

HealthEquity®

Employer Portal Guide

Introduction

Welcome to the HealthEquity Employer Portal Guide – your one-stop resource for easily managing the HealthEquity accounts for your company and employees. The guide is organized by topic, so it can be used as an introductory reference and an ongoing tool as you become acquainted with and use your online employer portal.

Important Note

This guide contains instructions for both integrated and non-integrated employers. Please watch for sections which contain separate instructions for each account type.

Contact Client Services at 866.382.3510 or employerservices@healthequity.com to confirm your group's specific setup and options.

Integrated eligibility:

If you are associated with one of HealthEquity's integrated health plan or third-party administrator (TPA) partners, they are sending enrollment data to HealthEquity electronically via secure file transfer protocol (FTP).

Non-integrated eligibility:

Eligibility information will be entered manually or uploaded through the employer portal.

Note: It is possible to have integrated health savings account (HSA) enrollment but non-integrated flexible spending account (FSA) enrollment.

Account types:

Health savings accounts (HSAs): HSAs are individually owned accounts that can be sponsored by an employer. As a sponsor of an HSA, the employer can direct HealthEquity to open an HSA (by providing eligibility information), make contributions to the HSA and pay account fees. Employers cannot see account balances, order replacement cards, view claims, make distributions or otherwise direct an HSA for their employees.

Reimbursement accounts: A reimbursement account is an Internal Revenue Service (IRS)-approved, tax-advantaged, employer-sponsored benefit plan. The employer funds and owns the accounts. As the plan sponsor, the employer can see account balances, claim payments and denials and other account details.

Flexible spending accounts (FSAs or HCRA), limited-purpose flexible spending accounts (LPFSAs or LPHCRAs), dependent care reimbursement accounts (DCRAs), health reimbursement arrangements (HRAs) and health incentive accounts (HIAs) are all categorized as reimbursement accounts throughout this guide.

Commuter benefits: For qualified employers, commuter benefit services are available and can be accessed from the member portal.

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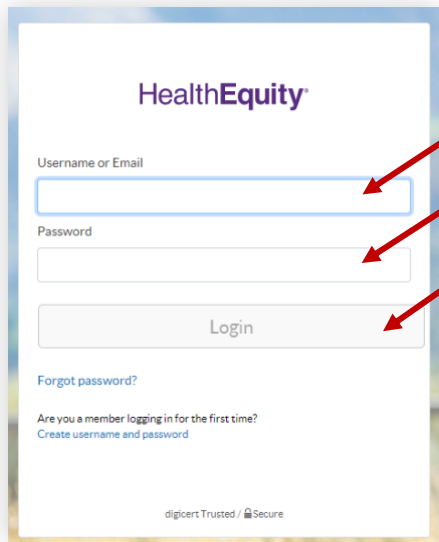
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Section 1 – Employer Settings and Portal Setup

Login Process

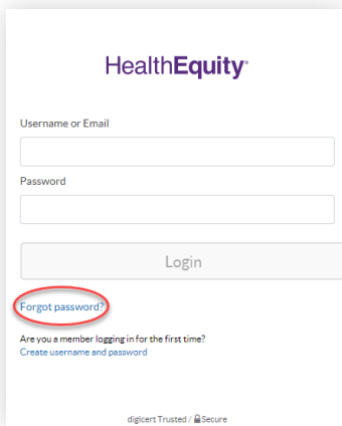


1. Go to **HealthEquity Login**
2. Enter your Username or Email and password.
3. Select 'Login' to go to your employer portal homepage.

The member portal and employer portal are both accessed from this page. If you have access to both, you will need separate usernames for each. If you have not yet established a user ID for the employer portal, please contact Employer Services at 866.382.3510.

Resetting Password

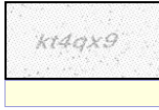
1. From login screen select 'Forgot password'.



2. Security Verification will appear.

Security Verification

To get started, complete the security check below by entering the text found in the box. This helps us prevent unauthorized access to your account.



Continue

3. Verify the code in the box and select 'Continue'.
4. The following will display. Add 'Username or Email Address' then select 'Send Password Reset Email'.

Forgot Password

Enter your username or the email address associated with your HealthEquity account and we will send you an email with a link to reset your password. This link will expire in 24 hours.

Username or Email Address

Send Password Reset Email

5. The message will appear.

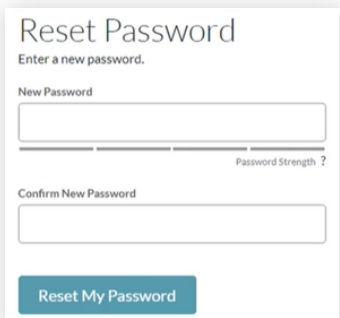
! An email was sent with instructions on how to change your password.

If you don't receive an email within 5 minutes, check your junk or spam folder, and verify that you've entered the username or email address associated with your HealthEquity account.

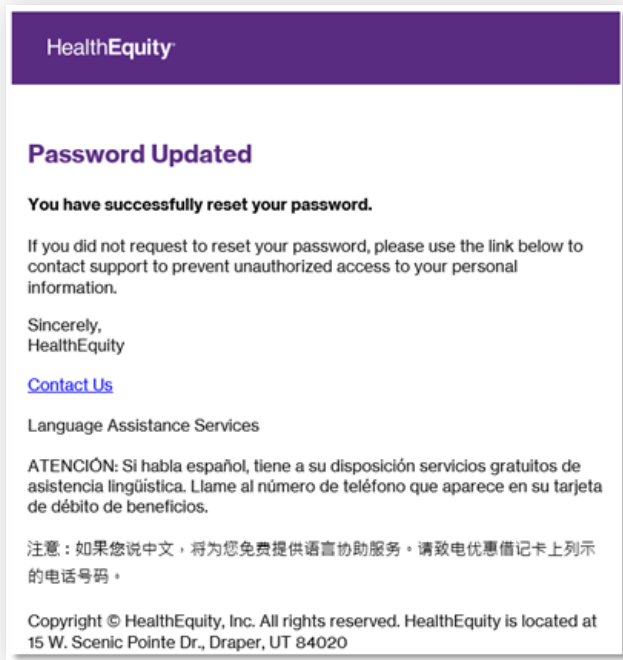
- 6. The following email will be sent to the email address associated with the HealthEquity login. The user will click on the link within the email, which expires within 10 minutes of being sent.



- 7. After clicking on the link in the email, the user will be brought to the Reset Password screen where they need to update the password in both the 'New Password' and 'Confirm New Password' fields and then click 'Reset My Password'.



- 8. External user will receive a 'You have successfully updated your password' message on the Reset Password screen, as well as an email notifying them of this updated password.



- 9. **Final Step:** The external user can now go back and login by clicking 'Return to Login'.

Company Detail

The HealthEquity portal allows Employers to take advantage of self-service. To edit or add to the ‘Employer Information’ page, your account must be enabled with the appropriate permissions to manage company info.

1. From the ‘Company Detail’ drop down, select ‘Employer Information’.

The screenshot shows the HealthEquity portal interface. At the top, there is a navigation bar with tabs: Employee Info, Insurance Info, Manage Money, Company Detail, Reports, and Resources. The 'Company Detail' tab is selected and highlighted with a red circle. A dropdown menu is open under 'Company Detail', with 'Employer Information' selected and highlighted with a red circle. A mouse cursor is pointing at 'Employer Information'. Other options in the dropdown include EFT Information, Manage Users, Email Settings, and Assign Broker/Agency. Below the navigation bar, the page title is 'Employer Information'. The main content area contains a form with the following sections:

- EMPLOYER INFORMATION**
 - Company Name (Full Legal Name): Training Portal - C
 - Doing Business As Name (DBA):
 - Company Tax ID: 11-2211222
 - Business Legal Status: Unknown
 - Main Company Address: 15 Scenic Point Dr
 - City: Draper
 - State: UT
 - Zip Code: 84118
 - Billing Address (if different):
 - City:
 - State:
 - Zip Code:
- CONTACT INFORMATION**
 - Owner/Executive Officer: Willy Crawford
 - Contact Person Name:
 - Contact Person Title:
 - Email Address: wrcrawford@healthequity.com
 - Phone: (801)727-1247
 - Fax:
 - Receive monthly invoices electronically
 - Opt-in to HSA/FSA Store Emails
 - Opt-in to FSA Store Promotions
 - Opt-in to HSA Store Promotions

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

2. Edit, add, or change any of the following information:
 - Employer information
 - Contact information
 - Invoice receipt method – paper or electronic
3. Select ‘Save’.

Manage Users

Those with a 'Manage Users' permission can grant access to additional client contacts through the employer portal. Each login can be assigned specific roles to give or deny individual users access to select areas or functions within the portal. These permissions may also limit what information can be shared with contacts who reach out to their Servicing Team.

Adding a User Login

1. From the 'Company Detail' dropdown select 'Manage Users'.



2. Select 'Add Login'. The following screen will display:



3. Complete all required (shaded) fields to designate roles and email preferences.

The 'Manage Users' form includes the following sections:

- Login Information:**
 - Active: (Only active logins can access the system)
 - Name (First M Last Suffix): [Shaded input fields]
 - User Name: [Shaded input field] (User Name must contain at least 6 characters, but may not include special characters such as @, #, \$, %, ^, &, etc.)
 - New Password: [Shaded input field] (Passwords must have at least 8 characters and contain 3 of the following categories: lower-case, upper-case, numbers, and symbols.)
 - Re-type Password: [Shaded input field]
 - New Email Address: [Shaded input field] (Updating the email here will only change it for the email setting below.)
 - Address Street 1: [Shaded input field]
 - City: [Shaded input field] State: [Dropdown] Zip Code: [Shaded input field]
 - Other Phone: [Shaded input field] Work/Daytime Phone: [Shaded input field]
- Roles:**
 - Manage Users
 - Manage Company Info
 - View Reports
 - Manage Employees
 - Make Contributions
- Email Settings:**
 - Receive 'Payment Received'
 - Receive 'Notification of Funds Returned'
 - Receive 'PPD Account Added for Employee(s)'
 - Receive 'FSA/HRA Renewal Notification'
 - Receive 'Contribution Reminder'
 - Receive 'Payment Due'
 - Receive 'Scheduled EFT'
 - Receive 'Notice of Incomplete Verification'
 - Receive 'Employer Newsletters'
- Frequency: [Monthly dropdown]
- Next Reminder: [Calendar icon]

Buttons: Add (green), Cancel (grey)

4. Select 'Add'.

Note: New logins will **not** be effective until the user's email address is verified by the associated user. To verify the address, the user will receive an email from HealthEquity requiring email address verification. The user ID and password you created for them will be needed to complete the verification process. If you need this email resent, please contact your Servicing Team.

User Roles

Five user roles are available in your employer portal:

1. **Manage users:** Users with this role can change any user's login settings and add and remove user logins.
2. **Manage company info:** Users with this role can change company information, including contact info, electronic funds transfer (EFT) info, broker assignments, paperless invoice option, etc.
3. **View reports:** Users with this role can view reports available on the 'Reports' page.
4. **Manage employees:** Users with this role have access to employee info and can update editable employee information, enroll employees, change coverage, terminate employers, etc.
Note: If HealthEquity is receiving enrollment data via file feed, updates should come on the file.
5. **Make contributions:** Users with this role have access to the 'Manage Money' tab where they can make contributions and view and pay fee invoices.

Note: You may also set up "notifications only" users by providing name and email address and selecting which communications they should receive.

Email Settings

Nine email settings are available in your employer portal:

1. **Payment received**
Sent the day any payment is processed; whether by HealthEquity when a check is received or by the employer via EFT.
2. **Notification of funds returned**
Sent after HSA funds have been held for 60 days for a member who is not enrolled, or if you have asked for funds to be returned to you.
Note: HealthEquity will return the funds in the same manner the funds were received.
3. **PPD account added for employee(s)**
This provides routing and account number information for your employees' HSAs, so that you may make direct deposit contributions to their accounts. To add this feature, you will need to contact your Client Servicing Team, this takes 24hrs to show the

P rearranged Payment and Deposit (PPD) Account Numbers Report once the setting is toggled on. The email will only be sent for Employees whose accounts we have set-up.

4. FSA/HRA renewal notification

Sent annually and required for annual plan setup.

5. Contribution reminder

Sent based on the preferences set in the login information screen.

6. Payment due

Sent after monthly invoices are created to remind the group that the invoice is available online and monthly fees are due.

7. Scheduled EFT

Sent about three business days prior to when an EFT has been scheduled to withdraw funds. If the EFT is scheduled less than three days out, an email will not be sent.

8. Notice of incomplete verification

Sent when the process to verify the identity of the enrollee was not successful. Employees will need to furnish documentation to verify their identify.

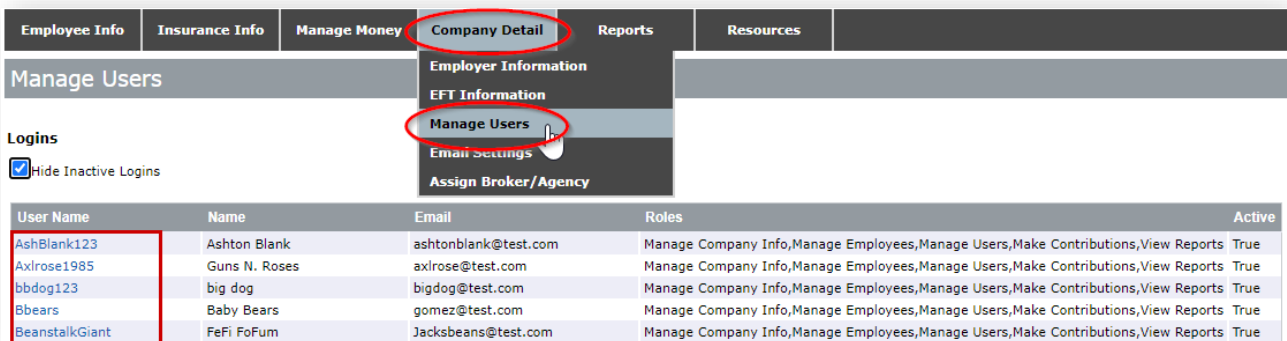
9. Employer newsletters

Notification of updates as well as educational information.

Modify a Login

Users with the 'Manage Users' role enabled can modify other users' login information. To modify a login:

1. From the 'Company Detail' drop down select 'Manage Users'.



2. Select the blue link associated with the user whose login you want to modify (located within the username column).
3. On the user's 'Login Information' page, add or modify fields and update login roles and email options if needed.

Manage Users

Login Information

Active (Only active logins can access the system)

Name (First M Last Suffix): Ashton Blank

User Name: AshBlank123

Confirmed Email Address:

New Email Address: ashtonblank@test.com

Address Street 1:

City: State: Zip Code:

Other Phone: Work/Daytime Phone:

Select which roles apply to login. Access for login is limited by leaving boxes unchecked.

Roles: Manage Users Manage Employees
 Manage Company Info Make Contributions
 View Reports

Select which emails to receive regarding your employer account.

Email Settings: Receive 'Payment Received' Receive 'Payment Due'
 Receive 'Notification of Funds Returned' Receive 'Scheduled EFT'
 Receive 'PPD Account Added for Employee(s)' Receive 'Notice of Incomplete Verification'
 Receive 'FSA/HRA Renewal Notification' Receive 'Employer Newsletters'
 Receive 'Contribution Reminder'

Frequency: Monthly

Next Reminder: 33

Save Cancel

4. Select 'Save'.

Inactivate a Login

To activate a login:

1. From the 'Company Detail' drop down select 'Manage Users'.

Employee Info	Insurance Info	Manage Money	Company Detail	Reports	Resources																														
Manage Users																																			
Logins																																			
<input checked="" type="checkbox"/> Hide Inactive Logins																																			
<table border="1"> <thead> <tr> <th>User Name</th> <th>Name</th> <th>Email</th> <th>Roles</th> <th>Active</th> </tr> </thead> <tbody> <tr> <td>AshBlank123</td> <td>Ashton Blank</td> <td>ashtonblank@test.com</td> <td>Manage Company Info,Manage Employees,Manage Users,Make Contributions,View Reports</td> <td>True</td> </tr> <tr> <td>Axlrose1985</td> <td>Guns N. Roses</td> <td>axlrose@test.com</td> <td>Manage Company Info,Manage Employees,Manage Users,Make Contributions,View Reports</td> <td>True</td> </tr> <tr> <td>bbdog123</td> <td>big dog</td> <td>bigdog@test.com</td> <td>Manage Company Info,Manage Employees,Manage Users,Make Contributions,View Reports</td> <td>True</td> </tr> <tr> <td>Bbears</td> <td>Baby Bears</td> <td>gomez@test.com</td> <td>Manage Company Info,Manage Employees,Manage Users,Make Contributions,View Reports</td> <td>True</td> </tr> <tr> <td>BeantalkGiant</td> <td>FeFi FoFum</td> <td>Jacksbeans@test.com</td> <td>Manage Company Info,Manage Employees,Manage Users,Make Contributions,View Reports</td> <td>True</td> </tr> </tbody> </table>						User Name	Name	Email	Roles	Active	AshBlank123	Ashton Blank	ashtonblank@test.com	Manage Company Info,Manage Employees,Manage Users,Make Contributions,View Reports	True	Axlrose1985	Guns N. Roses	axlrose@test.com	Manage Company Info,Manage Employees,Manage Users,Make Contributions,View Reports	True	bbdog123	big dog	bigdog@test.com	Manage Company Info,Manage Employees,Manage Users,Make Contributions,View Reports	True	Bbears	Baby Bears	gomez@test.com	Manage Company Info,Manage Employees,Manage Users,Make Contributions,View Reports	True	BeantalkGiant	FeFi FoFum	Jacksbeans@test.com	Manage Company Info,Manage Employees,Manage Users,Make Contributions,View Reports	True
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2. Select the blue link associated with the user whose login you want to inactivate (located in the username column). The following screen will display:

Manage Users

Login Information

Active (Only active logins can access the system)

Name (First M Last Suffix): Ashton Blank

User Name: AshBlank123

Confirmed Email Address:

New Email Address: ashtonblank@test.com

Address Street 1:

City: State: Zip Code:

Other Phone: Work/Daytime Phone:

Select which roles apply to login. Access for login is limited by leaving boxes unchecked.

Roles:

- Manage Users
- Manage Company Info
- View Reports
- Manage Employees
- Make Contributions

Select which emails to receive regarding your employer account.

Email Settings:

- Receive 'Payment Received'
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- Receive 'PPD Account Added for Employee(s)'
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- Receive 'Contribution Reminder'
- Receive 'Payment Due'
- Receive 'Scheduled EFT'
- Receive 'Notice of Incomplete Verification'
- Receive 'Employer Newsletters'

Frequency: Monthly

Next Reminder:

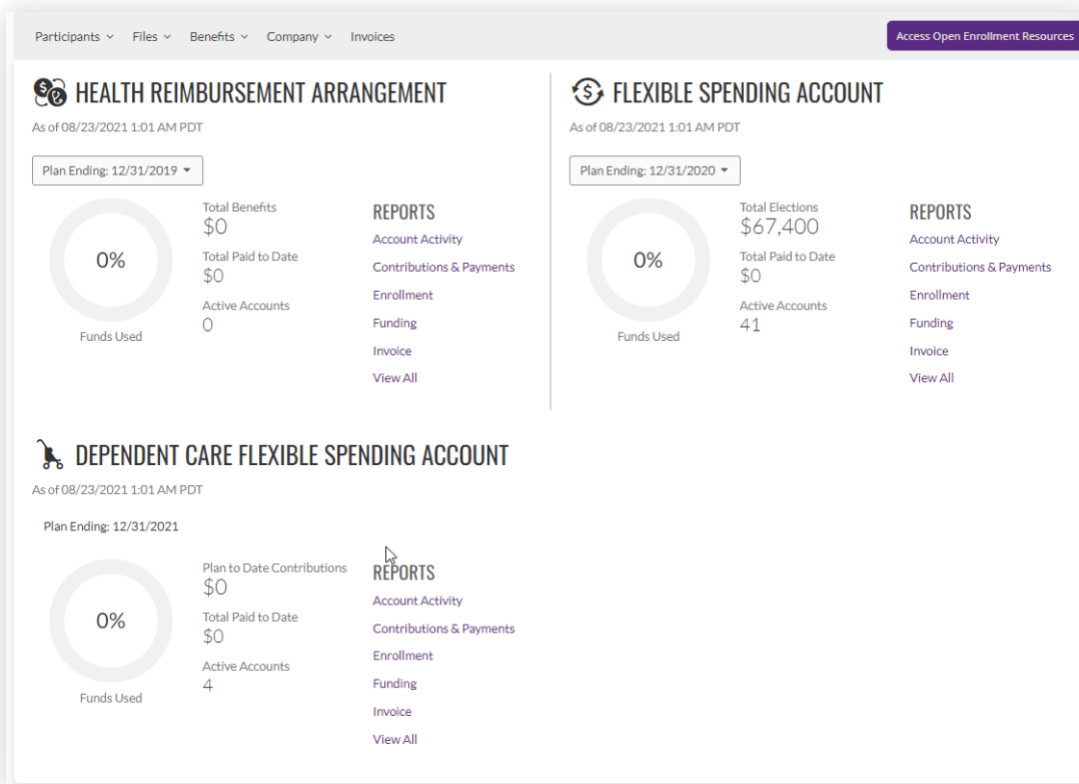
Save → Cancel ×

3. On the user's 'Login Information' page:
 - Uncheck the box to the right of 'Active'.
 - Click 'Save'.

HOME: Dashboard Overview

Healthcare (FSA/HSA/HRA), Dependent Care, Commuter and Other Programs

Once logged in, you will see your company’s account details. This ‘Home’ page is called the *DASHBOARD*, the first tab at the top left of the screen. A darkened tab at the top of the site indicates your present location on the Employer Portal. You can always click on these tabs to return to the main menu of that tab without having to use your browser’s “back” button.



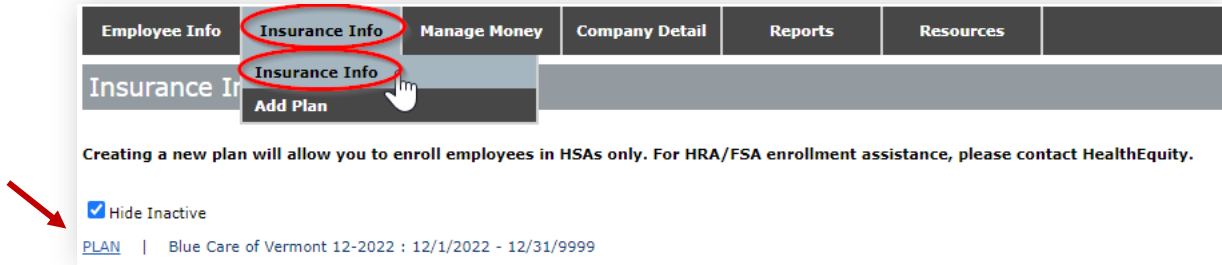
The Dashboard provides a dynamic display of total number of members (including those not eligible) and the election totals (does not include any Client contributions) made during enrollment. Simply select a plan to view an eight-year history of your plan performance.

- All plans you offer through HealthEquity, such as an HSA, HRA, Commuter Benefits, or the Wellness program, will also display details of these accounts on this screen.
- Unlike the other displays, the Wellness Program will display a count of total Eligible and Actual members. Actual members in the Wellness Program are those that have submitted a claim.
- The data shown on the Dashboard is a snapshot of each of your accounts at the close of business activity the prior night.

Portal Setup

Insurance information (integrated)– HSA plans

1. From the 'Insurance Info' drop down select 'Insurance Info'. The following screen will display:



2. From this page, you can view the number of employees in each plan by coverage level. Select the "Plan" link next to the associated insurance plan to be navigated to a page showing plan details. Your group's information will be provided from the eligibility file sent by your health plan or other agreed-upon party.

If your benefits are connected to a file partner or vendor, please contact your Client Servicing Team for additional set-up needs.

Note: You may be responsible for fees associated with setup and administration of your employees' accounts. You can review information on the monthly administration fee by clicking into the plan and reviewing the bottom of the 'Plan Summary' screen.

Add insurance information (non-integrated)

If you are setting up your employer portal for the first time, and your health plan or TPA will not be sending integrated eligibility, you will need to setup your HSA insurance information before continuing.

If you have integrated eligibility, skip to 'Company Info.'

Adding HSA plan information

HSA plan setup must be completed before you can fully enroll employees in a healthcare account. For those groups with our integrated partners, this step will be completed via the eligibility file.

Plan Setup

**** Call Client Services at 866.382.3510 for assistance for Plan Setup ****

This feature will only create our standard HSA product with the balance waiver and a \$3.95 monthly fee.

1. From the 'Insurance Info' dropdown select 'Add Plan'. The following screen will display:

The screenshot shows a navigation bar with tabs: Employee Info, Insurance Info, Manage Money, Company Detail, Reports, and Resources. The 'Insurance Info' tab is selected and highlighted. Below it, a dropdown menu is open, showing 'Insurance Info' and 'Add Plan'. The 'Add Plan' option is circled in red, and a mouse cursor is pointing to it. Below the dropdown is the 'New Plan Definition' form. The 'Insurance Company' field is highlighted in yellow and has a dropdown arrow and 'Add new' link. Below it are 'Effective/Start Date' and 'Renewal Date' fields, both highlighted in yellow and with calendar icons. The 'Plan Sponsor Unique Id' field is also highlighted in yellow. At the bottom of the form are 'Cancel' and 'Save Plan' buttons.

- a. If your group has not defined its health plan, you will see a green dialog box on the home page indicating such.
 - b. If your insurance carrier is not listed in the 'Insurance Company' drop down menu, click 'Add New' to add your carrier.
 - c. Fields in yellow are required.
 - d. The system automatically assigns a plan file ID and a coverage file ID when a new plan is created. These can be customized if you do not want to use the system generated IDs. If enrolling employees via the file upload method, you will reference the plan file ID by clicking on "Employee Info" in the menu then "HSA Employee Upload" you will be brought to a screen where you can select "View Plan IDs" to identify the active ID relevant to your Plan. Terminated plans will not show.
 - e. Select Save Plan to advance.
2. Complete all fields.

