

Office of Personnel Management (OPM)  
Healthcare & Insurance (HI)

**Federal Flexible Spending Account Program  
(FSAFEDS) Administration Services**  
**24322625D0002**

**ORDERING GUIDE**

This Ordering Guide sets forth the procedures for issuing Task Orders against the Indefinite Quantity Multi-Agency Contract (MAC) by agencies which offer FSAFEDS participation as a benefit to their employees.

Office of Personnel Management  
Healthcare and Insurance (HI)  
Life and Ancillary Benefits  
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## **FSAFEDS Program Administration Services Multi Agency Contract (MAC) Ordering Guide:**

This ordering guide is written for use by OPM and all agencies that make flexible spending accounts available to their employees as an ancillary benefit under the Federal Flexible Spending Account Program (FSAFEDS). This guide explains how the MAC will be used to efficiently monitor usage and agency payments for the services provided by the Contractor awarded the FSAFEDS Contract.

### **A. Program/Contracts:**

The services covered under the MAC and all related Task Orders shall be within the scope specified in the MAC Project Work Statement included within the awarded FSAFEDS MAC contract (24322625D0002).

Services under the MAC are limited to each agency's share of the pre-priced services under the FSAFEDS Contract. This MAC may be used by any agency that offers FSAFEDS to its employees during the Federal Benefits Open Season or a Special Enrollment Period. All agencies that make FSAFEDS available MUST pay for costs associated with providing those services on a per-enrolled-employee basis and MUST do so by issuing a Task Order against the MAC to fund the costs for the enrollment and participation of their employees.

The MAC requires Task Orders to be issued by agencies to ensure full tracking and reporting of MAC usage, however, there are some FSAFEDS participating agencies who may not have the ability to issue their own task order. The MAC was modified to include additional flexibilities to address such circumstances.

The 54-month contract period reflected in the MAC includes a six-month startup period prior to actual performance of services. The performance period for FSAFEDS administration services is comprised of a one-year base period and three one-year option periods.

Task Orders against the MAC may not extend beyond the performance period of the MAC, including any option period exercised.

### **B. Points of Contact:**

#### Contracting Officer's Representative (COR):

Joseph Young, Life and Ancillary Benefits

[FSA.Internet@opm.gov](mailto:FSA.Internet@opm.gov)

#### Contracting Officer (CO):

Delon Pinto, Life and Ancillary Benefits

[FSA.Internet@opm.gov](mailto:FSA.Internet@opm.gov)

For delivery of signed Task Orders to Contractor only (no other communications):  
[FSAFEDSBilling@healthequity.com](mailto:FSAFEDSBilling@healthequity.com)

**C. Content and Issuance of Task Orders:**

Utilizing Agencies may order services against the MAC to pay for their own share of costs for services relative to their employee enrollment, as further described in Section E below. Utilizing Agencies may not order any additional services against the MAC.

OPM Contracting Officers (COs) shall issue Task Orders for the start-up costs, their own agency usage, and for any services to be paid from the Risk Reserve Account.

OPM's COs are not responsible for issuance of Task Orders for other utilizing Agencies' shares of the service costs. However, there may be instances when an OPM CO issues a recording Task Order for an Agency at that Agency's request.

**D. NAICS & PSC Codes:**

- North American Industrial Classification System (NAICS) Code for the BPA and all Calls shall be 524292 – Third Party Administration of Insurance and Pension Funds.
- Product Service Code (PSC) for the BPA and all Calls shall be R711 – Support-Management: Banking.

**E. Task Order Issuance Process:**

This is a SINGLE AWARD IDIQ Multi Agency Contract (MAC) intended for government-wide use, and was advertised and competed as such, so competition is not required prior to issuance of future Task Orders. All Task Orders for FSAFEDS services must be issued to the single awardee.

There will be four different types of Task Orders possible against the MAC:

1. The initial Task Order, for Start Up Period / Start Up Costs – This will be issued by OPM and funded from the FSAFEDS Risk Reserve Account.
2. Task Orders for Buydown<sup>1</sup> – These are issued by OPM only and are intended to reduce the financial burden for utilizing agencies by paying a portion of the fixed price per enrolled employee account service fees.
3. Task Orders for Agency Service Fees – These will be issued by each Agency that makes available FSAFEDS as a benefit to its employees so that there is a contractual obligation between each utilizing Agency and the FSAFEDS Contractor against which the Contractor may invoice and from which the utilizing Agency will pay its share of fees (after adjustment for any buydowns paid for by OPM).
4. Recording Task Orders – These will be issued by OPM to assist Agencies that do not

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<sup>1</sup> Buydown: When appropriate based on balance of funds in the Risk Reserve Account, OPM may issue a Buydown Task Order which funds a portion of the fixed price per employee/account service fees. When a buydown Task Order will be provided to the Contractor, it will reduce the expense to utilizing agencies. OPM will notify the utilizing agencies accordingly so they may reduce their Task Orders accordingly. Buydown is a partial payment of the service fee which acts as a subsidy or discount. The SUM of the buydown Task Order rate and the utilizing agencies Tasks Order rate will always equal the total contracted rate for the given performance period.

have the ability to issue their own Task Orders for agency service fees. Agencies may pay their full year of fees using their Purchase Card or other OPM-approved method in lieu of issuance of a written Task Order. If an Agency chooses to pay by Purchase Card or any method other than issuing their own Task Order, the Agency must notify OPM.

