Score Sheet Summary

ETE0002 - Third Party Administration for Employee Reimbursement Accounts (ERA) and Commuter Benefits (CB)

		Total Available Points	Weight	Multiplier (Total Points / 10 Evaluator Points)	HSA Bank	Conexis	WageWorks	MOR Strategy Group	Optum	Diversified Benefit Services	US Bank	eFlex	TASC	ASI Flex
80%	**Mandatory & Technical Evaluation Criteria**													
2	*Mandatory Proposer Qualifications and Terms*													
2.1	Experience and References	60	6.0%	6.0	34.80	39.60	39.60	34.80	18.00	37.20	40.80	40.80	38.40	9.60
2.2	Standards for Lead Account Manager	70	7.0%	7.0	42.00	37.80	39.20	42.00	16.80	15.40	49.00	50.40	35.00	9.80
2.3	Security and Privacy	60	6.0%	6.0	31.20	40.80	40.80	31.20	30.00	30.00	34.80	44.40	45.60	9.60
2.4	Quality Control	60	6.0%	6.0	28.80	33.60	34.80	33.60	33.60	27.60	33.60	42.00	43.20	9.60
	Total	250	25.0%		136.80	151.80	154.40	141.60	98.40	110.20	158.20	177.60	162.20	38.60
3	*Third Party Administrative Services*													
3.1	Data System Capabilities	90	9.0%	9.0	43.20	57.60	61.20	52.20	48.60	45.00	59.40	61.20	57.60	54.00
3.2	Claims Processing, Banking Services and Reimbursement	80	8.0%	8.0	49.60	54.40	51.20	49.60	46.40	36.80	54.40	60.80	52.80	49.60
3.3	Enrollment	70	7.0%	7.0	36.40	32.20	40.60	37.80	33.60	37.80	42.00	46.20	42.00	43.40
3.4	Customer Service	70	7.0%	7.0	40.60	46.20	39.20	40.60	30.80	36.40	44.80	51.80	44.80	40.60
3.5	Program Information and Communication	70	7.0%	7.0	36.40	43.40	37.80	42.00	32.20	43.40	42.00	50.40	39.20	42.00
3.6	Services Provided to ETF and Employers	70	7.0%	7.0	36.40	44.80	42.00	39.20	28.00	39.20	40.60	51.80	47.60	40.60
3.7	Performance Standards and Penalties	50	5.0%	5.0	28.00	31.00	23.00	26.00	22.00	29.00	30.00	33.00	31.00	26.00
3.8	Transition, Implementation, and Turnover	50	5.0%	5.0	28.00	28.00	28.00	26.00	17.00	29.00	31.00	36.00	30.00	28.00
	Total	550	55.0%		298.60	337.60	323.00	313.40	258.60	296.60	344.20	391.20	345.00	324.20
	Total Mandatory & Technical Score	**800**	**80.0%**		**435.40**	**489.40**	**477.40**	**455.00**	**357.00**	**406.80**	**502.40**	**568.80**	**507.20**	**362.80**
20%	**Cost Evaluation**													
	Part 1.0 Employee Reimbursement Accounts Program (ERA)				$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	Part 2.0 Commuter Benefits Program (CB)				$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	Total Costs				$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	Weight				#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
	Total Cost Score	**200**	**20.0%**		**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**
	TOTAL	**1000**	**100%**		**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**

Name	Agree / Object	Signature	Date
Allen Angel	Agree	Allen Angel	6/9/14
Terri Carlson	Agree	Terri Carlson	6/9/14
Dennis Dissmore	Agree	Dennis Dissmore	6-9-14
Laura Vang	Agree	Laura Vang	6/9/14
Tara Pray	Agree	Tara Pray	6/9/14

Score Sheet Summary

ETE0003 - Third Party Administration for Health Savings Accounts (HSA) and Limited Flexible Spending Accounts (LFSA)