GENERAL PLAN INFORMATION

Insurance Company: GoldenRule
 Plan Start Date: 05/01/2023
 Renewal Date: 04/30/2023
 Description: GoldenRule 05-2023
 *Plan File ID: 270

Coverage Types Available for the Plan

Coverage	Deductible	*Coverage File ID	
Self		S	Delete
Family		F	Delete

+Click Here to add a new coverage type

Fees

Fee Type	Employee Amount	Employer Amount
Paper Statement Fee	\$1.00	\$0.00
Paper Enrollment Fee	\$0.00	\$10.00
HSA Admin Fee	\$0.00	\$3.95
HSA Admin Fee with Balance >= \$2,500.00	\$0.00	\$0.00

For a print-ready fee schedule, please contact Employer Services, available 8AM-7PM CST, at 866-382-3510 or at employerservices@healthequity.com.

Cancel X Save Plan >

3. Add Deductible limits for each coverage type.

- a. Add or delete any coverage types as needed.
- b. Please note minimum deductibles do apply for High Deductible Health Plans (HDHPs).

Note: If the health plan selected is an integrated partner with HealthEquity, a screen will appear after selecting ‘Save Plan,’ explaining that HealthEquity receives eligibility information from your health plan.

Note: You may be responsible for fees associated with setup and administration of your employees’ accounts. You can review information on the monthly administration fee on the bottom of the ‘Plan Summary’ screen.

- 4. Select ‘Save Plan’ when finished.
- 5. If your group offers multiple HSA plans, follow the steps again to create a ‘New Plan’ on the ‘Insurance Info’ page.
- 6. To review the insurance information you entered, select the blue ‘Plan’ link.
- 7. Select ‘Save Plan’.

Note: Once the plan is set up, enrollments can be added. For detailed instruction to enroll employees see instruction below.

Funding

HSA contributions, fee invoices and reimbursement account funding can be done via EFT or check. Please note that funds may not be available to employees for up to five business days. HSA contributions can also be sent by using the account and routing numbers to contribute to each employee’s HSA. To activate this option

and receive a list of PPD account numbers for your employees, contact Employer Services at 866.382.3510.

Note: All contributions made by our PPD solution will post as employee contributions. Because there is no distinction when they are pushed to us, so funds show as an Employee Contribution. Tax Form 5498 only reports one total, the employees W2 should show the distinction of contribution sources. Please contact Employer Services to discuss funding options for your reimbursement accounts. To setup EFT, follow the directions in the section below.

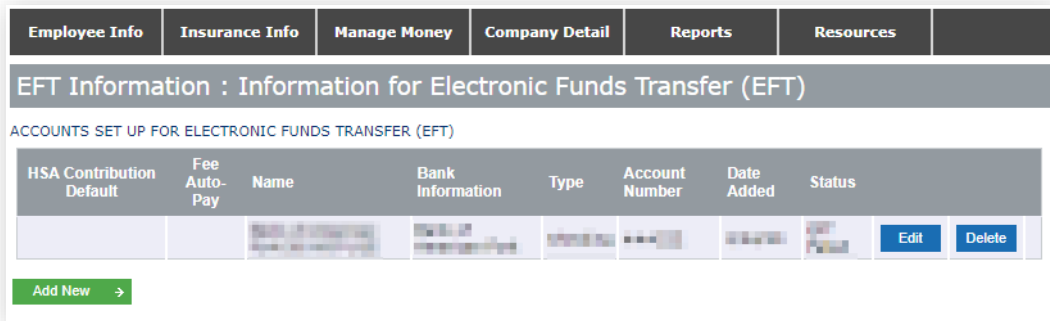
EFT Setup

You can set up an external business bank account for electronic funds transfer (EFT) payments for contributions and fees. EFT simplifies and improves the availability of funds when making payments. To add your bank account information, your account must be enabled with permissions to 'Manage Company Info.' You can add up to four accounts. Depending on the type of file you are using to send client contributions you may need to enable EFT as the HSA contribution default, please contact your Client Servicing Team.

1. From the 'Company Detail' drop down select 'EFT Information'. The following screen will display:



2. Select 'Add/Update.' The following screen will appear.



3. Select 'Add New.' The following screen will appear.

EFT Information : Information for Electronic Funds Transfer (EFT)

Enter your bank account information to set up Electronic Funds Transfer (EFT). Using your bank account for payments and other transfers will require additional verification (may take 2-3 business days depending on your bank).

Where to find your account information: After the information has been submitted, **a small dollar amount will be deposited into your account so that we can verify the account.** This small dollar deposit should be placed in this account within the next 2-3 business days. If you have questions please call us at 866-382-3510.

For faster verification, you may fax us a copy of a voided check to **520-844-7090** or scan and email it to employerservices@healthequity.com.

The screenshot shows a digital representation of a check with the following fields:

- Your Name:** 1234 Your Street, Your Town, 00000
- DATE:** _____
- PAY TO THE ORDER OF:** _____
- \$** _____
- DOLLARS**
- FOR:** _____
- Routing Number:** 000000000
- Account Number:** 000000000 296 456

Below the check image, there are two labels: "Routing Number" and "Account Number".

At the bottom of the form, there are several input fields:

- Enter Reference Name for the Account: _____ (Example: My Checking)
- Enter Routing Number (9 digits): _____
- Re-enter Routing Number: _____
- Enter Account Number: _____
- Re-enter Account Number: _____
- Account Type: **Checking** (Most are Checking)
- Financial Institution: _____

A green button labeled "Authorize" is located at the bottom right of the form.

4. Complete all fields (shaded fields are required) and select 'Authorize.'
5. A dialog box will ask you to select 'OK' to authorize the EFT.
 - a. Select 'OK' if you authorize the account to be used for EFT for both credit and debit transactions.
6. HealthEquity needs to verify that the account entered is valid and that you, as the employer contact, have access to the account. To do this,
7. HealthEquity will deposit a small amount into the account within one to two business days. Check the specified bank account to verify the transaction was successfully received.
8. Select 'OK' to acknowledge these instructions.
9. After you have verified the deposit was made, log back into your employer portal. On your home page, there will be a reminder to verify your external bank account.
10. Select 'Verify Now.'
11. Select 'Verify' next to the account you added.
12. Enter the amount in the green box.
13. A message will display to alert you to ensure the amount entered in the green box was entered correctly. Verify the entry and select 'OK.'

14. A green box will show that you have verified the account. You can now schedule payments from this account.

Note: HealthEquity does not remove the verification deposit from your account once the EFT is verified.

Broker/Consultant

During initial setup of the employer portal, you may be asked to designate your broker. You can assign or change your designated broker at any time.

1. From the 'Company Detail' drop down select 'Assign Broker/Agency'. The following screen will display:

The screenshot shows the 'Assign Broker/Agency' form in the HealthEquity portal. The 'Company Detail' menu is open, and 'Assign Broker/Agency' is selected. The form includes the following sections:

- Assign Broker/Agency:** Radio buttons for 'I have a Broker/Agency' (selected) and 'I do not have a Broker/Agency'.
- Find your Broker/Agency:** Input fields for 'Enter the Broker/Agency Name:' and 'OR Enter the Broker/Agency ID:', with a 'Search' button.
- Effective Date:** A date field set to '05/01/2023' with a tooltip that says 'Date they became your Broker/Agency on Record'.
- Permissions:** Checkboxes for 'Allow your broker to make reimbursement account plan changes' and 'Allow your Broker/Agency to have access to your Employer Portal'.
- Roles:** A section titled 'Select which roles apply to login. Access for login is limited by leaving boxes unchecked.' with checkboxes for 'Manage Users', 'Manage Company Info', 'View Reports', 'Manage Employees', and 'Make Contributions'.
- Email Notifications:** A section titled 'Select which emails to receive regarding your employer account.' with checkboxes for 'Contribution Reminder', 'Payment Received', 'Notification of Funds Returned', 'PPD Account Added for Employee(s)', 'Payment Due', 'Scheduled EFT', and 'Notice of Incomplete Verification'.
- Disclaimer:** A paragraph of legal text regarding the Business Associate Agreement (BAA) and HIPAA compliance.
- Save:** A green button at the bottom left.

2. Select 'I have a Broker/Agency.'
3. Search for your broker/agency by entering the name or ID and selecting 'Search.'
4. Enter the date they became your broker/agency on record.
5. To allow the broker to access your employer portal, select 'Allow your Broker/Agency to have access to your employer portal' and select the roles and email notifications you want to assign them.
6. Select 'Save.'

HSA Payroll Deduction (Forms and Info)

Process Message

To place information on the front page of your employees' member portal about how they can update their HSA payroll deductions:

1. From the 'Resources' drop down select 'HSA Payroll Deduction Process'. The following screen will display:

The screenshot shows the 'HSA Payroll Deduction Process' form. At the top, a navigation bar includes 'Employee Info', 'Insurance Info', 'Manage Money', 'Company Detail', 'Reports', and 'Resources'. The 'Resources' menu is open, showing 'Resource Documents', 'Employee Alerts', and 'HSA Payroll Deduction Process' (which is circled in red). Below the navigation, the form title is 'HSA Payroll Deduction Process' and the sub-section is 'Employer Contribution'. The main text explains the purpose of the form and provides instructions. A link for 'HSA Payroll Deduction Form Template' is provided. The 'Forms & Docs' section has three file upload fields, each with a 'Choose File' button and 'No file chosen' text. Below this is a 'Current Document(s)' field showing 'There are no files to show.' The 'Web Address for Payroll Updates' section has a text field containing 'http://resources.healthequity.com/Forms/Employee_HSA_Payroll_Deduction_Form.pdf' and a 'Current Web Address' field with the same URL. The 'Notes/Processing Info/Special Rules or Restrictions' section has a large empty text area. The 'Effective Dates' section has 'Start Date' set to '5/1/2023' and 'End Date' as an empty field, with a 'No End Date' checkbox. A note below the date fields states: 'Please be advised that Forms, Web Address, and/or Notes will still be displayed on your Employees' Member Portals once the Effective Date Range has passed. The information will show as "Expired". To remove this information permanently, you must remove it via the Employer Portal.' At the bottom of the form is an 'Add/Update' button.

2. Upload and/or enter information on how an employee can update their HSA payroll deductions by:
 - Uploading up to three applicable forms/documents.
 - Entering a website address.
 - Entering notes and/or additional instructions about the process.
3. Enter an effective date range – the dates when the information displays.
4. Select 'Add/Update.'

Note: Information placed here will stay on the member portal until it is removed or deleted. If the effective date range has passed the information will show as expired. We recommend reviewing this information annually to ensure accuracy.

Reimbursement Account Setup

New Setup and Renewal

The first year of a reimbursement plan, you must complete a new business notification form. An Implementation Manager will contact you to review the plan design and complete the plan setup process. Renewal requests will be sent to you via email to the contacts designated on the portal.

Integrated Enrollment

Your health plan will send plan information on the employee enrollment file. Plan setup cannot be completed until enrollment information is received.

Non-Integrated Enrollment

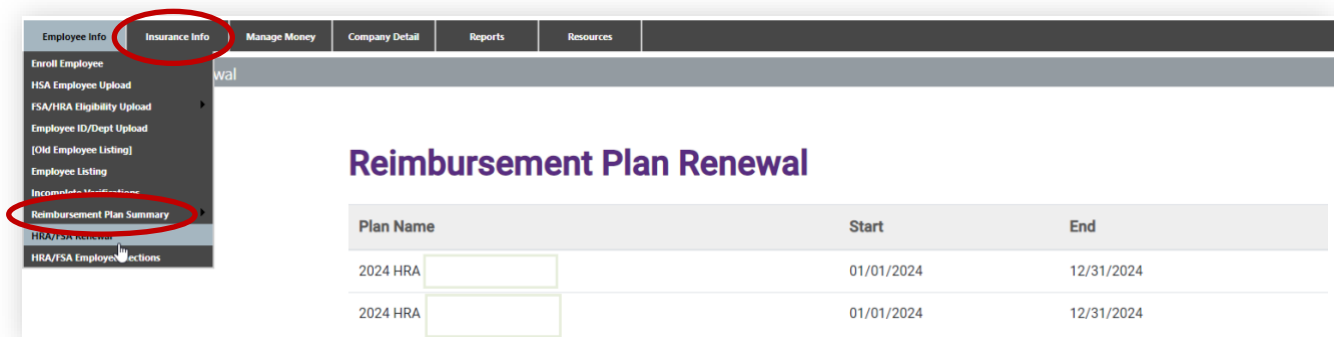
Once plan setup has been completed, you can enroll your employees manually or through file upload. See 'Enrolling Employees' for instructions.

To see your reimbursement plans, select 'Reimbursement Plan Summary' from the 'Employee Info' menu. Click on the '+' sign to the left of the plan to see how many employees are enrolled in the plan, grouped by election amount.

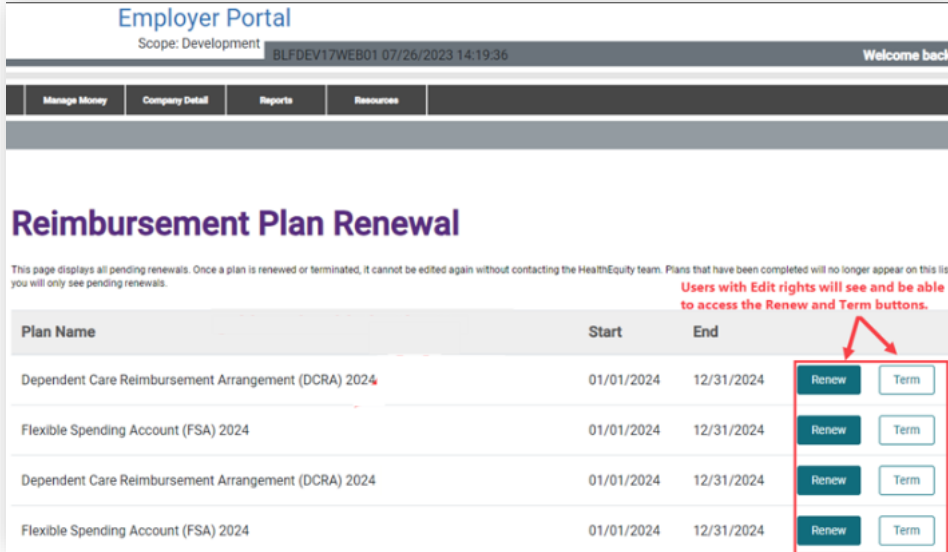
Annual Plan Renewal

Reimbursement Plan Renewal Screen

1. From the 'Employee Info' drop down select 'HRA/FSA Renewal'. The following screen will load showing all plans up for renewal.



- Those who have 'Edit' rights will have two options from here, 'Renew' or 'Term'.



HealthEquity Relationship

Screen options are the same for all plan types. This step in the renewal process assesses the Client relationship with HealthEquity.

Note: The 'Restart' button on each screen/step takes you back to the 'Reimbursement Plan Renewal' screen and does not save any changes that may have been made.

- From the 'Reimbursement Plan Renewal' screen, select 'Renew'. The 'HRA Plan: HealthEquity Relationship' screen will appear with the question: 'Are you making any vendor/carrier changes for the coming plan year?'
 - 'No' indicates no changes to be made. Click 'Continue With Renewal'
 - 'Yes' indicates there are changes to be made and additional options are displayed asking the user to indicate what is changing.



Note: Hover over the ? icon to view comments

Your relationship with HealthEquity may be direct or, more commonly, through a vendor or carrier, referred to as a Referring Partner. A Referring Partner could be a Health Plan, a Broker, a Benefits Admin vendor or another Third-Party Administrator (TPA). To ensure that your plan is set up correctly, we need to know if your relationship with HealthEquity will remain the same in the new plan year or will be changing.

1. The 'HRA Plan: HealthEquity Relationship' screen provides 3 options
 - a. Option 1:
'We were contracted with a HealthEquity referring partner but are changing to a different HealthEquity partner' opens a text box to enter the name of the new partner. Enter the new partner's name and select the 'Continue With Renewal' button.

HRA Plan: HealthEquity Relationship

Are you making any vendor/carrier changes for the coming plan year?

No
 Yes

What is changing?

We were contracted with a HealthEquity referring partner but are changing to a different HealthEquity partner.
Name of New Partner

We were contracted with a HealthEquity referring partner but are changing to a direct contract with HealthEquity.

We were contracted directly with HealthEquity but are changing to a contract through a HealthEquity referring partner.

Note: If the radio button is selected but the field is left blank an error message is presented 'Name of New Partner required'

Name of New Partner

Name of New Partner required

- b. Option 2:
'We were contracted with a HealthEquity referring partner but are changing to a direct contract with HealthEquity' does not present any additional fields and proceed with selecting the 'Continue With Renewal' button.

HRA Plan: HealthEquity Relationship

Are you making any vendor/carrier changes for the coming plan year? ⓘ

No

Yes

What is changing?

We were contracted with a HealthEquity referring partner but are changing to a different HealthEquity partner.

We were contracted with a HealthEquity referring partner but are changing to a direct contract with HealthEquity.

We were contracted directly with HealthEquity but are changing to a contract through a HealthEquity referring partner.

Continue With Renewal Restart

- c. Option 3:
'We were contracted directly with HealthEquity but are changing to a contract through a HealthEquity referring partner' opens a text box to enter the name of the partner. Enter the partner name and select the 'Continue With Renewal' button.

HRA Plan: HealthEquity Relationship

Are you making any vendor/carrier changes for the coming plan year? ⓘ

No

Yes

What is changing?

We were contracted with a HealthEquity referring partner but are changing to a different HealthEquity partner.

We were contracted with a HealthEquity referring partner but are changing to a direct contract with HealthEquity

We were contracted directly with HealthEquity but are changing to a contract through a HealthEquity referring partner.

Note: If the radio button is selected but the field is left blank an error message is presented 'Name of New Partner required'

Name of New Partner

Name of New Partner required

2. After completing the questions regarding your HealthEquity Relationship, click the 'Continue With Renewal' button to proceed to the next screen/step in the process which is 'Enrollment'.

Enrollment

Screen options are the same for all plan types.

1. The 'HRA Plan: Enrollment' screen will appear with the question: 'Do you anticipate that your plan enrollment will change significantly?'

HRA Plan: Enrollment

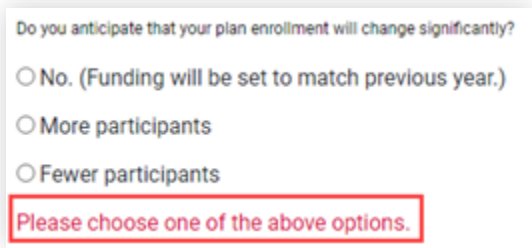
Do you anticipate that your plan enrollment will change significantly?

No. (Funding will be set to match previous year.)

More participants

Fewer participants

2. Select the appropriate option
 - a. No. (Funding will be set to match previous year).
 - b. More participants
 - c. Fewer participants
 - d. If no option is selected, an error message is presented 'Please choose one of the above options.'



Do you anticipate that your plan enrollment will change significantly?

No. (Funding will be set to match previous year.)

More participants

Fewer participants

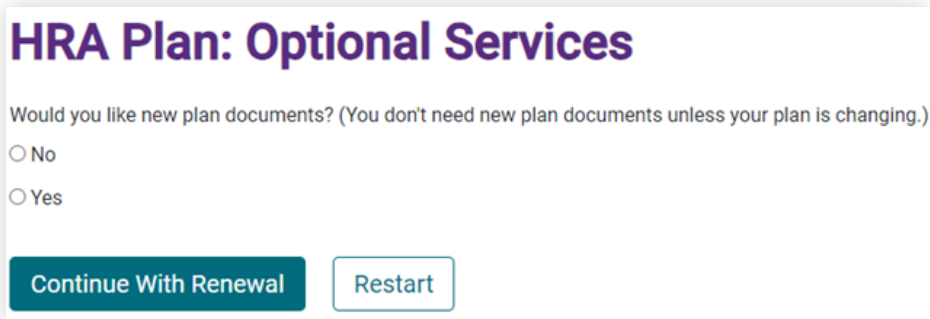
Please choose one of the above options.

3. Click the 'Continue With Renewal' button to proceed to the next screen/step which is 'Optional Services'.

Optional Services

Optional services will vary for FSA plans only.

1. The 'HRA Plan: Optional Services' screen will appear with the **question** (All Plan Types): 'Would you like new plan documents? (You don't need new plan documents unless your plan is changing.)'



HRA Plan: Optional Services

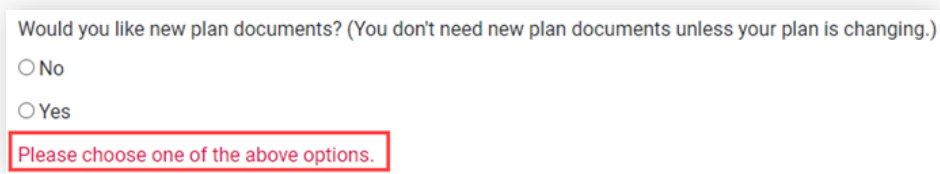
Would you like new plan documents? (You don't need new plan documents unless your plan is changing.)

No

Yes

[Continue With Renewal](#) [Restart](#)

2. Select the appropriate option 'Yes' or 'No' and click 'Continue With Renewal'. If no option is selected, an error message is presented 'Please choose one of the above options.'



Would you like new plan documents? (You don't need new plan documents unless your plan is changing.)

No

Yes

Please choose one of the above options.

3. After clicking 'Continue With Renewal' the next screen/step in the process is 'Basic Plan Information'.
4. This section is for FSA plans only. When an FSA account, the 'FSA Plan: Options Services' screen will appear with the question (**FSA Plan Only**): 'Would you like us to conduct discrimination testing?'

FSA Plan: Optional Services

Would you like us to conduct discrimination testing? ⓘ

No

Yes

Would you like new plan documents? (You don't need new plan documents unless your plan is changing.)

No

Yes

Continue With Renewal **Restart**

Note: Information Icon on this screen relates to discrimination testing:



5. After completing all 'Yes' / 'No' questions in 'Optional Services', click on 'Continue With Renewal'. This is where the FSA-specific screens/steps begin.
6. After clicking on 'Continue With Renewal', the 'Basic Plan Information' screen comes up (same as with HRA plan renewal but with additional/different questions).

Basic Plan Information

Basic Plan Information applies to all plan types. FSA plans have additional fields and options.

Note: FSA-Specific Plan Information is outlined below general Basic Plan Information.

1. The 'HRA Plan: Basic Plan Information' screen displays existing plan information to review.

HRA Plan: Basic Plan Information

Plan Year Start 01/01/2024	Plan Year End 12/31/2024	Runout Date ⓘ 03/01/2025
Early Term Runout Days ⓘ 30	Early Term Runout ⓘ	Paired with an HSA? ⓘ No

Employer Contributions

Individual \$3,000	Eligible Employee + Spouse \$6,000	Eligible Employee + Child \$6,000
Eligible Employee + Children \$6,000	Family \$6,000	

Employer Incentives ⓘ No	Prorated for Members Joining Mid-year Not available for deposit only plans	Individual Payment Cap \$3,000 Not available with debit card
-----------------------------	---	--

Funds Availability Annual	Rollover No	Offer Debit Card No
------------------------------	----------------	------------------------

Auto Pay Claims On	Auto Payee Provider
-----------------------	------------------------

[Change Plan](#)

[< Optional Services](#) [Skip to Final Plan Review](#) [Member Responsibility >](#)

2. Informational tool tips are available on this page for the following fields:

- Runout Date
- Early Term Runout Days
- Early Term Runout Date
- Paired with an HSA
- Employer Incentives

<p>Runout Date ⓘ</p> <p>The runout date defines the window of time following plan end in which expenses may be submitted but no new expenses incurred.</p>	<p>Early Term Runout Days ⓘ</p> <p>The amount of time allowed for terminated employees to submit (but not incur) expenses.</p>	
<p>Early Term Runout Date ⓘ</p> <p>The amount of time allowed for terminated employees to submit (but not incur) expenses.</p>	<p>Paired with an HSA? ⓘ</p> <p>If this HRA is paired with an HSA, the HRA deductible must be equal to or greater than the minimum deductible allowed by the IRS for an HSA qualified plan.</p>	<p>Employer Incentives ⓘ</p> <p>Additional deposits for rewards or wellness activities.</p>

- The toggle feature available on some fields on this screen enables / disables additional fields or pages later in the flow.



- Click on the 'Change Plan' button on the bottom left of page to make any necessary changes. You can either 'Cancel' any changes made or 'Save Changes'. Saved changes will display a **purple bar** next to any fields that were changed.

HRA Plan: Basic Plan Information

Plan Year Start 01/01/2024	Plan Year End 12/31/2024	Runout Date ⓘ 03/12/2025
Early Term Runout Days ⓘ 90	Early Term Runout ⓘ	Paired with an HSA? ⓘ Yes

Employer Contributions

Individual \$4,500	Eligible Employee + Spouse \$6,000	Eligible Employee + Child \$6,000
Eligible Employee + Children \$6,000	Family \$6,000	

Employer Incentives ⓘ No	Prorated for Members Joining Mid-year ⓘ Monthly Not available for deposit only plans	Individual Payment Cap \$3,000 Not available with debit card
-----------------------------	--	--

Funds Availability Annual	Rollover ⓘ Yes	Offer Debit Card No
------------------------------	-------------------	------------------------

Auto Pay Claims On	Auto Payee ⓘ Member	
-----------------------	------------------------	--

Change Plan

< Optional Services
Skip to Final Plan Review
Member Responsibility >

- Once all changes have been saved you can select from the following:
 - 'Change Plan' allows you to make additional changes, if needed
 - 'Optional Services' takes you back to the 'Optional Services' screen/step
 - 'Skip to Final Plan Review' takes you to a page where you can do a final review of the plan and provides you with another opportunity to make changes
 - 'Member Responsibility' takes you to the next step in the process which is 'Member Responsibility'

- 6. In addition to error messages for fields left blank, error messages may be presented on 'Early Term Runout Days/Date' fields as follows:

Both Early Term Runout Days and Early Term Runout Date cannot have a value

Early Term Runout Date should not exceed Runout Date

FSA-Specific

- 1. When the account is FSA the 'FSA Plan: Basic Plan Information' screen displays existing plan information to review.