Task Orders are to be Fixed Price based on the prices established in the MAC, or at the reduced prices designated by OPM Healthcare & Insurance (HI) following issuance of a buydown Task Order.

**Form Required:** OPM will utilize Form OF347 for issuance of Task Orders against this MAC and recommends that all other Agencies use Form OF347 as well. However, other Agencies may utilize any form deemed appropriate based on their own internal guidelines for issuance of Task Orders against a contract administered by another agency.

**Task Order Numbering:** Contracting Officers that issue Task Orders shall ensure they utilize Task Order numbering appropriate to their own Agency, as stipulated in the FAR.

A sample Task Order for Agency Service Fees is attached for illustration purposes.

#### **F. Task Order Duration / Period of Performance:**

Annual Task Orders for service fee payments must coincide with the calendar year periods of performance for the MAC itself. Each participating Agency will receive a Task Order Request in February of the period of performance that indicates the number of agency employees who enrolled in FSAFEDS during Open Season, stratified by account type, and the rate(s) per account for the plan year so that Agencies can prepare their Task Orders.

OPM recommends that participating Agencies use a new Task Order number for each calendar year of participation so that billing records are easy to review.

#### **Service Fee Task Order Funding:**

An Agency is required to issue a funded Task Order to the Contractor and pay its share of service fees for the whole calendar year if at least one employee enrolls in FSAFEDS during Open Season. Agencies have statutory authority to fund Task Orders across fiscal years. Agencies with questions concerning the use of appropriations across fiscal years should consult with their General Counsel.

Some agencies may have written policies that prohibit funding across fiscal years. In these cases, the participating Agency may reference its own incremental funding authorities, as applicable, to fund only the January through September months from one fiscal year's funds and leave the period of October through December unfunded until October 1.

Funding and payment for the remaining 3-month balance of the calendar year is not optional, and services cannot be cancelled based on limited availability of funds. The entire calendar year period of performance must be shown on Task Orders using split funding and may be listed on separate line items or noted clearly as "incrementally" funded. Agencies without such written

policies are required to obligate funding IN FULL prior to the January 1 start of services each year.

Line items for funding FSAFEDS Task Orders must reference the specific CLIN from the MAC applicable to that calendar year and plan type, as well as the price per account.

**Enrollment Adjustments Outside of Open Season:**

When newly eligible employees enroll in one or more FSAFEDS accounts outside of open season, agencies will be required to increase funding to cover the additional participation accordingly and provide a modification to that task order reflecting the increase in cost. An updated Task Order Request will be provided in October by the FSAFEDS contractor, so the original task order can be modified by the agency with the required additional funding and provided to the FSAFEDS contractor and OPM, prior to the second invoice being sent. The FSAFEDS contractor will conduct this catch-up billing through a separate invoice to the applicable agencies in January of each year.

**G. Minimum and Maximum Order Limitations:**

There is no minimum order limit for the value of individual Task Orders. The MAC minimum is equal to the Start Up Costs and is satisfied by issuance of the Start-Up Costs Task Order. The maximum value of all task orders issued against the MAC is \$250,000,000.00.

**H. Mandatory Reporting:**

In accordance with FAR 4.606(a)(ii)(A)(2), all Task Orders issued against the MAC that use Appropriated Funds are required to have the Agency CO complete FPDS-NG reporting.

Task Orders issued against the MAC that use Non-Appropriated Funds are not required to be reported in FPDS-NG, in accordance with FAR 4.606(b). In such instances, Agencies should follow internal procedures for FPDS-NG reporting of non-appropriated funds awards.

Agencies not subject to the FAR should refer to FAR 4.606(d) for guidance regarding FPDS-NG reporting of Task Orders against this MAC.

Regardless of funding type, and regardless of whether the issuing agency is subject to the FAR, utilizing agencies must provide copies of all Task Orders issued against the FSAFEDS MAC, as well as all modifications thereto, via email to OPM Healthcare & Insurance at [FSA.Internet@opm.gov](mailto:FSA.Internet@opm.gov). To fulfill its oversight responsibilities, OPM must be able to accurately monitor and track usage against the ceiling of \$250,000,000.00 and complete mandatory reporting of usage to the Office of Management and Budget (OMB).

**I. Suspension of Performance / Stop Work Order / Government Shutdown:**

FSAFEDS services are not suspended in event of a Government shutdown or lapse in appropriations.

**J. Task Order Closeout:**

Following completion of performance of each calendar year, utilizing agency COs shall perform at a minimum:

- Proof of payment of final invoice
- Release of Claims from the Contractor
- Modification of Task Order for deobligation of any remaining unused funds (including sending a copy to OPM Healthcare & Insurance at [FSAFEDSTOTracking@opm.gov](mailto:FSAFEDSTOTracking@opm.gov))