



## Health Savings Account – Employer Enrollment Process

There are six main steps to the HealthEquity Health Savings Account enrollment process. The focus of each step is designed towards providing an exceptional experience for both employer groups and for plan participants. HealthEquity is committed to supporting groups during the enrollment process and also to providing excellent service during the administration of the plan(s).

### 1 Employer Enrollment – Online

Each new employer group is required to register online with HealthEquity. Information required during the enrollment process includes company legal name, tax id, number of employees, physical address and primary contact information.

### 2 Plan Setup

Once the employer has completed the online enrollment process they will need to establish an HSA product Plan within the Employer Portal. Multiple HSA product types may be established to better manage an employer's population. Any questions regarding the plan design may be directed to Client Services.

### 3 Employee enrollment

HealthEquity can accept employee enrollment data directly from large employer groups. The Employer Portal also offers multiple options for enrolling employees, including an online entry process or a standard file upload.

### 4 Employer Orientation

Once the employer's plan is setup and employees have been enrolled, HealthEquity will contact the employer to provide them an orientation of tools and services. During this time HealthEquity describes the "next steps" of plan administration. Employer groups will be provided with all the information they need to assist them during their plan administration.

### 5 Employee welcome material and HealthEquity Member Portal

Employees will receive welcome material once their enrollment is complete. This material will provide them with plan information, the debit card (if applicable), as well as the contact information they need to reach HealthEquity's 24/7 Member Services team. The member will also be encouraged to log onto the HealthEquity Member Portal for real-time balance information and payment status.

### 6 HealthEquity Employer Portal

Each employer group is provided online access to the HealthEquity Employer Portal. From this portal, groups are able to run real-time reports and view real-time summary data of their plan(s) and participants. HealthEquity will provide portal training and documentation during employer orientation.

For any questions or assistance with HealthEquity's Health Savings Accounts, contact HealthEquity Client Services at (866) 382-3510.