		Total Available Points	Weight	Multiplier (Total Points / 10 Evaluator Points)	HSA Bank	Conexis	WageWorks	Optum	Diversified Benefit Services	Bank of Americal Merril Lynch	US Bank	eFlex	TASC	ASI Flex	Connect Your Care
80%	**Mandatory & Technical Evaluation Criteria**														
2	*Mandatory Proposer Qualifications and Terms*														
2.1	Experience and References	60	6.0%	6.0	34.80	39.60	39.60	18.00	37.20	28.80	40.80	40.80	38.40	9.60	30.00
2.2	Standards for Lead Account Manager	70	7.0%	7.0	42.00	37.80	39.20	16.80	15.40	32.20	49.00	50.40	35.00	9.80	7.00
2.3	Security and Privacy	60	6.0%	6.0	31.20	40.80	40.80	30.00	30.00	34.80	34.80	44.40	45.60	9.60	32.40
2.4	Quality Control	60	6.0%	6.0	28.80	33.60	34.80	33.60	27.60	37.20	33.60	42.00	43.20	9.60	32.40
	Total	250	25.0%		136.80	151.80	154.40	98.40	110.20	133.00	158.20	177.60	162.20	38.60	101.80
3	*Third Party Administrative Services*														
3.1	Data System Capabilities	90	9.0%	9.0	43.20	59.40	61.20	46.80	45.00	50.40	59.40	61.20	57.60	52.20	48.60
3.2	Claims Processing, Banking Services and Reimbursement	80	8.0%	8.0	56.00	56.00	51.20	41.60	38.40	44.80	54.40	60.80	52.80	46.40	44.80
3.3	Enrollment	70	7.0%	7.0	39.20	35.00	43.40	33.60	37.80	30.80	42.00	47.60	42.00	42.00	33.60
3.4	Customer Service	70	7.0%	7.0	40.60	44.80	39.20	32.20	37.80	43.40	44.80	51.80	44.80	37.80	42.00
3.5	Program Information and Communication	70	7.0%	7.0	36.40	44.80	37.80	32.20	43.40	36.40	42.00	50.40	39.20	43.40	42.00
3.6	Services Provided to ETF and Employers	70	7.0%	7.0	36.40	44.80	42.00	28.00	39.20	33.60	40.60	51.80	47.60	40.60	36.40
3.7	Performance Standards and Penalties	50	5.0%	5.0	29.00	31.00	22.00	22.00	29.00	25.00	32.00	33.00	32.00	26.00	28.00
3.8	Transition, Implementation, and Turnover	50	5.0%	5.0	28.00	28.00	28.00	17.00	29.00	32.00	33.00	35.00	30.00	27.00	25.00
	Total	550	55.0%		308.80	343.80	324.80	253.40	299.60	296.40	348.20	391.60	346.00	315.40	300.40
	Total Mandatory & Technical Score	**800**	**80.0%**		**445.60**	**495.60**	**479.20**	**351.80**	**409.80**	**429.40**	**506.40**	**569.20**	**508.20**	**354.00**	**402.20**
20%	**Cost Evaluation**														
	Part 3.0 Health Savings Accounts (HSA)				$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	Part 4.0 Limited Flex Spending Accounts (LFSA)				$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	Total Costs				**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
	Weight				#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
	Total Cost Score	**200**	**20.0%**		**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**
	TOTAL	**1000**	**100%**		**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**

Name	Agree / Object	Signature	Date
Allen Angel	Agree	Allen Angel	6/9/14
Terri Carlson	Agree	Terri Carlson	6/9/14
Dennis Dissmore	Agree	Dennis Dissmore	6/9/14
Laura Vang	Agree	Laura Vang	6/9/14
Tara Pray	Agree	Tara Pray	6/9/14

Score Sheet Summary

ETE0002 - Third Party Administration for Employee Reimbursement Accounts (ERA) and Commuter Benefits (CB)