FSA Plan: Basic Plan Information

Plan Year Start: 1/1/2024 | Plan Year End: 12/31/2024 | Runout Date: 12/31/2024

Early Term Runout Days: 0 | Early Term Runout Date: [Calendar Icon]

Allow Grace Period: (Off)
Rollovers cannot be allowed with Grace Period

Offer Debit Card: (Off)

Elections

Minimum: 0 | IRS Maximum: (On)

Employer Contribution: (Off)

Rollover

Allow Rollovers: (Off)

Save Changes | Cancel

2. FSA-specific fields on this screen are:

- 'Allow Grace Period' - If enabled / turned on, then the Grace Period Days and Grace Period End Date are required. An error is returned if these are left blank.

Grace Period Days or Grace Period End Date is required

- If enabled/turned on, then 'Allow Rollovers' (near bottom of screen) is disabled as Rollovers cannot be allowed with Grace Period.

Note: N/A to DCRA

Rollovers cannot be allowed with Grace Period

- Elections
 - 'Minimum' is optional
 - 'IRS Maximum' - If you are not using the IRS Maximum then a Custom Maximum is required to be entered. An error is returned if this is left blank.

Custom Maximum is required and must be greater than or equal to the Minimum

- 'Employer Contribution' - If enabled/ turned on then an 'Employer Contribution' amount is required. An error is returned if this is left blank.

Employer Contribution is required

3. Make any necessary changes and either 'Cancel' changes or 'Save Changes'. Saved changes will display a **purple** bar next to any fields that were changed.

4. Once all changes have been saved, select from the following:
 - 'Change Plan' - Allows you to make additional changes, if needed
 - 'Optional Services' - Takes you back to the Optional Services step
 - 'Final Plan Review' - Takes you to a page where you can do a final review of the Plan and provides another opportunity to make changes
 - 'Funding Allocation' - Takes you to the next step in the process which is Funding Allocation

Funding Allocation (non-HRA)

'FSA Plan: Funding Allocation' allows you to indicate your Funding allocation method and frequency.

1. From the 'Basic Plan Information' screen click on 'FSA Plan: Funding Allocation'. The Funding Allocation screen appears.

2. Click on 'Change Funding Allocation' to enable the fields and drop downs for 'Funding Allocation' and 'Frequency' to make changes, if needed.
3. 'Funding Allocation' dropdown options are the following and are explained by hovering over the Information icon:
 - a. 'Assumed' - Frequency, Pay Dates and First Pay Date must be entered.
 - b. 'Manual' - No additional info required
 - c. 'Integrated' - No additional info required

FSA Plan: Funding Allocation

Funding Allocations ⓘ

Assumed

- Select -

Assumed

Manual

Integrated

First Pay Date ⓘ

1/3/2024

Save Changes Cancel

Funding Allocations ⓘ

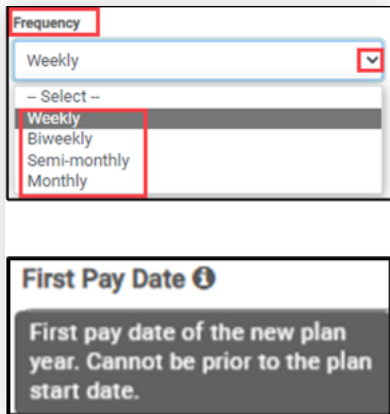
HealthEquity will track individual member/employer funding allocations using one of these methods:

Assumed: HealthEquity assumes individual funding allocations according to payroll calendar and annual election amount.

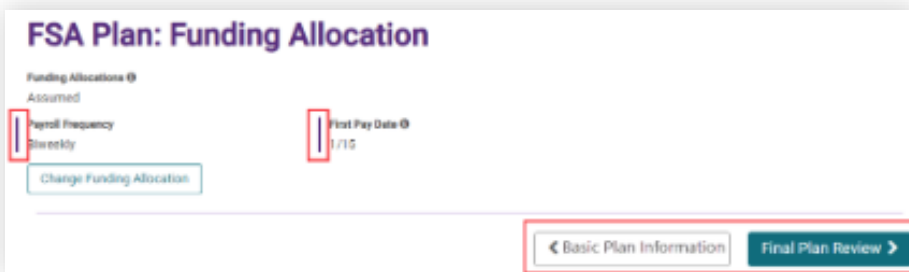
Manual: group will upload individual funding allocations through employer portal according to payroll calendar.

Integrated: third party sends funding allocations through electronic file feed. NOT AVAILABLE WITH FUNDING BASED ON ALLOCATION FILES.

4. 'Frequency' dropdown options are the following and explained by hovering over the Information icon:
 - a. 'Weekly' - First Pay Date* must be entered
 - b. 'Biweekly' - First Pay Date* must be entered
 - c. 'Semi-Monthly' - Pay Dates must be selected from these options:
 - 1st & 15th
 - 1st & 16th
 - 15th & 30th
 - 15th & 31st
 - 5th & 20th
 - 6th & 21st
 - d. 'Monthly' - Pay Dates must be selected from these options:
 - Last Friday of the Month
 - Other: If selected, First Pay Date must be entered.



5. Either 'Cancel' any changes made or 'Save Changes'. Saved changes will display a **purple** bar next to any fields that were changed:



6. Once all changes have been saved, select from the following:
 - 'Change Funding Allocation' - Allows you to make additional changes, if needed.
 - 'Basic Plan Information' - Takes you back to the Basic Plan Information step
 - 'Final Plan Review' - Takes you to a page where you can do a final review of the Plan and provides you with another opportunity to make changes.

Member Responsibility (HRA)

The 'Member Responsibility' screen relates to the amount a member must pay before the HRA will pay.

1. From the 'HRA Plan: Member Responsibility' screen, you can indicate if you will be using the IRS 'Statutory Amounts' or 'custom amounts'. Depending on how the Plan was previously set up, the screen displayed may be slightly different.
2. If the plan previously used the 'Statutory Amounts', the screen below is displayed. The toggle is turned ON (checked). If you intend to continue to use those amounts, then you need to enter the 'Per Person Responsibility' amount and 'Save Changes'.

HRA Plan: Member Responsibility

Statutory Amounts

Per Person Responsibility

[Save Changes](#) [Cancel](#)

3. If the plan previously had custom amounts, the screen below is displayed. The toggle is not checked and is OFF (minus sign in a circle). Amounts must be entered/changed for each field (as needed) as well as the 'Per Person Responsibility' amount and 'Save Changes'.

HRA Plan: Member Responsibility

Statutory Amounts

No

Individual \$2,000	Eligible Employee + Spouse \$4,000	Eligible Employee + Child \$4,000
Eligible Employee + Children \$4,000	Family \$4,000	

Per Person Responsibility

\$2,000

[Change Member Responsibility](#)

[← Basic Plan Information](#)
[Skip To Final Plan Review](#)
[Eligible Expense Types >](#)

Note: Informational tool tips are available on this page for the following fields:

- Statutory Amounts
- Per Person Responsibility

Statutory Amounts

For HRA's paired with an HSA, the HRA is required to have deductibles equal to or greater than the IRS minimum deductibles. Enable Statutory Amounts if you want to use the IRS minimums for all tiers. Otherwise, specify your desired HRA deductibles.

Per Person Responsibility

Amount that must be met by each individual before the HRA will pay out. It cannot exceed the aggregate family responsibility amount for an individual and it must be divisible into all other aggregate family responsibility tiers.

4. To make changes, toggle Off the 'Statutory Amounts' (if it is turned On), make the changes, and click 'Save Changes'. This will enable the 'Change Member Responsibility' button. The 'Statutory Amounts' toggle will now be turned Off and you can make changes.

Statutory Amounts

- Turning on the Statutory Amounts will use the current IRS Limits for the following:
 - Individual
 - Eligible Employee + Spouse
 - Eligible Employee + Child
 - Eligible Employee + Children
 - Family
- To use Statutory Amounts, turn On (shows as a checkmark) the toggle for 'Statutory Amounts' and enter the 'Per Person Responsibility' amount.

HRA Plan: Member Responsibility

Statutory Amounts

Per Person Responsibility

[Save Changes](#) [Cancel](#)

- No further changes are necessary if using the Statutory Amounts.
- You can either 'Cancel' any changes made or 'Save Changes'.
- Saved changes will display. Statutory Amounts toggle now shows 'Yes' and a **purple** bar is displayed next to any fields that were changed:

HRA Plan: Member Responsibility

Statutory Amounts

Yes

Per Person Responsibility

[Change Member Responsibility](#)

[← Basic Plan Information](#) [Skip To Final Plan Review](#) [Eligible Expense Types >](#)

- Once all changes have been saved, you can select from the following:
 - 'Change Member Responsibility' - Allows you to make additional changes, if needed.
 - 'Basic Plan Information' - Takes you back to the Basic Plan Information screen.
 - 'Skip to Final Plan Review' - Takes you to a page where you can do a final review of the Plan and provides you with another opportunity to make changes.
 - 'Eligible Expense Types' - Takes you to the next step in the process which is 'Eligible Expense Types'

Custom Amounts

1. To enable entering custom amounts, turn off (shows as a minus sign in a circle) if needed, the toggle for 'Statutory Amounts' and enter the custom amounts for each applicable field:
 - Individual
 - Eligible Employee + Spouse
 - Eligible Employee + Child
 - Eligible Employee + Children
 - Family

HRA Plan: Member Responsibility

Statutory Amounts

Individual 2000	Eligible Employee + Spouse 4000	Eligible Employee + Child 4000
Eligible Employee + Children 4000	Family 4000	

Per Person Responsibility
2000

[Save Changes](#) [Cancel](#)

2. Enter the 'Per Person Responsibility' amount.
3. Either 'Cancel' any changes made or 'Save Changes'.
4. Saved changes will display. 'Statutory Amounts' toggles now shows 'No' and a **purple** bar next to any fields that were changed:

HRA Plan: Member Responsibility

Statutory Amounts No

Individual \$2,000	Eligible Employee + Spouse \$0	Eligible Employee + Child \$0
Eligible Employee + Children \$0	Family \$0	

Per Person Responsibility
\$0

[Change Member Responsibility](#)

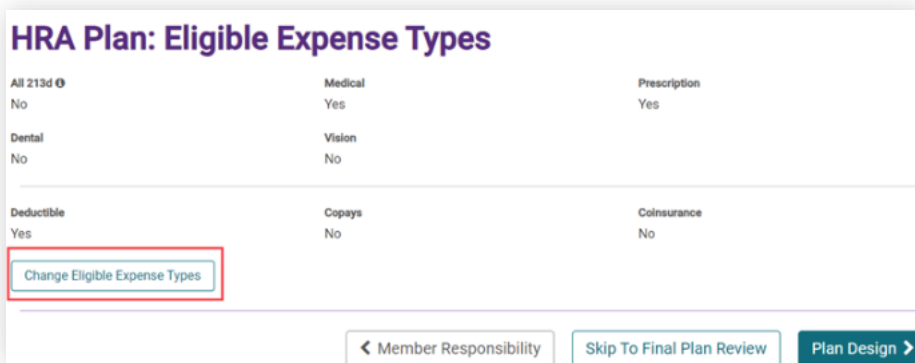
[← Basic Plan Information](#) [Skip To Final Plan Review](#) [Eligible Expense Types →](#)

5. Once all changes have been saved, select from the following:
 - ‘Change Member Responsibility’ - Allows you to make additional changes, if needed.
 - ‘Basic Plan Information’ - Takes you back to the Basic Plan Information screen.
 - ‘Skip to Final Plan Review’ - Takes you to a page where you can do a final review of the Plan and provides you with another opportunity to make changes.
 - ‘Eligible Expense Types’ - takes you to the next step in the process which is ‘Eligible Expense Types’

Eligible Expense Types (HRA)

The Eligible Expense Types screen allows Clients to review the existing Eligible Expense Types on their HRA and make changes, if needed.

1. The fields on the ‘HRA Plan: Eligible Expense Types’ screen are toggles that can be turned On = Yes (offer) or Off = No (do not offer) for each expense type.



2. If no changes need to be made, click on:
 - ‘Member Responsibility’ - Takes you back to the Member Responsibility page
 - ‘Skip to Final Plan Review’ - Takes you to a page where you can do a final review of the Plan and provides you with another opportunity to make changes.
 - ‘Plan Design’ - Takes you to the next step in the process which is Plan Design
3. If changes are needed, click on the ‘Change Eligible Expense Types’ button. Click on the toggle for each expense type to turn it on or off as needed.

HRA Plan: Eligible Expense Types

All 213d	Medical	Prescription
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dental	Vision	
<input type="checkbox"/>	<input type="checkbox"/>	
Deductible	Copays	Coinsurance
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save Changes](#) [Cancel](#)

- 4. If you select 'All 213d', the system automatically turns on (checks) all the other expense type options. This eliminates the need for users to have to individually select all the other expense types.

All 213d

This encompasses all IRS-allowed expenses.

- 5. If you do not want 'All 213d', but do want all the other options turned on, you can turn off All 213d and then select each of the other options.
- 6. You can either 'Cancel' any changes made or after all changes have been made, click on 'Save Changes'.
- 7. Saved changes updates the screen to show Yes (On)/No (Off) and a **purple** bar next to each field that was changed.

HRA Plan: Eligible Expense Types

All 213d	Medical	Prescription
Yes	Yes	Yes
Dental	Vision	
Yes	Yes	
Deductible	Copays	Coinsurance
Yes	Yes	Yes

[Change Eligible Expense Types](#)

[Member Responsibility](#) [Skip To Final Plan Review](#) [Rollovers](#)

8. Select from the options at the bottom of the screen:
 - 'Change Eligible Expense Types' - Allows you to make additional changes, if needed.
 - 'Member Responsibility' - Takes you back to the Member Responsibility page
 - 'Skip to Final Plan Review' - Takes you to a page where you can do a final review of the Plan and provides you with another opportunity to make changes.
 - 'Rollovers' (*specific to HRA plans*) - Takes you to the next step in the process which is Rollovers

Rollovers (HRA)

The Rollover screen is only available if Rollovers is set to 'Yes' on the Basic Plan Information page.

1. The 'HRA Plan: Rollovers' screen gathers information on your rollover amounts for each coverage type.

Coverage Type	Minimum ⓘ	Maximum ⓘ
Individual		
EE + Spouse		
EE + 1 Child		
EE + Children		
Family		

Change Rollovers

Note: Informational tool tips are available on this page for the following fields:

- No Minimum
- No Maximum

No Minimum ⓘ
Minimum balance required for unused funds to rollover.

No Maximum ⓘ
Maximum amount allowed to rollover.

2. Click on 'Change Rollovers' to make any necessary changes

HRA Plan: Rollovers

Rollover Percentage of Remaining Funds
100%

Coverage Type	Minimum ⓘ	Maximum ⓘ
Individual		
EE + Spouse		
EE + 1 Child		
EE + Children		
Family		

[Change Rollovers](#)

Note: If Minimum or Maximum is turned off, then the fields are grayed out and amounts cannot be entered.

No Minimum ⓘ

Minimum

Minimum

No Maximum ⓘ

Maximum

3. Either 'Cancel' any changes made or 'Save Changes'.

HRA Plan: Rollovers

Rollover For All Coverage Types:

Percentage of Remaining Funds:

No Minimum No Maximum

Coverage Type	Minimum	Maximum
Individual	<input type="text" value="0"/>	<input type="text" value="0"/>
EE + Spouse	<input type="text" value="0"/>	<input type="text" value="0"/>
EE + 1 Child	<input type="text" value="0"/>	<input type="text" value="0"/>
EE + Children	<input type="text" value="0"/>	<input type="text" value="0"/>
Family	<input type="text" value="10"/>	<input type="text" value="1000"/>

4. Saved changes will display a **purple** bar next to any fields that were changed.

HRA Plan: Rollovers

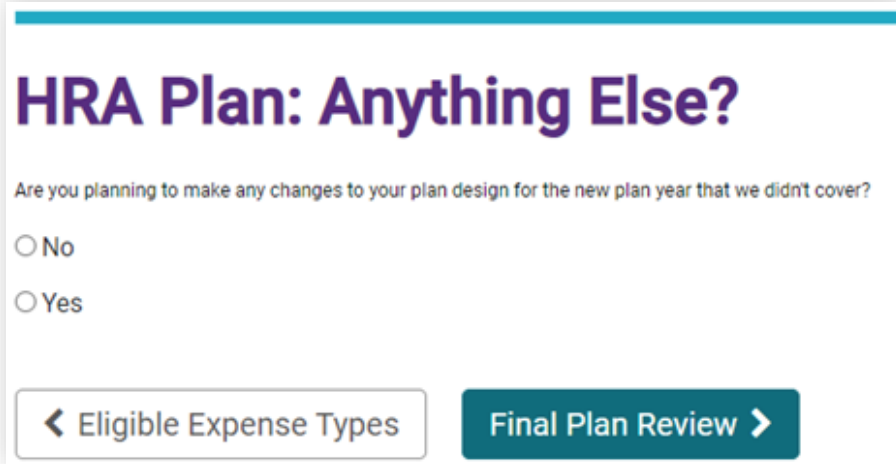
Rollover Percentage of Remaining Funds: 100%

Coverage Type	Minimum	Maximum
Individual		
EE + Spouse		
EE + 1 Child		
EE + Children		
Family		

5. Select from the options at the bottom of the screen
- 'Change Eligible Expense Types' - Allows additional changes, if needed.
 - 'Skip to Final Plan Review' - Takes you to a page where you can do a final review of the Plan and provides you with another opportunity to make changes.
 - 'Plan Design' - Takes you to the next step in the process which is Plan Design

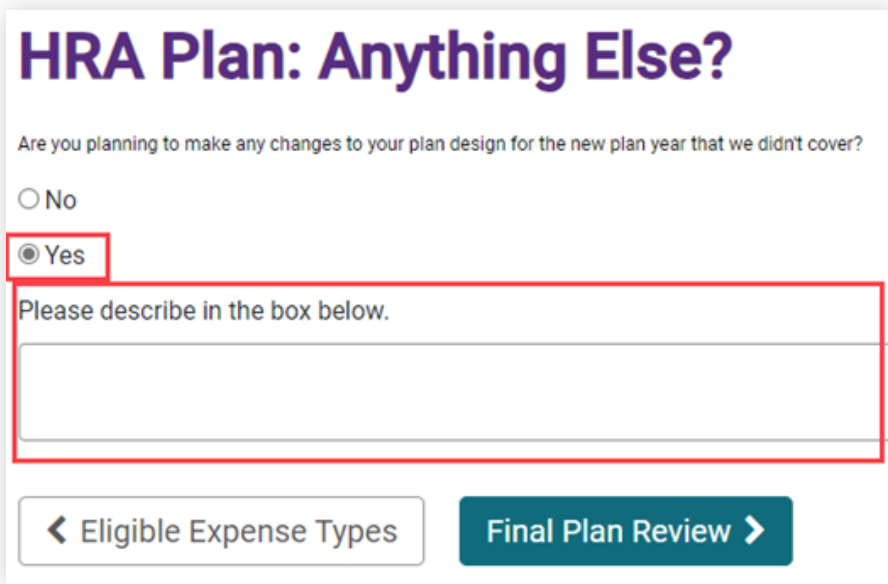
Plan Design (HRA)

1. The 'HRA Plan: Anything Else?' screen will appear with the question: 'Are you planning to make any changes to your plan design for the new plan year that we didn't cover?'



The screenshot shows a white card with a teal header bar. The title 'HRA Plan: Anything Else?' is in large purple font. Below it is the question 'Are you planning to make any changes to your plan design for the new plan year that we didn't cover?'. Two radio buttons are visible: 'No' (selected) and 'Yes'. At the bottom are two buttons: 'Eligible Expense Types' (with a left arrow) and 'Final Plan Review' (with a right arrow).

2. If 'Yes' is selected (there are other changes), a text box opens 'Please describe in the box below.'



This screenshot is similar to the previous one, but the 'Yes' radio button is selected and highlighted with a red box. Below the radio buttons, a text box is open with the prompt 'Please describe in the box below.' and a large empty input area. The 'Eligible Expense Types' and 'Final Plan Review' buttons are also present at the bottom.

3. If 'No' is selected (there are no more changes), click on one of the following:
 - 'Eligible Expense Types' - Takes you back to the Eligible Expense Types screen
 - 'Final Plan Review' - Takes you to the last step in the process which is Final Plan Review

Final Plan Review

The last step in the process is to review and confirm the HRA Plan details.

1. The 'HRA Plan' screen displays one of the following:
 - All the answers and settings completed in the previous steps
 - If no changes were made, all the current settings that will be carried over to the next year's plan
2. At the top of this screen, it states:
Please review your plan details. Once submitted, the details can only be changed by contacting HealthEquity customer service.

HRA Plan

There is no year-over-year rollover. Once submitted, the data can only be changed by contacting HealthEquity customer service.

HealthEquity Relationship

Wants/needs changes for the coming plan year?

No

[Change Partner](#)

Enrollment

Do you anticipate that your plan enrollment will change significantly?
No. (Funding will be set to match previous year.)

[Change Enrollment](#)

Optional Services

Prepays or Annual Plan Revisions

No

Plan adjustments will not change unless they are a change of plan.

[Change Optional Services](#)

Basic Plan Information

Plan Year Start 01/01/2024	Plan Year End 12/31/2024	Renew Date [Ⓢ] 04/01/2024
Early Term Renewal Days [Ⓢ] 90	Early Term Renewal [Ⓢ] No	Paired with an HRA? [Ⓢ] No

Employer Contributions

Individual (\$20)	Eligible Employees + Spouse (\$1,000)	Eligible Employees + Child (\$1,000)
Eligible Employees + Children (\$1,000)	Family (\$1,000)	
Employer Incentives [Ⓢ] No	Provided for Members Joining After year (2x/3x/4x) Not available to support any plans	Individual Payment Cap \$0 Not available to support any plans

Funds Availability Annual	Rollover No	Offer Split Cost No
------------------------------	----------------	------------------------

Auto Pay Dates On	Auto Payee Member
----------------------	----------------------

[Change Basic Plan Information](#)

Member Responsibility

Monthly Amounts [Ⓢ]
No

Per Person Responsibility [Ⓢ]
\$0

[Change Member Responsibility](#)

Eligible Expense Types

All Other [Ⓢ] Yes	Medical Yes	Prescription Yes
Dental Yes	Vision Yes	
Recreation Yes	Travel Yes	Entertainment Yes

[Change Eligible Expense Types](#)

Rollovers

Rollover Percentage of Remaining Funds
100%

Coverage Type	Minimum [Ⓢ]	Maximum [Ⓢ]
Individual		
Individual - Spouse		
Individual - 1 Child		
Individual - Child		
Family		

[Change Rollovers](#)

Anything Else?

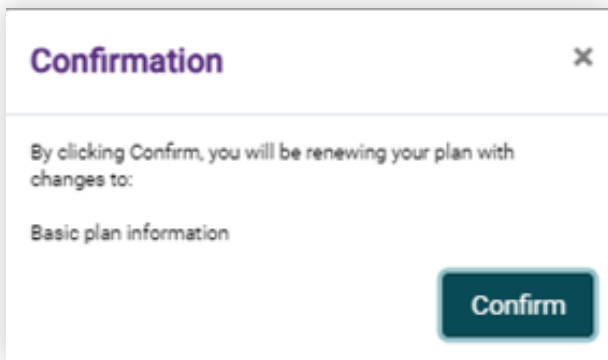
Any plan design changes?

No

[Change Anything Else](#)

[Renew With Changes](#) [Restart](#)

3. **HRA ONLY:** Once all the plan details are reviewed, select 'Renew With Changes' or 'Restart'
4. The 'HRA Plan Renewal' process is now complete
5. Clicking 'Restart' takes you back to the 'Reimbursement Plan Renewal' page and does not save any of the changes that were made.
6. **FSA ONLY:** Once all the plan details are reviewed, select to:
 - Renew Without Changes
 - Renew With Changes: Displayed if changes were made from this screen
 - Restart: Takes the user back to the 'Reimbursement Plan Renewal' screen to start over.
7. 'Renew With Changes' will present a 'Confirmation' message and display which screens/steps changes were made on and a 'Confirm' button.



8. Click on 'Confirm' and receive a message indicating 'Renewing with Changes'.
9. You are back on the main 'Reimbursement Plan Renewal' screen and a 'Success!' message is displayed.



Term Button

1. From the 'Reimbursement Plan Renewal Screen' click on the 'Term' button to terminate a plan with HealthEquity.

Reimbursement Plan Renewal

This page displays all pending renewals. Once a plan is renewed or terminated, it cannot be edited again without contacting the HealthEquity team. Plans that have been completed will no longer appear on this list, you will only see pending renewals.

Plan Name	Start	End	Renew	Term
Flexible Spending Account (FSA) 2024	01/01/2024	12/31/2024	Renew	Term
Flexible Spending Account (FSA) 2024	01/01/2024	12/31/2024	Renew	Term
Flexible Spending Account (FSA) 2024	01/01/2024	12/31/2024	Renew	Term
Flexible Spending Account (FSA) 2024	01/01/2024	12/31/2024	Renew	Term

2. The 'FSA Plan: Term' screen will ask two questions and provide an option for 'Additional Comments'
 - a. 'HealthEquity will administer run out' = Toggle 'Yes' (checkmark) or 'No' (minus sign)
 - b. 'Reason for Terminating?' (required) – Select from the drop-down list for reasons
 - c. 'Additional comments?' Please share any additional comments with us' = Free form text area

FSA Plan: Term

We're sad to see you go. Please provide the following information so we can provide you the best service possible to complete your experience with HealthEquity. Please note, if you choose to have your new partner administer your run out, HealthEquity will stop processing claims on your plan end date.

