

HSA Implementation Checklist

for PHP health plans with HealthEquity Integrated Health Savings Accounts

Eligibility

Employers send enrollment to PHP. When processed, PHP sends that eligibility to HealthEquity. Eligibility files are sent daily.

Claims

Once everything is set up in both PHP's and HealthEquity's systems, PHP will send claims information to HealthEquity on a weekly basis.

What HealthEquity needs to get started

- ✓ Employer submits the [New Business Form](#) to HealthEquity.

What Providence Health Plan needs to get started

- ✓ Employer/producer completes PHP's Master Contract Application and submits it to their PHP Sales Team. Include the HSA product selection, and check the HSA account box under the CDHP Accounts section.
- ✓ Employer submits enrollment information.
 - Paper Enrollment Forms - the employee must select the HSA plan box, and the "Integrated Health Savings Account with HealthEquity" box.
 - Spreadsheet enrollment – there must be a "Y" indicated in column titled "With HealthEquity Account".
 - EDI enrollment – all enrollment must be received through the file. Updates cannot be made manually.
 - Employees electing an HSA account must fill out the HSA Authorization Form. (This form is required due to the Patriot's Act language, but is retained by the employer for their records. It is not sent to PHP or HealthEquity.)
- ✓ Employer/producer needs to inform PHP if the group already has HealthEquity accounts with another carrier.

What's next?

- HealthEquity will contact the employer to schedule a convenient time to discuss the steps to implement the HSA accounts. (usually within 2-3 business days after the [New Business Form](#) is received)
- PHP will set the group up in our system and send the group and employee information to HealthEquity in our daily eligibility file. (usually 10-15 days from the date Underwriting approves the new group)
- Once HealthEquity loads the eligibility information, HSA accounts will be set up, and welcome kits mailed, including debit cards if applicable. (confirm debit card turnaround with HealthEquity when finalizing the HSA set up)

- Please note:
 - If none of the employees sign up for an HSA account, HealthEquity will not load any information in their system. If a new employee is hired later that elects an HSA account, the set up process will begin once HealthEquity receives a [New Business Form](#) and eligibility from PHP.
 - If employees currently have a HealthEquity account, or have had one in the past, they will need to contact HealthEquity directly with any changes to their personal information such as address, email, name, or changes to those authorized to access the account.

HealthEquity Support and Resources

Implementation Help –

[Sales Resources website](#) – for useful information, videos, and forms such as the Employee HSA Contribution Form or HSA Rollover/Transfer Request Form.

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

Employer/Member Account Set Up
onboarding@healthequity.com

Post Implementation Help –

Producers
877-949-6727
salesupport@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 Service Team with additional questions.