		Total Available Points	Weight	Multiplier (Total Points / 10 Evaluator Points)	HSA Bank	Conexis	WageWorks	MOR Strategy Group	Optum	Diversified Benefit Services	US Bank	eFlex	TASC	ASI Flex
80%	**Mandatory & Technical Evaluation Criteria**													
2	*Mandatory Proposer Qualifications and Terms*													
2.1	Experience and References	60	6.0%	6.0	34.80	39.60	39.60	34.80	18.00	37.20	40.80	40.80	38.40	9.60
2.2	Standards for Lead Account Manager	70	7.0%	7.0	42.00	37.80	39.20	42.00	16.80	15.40	49.00	50.40	35.00	9.80
2.3	Security and Privacy	60	6.0%	6.0	31.20	40.80	40.80	31.20	30.00	30.00	34.80	44.40	45.60	9.60
2.4	Quality Control	60	6.0%	6.0	28.80	33.60	34.80	33.60	33.60	27.60	33.60	42.00	43.20	9.60
	Total	250	25.0%		136.80	151.80	154.40	141.60	98.40	110.20	158.20	177.60	162.20	38.60
3	*Third Party Administrative Services*													
3.1	Data System Capabilities	90	9.0%	9.0	43.20	57.60	61.20	52.20	48.60	45.00	59.40	61.20	57.60	54.00
3.2	Claims Processing, Banking Services and Reimbursement	80	8.0%	8.0	49.60	54.40	51.20	49.60	46.40	36.80	54.40	60.80	52.80	49.60
3.3	Enrollment	70	7.0%	7.0	36.40	32.20	40.60	37.80	33.60	37.80	42.00	46.20	42.00	43.40
3.4	Customer Service	70	7.0%	7.0	40.60	46.20	39.20	40.60	30.80	36.40	44.80	51.80	44.80	40.60
3.5	Program Information and Communication	70	7.0%	7.0	36.40	43.40	37.80	42.00	32.20	43.40	42.00	50.40	39.20	42.00
3.6	Services Provided to ETF and Employers	70	7.0%	7.0	36.40	44.80	42.00	39.20	28.00	39.20	40.60	51.80	47.60	40.60
3.7	Performance Standards and Penalties	50	5.0%	5.0	28.00	31.00	23.00	26.00	22.00	29.00	30.00	33.00	31.00	26.00
3.8	Transition, Implementation, and Turnover	50	5.0%	5.0	28.00	28.00	28.00	26.00	17.00	29.00	31.00	36.00	30.00	28.00
	Total	550	55.0%		298.60	337.60	323.00	313.40	258.60	296.60	344.20	391.20	345.00	324.20
	Total Mandatory & Technical Score	**800**	**80.0%**		**435.40**	**489.40**	**477.40**	**455.00**	**357.00**	**406.80**	**502.40**	**568.80**	**507.20**	**362.80**
20%	**Cost Evaluation**													
	Part 1.0 Employee Reimbursement Accounts Program (ERA)				$ -	$ -	$ -	$ -	$ -	$ -	$ 32,750.00	$ 42,575.00	$ 37,990.00	$ -
	Part 2.0 Commuter Benefits Program (CB)				$ -	$ -	$ -	$ -	$ -	$ -	$ 1,301.00	$ -	$ 3,770.00	$ -
	Total Costs				**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 34,051.00**	**$ 42,575.00**	**$ 41,760.00**	**$ -**
	Weight				#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	100.00%	79.98%	81.54%	#DIV/0!
	Total Cost Score	**200**	**20.0%**		**	**	**	**	**	**	**200.00**	**160.00**	**163.10**	**
	TOTAL	**1000**	**100%**		**#VALUE!**	**#VALUE!**	**#VALUE!**	**#VALUE!**	**#VALUE!**	**#VALUE!**	**702.40**	**728.80**	**670.30**	**#VALUE!**
												*		

Notes:

* The RFP evaluation committee recommended this vendor for all four programs for RFP's ETE0002 and ETE0003. The ETF Board accepted the recommendation.