HealthEquity will administer run out

Reason for Terminating?

-- Select --

- No longer offering HRA/FSA
- Changing health plans
- Pricing
- Service
- Other

Additional comments?

Please share any additional comments with us

Terminate Plan

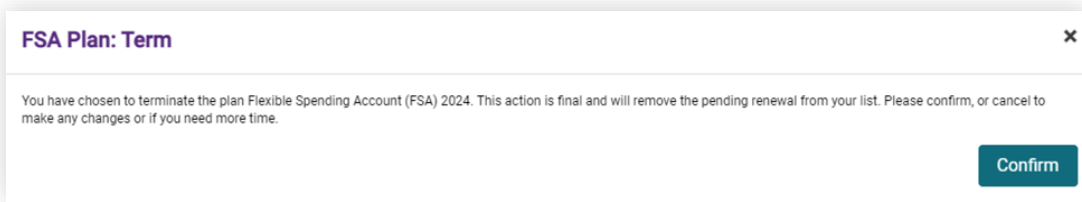
3. If 'Reason for Terminating' is left blank an error message 'Reason for Terminating is required' is returned

Reason for Terminating?

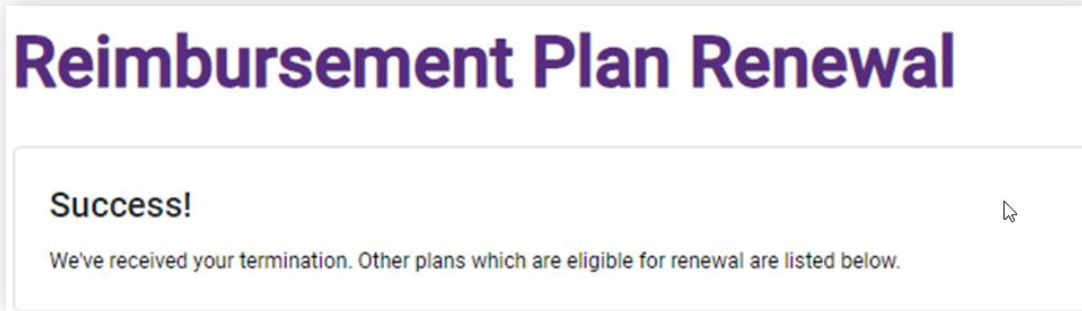
-- Select --

Reason for Terminating is required

4. After completing the fields on the 'FSA Plan: Term' screen, click on 'Terminate Plan' or 'Cancel'.
5. Clicking 'Terminate Plan' will display the 'FSA Plan: Term' screen with a 'Confirm' button



- 6. After clicking 'Confirm', the 'Reimbursement Plan Renewal' screen displays the message '**Success!** We've received your termination. Other plans which are eligible for renewal are listed below' .



Copays

The 'FSA/HRA Copay Form' should be completed when a debit card is offered with your plan. This form is important as it will assist us with copay matching for debit card transactions. Please contact Employer Services at 866.382.3510 or employerservices@HealthEquity.com to request this form.

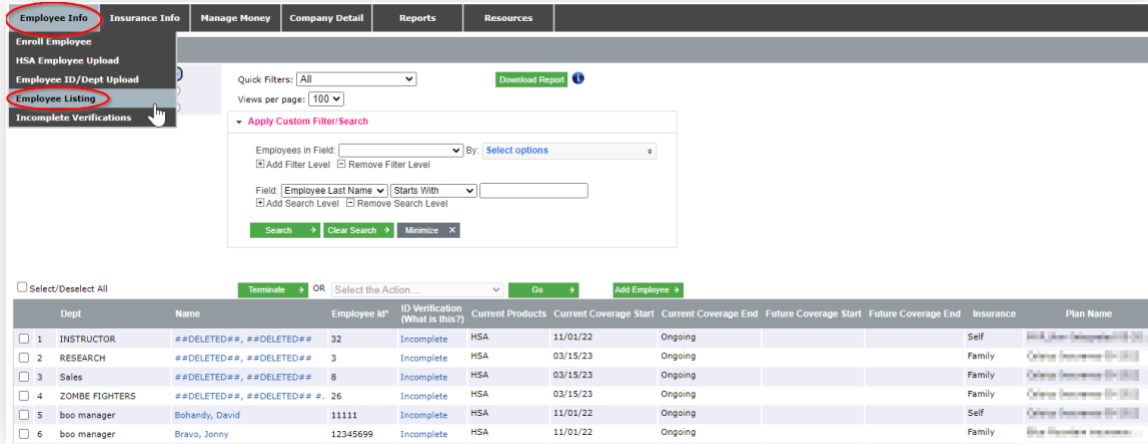
Please complete the copay form prior to your plan effective date as we are unable to retroactively auto-match copays to past debit card transactions. If you have changes to the copays, please complete a new copay form with ALL copays.

Note: Your 'Health Plan Benefit Summaries' document will not be accepted in lieu of completing the copay form.

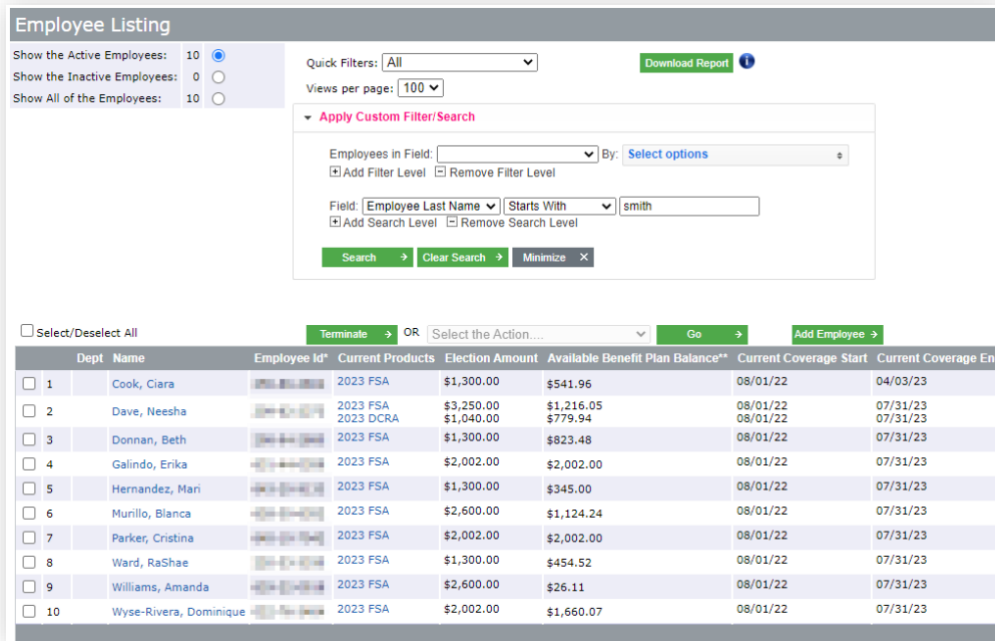
Section 2 – Employee Info and Enrollment

Using the Employee Listing

1. From 'Employee Info' dropdown select 'Employee Listing'. The following screen will display.



2. If the employee listing does not appear automatically, search by last name or other criteria. After entering the criterion click 'Search'.



3. Use your employee listing to:
 - a. Verify which employees are enrolled in an HSA or reimbursement account.
 - b. See your active and inactive employees (use the radio buttons).

An inactive employee is one who has been terminated or voluntarily dropped coverage.
 - c. Use the search or filter features to easily find an employee.
 - o You can also sort rows by clicking on a column header.
 - d. See if any enrollees have incomplete identity verification. HealthEquity is required by the USA PATRIOT Act to verify the identity of each person enrolled in an HSA.
 - e. See coverage start and end dates as well as any future coverage for employees.
 - f. Perform a search using different parameters such as first name, last name, employee ID, start date, end date, etc.
 - g. Export your employee listing to Excel by selecting 'Download Report.'
 - h. Assign a department ID and use this for sorting and filtering on reports.
 - i. If an employee ID has not been provided, the employee's Social Security Number (SSN) will show in this field.
 - j. ID verification is for HSA members only (this is not necessary for FSA). Employees who have not passed the verification process cannot receive contributions to their HSA.
 - k. The current coverage and future coverage dates allow you to see what enrollment we have received.
 - o The insurance and plan name fields are only populated for HSAs.
 - o Reimbursement plans may show 'No Coverage' in this field.
 - l. Click on an employee's name to view the 'Enroll Employee' screen, where you can view or modify non-integrated enrollment.

HSA Only (Terminate in bulk)

If utilizing non-integrated enrollment, HSAs can be terminated in bulk from the employee listing.

1. Select employees that need to be terminated by clicking the box next to each individual.
2. Click the 'Terminate' button.
3. Enter the day after the last day of coverage. I.E., 01/01/2024 if the term date is 12/31/2023.
4. Select Update

Select/Deselect All Terminate → OR Select the Action.... Go → Add Employee →

	Dept	Name	Employee Id*	ID Verification (What is this?)	Current Products	Election Amount	Available Benefit Plan Balance**	Current Coverage Start	Current Coverage End
<input type="checkbox"/>	1	Smith, Aaron L.	[Masked]	Not Applicable	2022 FSA 2023 FSA	\$2,000.00 \$2,850.00	\$0.00 \$921.44	01/01/22 01/01/23	12/31/22 12/31/23
<input checked="" type="checkbox"/>	2	Smith, Ariana	[Masked]	Complete	HSA			01/01/23	12/31/23
<input checked="" type="checkbox"/>	3	Smith, Benjamin T.	[Masked]	Complete	HSA			01/01/23	12/31/23
<input checked="" type="checkbox"/>	4	Smith, Calvin	[Masked]	Complete	HSA			01/01/22	Ongoing

Terminate Employee

Terminating an employee's HSA coverage will remove them as an active Member under your plan, and update them to a HealthEquity individual product where they will become responsible for monthly administration fees. HealthEquity will notify the employee of these changes via email. Please enter the date on which the employee no longer has coverage under this plan. The date cannot be earlier than the first of the current month for billing purposes.

Employee(s) selected:

Employee	Coverage Start	Coverage End
[Masked]	1/1/2022	Ongoing
[Masked]	1/1/2022	Ongoing
[Masked]	1/1/2022	Ongoing

No Coverage Date As Of ←

Adding Dept ID or Employee ID by File Upload

To protect employee information, Social Security Numbers will be masked online and in most reports. To assist you in identifying employees, employee IDs and department IDs can be added for each employee. This can be done one by one in the employee listing, or by file upload.

1. Select 'Employee ID/Dept Upload' from under 'Employee Info.' The following screen displays:

The screenshot shows the 'Employee Info' menu on the left with 'Employee ID/Dept Upload' selected. The main content area displays the 'Upload Employee ID and Department' screen, which includes instructions to upload an XLSX, XLS, or CSV file (2MB or smaller) and a 'Select files...' button.

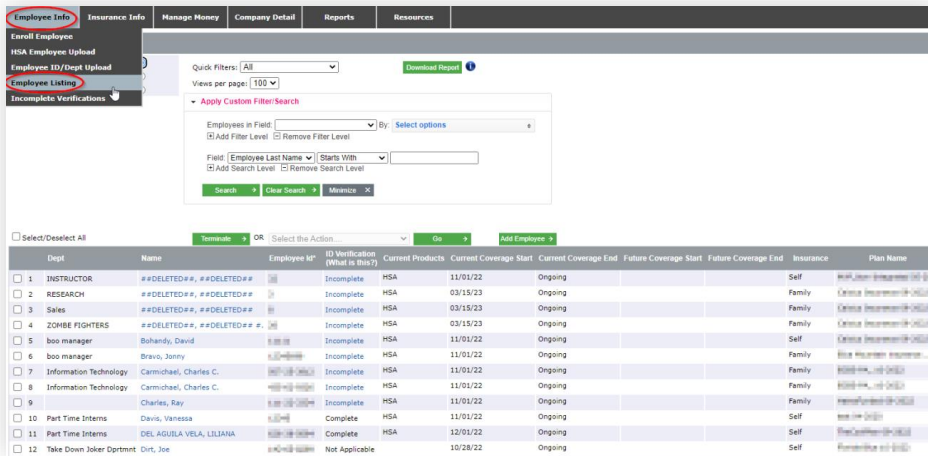
2. 'Download Template', or 'View Instructions' using the links provided.
3. Select your completed file.

- If there are any errors, they will be pointed out to you. Correct your file and select your updated file to continue.
- Once complete, the uploaded values will be available to review on the employee listing.

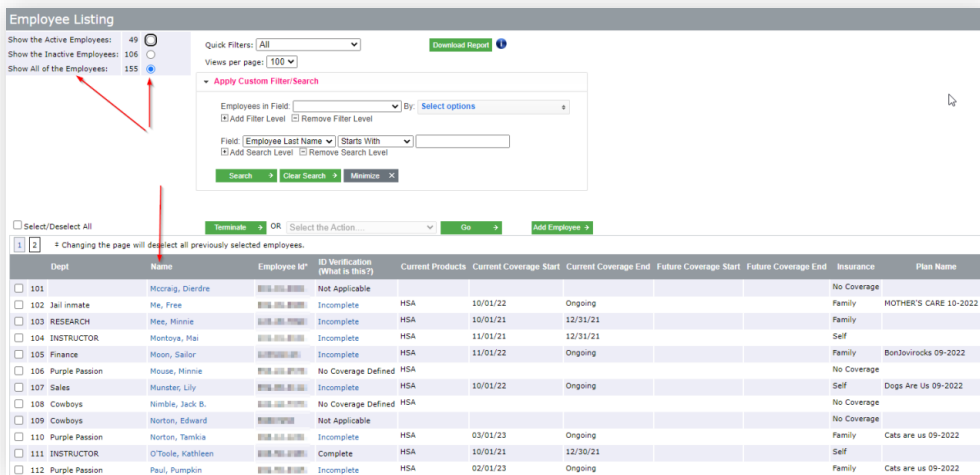
Non-Integrated HSA Enrollment

To enroll employees one at a time for an EXISTING member:

- From the 'Employee Info' dropdown select 'Employee Listing'. The following screen will display:



- Select 'Show All of the Employees'. Click on the name of the individual that will be adding the HSA account for the new plan year then select '+HSA' at the bottom of the page.



Enroll Employee

* First Name Dierdre	Middle Name	* Last Name McCraig	Suffix
* SSN XXX-XX-0001	Employee ID ?	* Gender <input checked="" type="radio"/> Female <input type="radio"/> Male	* Date of Birth 02/20/1976
Email Address donotuse@email.com	* Personal Phone 801-727-1216 ext	Work Phone (###)###-#### ext	Category/Department ?

Physical Address

* Street 1 15 W Scenic Pointe Drive	Street 2	
* City Draper	* State UT	* ZIP Code 84020

Mailing Address

Use physical address as mailing address ?

Accounts

+ HSA

Description	Start	End	Coverage Level	Election
-------------	-------	-----	----------------	----------

3. Select the plan and coverage level, then enter the coverage effective date.

If desired, enter their annual contribution per pay period here and they will be stored as saved values for later use in making contributions. Select 'Add Account.'

Add HSA

Please select a plan

Test 09-2022

GoldenRule 09-2022

MVP 08-2022

Coverage Level Self	Coverage Effective Beginning 4/24/2023
Employee Contribution ? \$0.00	Employer Contribution ? \$0.00

Note: The effective date should always be the first of the month. This date drives billing and is not necessarily an employee's high deductible health plan effective date but is rather the first of the month of their HealthEquity HSA coverage.

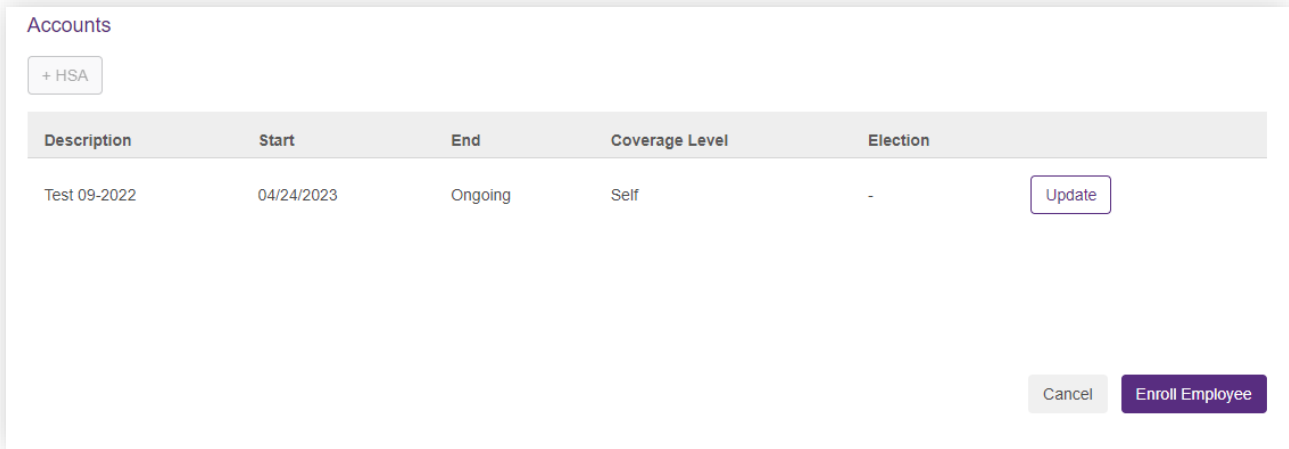
4. Review information to ensure it is correct and select 'Update'.

To enroll employees one at a time for a NEW member:

1. From the 'Employee Info' drop down select 'Enroll Employee'. The following screen will display:

- a. Complete all fields on the 'Enroll Employee' page (fields with an asterisk are required) and select the '+HSA' box under 'Accounts.'
- b. To define your employee's coverage, select the plan and coverage level, then enter the coverage effective date. If you enter the per pay period annual contribution amounts here, they will be stored as saved values for your use in making contributions. Select 'Add Account'.

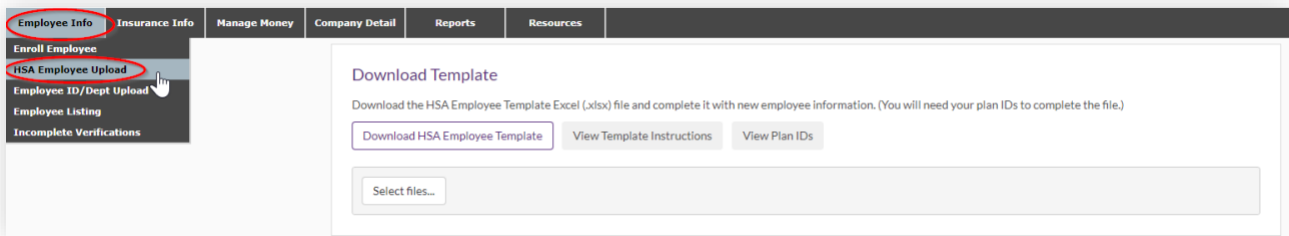
- c. After selecting Add Account the coverage will appear on the Enroll Employee page. Finalize enrollment by clicking the purple 'Enroll Employee' box.



Note: The effective date should always be the first of the month. This date drives billing and is not necessarily an employee’s high deductible health plan effective date but is rather the first of the month of their HealthEquity HSA coverage.

Enrolling employees via file upload (recommended for 25+ employees):

1. From the 'Employee Info' dropdown select the 'HSA Employee Upload' option. The following screen will display:



2. Select 'Download HSA Employee Template.'

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	
EMPLOYEE ID	SOCIAL SEC	EMPLOYER CONTRIBUTION	EMPLOYEE CONTRIBUTION	FIRST NAME	LAST NAME	MIDDLE	SUFFIX	EMAIL ADDRESS	CATEGORY OR DEPARTMENT	BIRTH DATE	GENDER	STREET 1	STREET 2	CITY	STATE	ZIP CODE	HOME PHONE	WORK PHONE	MAILING STREET1	MAILING STREET2	MAILING CITY	MAILING STATE	MAILING ZIP CODE	
000-00-0000	111-11-1111			Jane	Doe			jane@bemail.com		1/1/1980	F	15 W Spenic Pome Drive	Suite 100	Draper	UT	84020	801-727-1216						84020-0110	
999-99-9999				John	Doe		Jr	john.doe@bemail.com		7/16/1975	M	123 Easy Street		Alpine	UT	84004	801-727-1000						84004-0110	
				Jill	Doe			jill@bemail.com		8/23/1954	F	987 Sample Drive		Highland	UT	84003	801-727-1954			PO Box 1096		Alpine	UT	84003

3. Complete the template using 'View Template Instructions,' if needed. You can get the plan IDs for the template from the 'View Plan IDs' option.

Do not delete any columns from this template. If columns are deleted the file will not upload properly into our system.

4. Once you have completed the employee template, save it for your records.
5. Complete the upload by selecting 'Select File' under 'Upload Completed File' header and browse your files to find the saved template.
6. Select 'Upload.'

The upload will be batched for processing at a later time (usually within an hour). An email is sent to the address associated with your login ID, confirming the upload.

Modifying (or terminating) an Employee's Coverage

Non-integrated

You can change an employee's coverage information through your employer portal unless enrollment is being delivered on an integrated file feed.

Note: Some fields under 'Employee Listing' are not editable. For example, employee demographic data can only be changed by the account owner.

1. From the 'Employee Info' dropdown select the 'Employee Listing'. The following screen will display:

	Dept	Name	Employee ID*	ID Verification (What is this?)	Current Products	Current Coverage Start	Current Coverage End	Future Coverage Start	Future Coverage End	Insurance	Plan Name
<input type="checkbox"/>	1	INSTRUCTOR	##DELETED##, ##DELETED##	Incomplete	HSA	11/01/22	Ongoing			Self	Self, Low-Deductible HD-HEALTH
<input type="checkbox"/>	2	RESEARCH	##DELETED##, ##DELETED##	Incomplete	HSA	03/15/23	Ongoing			Family	Central Insurance (HSA-HEALTH)
<input type="checkbox"/>	3	Sales	##DELETED##, ##DELETED##	Incomplete	HSA	03/15/23	Ongoing			Family	Central Insurance (HSA-HEALTH)
<input type="checkbox"/>	4	ZOMBIE FIGHTERS	##DELETED##, ##DELETED##	Incomplete	HSA	03/15/23	Ongoing			Family	Central Insurance (HSA-HEALTH)
<input type="checkbox"/>	5	boo manager	Bohandy, David	Incomplete	HSA	11/01/22	Ongoing			Self	Central Insurance (HSA-HEALTH)
<input type="checkbox"/>	6	boo manager	Bravo, Jonny	Incomplete	HSA	11/01/22	Ongoing			Family	Blue Cross of Michigan (HSA-HEALTH)
<input type="checkbox"/>	7	Information Technology	Carmichael, Charles C.	Incomplete	HSA	11/01/22	Ongoing			Family	Blue Cross of Michigan (HSA-HEALTH)
<input type="checkbox"/>	8	Information Technology	Carmichael, Charles C.	Incomplete	HSA	11/01/22	Ongoing			Family	Blue Cross of Michigan (HSA-HEALTH)
<input type="checkbox"/>	9		Charles, Ray	Incomplete	HSA	11/01/22	Ongoing			Family	Blue Cross of Michigan (HSA-HEALTH)
<input type="checkbox"/>	10	Part Time Interns	Davis, Vanessa	Complete	HSA	11/01/22	Ongoing			Self	Blue Cross of Michigan (HSA-HEALTH)
<input type="checkbox"/>	11	Part Time Interns	DEL AGUILA VELA, LILIANA	Complete	HSA	12/01/22	Ongoing			Self	Blue Cross of Michigan (HSA-HEALTH)
<input type="checkbox"/>	12	Take Down Joker Dprtmnt	Dirt, Joe	Not Applicable		10/28/22	Ongoing			Self	Blue Cross of Michigan (HSA-HEALTH)

2. Select 'Show All of the Employees'. If the employee listing does not appear automatically, search by last name or other criteria. After entering the criterion click 'Search'. Click on the name of the individual that needs the coverage tier change.

Employee Listing

Show the Active Employees: 49
 Show the Inactive Employees: 106
 Show All of the Employees: 155

Quick Filters: All [Download Report](#)

Views per page: 100

Apply Custom Filter/Search

Employees in Field: By:

Add Filter Level Remove Filter Level

Field: Starts With:

Add Search Level Remove Search Level

[Search](#) [Clear Search](#) [Minimize](#)

Select/Deselect All [Terminate](#) OR [Go](#) [Add Employee](#)

1 2 Changing the page will deselect all previously selected employees.

