HRA Implementation Checklist

for implementing HealthEquity Integrated Health Reimbursement Arrangements

Eligibility

Employers send enrollment information to Providence Health Plan (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 system, 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 including the HRA product selection, and submits it to their PHP Sales Team.

- Employer submits enrollment information.

- If there are any employees that are not eligible for an HRA account, e.g. sole proprietors, partners and more-than-2% Subchapter S corporation shareholders, a list of these employees must be provided to PHP so eligibility will not be sent to HealthEquity. Any questions regarding HRA account eligibility should be directed to 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 HRA. (usually within 2-3 business days after the New Business Form is received)

- HealthEquity will work with the employer to complete an Employer Application to determine and finalize the HRA plan design and funding arrangements.

- Once the HRA plan design and funding arrangements have been finalized, HealthEquity will set up the accounts and send welcome kits, including debit cards if applicable. (confirm debit card turnaround with HealthEquity when finalizing the HRA set up)

- 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)

- 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.

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

Employer/Member Account Set Up
onboarding@healthequity.com

Post Implementation Help –

Broker Services
800-819-5852
brokerservices@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.