

**THE SCHOOL BOARD OF SARASOTA COUNTY, FLORIDA
FINANCIAL SERVICES DEPARTMENT**

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TO: Mitsi Corcoran, Chief Financial Officer

FROM: Lynn Peterson, Risk Manager

DATE: August 18, 2014

SUBJECT: Enrollment and Benefit Administration System

Background

Since October 2012, The School Board of Sarasota County has been utilizing the Univers Workplace Solutions electronic benefit enrollment system for the benefit enrollment of new hires, return to work employees, open enrollment, and life event changes. Over the past two years, the Risk Management Department has faced many significant challenges with this system. Since Univers has failed to provide services promised, the decision was made to terminate the three year contract (one year early without penalty), and enter into a new contract with PlanSource.

In February 2014, the Risk Management Department began researching benefit enrollment systems to replace Univers. The new system would need to be able to work with the ESD HR/Payroll System and our benefit provider systems and provide expansive reporting capabilities. The selected company would also need to agree to continue with a similar contract for funding through voluntary benefits with Aflac. Five enrollment systems through various carriers were analyzed, including PlanSource, Bentek, Benetrac, Spotlight and FBMC. PlanSource was found to have the best system to fit the needs of the School Board of Sarasota County.

PlanSource and Aflac Proposal for the Benefit Enrollment System

The proposal is a comprehensive enrollment system funded through the Group Voluntary Aflac plans.

The PlanSource contract includes the following:

- Provide a benefits administration portal for the processing of new hire enrollments, open enrollment, evidence of insurability, ad hoc reporting, life event processing, employment status changes, premium billing reporting, data import and export and historical data viewer.
- Provide employee self-service tools including enrollment and life event changes and confirmation statements.
- Work with Risk Management on configuration, strategies, needs and implementation
- Train Risk Management on the software and discrepancy report management
- Provide Risk Management with system support
- Construct and test interfaces with carriers and providers to facilitate transmission of electronic eligibility files
- Construct interfaces with Sarasota payroll system to facilitate transmission of employee demographic data.

Aon will be the broker of record for the voluntary benefits listed for a minimum of three years, but will forfeit all commissions to pay for the Plan Source system.

Enrollment System Cost

The initial Implementation fee is \$5.00 per employee and the monthly fee is \$2.00 per employee per month (PEPM). Both of these fees will be paid by Aflac. The previous contract with Unifers charged a total of \$2.30 PEPM of which \$2.00 PEPM was paid by Aflac and \$0.30 PEPM was paid by The School Board of Sarasota County out of funds provided by Florida Blue in 2012 [The 2012 Florida Blue contract allowed for \$65,000 towards implementation of an enrollment system. This amount was paid to Sarasota in 2012. To date \$34,963.10 is remaining in this fund. It is anticipated an additional \$6,000.00 will be paid out for monthly fees owed to Unifers through October 2014].

Recommendation

It is recommended that the Sarasota County School Board accept the \$0 cost proposal for implementation of the Plan Source benefit enrollment system for three years.

Attachments: PlanSource Proposal
Aflac Proposal