Dept	Name	Employee ID*	ID Verification (What is this?)	Current Products	Current Coverage Start	Current Coverage End	Future Coverage Start	Future Coverage End	Insurance	Plan Name
<input type="checkbox"/> 101	McCraig, Dierdre	██████████	Not Applicable						No Coverage	
<input type="checkbox"/> 102	Jail inmate	Me, Free	Incomplete	HSA	10/01/22	Ongoing			Family	MOTHER'S CARE 10-2022
<input type="checkbox"/> 103	RESEARCH	Mee, Minnie	Incomplete	HSA	10/01/21	12/31/21			Family	
<input type="checkbox"/> 104	INSTRUCTOR	Montoya, Mai	Incomplete	HSA	11/01/21	12/31/21			Self	
<input type="checkbox"/> 105	Finance	Moon, Sailor	Incomplete	HSA	11/01/22	Ongoing			Family	BonJovirocks 09-2022
<input type="checkbox"/> 106	Purple Passion	Mouse, Minnie	No Coverage Defined	HSA					No Coverage	
<input type="checkbox"/> 107	Sales	Munster, Lily	Incomplete	HSA	10/01/22	Ongoing			Self	Dogs Are Us 09-2022
<input type="checkbox"/> 108	Cowboys	Nimble, Jack B.	No Coverage Defined	HSA					No Coverage	
<input type="checkbox"/> 109	Cowboys	Norton, Edward	Not Applicable						No Coverage	
<input type="checkbox"/> 110	Purple Passion	Norton, Tamkia	Incomplete	HSA	03/01/23	Ongoing			Family	Cats are us 09-2022
<input type="checkbox"/> 111	INSTRUCTOR	O'Toole, Kathleen	Complete	HSA	10/01/21	12/30/21			Self	
<input type="checkbox"/> 112	Purple Passion	Paul, Pumpkin	Incomplete	HSA	02/01/23	Ongoing			Family	Cats are us 09-2022

3. From the 'Enroll Employee' screen click 'Update' next to coverage needing an update.

Enroll Employee

* First Name David Middle Name Last Name Bohandy Suffix

* SSN XXX-XX-0000 Employee ID 11111 Gender Female Male Date of Birth 09/03/1960

Email Address dbohandy@gvsd.net Personal Phone (208)462-5221 ext. Work Phone (###)###-#### ext. Category/Department boo manager

Physical Address

* Street 1 44 Starview Dr Street 2

* City Garden Valley * State ID * ZIP Code 83622

Mailing Address

Use physical address as mailing address

Accounts

+ HSA

Description	Start	End	Coverage Level	Election	
Insurance 09-2022	11/01/2022	Ongoing	Self	-	Update

[Cancel](#) [Update](#)

4. Select the dropdown under 'Coverage Level' and change to appropriate coverage tier OR add a term date. Click 'Save'.

Update HSA

Liberty Coverage Savings Plan

Coverage Level

Family

Self

Family

1/1/2023

Employee Contribution

Employer Contribution

Cancel Save

5. On the enrollment info screen view the updated coverage level and click 'Update' to finalize the change.

Description	Start	End	Coverage Level	Election
Liberty Coverage Savings Plan	1/1/2023	Ongoing	Family	-

Update

Employer/Member:

Multi-Plan Member:

Plan Application Required:

Cancel Update

Integrated

Coverage changes and terminations will be sent to HealthEquity by the health plan or other eligibility source and will reflect on your employee listing.

Integrated HSA Enrollment

HSA's for participants are created automatically when HealthEquity receives the enrollment file from your health plan partner or enrollment vendor. However, you have the option to create a temporary/partial enrollment – which can be helpful if you need to load contributions prior to receipt of enrollment.

Note: To view employees who are enrolled, please access the employee listing. Instructions can be found in the section titled 'Using the employee listing'.

Creating a coverage intent

1. If you need to load contributions for someone missing enrollment, create a temporary/partial enrollment. From the 'Employee Info' dropdown select 'Enroll Employee'.

The screenshot shows the 'Enroll Employee' form with the following fields and sections:

- Employee Info:** A dropdown menu is open, showing options: 'Enroll Employee' (selected), 'HSA Employee Upload', 'Employee ID/Dept Upload', 'Employee Listing', and 'Incomplete Verifications'.
- Enroll Employee Form:**
 - Personal Information:** * First Name, Middle Name, * Last Name, Suffix, * SSN, Employee ID (with help icon), * Gender (Female/Male), * Date of Birth (mm/dd/yyyy).
 - Contact:** Email Address, * Personal Phone (with area code and ext. fields), Work Phone (with area code and ext. fields), Category/Department (dropdown).
 - Physical Address:** * Street 1, Street 2, * City, * State (dropdown), * ZIP Code.
 - Mailing Address:** Use physical address as mailing address (with help icon).
 - Accounts:** + HSA button.
- Buttons:** Cancel and Enroll Employee (highlighted with a red circle).

2. Complete all fields on the 'Enroll Employee' page (fields with an asterisk are required). Select the '+HSA' button.

This close-up view of the 'Enroll Employee' form highlights the following elements:

- Accounts Section:** A red arrow points to the '+ HSA' button.
- Bottom Buttons:** The 'Enroll Employee' button is circled in red, indicating the next step in the process.

3. In the Add HSA box select the plan. Enter 'Employee Contribution' and 'Employer Contribution' values if desired. Click 'Create Coverage Intent'.

Add HSA

[Plan Name]

Please note that HSA eligibility information is sent to HealthEquity for your employees by a partner health plan or other eligibility source. Therefore, you cannot enroll your employees into the HSA through this website but can create a coverage intent (i.e. partial enrollment) which will allow you to allocate contributions to them while we await their eligibility information.

Employee Contribution ⓘ

Employer Contribution ⓘ

4. On the Employee Enroll screen verify that all information is correct, then select 'Enroll Employee.'

Accounts

Description	Start	End	Coverage Level	Election	
HSA Coverage Intent	-	-	-	-	<input type="button" value="Update"/>

Employee/Member:
Account/Group Number:
Registration Number: **Change Paper/Online Fee**

5. Contributions can now be sent for this employee but will remain in a suspense account until eligibility is received and the account is activated.

Reimbursement Account Enrollment

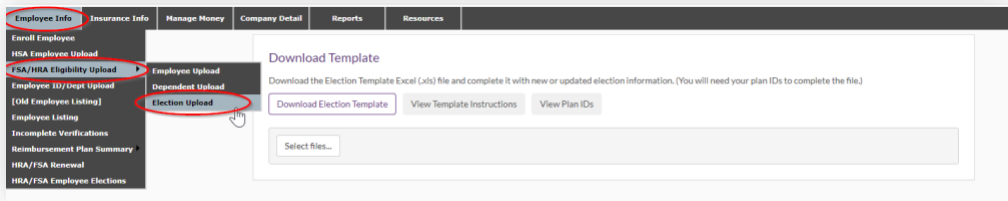
Integrated Enrollment

All enrollment, coverage changes, and terminations will be sent to HealthEquity by the health plan or enrollment vendor and cannot be modified on the employer portal.

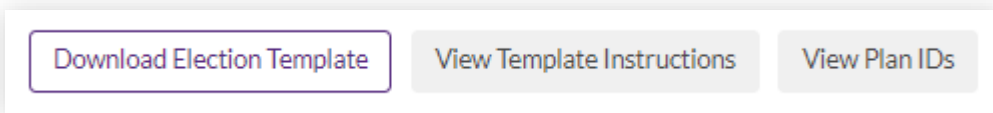
If your health plan or enrollment vendor sends integrated enrollment data, but does not send annual election amounts, you will need to upload the employee’s annual election amounts on the employer portal. To upload elections only, follow the process below.

Election Upload Only

1. From the ‘Employee Info’ dropdown select the ‘FSA/HRA Eligibility Upload’ and select ‘Election Upload’.
The following screen will display:



2. Click on ‘Download Election Template’ which will provide the template to be completed.



Do NOT delete any columns from this template. If columns are deleted, the file will not upload properly into our system. Be sure to remove the sample records from the template file.

3. Click on ‘View Template Instructions’ to aid you in completing the template
4. Click on ‘View Plan IDs’ to identify the Plan ID needed in column ‘E’ (RA Plan ID)
5. Once you have completed the election template, save to your computer
6. Click ‘Select files...’ and browse for your save Election Template.

Download Template

Download the Election Template Excel (.xls) file and complete it with new or updated election information. (You will need your plan IDs to complete the file.)

7. If accepted, the uploaded files will turn green. If not accepted, the uploaded file will turn red and a list of items needing adjustment will be shown.
 - a. Correct as indicated and upload again.
8. Processing file time varies. An email will be sent after successful upload once processing is complete.

Non-Integrated Enrollment

To enroll employees one at a time for an **EXISTING** member:

1. From the 'Employee Info' dropdown select 'Employee Listing'. The following screen will display.

Dept	Name	Employee ID*	ID Verification (What is this?)	Current Products	Current Coverage Start	Current Coverage End	Future Coverage Start	Future Coverage End	Insurance	Plan Name
<input type="checkbox"/> 1	INSTRUCTOR	##DELETED##, ##DELETED##	32	Incomplete	HSA	11/01/22	Ongoing		Self	Health Equity Select Plan
<input type="checkbox"/> 2	RESEARCH	##DELETED##, ##DELETED##	3	Incomplete	HSA	03/15/23	Ongoing		Family	Health Equity Select Plan
<input type="checkbox"/> 3	Sales	##DELETED##, ##DELETED##	8	Incomplete	HSA	03/15/23	Ongoing		Family	Health Equity Select Plan
<input type="checkbox"/> 4	ZOMBE FIGHTERS	##DELETED##, ##DELETED##, ##	26	Incomplete	HSA	03/15/23	Ongoing		Family	Health Equity Select Plan
<input type="checkbox"/> 5	boo manager	Bohandy, David	11111	Incomplete	HSA	11/01/22	Ongoing		Self	Health Equity Select Plan
<input type="checkbox"/> 6	boo manager	Bravo, Jonny	12345699	Incomplete	HSA	11/01/22	Ongoing		Family	Health Equity Select Plan

2. Select 'Show All of the Employees'. Click on the name of the individual that will be adding an account for the new plan year. On the 'Enroll Employee' screen, select the appropriate account type ('+FSA', '+LPPFSA', '+HRA' or '+DCRA').

Employee Listing

Show the Active Employees: 49
 Show the Inactive Employees: 106
 Show All of the Employees: 155

Quick Filters: All [Download Report](#)

Views per page: 100

Apply Custom Filter/Search

Employees in Field: By: [Select options](#)

Add Filter Level Remove Filter Level

Field: Employee Last Name Starts With

Add Search Level Remove Search Level

[Search](#) [Clear Search](#) [Minimize](#)

Select/Deselect All [Terminate](#) OR [Select the Action...](#) [Go](#) [Add Employee](#)

1 2 * Changing the page will deselect all previously selected employees.

Dept	Name	Employee ID*	ID Verification (What is this?)	Current Products	Current Coverage Start	Current Coverage End	Future Coverage Start	Future Coverage End	Insurance	Plan Name
<input type="checkbox"/> 101	McCraig, Dierdre	██████████	Not Applicable						No Coverage	
<input type="checkbox"/> 102 Jail inmate	Me, Free	██████████	Incomplete	HSA	10/01/22	Ongoing			Family	MOTHER'S CARE 10-2022
<input type="checkbox"/> 103 RESEARCH	Mee, Minnie	██████████	Incomplete	HSA	10/01/21	12/31/21			Family	
<input type="checkbox"/> 104 INSTRUCTOR	Montoya, Mai	██████████	Incomplete	HSA	11/01/21	12/31/21			Self	
<input type="checkbox"/> 105 Finance	Moon, Sailor	██████████	Incomplete	HSA	11/01/22	Ongoing			Family	BonJovirocks 09-2022
<input type="checkbox"/> 106 Purple Passion	Mouse, Minnie	██████████	No Coverage Defined	HSA					No Coverage	
<input type="checkbox"/> 107 Sales	Munster, Lily	██████████	Incomplete	HSA	10/01/22	Ongoing			Self	Dogs Are Us 09-2022
<input type="checkbox"/> 108 Cowboys	Nimble, Jack B.	██████████	No Coverage Defined	HSA					No Coverage	
<input type="checkbox"/> 109 Cowboys	Norton, Edward	██████████	Not Applicable						No Coverage	
<input type="checkbox"/> 110 Purple Passion	Norton, Tamkia	██████████	Incomplete	HSA	03/01/23	Ongoing			Family	Cats are us 09-2022
<input type="checkbox"/> 111 INSTRUCTOR	O'Toole, Kathleen	██████████	Complete	HSA	10/01/21	12/30/21			Self	
<input type="checkbox"/> 112 Purple Passion	Paul, Pumpkin	██████████	Incomplete	HSA	02/01/23	Ongoing			Family	Cats are us 09-2022

Enroll Employee

* First Name Middle Name * Last Name Suffix

* SSN Employee ID * Gender Female Male * Date of Birth

Email Address * Personal Phone ext Work Phone ext Category/Department

Physical Address

* Street 1 Street 2

* City * State * ZIP Code

Mailing Address

Use physical address as mailing address

* Street 1 Street 2

* City * State * ZIP Code

Accounts

3. Select the plan the member is enrolling in.

Add FSA

HCRA 2022: 2022 FSA [redacted]
01/01/2022 - 12/31/2022

4. Add annual 'Election Amount' and 'Start Date'. Ensure the 'End Date' is accurate. Click 'Add Account'.

Election Amount
\$2500

Start Date **End Date (Inclusive)**
01/01/2022 12/31/2022

5. Review information to ensure it is correct and select 'Update'.

Accounts

Description	Start	End	Coverage Level	Election	
[redacted]	-	-	-	-	
HCRA 2022: 2022 FSA Non-Integrated	01/01/2022	12/31/2022	-	\$2,500.00	<input type="button" value="Update"/>

To enroll employees one at a time for a NEW member:

1. From the 'Employee Info' drop down select 'Enroll Employee'. The following screen will display:

2. Complete all fields on the 'Enroll Employee' page (fields with an asterisk are required), and select the '+FSA', '+LPFSA', 'HRA' or '+DCRA' box under 'Accounts' at the bottom of the page.
3. Select the plan the member is enrolling in.

4. Add annual 'Election Amount' and 'Start Date'. Ensure the 'End Date' is accurate. Click 'Add Account'.

5. Review information to ensure it is correct and select 'Enroll Employee'.

Accounts

+ HSA + FSA + LPFSA + HRA + DCRA

Description	Start	End	Coverage Level	Election	
HCRA 2022: 2022 FSA Non-Integrated	01/01/2022	12/31/2022	-	\$2,500.00	Update

Cancel Update

6. Review information to ensure it is correct and select 'Enroll Employee.'

Enrolling multiple employees at a time by upload

For reimbursement accounts (i.e., FSA, HRA, etc.), employers can upload enrollment as well as dependent information.

Note: Recommended for 25+ employees

Uploading Enrollment

- From the 'Employee Info' dropdown select 'FSA/HRA Eligibility Upload' then select 'Employee upload'. The following screen will display:

The screenshot shows the 'Employee Info' dropdown menu with 'FSA/HRA Eligibility Upload' and 'Employee Upload' highlighted. A 'Download Template' dialog box is open, showing a 'Download Employee Template' button and a 'Select files...' input field.

- Click on 'Download Election Template' which will provide the template to be completed.

Download Employee Template View Template Instructions View Plan IDs

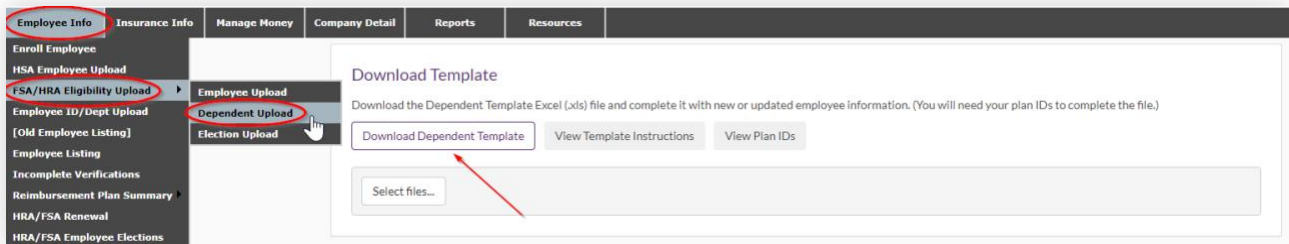
EMPLOYEE ID	SOCIAL SEC	FIRST NAME	LAST NAME	MIDDLE	SUFFIX	EMAIL ADDRESS	CATEGORY OR DEPARTMENT	BIRTH DATE	GENDER	STREET 1	STREET 2	CITY	STATE	ZIP CODE	HOME PHONE	WORK PHONE	MAILING STREET1	MAILING STREET2	MAILING CITY	MAILING STATE
000-00-0000		Jane	Doe	M		jdoe@email.com		1/1/1980	F	15 W Scenic Pointe Drive	Suite 100	Draper	UT	84020	801-727-1216					
111-11-1111		John	Doe		Jr.	JohnDoe@email.com		7/16/1976	M	123 Easy Street		Alpine	UT	84004	801-727-1000	801-727-1005	PO Box 1096		Alpine	UT
999-99-9999		Jill	Doe			Jill@email.com		8/23/1954	F	987 Sample Drive		Highland	UT	84003	801-727-7654					

Do NOT delete any columns from this template. If columns are deleted, the file will not upload properly into our system. Be sure to remove the sample records from the template file.

3. Click on 'View Template Instructions' to aid you in completing the template.
4. Click on 'View Plan IDs' to identify the Plan ID needed in column Z (RA Plan ID).
5. Once you have completed the employee template, save to your computer.
6. Click 'Select Files...' and browse for your saved template.
7. If accepted, the uploaded file will turn green. If not accepted, the uploaded file will turn red and a list of items needing adjustment will be shown.
 - a. Correct as indicated and upload again.
8. Processing time varies. An email will be sent after successful upload once processing is complete.

Uploading Dependent Information

1. From the 'Employee Info' dropdown select 'FSA/HRA Eligibility Upload' then select 'Dependent Upload'.



2. Click on 'Download Dependent Template'. The following will appear

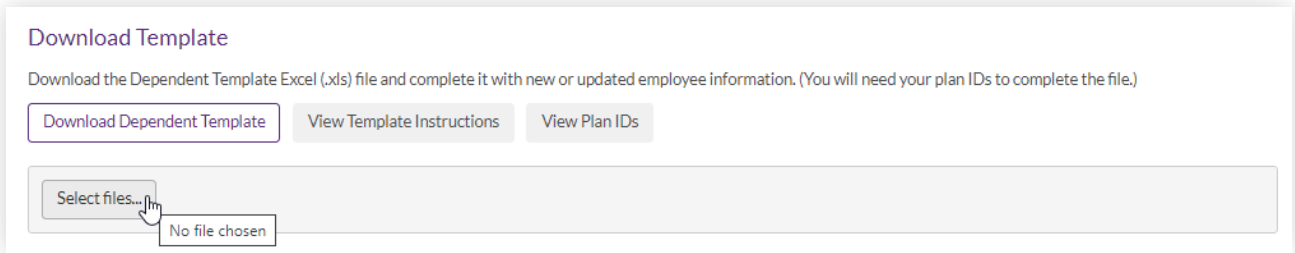
PRIMARY SOCIAL SEC	SOCIAL SEC	FIRST NAME	LAST NAME	MIDDLE	SUFFIX	BIRTH DATE	GENDER	RELATIONSHIP	SPAN START DATE	SPAN END DATE	RA PLAN ID
000-00-0000	222-22-2222	Jane	Doe	M		1/1/1980	F	Child	1/1/2015	12/31/2015	1
111-11-1111	333-33-3333	John	Doe		Jr.	7/16/1976	M	Other	1/1/2015	12/31/2015	2
999-99-9999	888-88-8888	Jill	Doe			8/23/1954	F	Spouse	1/1/2015	12/31/2015	2

Do NOT delete any columns from this template. If columns are deleted, the file will not upload properly into our system. Be sure to remove the sample records from the template file.

3. Click on 'View Template Instructions' to aid you in completing the template.

Note: All bolded column headings must be completed.
4. Click on 'View Plan IDs' to identify the Plan ID needed in column L (RA Plan ID).

5. Once you have completed the dependent template, save to your computer.
6. Click 'Select Files...' and browse for your saved template.
7. Complete the upload by selecting the 'Select File' under 'Upload Completed File.' Select 'Upload.'



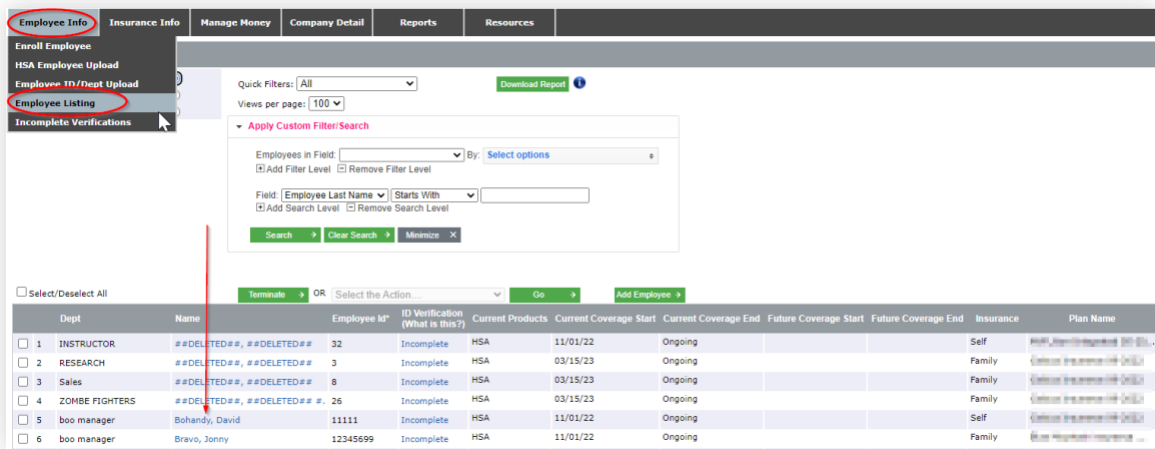
8. If accepted, the uploaded file will turn green. If not accepted, the uploaded file will turn red and a list of items needing adjustment will be shown.
 - a. Correct as indicated and upload again
9. Processing time varies. An email will be sent after successful upload once processing is complete.

Modifying an Employee's Coverage

You can change an employee's coverage through your employer portal unless enrollment is being delivered on an integrated file feed.

Note: Some fields under 'Employee Listing' are not editable. For example, employee demographic data can only be changed by the account holder.

1. From the 'Employee Info' dropdown, select 'Employee Listing'. The following screen will display:



2. Select 'Show All of the Employees'. If the employee does not appear automatically, search by last name or other criteria. After entering the criteria, click 'Search.' Click on the name of the individual that needs an update.

Employee Listing

Show the Active Employees: 49
 Show the Inactive Employees: 106
 Show All of the Employees: 155

Quick Filters: All
 Views per page: 100

Apply Custom Filter Search

Employees in Field: [Dropdown] By: [Dropdown]
 Add Filter Level Remove Filter Level

Field: Employee Last Name [Dropdown] Starts With: [Text Box]
 Add Search Level Remove Search Level

Search [Button] Clear Search [Button] Minimize [Button]

Select/Deselect All OR

Dept	Name	Employee ID	ID Verification (What is this?)	Current Products	Current Coverage Start	Current Coverage End	Future Coverage Start	Future Coverage End	Insurance	Plan Name
<input type="checkbox"/>	101 Mccraig, Dierdre		Not Applicable						No Coverage	
<input type="checkbox"/>	102 Jail inmate Me, Free		Incomplete	HSA	10/01/22	Ongoing			Family	MOTHER'S CARE 10-2022
<input type="checkbox"/>	103 RESEARCH Meu, Minnie		Incomplete	HSA	10/01/21	12/31/21			Family	
<input type="checkbox"/>	104 INSTRUCTOR Montoya, Mai		Incomplete	HSA	11/01/21	12/31/21			Self	
<input type="checkbox"/>	105 Finance Moon, Sailor		Incomplete	HSA	11/01/22	Ongoing			Family	BonJovirocks 09-2022
<input type="checkbox"/>	106 Purple Passion Mouse, Minnie		No Coverage Defined	HSA					No Coverage	
<input type="checkbox"/>	107 Sales Munster, Lily		Incomplete	HSA	10/01/22	Ongoing			Self	Dogs Are us 09-2022
<input type="checkbox"/>	108 Cowboys Nimble, Jack B.		No Coverage Defined	HSA					No Coverage	
<input type="checkbox"/>	109 Cowboys Norton, Edward		Not Applicable						No Coverage	
<input type="checkbox"/>	110 Purple Passion Norton, Tamkia		Incomplete	HSA	03/01/23	Ongoing			Family	Cats are us 09-2022
<input type="checkbox"/>	111 INSTRUCTOR O'Toole, Kathleen		Complete	HSA	10/01/21	12/30/21			Self	
<input type="checkbox"/>	112 Purple Passion Paul, Pumpkin		Incomplete	HSA	02/01/23	Ongoing			Family	Cats are us 09-2022

3. From the 'Enroll Employee' screen, click 'Update' next to coverage needing an update.

Accounts

+HSA +FSA +LPFSA +HRA +DCRA

Description	Start	End	Coverage Level	Election	
HCRA 2022: 2022 FSA Non-Integrated	01/01/2022	12/31/2022	-	\$2,500.00	<input type="button" value="Update"/>

4. Edit appropriate fields and select 'Save'.

Update FSA

HCRA 2022: 2022 FSA Non-Integrated
 01/01/2022 - 12/31/2022

Election Amount
 \$2500.00

Start Date: 01/01/2022
 End Date (Inclusive): 05/09/2022

5. Confirm the update is listed and click 'Update'.

Accounts

+ HSA + FSA + LPFSA + HRA + DCRA

Description	Start	End	Coverage Level	Election	
HCRA 2022: 2022 FSA Non-Integrated	01/01/2022	05/09/2022	-	\$2,500.00	<input type="button" value="Update"/>

Section 3 – Contributions, Deductions, and Invoices

HSA Contributions

HSA contributions can be loaded to the employer portal using two methods

1. Submit by Employee Listing
2. Upload a File

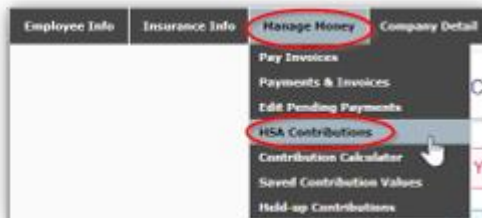
Note: If contributions are being sent on a file from your payroll system or payroll administrator, no action on the portal is required.

*If you have outstanding invoices more than 60 days old, you will be required to pay these amounts with your contribution before finalizing the submission.

