



Reimbursement Accounts – Employer Enrollment Process

There are six main steps to the HealthEquity reimbursement 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 application

Each new employer group will need to complete the HealthEquity Reimbursement Account Application. This document gathers information about the employer group and the details regarding the employer's reimbursement plan(s).

2 Plan review and plan documents

Once the employer application is received, HealthEquity will contact the employer to review and discuss the plan design details. Any questions regarding the plan design will be addressed during this initial contact. HealthEquity will gather all the information needed to move forward with creating the plan documents that will govern the plan administration.

3 Employee enrollment

HealthEquity can accept employee enrollment data directly from the employer group or in some situations this data can be supplied by the employer's health plan. During the employer setup process HealthEquity will discuss with the group which enrollment options are available.

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 and HealthEquity Member Portal

Employees will receive a welcome letter once their enrollment is complete. This letter will provide them with plan information as well as the contact information they need to reach HealthEquity's 24/7 Member Services team. Also, this letter will encourage the participant 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 Reimbursement Accounts, contact HealthEquity Client Services at (866) 382-3510.