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.