

EMPLOYER SERVICE FEES

Fees for Health Savings Account (HSA) administration

Service	Service Fee
Health savings account activation and setup (one-time fee)	Included
HSA monthly administration per account per month (PAPM); includes standard HSA <ul style="list-style-type: none"> • Monthly admin fee • Helpful HealthEquity Member services support available 24/7 • HealthEquity Visa® Health Account Card¹ • Annual tax reporting: 1099-SA and 5498-SA • Integrated PayChoice™ payment platform • Online contributions (employers and employees) • Electronic member statements 	\$2.50 PAPM
Additional employer costs for services as requested by employer Returned deposited item, employer contribution refund request, manual processing ²	\$20 per item/request

¹ This card is issued by The Bancorp Bank; Member FDIC, pursuant to a license from Visa U.S.A. Inc. Your card can be used everywhere Visa debit cards are accepted for qualified expenses. This card cannot be used at ATMs and you cannot get cash back, and cannot be used at gas stations, restaurants, or other establishments not health related. See Cardholder Agreement for complete usage restrictions.

² Contributions are managed online via the Employer Portal. A \$20.00 fee will apply only if you create and send paper instructions to HealthEquity for allocating contribution payments. There is no fee for paying online or for entering contribution instructions online and sending a paper check.

HSA fees for employees

Service	Service Fee	Frequency
Account setup	Paid by Employer	One-time
Monthly admin fee	\$2.50*	Monthly
Replacement card	5 free; \$5 for each additional card if original is lost, stolen, or damaged	Per card
Reimbursement check	\$2 for paper check. No fee for electronic funds transfer	Per check
Payment directed to provider	Free	
Return deposited item	\$20	Per transaction
Overdraft	\$20	Per transaction
Stop payment	\$20	Per request
Distribution of excess contribution request	\$20	Per request
Account closing	\$25	One-time
Paper account statement	\$1.50 per monthly statement requested (no fee for electronic statements)	Monthly

*Monthly admin fees are typically paid by the employer but may be billed to the account holder. If an individual account holder changes health plans or employers, the account may be charged up to \$3.95 per month to be billed directly to the account holder.

Nothing in this communication is intended as legal, tax, financial or medical. Always consult a professional when making life changing decisions. In addition to restrictions imposed by law, your employer may limit what expenses are eligible for reimbursements. It is the members' responsibility to ensure eligibility requirements as well as if they are eligible for the plan and expenses submitted.

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Reimbursement account (FSA/HRA) administration

Service	Service Fee
FSA/HRA plan setup (one-time fee) Plan Document and SPD Non-Discrimination Testing	One-time setup fee per plan \$250 (no renewal fee) ¹ Included once per plan year One round standard testing per plan year included
Annual maintenance <ul style="list-style-type: none"> Changes to plan document Annual discrimination testing 	Amendments to plan docs \$100 Additional non discrimination testing after the first round - \$600 each
RA Plan Amendment fee	\$250 ²
Reimbursement account administration <ul style="list-style-type: none"> Helpful HealthEquity Member Services support available 24/7 HealthEquity Visa® Health Account Card³ (if applicable) Integrated PayChoice™ payment platform Electronic member and employer statements 	Reimbursement account administration fee: <ul style="list-style-type: none"> HRA \$3.45 per participant per month FSA \$3.45 DCRA \$3.45 LPFSA \$2.45 (if member has an LPFSA coupled with an HSA) Stacked HRA and FSA \$3.45⁴
Additional employer costs for HealthEquity services as requested by employer Returned deposited item, employer contribution refund request, manual processing fee ⁵	\$20 per item/request

¹Setup fee will be waived for CDPHP administered HRA/FSA plans transitioning to HealthEquity.

²In the event that the change in plan design requires claims to be reprocessed, there is a \$250 per hour reprocessing fee.

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⁴In the case of FSA and/or HRA Reimbursement Accounts, HealthEquity charges only one PAMP fee even if an individual member has more than one FSA and /or HRA. This does not apply to an LPFSA coupled with any other product. If a LPFSA is coupled with another product, the monthly PAMP for the LPFSA is an additional \$2.45.

⁵Contributions are managed online via the Employer Portal. A \$20.00 fee will apply only if you create and send paper instructions to HealthEquity for allocating contribution payments. There is no fee for paying online or for entering contribution instructions online and sending a paper check.

Expect a remarkable experience every step of the way

866.855.8908

SalesSupport@
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Fees for reimbursement account (FSA/HRA) holders

Service	Service Fee	Frequency
Replacement card *	5 free; \$5 for each additional card if original is lost, stolen, or damaged, paid by member	Per card
Reimbursement check	\$2 for paper check. No fee for electronic funds transfer	Per check
Payment directed to provider	Free	
Stop payment	\$20	Per request
Paper account statement	\$1 per monthly statement requested (no fee for electronic statements)	Monthly

A HealthEquity Visa reimbursement account card is only issued when it complements the plan design. Nothing in this communication is intended as legal, tax, financial or medical. Always consult a professional when making life changing decisions. In addition to restrictions imposed by law, your employer may limit what expenses are eligible for reimbursements. It is the members' responsibility to ensure eligibility requirements as well as if they are eligible for the plan and expenses submitted. Copyright © 2024 HealthEquity, Inc. All rights reserved. 4-04-01_CDPHP_Fee_Schedule_June_2024