

The **Statement of Work** we will provide is as follows:

Implementation –\$15,000 one-time fee

- Work with current/previous electronic enrollment vendor to develop a plan for transferring historical data to our ENAV system for two (2) years (2024 & 2025) plus the new set up for Open Enrollment for the 2026 plan year.
- Ensure that data is accurate and has been audited for the current plan year’s benefits.
- Customize ENAV to the needs of Hidalgo County.
- Provide functionality for employees to complete annual and ongoing benefits enrollment and complete qualified life event notifications online.
 - Including capabilities for employee self-enrollment with plan comparisons, access to videos, and email notifications/communications.
- Manage all aspects of annual open enrollment, including project management, development of communications, and sending data to appropriate third-party benefits carriers and payroll files.
 - Assist Administration with communications to employees and retirees regarding implementation of new electronic enrolment system.
 - Provide payroll reports.
 - Electronic PDF file of Open Enrollment Forms for each employee that enrolled.
 - Administration approval for any new dependents added to the insurance plan(s) to ensure receipt of birth certificate, marriage certificate, etc.
- Develop data feeds between ENAV and benefits carriers.
 - *Please note that if an 834 feed is required by a benefits carrier, we would only charge the per employee per month (PEPM) ENAV cost we will incur to Hidalgo County, if applicable. However, we will make every effort to develop alternative methods of data exchange to continue to save the County money.*

Electronic Enrollment System – \$50,000 annual fee (to be paid in 12 monthly payments)

- Electronic Data Interchange (EDI) files/Data Feeds
 - *Please note that if an 834 feed is required by a benefits carrier, we would only charge the per employee per month (PEPM) ENAV cost we will incur to Hidalgo County, if applicable. However, we will make every effort to develop alternative methods of data exchange to continue to save the County money.*
- Audits relating to employer payroll file deductions, ENAV, and benefits carriers.
- Work with Administration to identify desired ongoing reports and frequency.
 - New hire enrollments, qualifying events, and updates to payroll reports.
- Provide ongoing sample communications to be used during ongoing administration to Administration.
- Manage all aspects of ongoing benefit enrollment for new hires, qualified events, and terminations.

"Attachment A"

- Ensure divisions, departments, etc. are added to easily distinguish which entity the employee is employed in. Also, customize the new hire benefits that are eligible for each employee.
- Data management changes relating to new plans, new carriers, new exports, new rates, and removing plans and moving elections available to new carriers for active and passive enrollments.

ACA 1094C & 1095C Annual IRS Filing - \$20,000 annual fee (to be paid at completion of each annual filing)

Ortegon Insurance Agency will also provide the ACA 1094C & 1095C Annual Filing for the following:

- Set-Up
- ACA Monthly Data Management
- ACA Eligibility Tracking
- 1095C Forms populated, audited, and mailed to the members by the IRS mailing deadline.
- IRS Electronic Filing of the 1094C and 1095Cs by the IRS filing deadline.
- Documentation of the confirmed IRS filing/approvals, PDF copies of each 1095C forms, and any additional confirmation pertaining to the final IRS filings.

Please accept this letter as our format quote for providing Hidalgo County with an online Electronic Enrollment System as an amendment to my current Consulting contract.

If you have any questions or need additional information, please contact me as follows:

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- Cell Ph: 956-463-0945
- Email: yvonne@ortegonagency.com

Sincerely,

Yvonne Ortegon

Yvonne M. Ortegon

CEO/Owner

Ortegon Insurance Agency, LLC