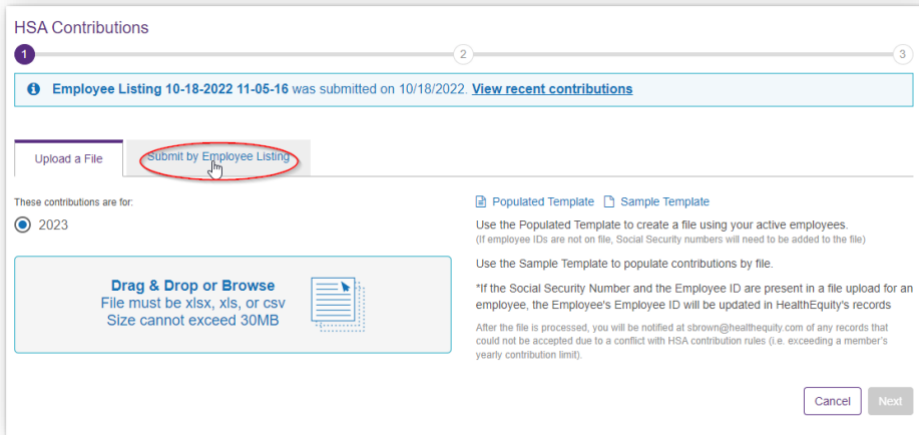
Submit by Employee Listing

Used when contributions are needed for a few people. When processing a large number of employees, consider using the 'Upload a File' section below.

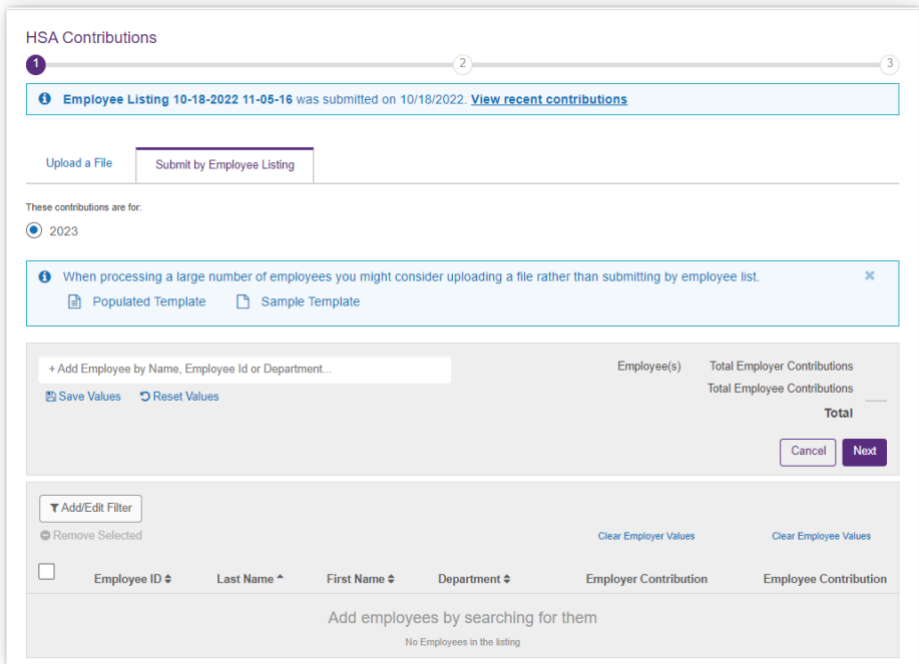
1. From the home screen, click on 'Make Contribution.' If you are not on the home screen, go to the 'Manage Money' dropdown and select 'HSA Contributions.'



2. From the 'HSA Contributions' screen, select 'Submit by Employee Listing.'



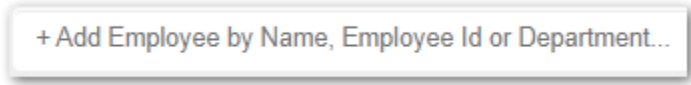
3. You will see the following screen.



4. Ensure the tax year is accurate. Between January and the tax filing deadline (i.e., April 15th), you will see two tax years listed. Be sure the desired tax year is selected.



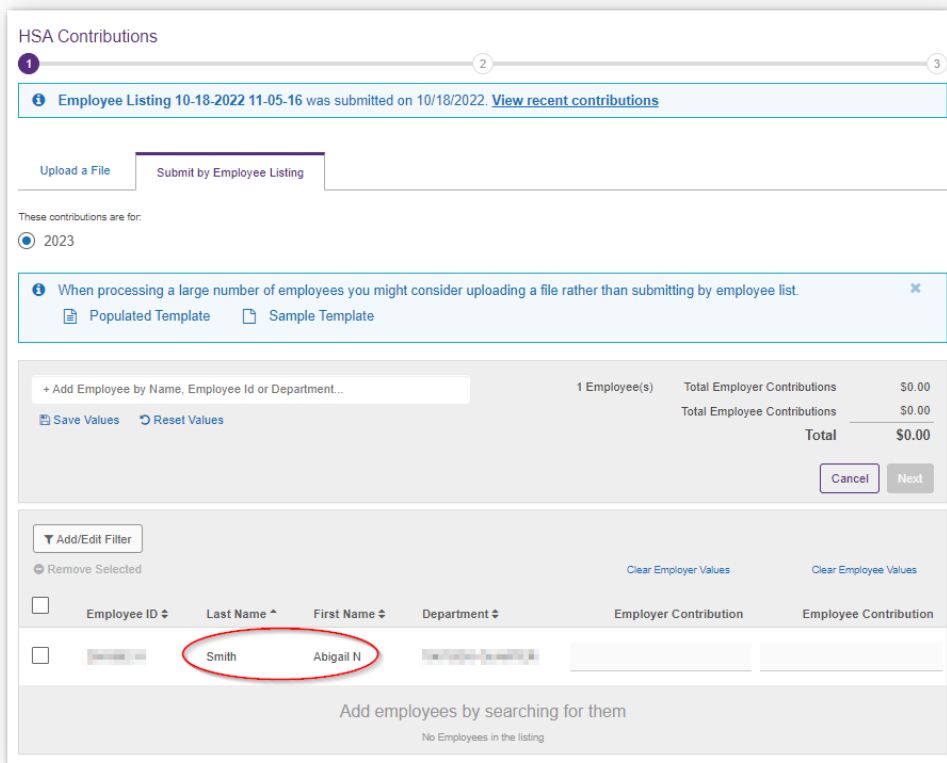
5. In the '+ Add Employee by Name, Employee ID or Department' box, search by employee name, employee ID, or department code. In this example, we are searching for employee Abigail Smith. You can search by first or last name.



6. Click on the employee's name once located in the list



7. The employee will populate to the HSA Contributions screen



- Additional employees can be added to your list by searching for (and selecting) them in the '+Add Employee by Name, Employee ID, or Department' box. Once all desired employees are listed, enter the appropriate employer and/or employee contribution amounts. As you add the totals above your list will increase.

The screenshot shows a web interface for adding employees. At the top, there is a search box with the text '+ Add Employee by Name, Employee Id or Department...'. Below it are 'Save Values' and 'Reset Values' buttons. To the right, a summary table is displayed:

1 Employee(s)	Total Employer Contributions	\$50.00
	Total Employee Contributions	\$200.00
	Total	\$250.00

Below the search box is a table of employees. The first row is highlighted with a red box, showing the contribution amounts entered:

Employee ID	Last Name	First Name	Department	Employer Contribution	Employee Contribution
200356211	Smith	Abigail N	7907CDO QUARTER	\$50.00	\$200.00

At the bottom of the interface, there is a button 'Add/Edit Filler', a 'Remove Selected' option, and a 'No Employees in the listing' message.

- If the same employer and/or employee contribution totals will be used for future payrolls, we recommend clicking the 'Save Values' link.

This is a close-up of the 'Save Values' button, which is circled in red. The button is located below the search box and next to the 'Reset Values' button.

- After entering the employer and employee contributions, click 'Next' below the total.

This is a close-up of the summary table and the 'Next' button. The table shows the total contributions for 1 employee, and the 'Next' button is highlighted with a mouse cursor.

1 Employee(s)	Total Employer Contributions	\$50.00
	Total Employee Contributions	\$200.00
	Total	\$250.00

Buttons: Cancel, Next

- On the HSA Contribution payment screen, double check the tax year, employer contribution total, employee contribution total, and the total amount submitted. Select the payment method. If EFT is chosen, select the appropriate bank account. Choose the 'Transfer Date,' and click 'Submit'.

HSA Contributions

1 ————— 2 ————— 3

Payment

Contribution Availability

Electronic Funds Transfer (EFT)

- Available in portal: On the date you have scheduled the payment
- Available on card: One business day after scheduled payment

Please note: This availability may be extended by HealthEquity for up to 5 business days.

Contribution Details Tax Year 2023

Submitted Contributions	\$250.00
Employer Contributions	\$50.00
Employee Contributions	\$200.00
Fees & Adjustments View Invoices	\$0.00
Total Amount Submitted	\$250.00

*The total amount of your contribution will be reduced if a member hits their yearly contribution limit.

Payment Method

EFT Check / Other

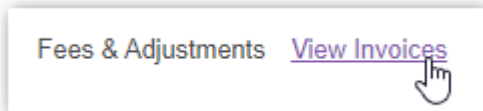
Account

Bank of America (XXXXXXXX2000 Bank of America) ▼

Transfer Date

6/6/2023

Note: If the total includes an amount next to ‘Fees & Adjustments,’ you likely have an outstanding invoice older than 60 days. To view the invoices being included, click on ‘View Invoices.’



To proceed with the contributions, you are required to pay the outstanding invoices.

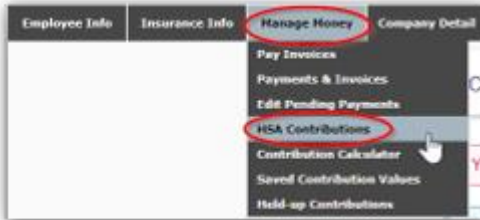
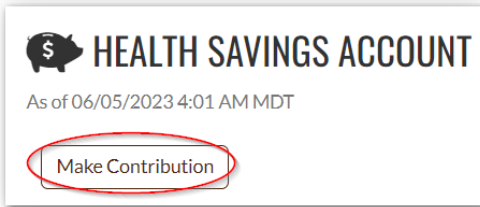
12. Following submission, you will receive a processing email with Invoice ID. If you have questions about any suspended or rejected contributions, please contact HealthEquity.

Note: HSA enrollees will not see a deposit until monies arrive.

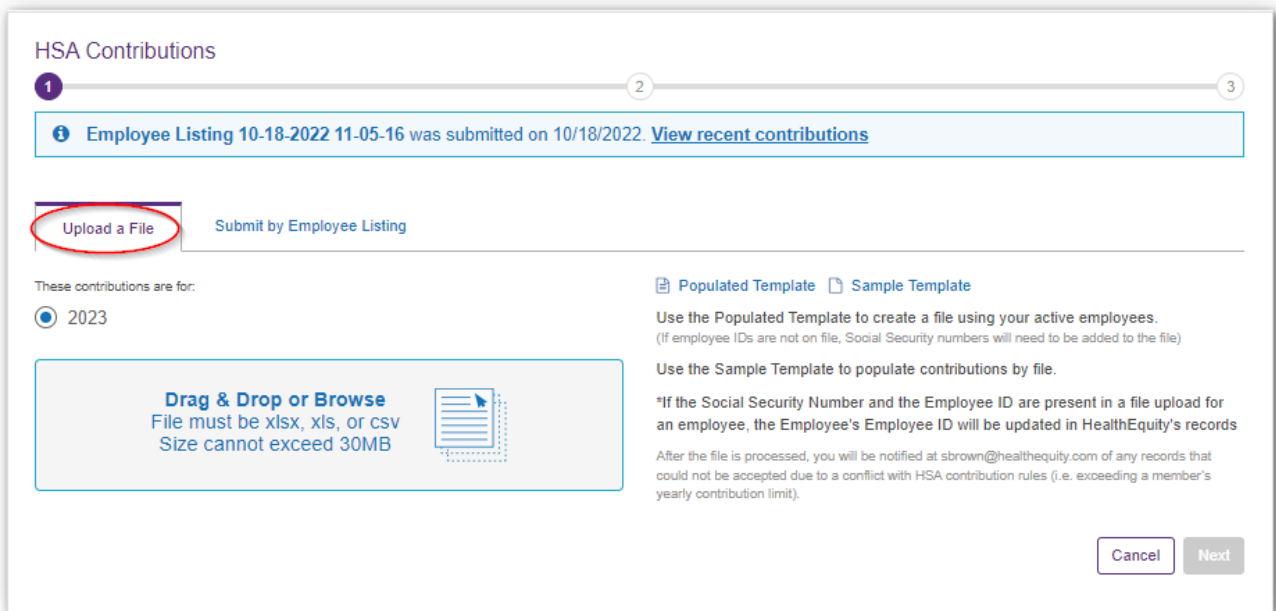
Upload a File

Used when contributions are needed for multiple people. When processing contributions for one or two people, consider using the ‘Submit by Employee Listing’ section above.

1. From the home screen, click on ‘Make Contribution.’ If you are not on the home screen, go to the ‘Manage Money’ dropdown and select ‘HSA Contributions.’



2. On the 'HSA Contributions' screen, the Employer Portal will default to 'Upload a File.'



3. Ensure the tax year is accurate. Between January and the tax filing deadline (i.e., April 15th), you will see two tax years listed. Be sure the desired tax year is selected.



- Download the 'Populated Template' or 'Sample Template.' The populated includes your active HSA population. The sample template provides instructions and column headers.

Note: Do not add, remove, or reorder any columns from the template.

- Complete the required fields: SSN, employer contribution, employee contribution, first name, and last name. Save the completed spreadsheet to your computer.

Employee ID	SSN	Employer Cont	Employee Cont	First Name	Last Name
	123-45-6789	50	75	Charlene	Smith
	111-22-3333	50	100	William	Smith
	111-33-4444	0	125	Lerisa	Smith
	222-22-3333	0	150	Ariann	Smith
	333-22-3333	50	100	Alex	Smith
	444-22-3333	50	125	Abigail	Smith

- Drag & Drop or Browse for the saved HSA contribution template

- Once uploaded successfully, the file name will appear in green. You will see 'Validation Successful.' Click 'Next.'

Note: If the validation is unsuccessful, review the instructions and/or formatting errors. Make necessary corrections, resave the spreadsheet, and upload again. For assistance with persistent errors, contact HealthEquity.

Upload a File
Submit by Employee Listing

Replace file...

ABC Group_Payroll 18_HSA Contri...
18.78 KB

✔ Validation Successful

Total Employees	6	Total Employer Contributions	\$200.00
Tax Year	2023	Total Employee Contributions	\$675.00
		Grand Total	\$875.00

Cancel
Next

8. On the HSA Contribution payment screen, double check the tax year, employer contribution total, employee contribution total, and the total amount submitted. Select the payment method. If EFT is chosen, select the appropriate bank account. Choose the 'Transfer Date,' and click 'Submit'.

HSA Contributions
1
2
3

Payment

Contribution Availability

Electronic Funds Transfer (EFT)

- Available in portal: On the date you have scheduled the payment
- Available on card: One business day after scheduled payment

Please note: This availability may be extended by HealthEquity for up to 5 business days.

Contribution Details Tax Year 2023

Submitted Contributions	\$875.00
Employer Contributions	\$200.00
Employee Contributions	\$675.00
Fees & Adjustments View Invoices	\$0.00
Total Amount Submitted	\$875.00

*The total amount of your contribution will be reduced if a member hits their yearly contribution limit.

Payment Method

EFT
 Check / Other

Account

Bank of America (XXXXXXXXX2000 Bank of America)

Transfer Date

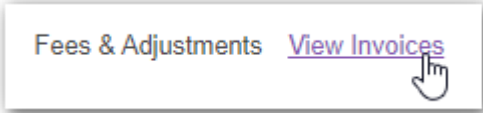
6/7/2023

Cancel
Submit

Note: If the total includes an amount next to 'Fees & Adjustments,' you likely have an outstanding invoice older than 60 days. To view the invoices being included, click on 'View Invoices.'

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To proceed with the contributions, you are required to pay the outstanding invoices.

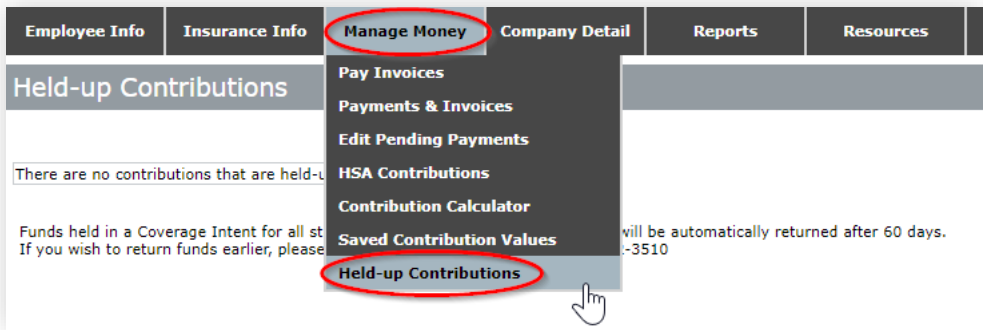
- Following submission, you will receive a processing email with Invoice ID. If you have questions about any suspended or rejected contributions, please contact HealthEquity.

Note: HSA enrollees will not see a deposit until monies arrive. If sending check or wire/Automated Clearing House (ACH) push payment, send payment as soon as possible.

Held-up Contributions

When an employee’s account is not able to accept contributions (because enrollment has not been received, or they have not passed identity verification requirements) a coverage intent can be used to accept the contributions, and funds are held-up.

- To view held-up contributions, from the ‘Manage Money’ dropdown select ‘Held-Up Contributions’.



Employee Id	Name	Days Waiting	Reason	ER Cont	EE Cont	Pending ER	Pending EE
[blurred]	Cao, Hoai T.	120	Failed CIP	\$500.00	\$0.36	\$0.00	\$0.00
[blurred]	Ramirez, Imanol	120	Failed CIP	\$500.00	\$86.58	\$0.00	\$0.00
[blurred]	Washington, Maurice	120	Failed CIP	\$1,000.00	\$0.00	\$0.00	\$0.00
[blurred]	Tran, Huong	112	Failed CIP	\$500.00	\$0.00	\$0.00	\$0.00
[blurred]	Gomez Leyva, Jesus A.	22	Failed CIP	\$458.37	\$0.00	\$0.00	\$0.00
[blurred]	Palmer, Brandelle K.	29	Failed CIP	\$750.06	\$333.35	\$0.00	\$0.00

Some funds are held indefinitely (i.e. Incomplete Verification). Others are automatically returned after 60 days. If you wish to return funds earlier, please contact Employer Services at (866) 382-3510

Reimbursement Account Deductions

FSA accounts allow members to access their full election at coverage start. Dependent Care FSAs only allow access to funds once they are withheld from payroll.

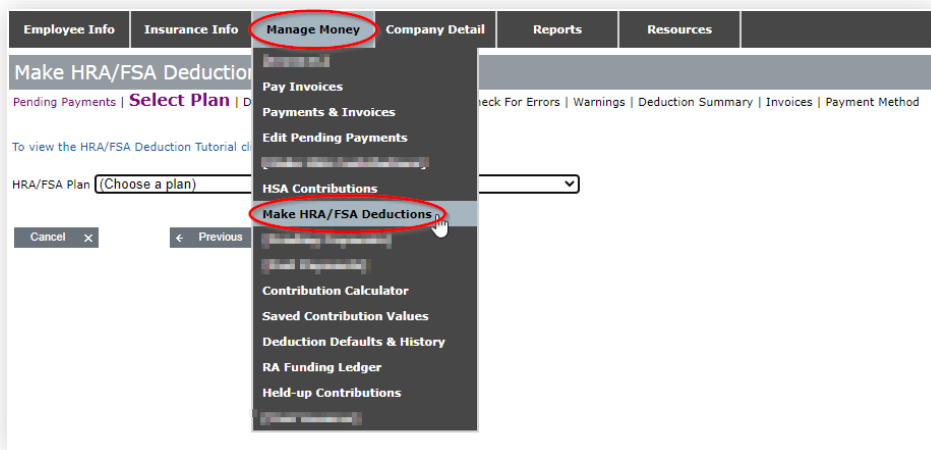
There are several ways to provide payroll deductions to HealthEquity:

1. Assumed deductions - HealthEquity can post an assumed deduction amounts each pay period. Assumed deductions are based on the payroll cycle, payroll start date, employee coverage dates, and employee election amount.
Note: This is not available for some payroll schedules (such as bi-weekly payroll that only withholds deductions from 24 pay periods).
2. Assumed deductions are configured during implementation. If you would like to change your deduction method, contact employer services.
3. Load payroll deductions on the Employer Portal. You can utilize saved defaults, manual entry, or upload a file. Deductions should be loaded after each pay period.
4. Integrated file feed from the payroll system or payroll vendor.

Note: If utilizing assumed deductions or an integrated file feed, no action is needed per pay period. Loading payroll deductions to the portal requires action each pay period.

Use Saved Defaults or Manual Entry

1. From the 'Manage Money' dropdown select 'Make HRA/FSA Deductions'.



2. Choose the correct plan from the drop-down list and select 'Next'.

Make HRA/FSA Deductions

Pending Payments | **Select Plan** | Deduction Method | Make Deductions | Check For Errors | Warnings | Deduction Summary | Invoices | Payment Method

[To view the HRA/FSA Deduction Tutorial click here](#)

HRA/FSA Plan (Choose a plan) ▼

Cancel × ← Previous **Next** →

3. Under 'How would you like to make a deduction?' select 'Use current defaults,' 'Use current defaults for selected employees,' or 'Search for specific employees.' Because the 'Use current defaults for all selected employees' is most common, it will be used for demonstration. After selection, click 'Next.'

Make HRA/FSA Deductions

Pending Payments | Select Plan | **Deduction Method** | Make Deductions | Check For Errors | Warnings | Deduction Summary | Invoices | Payment Method

Complete the following steps to make a reimbursement account deduction to your employee account(s).

How would you like to make a deduction?

Use Current Defaults for all employees

Search for specific employees

Use Current Defaults for selected employees

Upload a File

Cancel × ← Previous **Next** →

4. Enter the 'Contribution Post Date.' This is the pay date. For DCRA (DCFSA), this is the date the balance will increase.

This tool is for funding HRA/FSA deductions only.

Please indicate the amount of employer and/or employee deduction for each employee's account. You can also save your amounts as the new defaults by clicking the checkbox at the bottom of the table.

Department/Category Filter: **Apply Filter** →

Hide Inactive Employees [Bottom Of Page](#) [Restore Defaults](#) [Clear All Amounts](#)

Contribution Post Date: ←

Plan	Employee Name	Date Range	Election Amount	Employer Contribution	Employee Contribution
Health Savings Account	Employee Name	01/01/23 to 12/31/23	\$5,000.00	<input type="text"/>	<input type="text"/>
Health Savings Account	Employee Name	01/01/23 to 12/31/23	\$5,000.00	<input type="text"/>	<input type="text"/>
Health Savings Account	Employee Name	01/01/23 to 12/31/23	\$500.00	<input type="text"/>	<input type="text"/>
Health Savings Account	Employee Name	04/01/23 to 12/31/23	\$3,750.00	<input type="text"/>	<input type="text"/>
Health Savings Account	Employee Name	05/01/23 to 12/31/23	\$5,000.00	<input type="text"/>	<input type="text"/>
Calculate Totals				Page Subtotal: \$0.00	\$0.00
				Total: \$0.00	\$0.00

Save these as defaults.

Cancel × ← Previous **Next** →

- If amounts are already listed, default values were previously saved. Confirm the amounts match your current payroll deductions before proceeding. Amounts can be changed if needed.
- If no amounts are listed, enter the appropriate payroll deduction amount in the 'Employee Contribution' column. If an employer contribution is given to employees, add the employer contribution amount to the 'Employer Contribution' column.

Hide Inactive Employees [Bottom Of Page](#) [Restore Defaults](#) [Clear All Amounts](#)

Contribution Post Date:

Plan	Employee Name	Date Range	Election Amount	Employer Contribution	Employee Contribution
HealthEquity	John Doe	01/01/23 to 12/31/23	\$5,000.00	<input type="text"/>	\$208.33
HealthEquity	Jane Smith	01/01/23 to 12/31/23	\$5,000.00	<input type="text"/>	\$208.33
HealthEquity	Mike White	01/01/23 to 12/31/23	\$500.00	<input type="text"/>	\$5.00
HealthEquity	Alice Brown	04/01/23 to 12/31/23	\$3,750.00	<input type="text"/>	\$125.00
HealthEquity	Bob Black	05/01/23 to 12/31/23	\$5,000.00	<input type="text"/>	\$208.33
Calculate Totals			Page Subtotal:	\$0.00	\$0.00
			Total:	\$0.00	\$0.00

Save these as defaults.

