FSA Implementation Checklist
for implementing HealthEquity Integrated Flexible Spending Accounts

Eligibility

Providence Health Plan does not collect and provide eligibility for these accounts; employers work directly with HealthEquity to set up and maintain FSA eligibility.

Claims

Once everything is set up in HealthEquity’s system, they will send PHP a list of the members they need claims information for. PHP then sends HealthEquity a weekly file with any corresponding claims data.

What HealthEquity® needs to get started

- Employer submits the New Business Form to HealthEquity.
- Employer provides FSA eligibility using HealthEquity’s template, uploading the information through the Employer Portal.

What Providence Health Plan needs to get started

- Employer/producer completes PHP’s Master Contract Application including the FSA product selection, and submits it to their PHP Sales Team.

What’s next?

- HealthEquity will contact the employer to schedule a convenient time to review and finalize the FSA plan design, and set up funding arrangements. (usually within 2-3 business days after the New Business Form is received)
- Once the plan design and funding arrangements have been finalized, HealthEquity will set up the employee accounts and send welcome kits, including debit cards if applicable.
To ensure debit cards are received by the effective date, please allow 4 weeks processing time, once the employee elections have been received.

HealthEquity® Support and Resources

Implementation Help –

Sales Resources website – for useful information, videos, and forms.

Broker Sales Team
877-949-6727
brokersales@healthequity.com

Employer/Member Account Set Up
onboarding@healthequity.com

Post Implementation Help –

Broker Services
800-819-5852
brokerservices@healthequity.com

Employers
866-382-3510
employerservices@healthequity.com

Members
877-873-9366
memberservices@healthequity.com

Providence Health Plan Support and Resources

Sales Resources website

Please contact your Sales Team with additional questions.