** This vendors cost proposal was not opened by the evaluation committee.

Score Sheet Summary

ETE0003 - Third Party Administration for Health Savings Accounts (HSA) and Limited Flexible Spending Accounts (LFSA)

		Total Available Points	Weight	Multiplier (Total Points / 10 Evaluator Points)	HSA Bank	Conexis	WageWorks	Optum	Diversified Benefit Services	Bank of Americal Merril Lynch	US Bank	eFlex	TASC	ASI Flex	Connect Your Care
80%	**Mandatory & Technical Evaluation Criteria**														
2	*Mandatory Proposer Qualifications and Terms*														
2.1	Experience and References	60	6.0%	6.0	34.80	39.60	39.60	18.00	37.20	28.80	40.80	40.80	38.40	9.60	30.00
2.2	Standards for Lead Account Manager	70	7.0%	7.0	42.00	37.80	39.20	16.80	15.40	32.20	49.00	50.40	35.00	9.80	7.00
2.3	Security and Privacy	60	6.0%	6.0	31.20	40.80	40.80	30.00	30.00	34.80	34.80	44.40	45.60	9.60	32.40
2.4	Quality Control	60	6.0%	6.0	28.80	33.60	34.80	33.60	27.60	37.20	33.60	42.00	43.20	9.60	32.40
	Total	250	25.0%		136.80	151.80	154.40	98.40	110.20	133.00	158.20	177.60	162.20	38.60	101.80
3	*Third Party Administrative Services*														
3.1	Data System Capabilities	90	9.0%	9.0	43.20	59.40	61.20	46.80	45.00	50.40	59.40	61.20	57.60	52.20	48.60
3.2	Claims Processing, Banking Services and Reimbursement	80	8.0%	8.0	56.00	56.00	51.20	41.60	38.40	44.80	54.40	60.80	52.80	46.40	44.80
3.3	Enrollment	70	7.0%	7.0	39.20	35.00	43.40	33.60	37.80	30.80	42.00	47.60	42.00	42.00	33.60
3.4	Customer Service	70	7.0%	7.0	40.60	44.80	39.20	32.20	37.80	43.40	44.80	51.80	44.80	37.80	42.00
3.5	Program Information and Communication	70	7.0%	7.0	36.40	44.80	37.80	32.20	43.40	36.40	42.00	50.40	39.20	43.40	42.00
3.6	Services Provided to ETF and Employers	70	7.0%	7.0	36.40	44.80	42.00	28.00	39.20	33.60	40.60	51.80	47.60	40.60	36.40
3.7	Performance Standards and Penalties	50	5.0%	5.0	29.00	31.00	22.00	22.00	29.00	25.00	32.00	33.00	32.00	26.00	28.00
3.8	Transition, Implementation, and Turnover	50	5.0%	5.0	28.00	28.00	28.00	17.00	29.00	32.00	33.00	35.00	30.00	27.00	25.00
	Total	550	55.0%		308.80	343.80	324.80	253.40	299.60	296.40	348.20	391.60	346.00	315.40	300.40
	Total Mandatory & Technical Score	**800**	**80.0%**		**445.60**	**495.60**	**479.20**	**351.80**	**409.80**	**429.40**	**506.40**	**569.20**	**508.20**	**354.00**	**402.20**
20%	**Cost Evaluation**														
	Part 3.0 Health Savings Accounts (HSA)				$ -	$ -	$ -	$ -	$ -	$ -	$ 3,130.00	$ 5,089.50	$ 4,538.50	$ -	$ -
	Part 4.0 Limited Flex Spending Accounts (LFSA)				$ -	$ -	$ -	$ -	$ -	$ -	$ 1,760.00	$ 2,288.00	$ 2,041.60	$ -	$ -
	Total Costs				**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 4,890.00**	**$ 7,377.50**	**$ 6,580.10**	**$ -**	**$ -**
	Weight				#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	100.00%	66.28%	74.31%	#DIV/0!	#DIV/0!
	Total Cost Score	**200**	**20.0%**		**	**	**	**	**	**	**200.00**	**132.60**	**148.60**	**	**
	TOTAL	**1000**	**100%**		**#VALUE!**	**#VALUE!**	**#VALUE!**	**#VALUE!**	**#VALUE!**	**#VALUE!**	**706.40**	**701.80**	**656.80**	**#VALUE!**	**#VALUE!**
												*			

Notes:

* The RFP evaluation committee recommended this vendor for all four programs for RFP's ETE0002 and ETE0003. The ETF Board accepted the recommendation.

** This vendors cost proposal was not opened by the evaluation committee.