

FSA Implementation Checklist

for implementing HealthEquity Integrated Flexible Spending Accounts

Eligibility

Providence Health Plan does **not collect and provide eligibility for these accounts**; employers and employees 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 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 Sales Team
877-949-6727
salessupport@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.