

# FSA New Participant Checklist



## Welcome to your new Flexible Spending Account (FSA)!

This checklist helps you get started with your FlexSystem Flexible Spending Account (FSA) by TASC. Follow these simple steps to set up the tools that make plan management easy.

For more information on the new tools available, please refer to your Participant Reference Guide.



## Review FSA Materials

**New participant online resources:**  
<https://partners.tasconline.com/stanford>

As a new participant, you have many great resources available online. Before you sign in, review the Frequently Asked Questions, Mobile Experience flyer, and other valuable materials that will help you to better understand and manage your FSA.



## Sign in to your account

**Online account management:**  
<https://partners.tasconline.com/stanford>

From the Partners page, click the green login button to go Cardinal At Work website. You will click the red Employee login button. Once logged in, click on the main menu in the top navigation and select TASC.

- Online claim submittal.
- Stanford FSA Card management.
- Direct deposit set up.
- Notification preferences.

**Important! From your profile, please verify your email to receive important FSA communications.**



## Download Reference Guide

We've created a step-by-step guide to help you access your FSA account online, use the Stanford FSA Mastercard, submit requests for reimbursement, set up direct deposit of your reimbursement funds (if preferred), and much more! Please read the guide carefully and take advantage of the available tools.

Stanford University

Flexible Spending Account

debit

John Smith



## Receive Stanford FSA Card

**Your Stanford FSA Card will be sent to your home address in a plain white envelope.**

- Contains 12-digit TASC ID.
- Pays eligible healthcare and dependent care expenses at the point of purchase.
- Eliminates requests for reimbursement.
- Receive reimbursement via MyCash\*. Funds can be used for everyday purchases for retail and healthcare items together in one transaction. Merchants such as Walmart and CVS do not allow transactions involving non-qualified healthcare items. MyCash funds may also be withdrawn at an ATM with a PIN\*.
- Manage card online: view activity, request dependent card, request PIN.

\*For more information, see your Cardholder agreement.



## Swipe your Stanford FSA Card

**The Stanford FSA Card allows you to pay for eligible FSA expenses when the service is provided or product is purchased.**

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

Use your card at your provider's office (e.g., doctor, dentist, optometrist, or day care) to pay for your eligible out-of-pocket costs. All Stanford FSA Card transactions and services need to occur within the Plan Year.

**Your Stanford FSA 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.**

The TASC Card is issued by Pathward, Member FDIC, pursuant to license by Mastercard International Incorporated. Mastercard is a registered trademark, and the circles design is a trademark of Mastercard International Incorporated.



## 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.  
 Eligible OTC medicines and drugs.  
 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 needs to 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 (preschool).  
 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 Stanford FSA Card to pay for an eligible employee benefits expense, simply submit a request for reimbursement.**

Requests are processed daily. When you submit a request for reimbursement for an eligible FSA expense, your approved reimbursement will be deposited directly into your MyCash account—usually within 24-48 hours.

### WHAT IS MYCASH?

MyCash is an account that holds your reimbursement funds. All reimbursements are deposited into your MyCash account and are disbursed via the Stanford FSA Card or via the online portal.



## Manage your MyCash

**You can access your MyCash funds in three ways:**

- Swipe your Stanford FSA Card at most retail merchants that accept Mastercard (except certain Walmart, CVS, and ShopKo stores, or for pay-at-pump purchases).
- Withdraw at an ATM (with a PIN) using your Stanford FSA Card. ATM/bank fees may apply.
- Transfer to a personal bank account (direct deposit) via online portal. Visit Settings from the TASC home screen.

**It's easy to manage your MyCash funds from MyTASC.**

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



## Need help? Contact Customer Care:

**855-842-4913**



**Customer Care Specialists available 8-5, M-F, all time zones.**

- Automatic user-recognition if calling from a registered phone number. (Register phone numbers online in your profile, or call Customer Care.)

**Interactive Voice Response system, 24/7**

- Obtain account balances.
- Check reimbursement status.

**Support Requests, 24/7**

- Submit a Support Request via the online portal.
- Click on Contact Us on the home screen.

**For more information, download the Participant Reference Guide from**

<https://partners.tasconline.com/stanford>.