- If you want to save the amounts for future use, select the box next to 'Save these as defaults.'
- Click the 'Calculate Totals' button. If the amount matches, click 'Next' to proceed

Hide Inactive Employees [Bottom Of Page](#) [Restore Defaults](#) [Clear All Amounts](#)

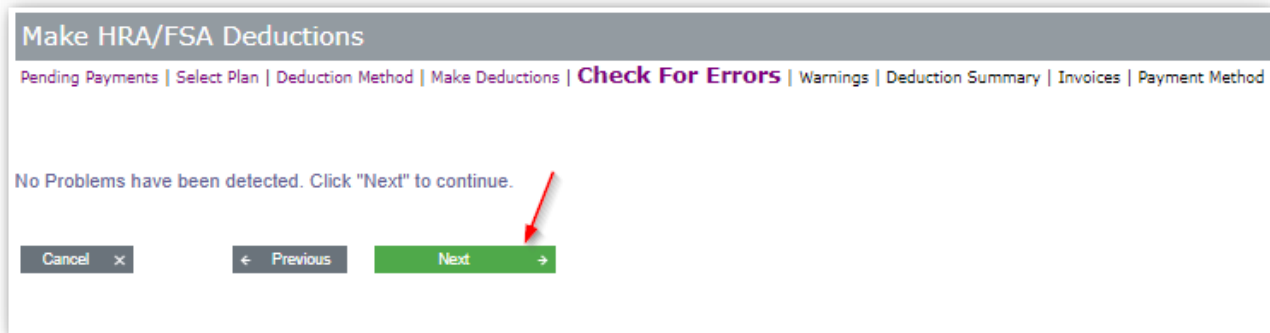
Contribution Post Date:

Plan	Employee Name	Date Range	Election Amount	Employer Contribution	Employee Contribution
HealthEquity	John Doe	01/01/23 to 12/31/23	\$5,000.00	<input type="text"/>	\$208.33
HealthEquity	Jane Smith	01/01/23 to 12/31/23	\$5,000.00	<input type="text"/>	\$208.33
HealthEquity	Mike White	01/01/23 to 12/31/23	\$500.00	<input type="text"/>	\$5.00
HealthEquity	Alice Brown	04/01/23 to 12/31/23	\$3,750.00	<input type="text"/>	\$125.00
HealthEquity	Bob Black	05/01/23 to 12/31/23	\$5,000.00	<input type="text"/>	\$208.33
Calculate Totals			Page Subtotal:	\$0.00	\$754.99
			Total:	\$0.00	\$754.99

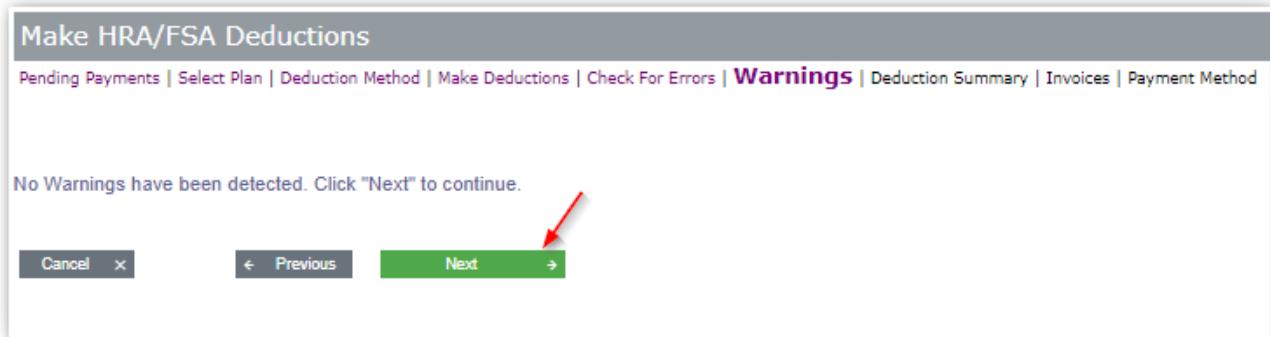
Save these as defaults.

9. If problems have been detected, you will see them on the 'Check for Errors' screen. If corrections are needed, click 'previous' and take necessary actions. If no problems have been detected, click 'Next.'

Note: If your deductions have errors, you will not be able to proceed until the errors are fixed.



10. If warnings have been detected, you will see them on the 'Warnings' screen. If corrections are needed, click 'previous' twice and take necessary actions. If no warnings have been detected, click 'Next.'



11. On the 'Deduction Summary' screen, you will see a summary of deductions by amount and count. If everything looks correct, click 'Submit & Continue.'

Note: Clicking 'Submit & Continue' will post the payroll deductions. If the system takes you to a payment screen, payment may be required. However, that does not mean the deductions were not posted.

Do not back up and click 'submit & continue' again. That will result in duplicate payroll deductions.

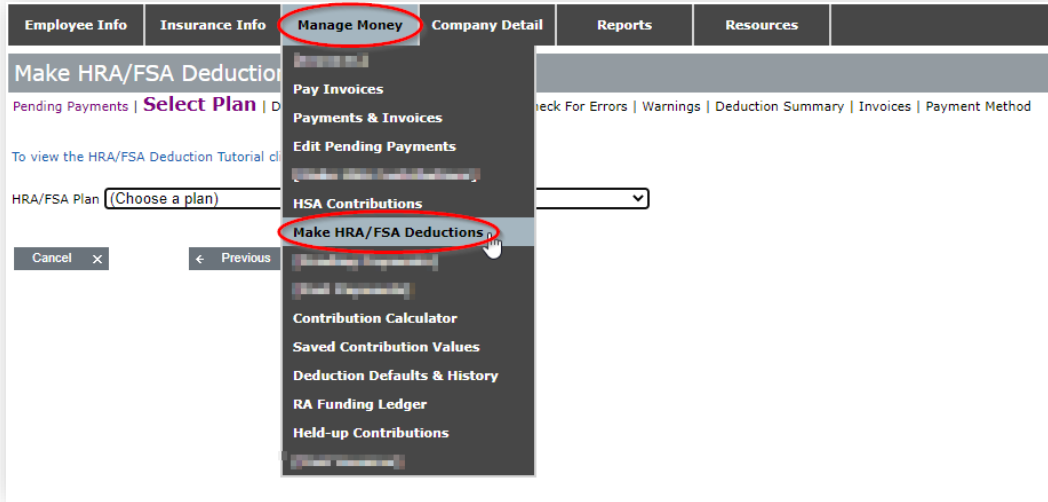
12. If payment is due, select a payment method and click 'Finish.' If the payment total shows \$0, you can click 'Finish' or navigate away from the screen.

Note: Most reimbursement accounts utilize pre-funding and regular replenishments. If that is true, the payment total will be \$0 unless you have outstanding unpaid invoices.

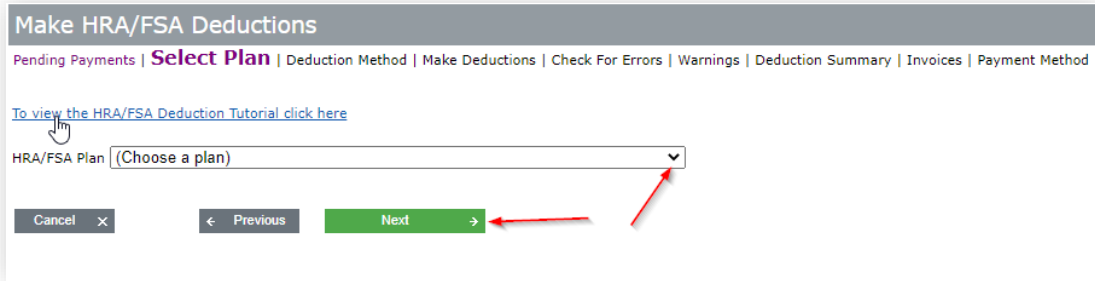
13. To confirm deposits were successful, navigate to Manage Money > Deduction Defaults & History > Click Deduction History tab. Additional instructions can be found in the *Deduction Defaults and History - Reimbursement Accounts Only* section below.

Upload a File

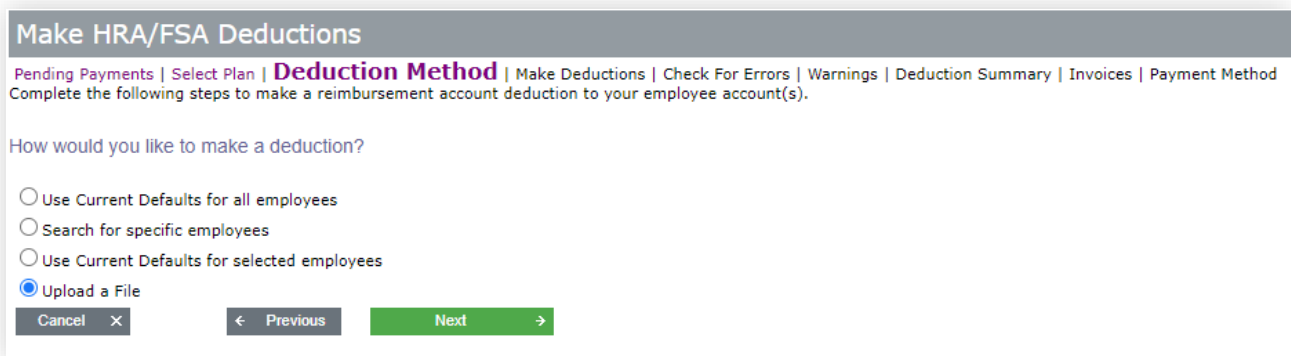
1. From the 'Manage Money' dropdown select 'Make HRA/FSA Deductions'.



2. Choose the correct plan from the drop-down list and select 'Next.'



3. Select 'Upload a File' and click 'Next.'



4. You will see the following, including two links to download the upload template.

- a. Create a file using your active employees. If you click 'here', the template will populate with all your active enrollment.

Make HRA/FSA Deductions

[Pending Payments](#) | [Select Plan](#) | [Deduction Method](#) | **Make Deductions** | [Check For Errors](#) | [Warnings](#)

This tool is for funding HRA/FSA deductions only.

Click Browse to locate the file you would like to upload then click Next. Please ensure that the file is in the correct format - either Microsoft Excel or .csv (comma separated values).

To have us create a file using the information for your active employees, please click here

For sample deduction files and instructions go [here](#).

Choose a File No file chosen

- b. Sample deduction file and instructions. If you click 'here', the template will include your required columns and instructions for each column

Make HRA/FSA Deductions

[Pending Payments](#) | [Select Plan](#) | [Deduction Method](#) | **Make Deductions** | [Check For Errors](#) | [Warnings](#)

This tool is for funding HRA/FSA deductions only.

Click Browse to locate the file you would like to upload then click Next. Please ensure that the file is in the correct format - either Microsoft Excel or .csv (comma separated values).

To have us create a file using the information for your active employees, please click [here](#)

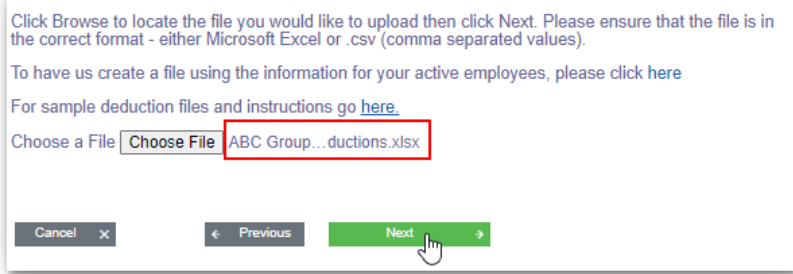
For sample deduction files and instructions go here.

Choose a File No file chosen

- 5. Populate the template with the required data, including the appropriate deposit amount. Save the template in Excel or .csv (comma separated values) format.

SSN (required)	PLAN TYPE (HCRA, DCRA, HRA)	LAST NAME	FIRST NAME	Deposit Date	Employee Contribution (required)	Employer Contribution (required)
██████████	DCRA	Harrison	Lorraine	6/22/2023	\$35.00	\$0.00
██████████	DCRA	Kim	Jonathan	6/22/2023	\$50.00	\$0.00
██████████	DCRA	Smith	Alison	6/22/2023	\$120.00	\$0.00

- 6. Click on 'Choose File' to browse for your saved template. Once you see the file attached, click 'Next.'

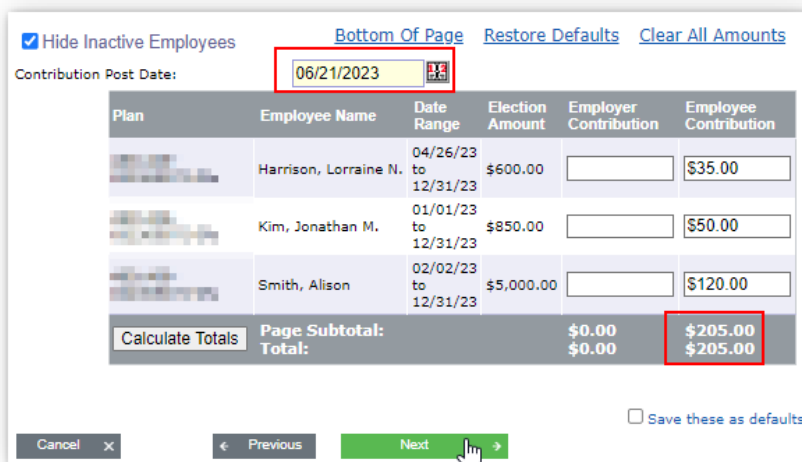


- If the file was uploaded successfully, you will see a grid with the population and the contribution listed on the upload template.

Note: If you do not see any values in the employee (or employer) contribution column, something on your template is incorrect. Double check your template and try again.

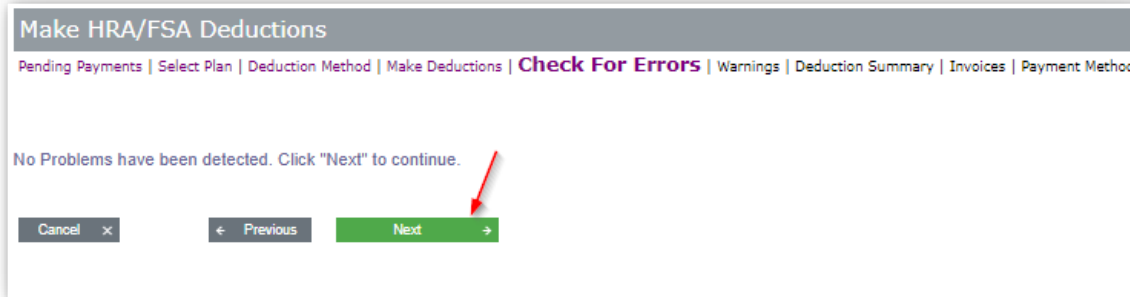
Plan	Employee Name	Date Range	Election Amount	Employer Contribution	Employee Contribution
	Harrison, Lorraine N.	04/26/23 to 12/31/23	\$600.00		\$35.00
	Kim, Jonathan M.	01/01/23 to 12/31/23	\$850.00		\$50.00
	Smith, Alison	02/02/23 to 12/31/23	\$5,000.00		\$120.00
<input type="button" value="Calculate Totals"/>	Page Subtotal:			\$0.00	\$205.00
	Total:			\$0.00	\$205.00

- Enter a 'Contribution Post Date.' This is the pay dates. For DCRA (DCFSA), this is the date the balance will increase. If necessary, click the 'Calculate Totals' button. Ensure that the total matches the expected total. If it does, click 'Next.'

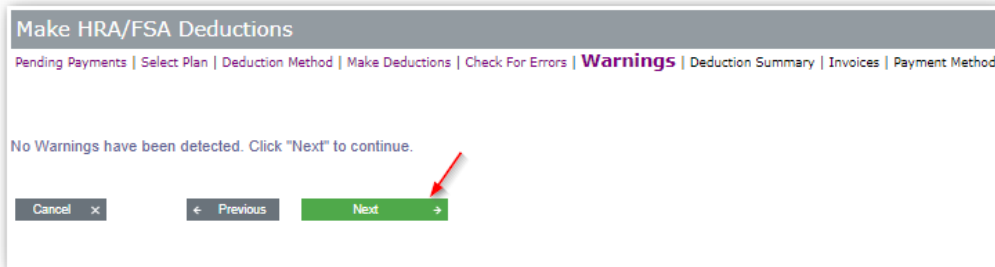


- If problems have been detected, you will see them on the 'Check for Errors' screen. If corrections are needed, click 'Previous' and take necessary actions. If no problems have been detected, click 'Next.'

Note: If your deductions have errors, you will not be able to proceed until the errors are fixed.



- If warnings have been detected, you will see them on the 'Warnings' screen. If corrections are needed, click 'Previous' twice and take necessary actions. If no warnings have been detected, click 'Next.'



- On the 'Deduction Summary' screen, you will see a summary of deductions by amount and count. If everything looks correct, click 'Submit & Continue.'

Note: Clicking 'Submit & Continue' will post the payroll deductions. If the system takes you to a payment screen, payment may be required. However, that does not mean the deductions were not posted.

Do not click 'Submit & Continue' again. That will result in duplicate payroll deductions.

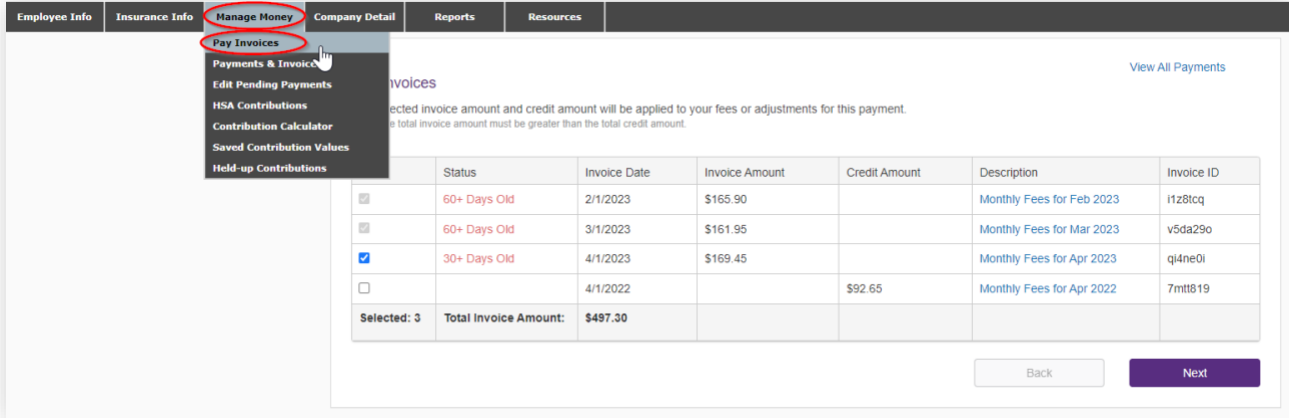
- If payment is due, select a payment method and click 'Finish.' If the payment total shows \$0, you can click 'Finish' or navigate away from the screen.

Note: Most reimbursement accounts utilize pre-funding and regular replenishments. If that is true, the payment total will be \$0 unless you have outstanding unpaid invoices.

- To confirm deposits were successful, navigate to Manage Money > Deduction Defaults & History > Click Deduction History tab. Additional instructions can be found in the *Deduction Defaults and History – Reimbursement Accounts Only* section below.

Pay Invoices

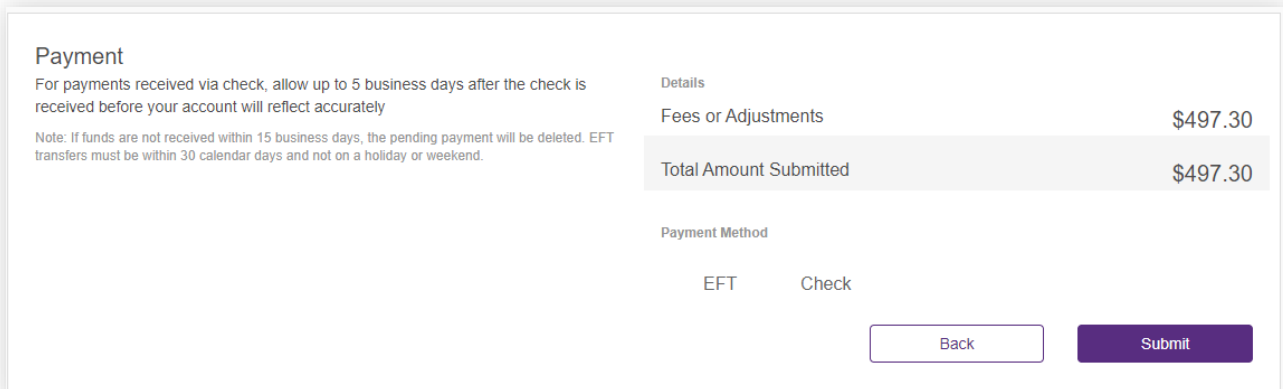
1. From the 'Manage Money' dropdown select 'Pay Invoices'. The following screen displays:



2. Select the invoice(s) you would like to pay by checking the box on the left. If invoices are more than 60 days old, you will be required to pay. To apply a credit invoice towards an outstanding invoice, select both. *Credits must not be greater than amount owed.*

Note: The invoice 'description' is a link. To save the invoice as a PDF, click on the description link. Then click the 'Print' button. From here, click on the description again to view a report containing line-item details for the invoice.

3. Select 'Next.'
4. Select the payment method:



EFT

1. If you have a verified EFT account on file, the system will default to this payment method. If you have more than one EFT account, select it from the dropdown menu.

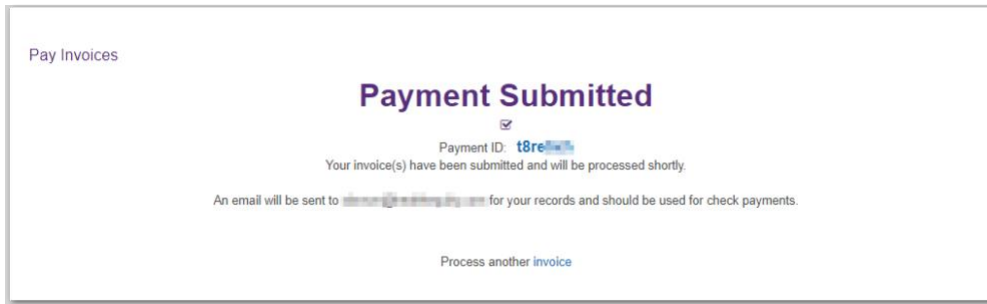
2. Select the transfer date (may not schedule more than 30 days in advance).
3. Select 'Submit.'

The screenshot shows a 'Payment' form with the following sections:

- Payment**: For payments received via check, allow up to 5 business days after the check is received before your account will reflect accurately. Note: If funds are not received within 15 business days, the pending payment will be deleted. EFT transfers must be within 30 calendar days and not on a holiday or weekend.
- Details**: Fees or Adjustments: \$1,311.14; Total Amount Submitted: \$1,311.14.
- Payment Method**: Radio buttons for EFT and Check.
- Account**: Wells Fargo Checking (XXXXXXXX) with a dropdown arrow.
- Transfer Date**: 6/23/2023 with a calendar icon.
- Buttons**: 'Back' and 'Submit' (highlighted with a mouse cursor).

Check

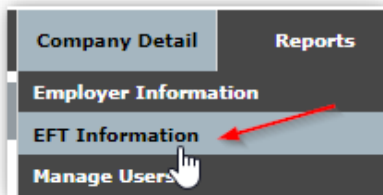
1. If 'Check' is selected, you will not see an EFT account. Click 'Submit.' If payment is not received within 40 days, the payment will be deleted, and you will have to repeat this process.
2. Include the Payment ID with your check payment.



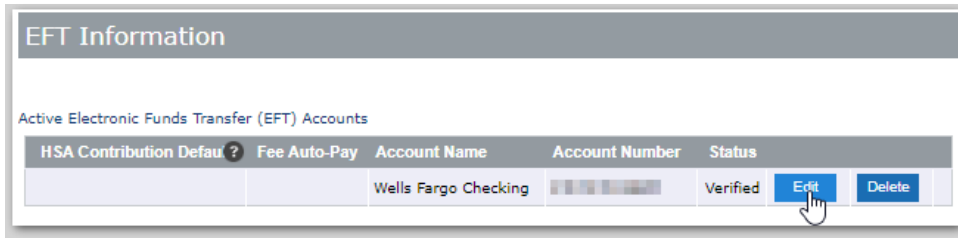
Fee Auto Pay

This section assumes a verified EFT account is on file. To add a new EFT, refer to 'EFT Setup' section above.

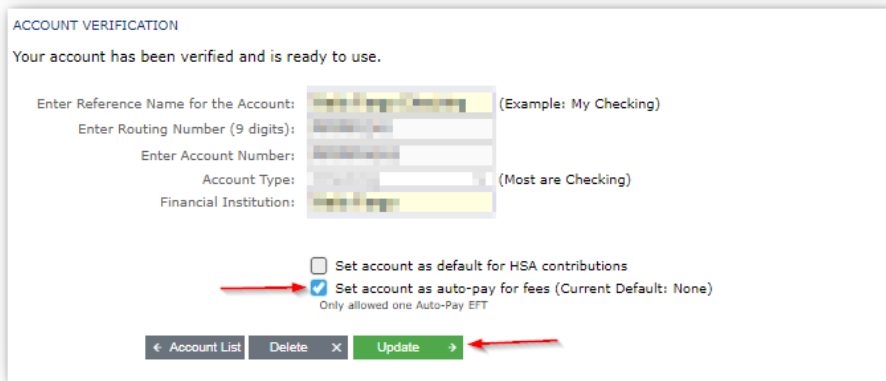
1. To auto pay fees, navigate to 'Company Detail' and click on 'EFT Information.'



2. Next to the bank account, click on 'Edit.'

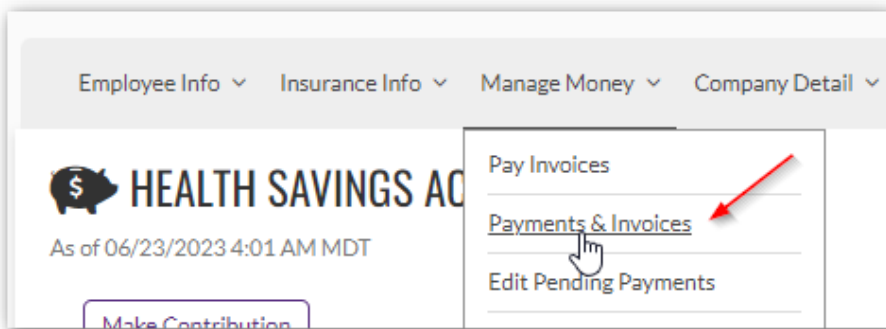


3. Select the box next to 'Set account as auto-pay for fees.' Then click 'Update.'



Viewing Payments & Invoices

1. To view all invoices, navigate to the 'Manage Money' tab and click on 'Payments & Invoices.'



2. On this screen, you will see a grid with the following headers.

- Invoice Date – Date the invoice was generated
- Invoice ID – Invoice ID as assigned by HealthEquity
- Payment Date – Date payment scheduled
- Available Date – Date payment arrived
- Payment ID – Payment ID as assigned by HealthEquity
- Invoice Total – Amount of invoice
- Invoice Type – Type of invoice i.e., fees, contributions, etc.

