.0	\$45,375	4.4 Acct Closure Fee - (\$0) 5 Stop Check Fee - (\$0) 5 Distribution/Refund Fee - (\$0) 5 Overdraft Fee - (\$0) 5 Paper Statement Fee - (\$0) 5 Investment Fee - (\$0) 5 Min Mthly Billing Fee - (\$100) 1