- Payment Type – Type of payment i.e., ACH, wire, check
- Invoice Description – Description of the invoice
- Status – Shows unpaid, pending, or complete

Invoice Date	Invoice ID	Payment Date	Available Date	Payment ID	Invoice Total	Invoice Type	Payment Type	Invoice Description	Status
6/22/2023	goh7	6/22/2023	6/26/2023	ged1	\$7,330.61		ACH: #6883	RA Replenishment for DCRA 2023	Pending
6/22/2023	f1w2	6/22/2023	6/26/2023	fqna	\$3,499.46		ACH: #6883	RA Replenishment for HCRA 2023	Pending
6/19/2023	0pm	6/19/2023	6/20/2023	sn32	\$14,955.76		ACH: #6883	Contribution/Transfer created by file: 2023-06-19-10-49-47_HSA_061623.xls;65761.NI.20230619105007271.txt (1 of 1)	Complete
6/16/2023	i677	6/16/2023	6/16/2023	e81c	\$0.00		Zero Sum	Contribution transferred to employee	Complete
6/15/2023	kukt	6/15/2023	6/19/2023	i9us	\$133.91		ACH: #6883	RA Replenishment for LPHCRA 2023	Complete
6/15/2023	9b9	6/15/2023	6/19/2023	4694	\$3,390.66		ACH: #6883	RA Replenishment for HCRA 2023	Complete
6/15/2023	fvjrj	6/15/2023	6/19/2023	1dxk	\$919.00		ACH: #6883	RA Replenishment for DCRA 2023	Complete

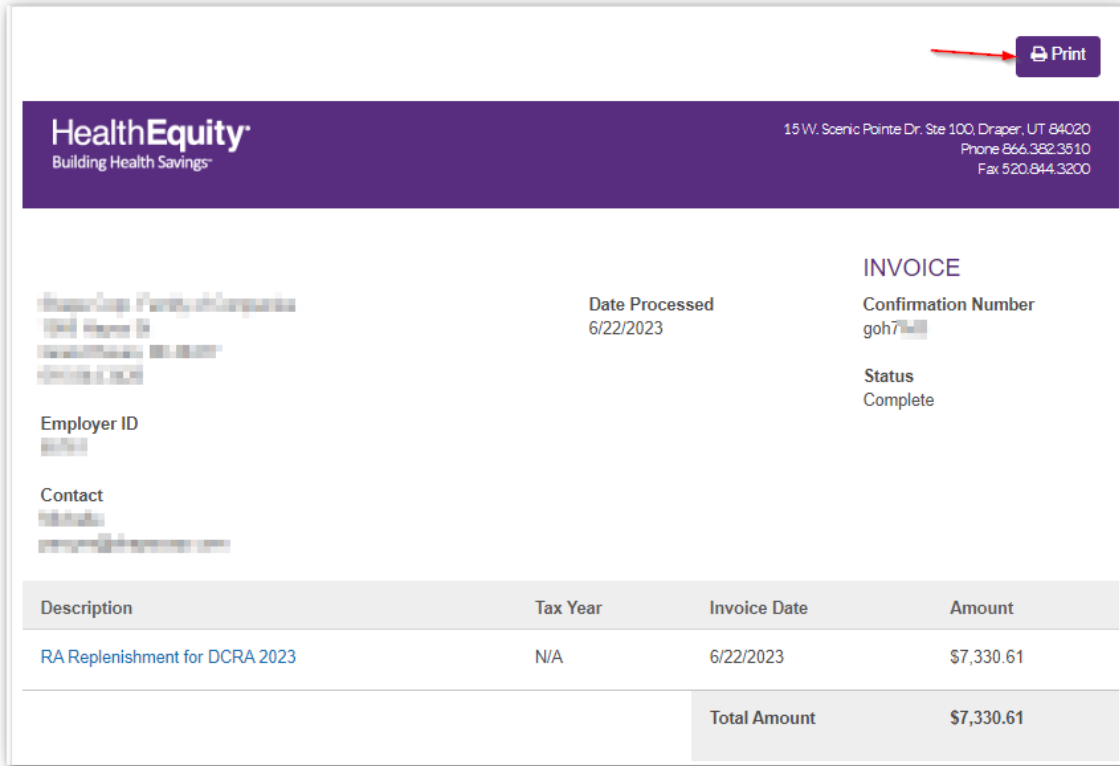
3. The report can be exported by clicking on the disk image and selecting a download format (i.e., Excel).

4. If you are looking for a specific invoice, you can filter by status, invoice type, invoice ID, payment ID, or date span. After entering filters, click 'View Report' to search.

5. To view the invoice or associated details, click on the invoice ID.

Invoice Date	Invoice ID	Payment Date	Available Date	Payment ID	Invoice Total	Invoice Type	Payment Type	Invoice Description
6/22/2023	goh7	6/22/2023	6/26/2023	ged1	\$7,330.61		ACH: #6883	RA Replenishment for DCRA 2023
6/22/2023	f1w2	6/22/2023	6/26/2023	fqna	\$3,499.46		ACH: #6883	RA Replenishment for HCRA 2023

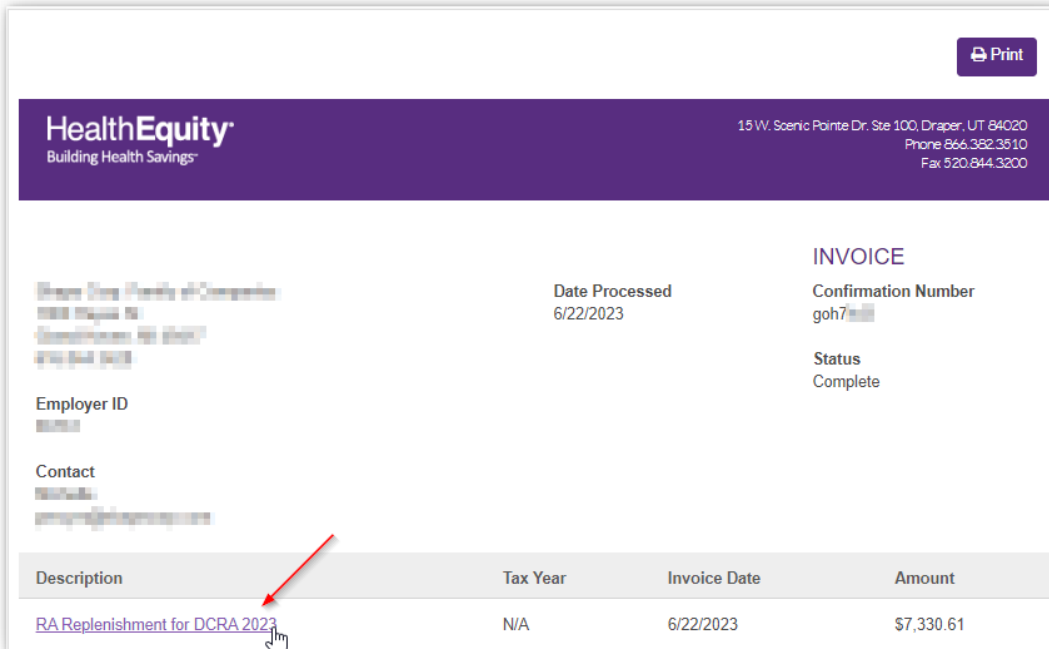
6. To print to download a copy of the invoice, click on 'Print.'



The screenshot shows the top portion of an invoice. At the top right, a red arrow points to a purple button labeled 'Print'. Below the header, the HealthEquity logo and contact information are visible. The invoice details include the date processed (6/22/2023), confirmation number (goh7), and status (Complete). A table at the bottom lists the invoice items.

Description	Tax Year	Invoice Date	Amount
RA Replenishment for DCRA 2023	N/A	6/22/2023	\$7,330.61
Total Amount			\$7,330.61

7. To view the contribution, claim, or fee details for the invoice, click on the 'Description.'



This screenshot is identical to the previous one, but with a red arrow pointing to the 'Description' column of the table, specifically to the text 'RA Replenishment for DCRA 2023', which is underlined and appears to be a clickable link.

Description	Tax Year	Invoice Date	Amount
RA Replenishment for DCRA 2023	N/A	6/22/2023	\$7,330.61
Total Amount			\$7,330.61

8. If viewing a claim invoice, click on the green Excel symbol to download the report detail.

Name	Employee ID	Department	Account Type	Payment Date	Payment Type	Payment Amount	Payee
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/22/2023	ACH	\$720.00	Member
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/22/2023	ACH	\$720.00	Member
[Redacted]	[Redacted]	[Redacted]	2023 DCRA 7/1/2022 to 6/30/2023	6/26/2023	ACH	\$1,500.00	Member
[Redacted]	[Redacted]	PLP	2023 DCRA 1/11/2023 to 6/30/2023	6/19/2023	ACH	\$21.00	Member
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/23/2023	ACH	\$3,613.46	Member
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/22/2023	ACH	\$240.00	Member
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/22/2023	ACH	\$240.00	Member
[Redacted]	[Redacted]	LHT	2023 DCRA 7/1/2022 to 6/30/2023	6/19/2023	ACH	\$96.15	Member
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/22/2023	ACH	\$180.00	Member
						\$7,330.61	Total Records: 9

9. If viewing a fee or contribution invoice, click on the disk image and select the method of export.

Invoice ID: Department:

Last Name: First Name:

Employee ID: Member ID (HQY only):

1 of 2 ?

Contribution/Transfer created by file: [Redacted]
 Invoice ID: [Redacted]
 Tax Year: 2023

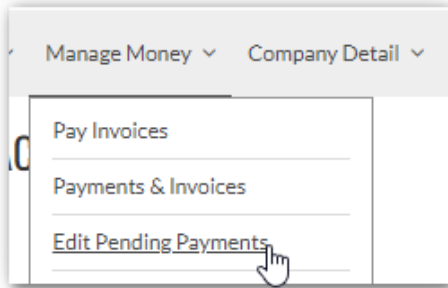
As of 6/23/2023 6:27:19 PM CST
 Invoice Date: 6/19/2023

Description	Employee ID	Department	Last Name	First Name	Employer Contribution	Employee Contributions	Fee or Other	Total
HSA Contribution	[Redacted]	CA65	[Redacted]	[Redacted]	\$9.62	\$0.00	\$0.00	\$9.62
HSA Contribution	[Redacted]	CA65	[Redacted]	[Redacted]	\$9.62	\$0.00	\$0.00	\$9.62
HSA Contribution	[Redacted]	CA65	[Redacted]	[Redacted]	\$9.62	\$0.00	\$0.00	\$9.62
HSA Contribution	[Redacted]	[Redacted]	[Redacted]	[Redacted]	\$19.23	\$30.00	\$0.00	\$49.23

Editing Pending Payments

If a payment is scheduled but not received, it will appear on the 'Edit Pending Payments' screen. To view pending payments, navigate to the 'Manage Money' tab and click 'Edit Pending Payments'

Note: If the EFT has already been reported to the bank, the transaction will not appear on the 'Edit Pending Payments' screen. It is too late to stop the EFT. You can view the invoice on the 'Payments & Invoices' screen.

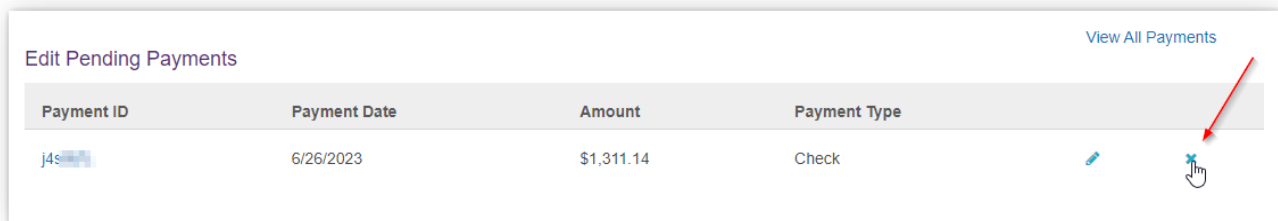


From the 'Edit Pending Payments' screen, you have three options.

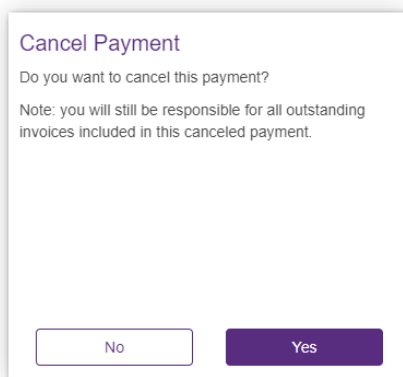
1. Cancel pending payment
2. Edit pending payment
3. View payment details (can also be viewed from the 'payments & invoices' screen).

Cancel Pending Payment

1. To cancel a scheduled payment, click on the 'x' icon.



2. After clicking the 'x,' you will be asked to approve the cancellation. In some cases, the invoice will be moved back to the 'Pay Invoices' screen. In other cases, the invoice will be deleted. Pay special attention to the message on the 'Cancel Payment' screen. If you want to proceed, click 'Yes.'



Edit Pending Payment

1. To edit a pending payment, click on the pencil icon.

Edit Pending Payments View All Payments

Payment ID	Payment Date	Amount	Payment Type	
j4s	6/26/2023	\$1,311.14	Check	

2. Make the necessary changes and then click 'Submit' to finish.

Edit Payment

For payments received via check, allow up to 5 business days after the check is received before your account will reflect accurately.
 Note: If funds are not received within 15 business days, the pending payment will be deleted. EFT transfers must be within 30 calendar days and not on a holiday or weekend.

Payment ID: j4s
 Payment Date: 6/26/2023

Total Amount Submitted: \$1,311.14

Payment Method: EFT Check

Account: Wells Fargo Checking 0000000000
 Transfer Date: 6/30/2023

View Invoice/Payment Details

1. To view, click on the Payment ID.

Edit Pending Payments View All Payments

Payment ID	Payment Date	Amount	Payment Type	
j4s	6/26/2023	\$1,311.14	Check	

2. Save or print the invoice by clicking on the 'Print' button. If you want to view additional detail. Click on the 'Description' link.

HealthEquity
Building Health Savings®

15 W. Sene Pointe Dr., Ste 100, Draper, UT 84020
 Phone: 855.352.3510
 Fax: 520.844.3000

INVOICE


Date Processed: 6/26/2023
 Date Available: 6/28/2023
 Confirmation Number: j4s
 Status: Requested

Employer ID: 84502481
 Contact: [\[Link\]](#)

Description	Tax Year	Invoice Date	Amount
RA Replenishment for HCRA 2023	N/A	5/24/2023	\$1,311.14
Total Amount			\$1,311.14

3. If viewing a claim invoice, click on the green Excel symbol to download the report detail.

View Invoice Claim Matching



Name	Employee ID	Department	Account Type	Payment Date	Payment Type	Payment Amount	Payee
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/22/2023	ACH	\$720.00	Member
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/22/2023	ACH	\$720.00	Member
[Redacted]	[Redacted]		2023 DCRA 7/1/2022 to 6/30/2023	6/26/2023	ACH	\$1,500.00	Member
[Redacted]	[Redacted]	PLP	2023 DCRA 1/11/2023 to 6/30/2023	6/19/2023	ACH	\$21.00	Member
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/23/2023	ACH	\$3,613.46	Member
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/22/2023	ACH	\$240.00	Member
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/22/2023	ACH	\$240.00	Member
[Redacted]	[Redacted]	LHT	2023 DCRA 7/1/2022 to 6/30/2023	6/19/2023	ACH	\$96.15	Member
[Redacted]	[Redacted]	SHA	2023 DCRA 7/1/2022 to 6/30/2023	6/22/2023	ACH	\$180.00	Member
						\$7,330.61	Total Records: 9


4. If viewing a fee or contribution invoice, click on the disk image and select the method of export.

Invoiced Contributions & Fees

Invoice ID: Department: View R

Last Name: First Name:

Employee ID: Member ID (HQY Only):

1 of 2 ? Find | Next 

Contribution/Transfer created by file: [Redacted]

Invoice ID: [Redacted]
Tax Year: 2023

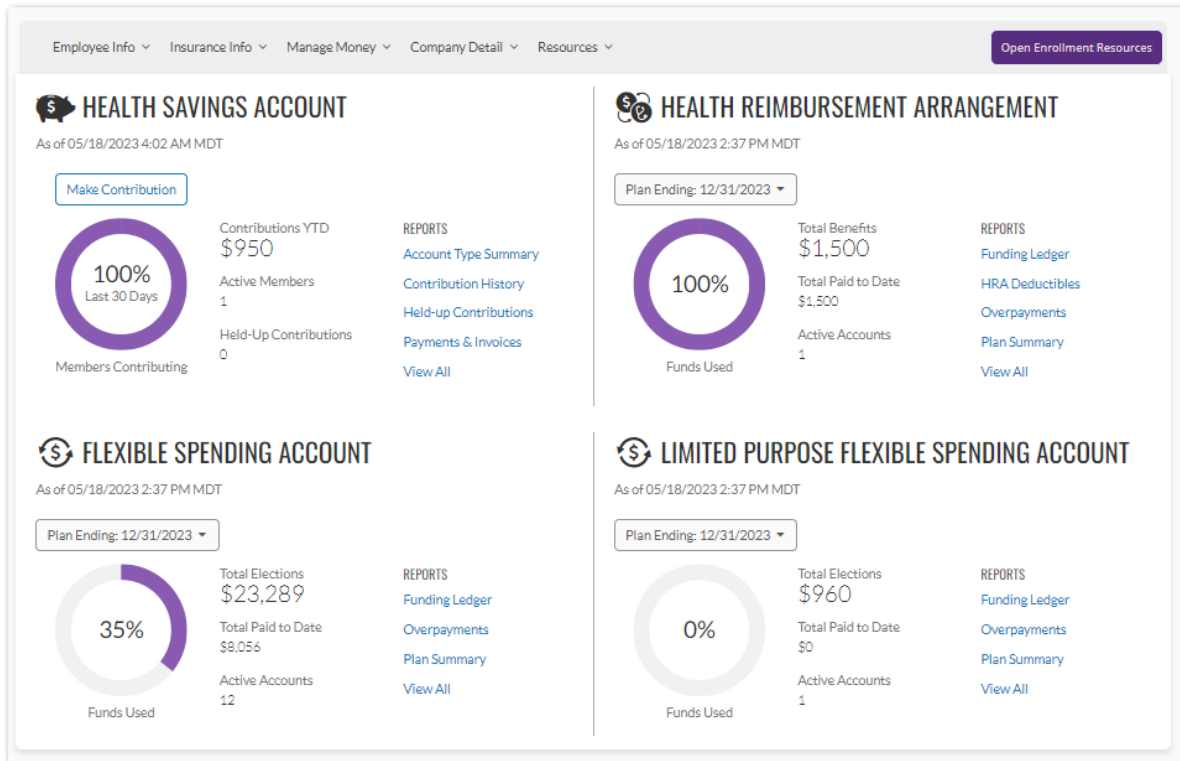
As of 6/23/2023 6:27:19 PM CST
Invoice Date: 6/19/2023

Description	Employee ID	Department	Last Name	First Name	Employer Contribution	Employee Contributions	Fee or Other	Total
HSA Contribution	[Redacted]	CA65	[Redacted]	[Redacted]	\$9.62	\$0.00	\$0.00	\$9.62
HSA Contribution	[Redacted]	CA65	[Redacted]	[Redacted]	\$9.62	\$0.00	\$0.00	\$9.62
HSA Contribution	[Redacted]	CA65	[Redacted]	[Redacted]	\$9.62	\$0.00	\$0.00	\$9.62
HSA Contribution	[Redacted]		[Redacted]	[Redacted]	\$19.23	\$30.00	\$0.00	\$49.23

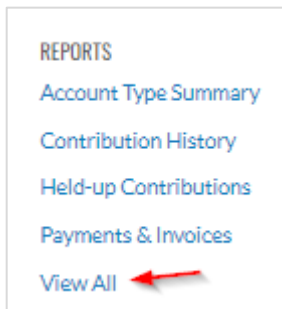
Section 4 – Reporting

Reporting

On the HealthEquity home screen, there are sections dedicated to each account type (i.e., HSA, FSA, LPFSA, DCFSA, HRA). Each section includes a subsection titled 'Reports.' The subsection includes most commonly used reports and a link to all reports.



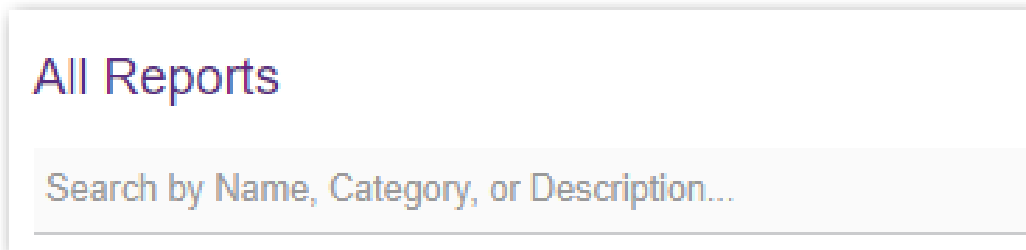
1. To see a list of all reports and descriptions, click on 'View All' under any of the account type sections.



Each report is listed along with the Report Category and Report Description

Report Name	Report Category	Report Description
Account Type Summary	General	<p>This report provides the number of members within designated balance ranges, including the average and maximum balance in each range.</p> <p>The report categorizes members into the following balance ranges:</p> <ul style="list-style-type: none"> \$0 \$.01-\$500 \$501-\$1,000 \$1,001-\$1,500 \$1,501-\$2,000 \$2,001-\$2,500 \$2,501-\$5,000 Greater than \$5,000 <p>The data provided is current as of the date shown on the report.</p>
Card Status Report*	General	Check the card order status for your employees. Cards are typically received 7-10 business days after mail date.
Claim Payments	FSA/HRA	<p>Select a date range and view a list of claim payments. View payment information including: date of payment, payment method (virtual card, check or card transaction), amount and payee (employee or provider paid).</p> <p>Report details: employee name, employee ID, department, account type, payment date, payment type, payment amount and payee.</p>
Claims Detail*	FSA/HRA	<p>View details of processed claim information for each employee, the plan the claim was paid from, when it was paid, how it was paid, payment amount and if it was a reimbursement to the employee or payment to the provider.</p> <p>Report details: employee name, employee ID, date processed, date of service, patient name, amount paid and payment information.</p>
Contribution History	HSA	<p>View a listing of each employees contribution history. The report displays total contributions made by the employer to employees HSAs. It also shows the total contributions made by the employee, excluding contributions outside of payroll. Click on an employee name to see the date and amount of each contribution.</p> <p>Report details: employee ID, department, employee name, employer contributions, employee contributions, pending contributions made by the employer and employee.</p>

2. Use the search box at the top of the page to search by Name, Category, or Description



3. Once you find the report needed, click on the name of the report

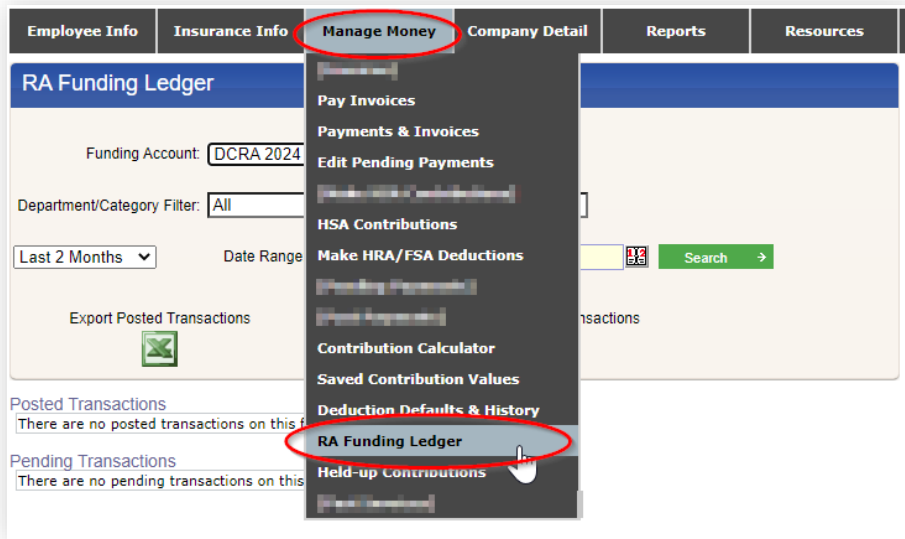
Contribution History	HSA	View a listing of each employees contribution history. The report displays total contributions made by the employer to employees HSAs. It also shows the total contributions made by the employee, excluding contributions outside of payroll. Click on an employee name to see the date and amount of each contribution. Report details: employee ID, department, employee name, employer contributions, employee contributions, pending contributions made by the employer and employee.
Funding Ledger	FSA/HRA	Claim payment detail that is able to be filtered by date range and shows the members name, the plan the claim was paid from, when it was paid, how it was paid and payment amount. This report includes: employee name, employee ID, plan, type of payment used (ACH or check), description of payment, credit or debit and total balance.
Funding Summary	FSA/HRA	View plan liability, total funds received and claims paid. This report allows you to track the election amount against the claims paid from a plan and may be filtered by plan year and account type. Report details: funding schedule, start date, prefund percent, prefund amount, total election amount, total claims paid, funding received, available balance, claims pending and funding pending.
Held-up Contributions	HSA	View all employer or employee contributions being held. Reasons why dollars may be held include: customer identification process (CIP) required by the US PATRIOT Act, FSA coverage, contribution limits, etc. The report includes: employee ID, employee name, amount contributed, reason for delay, days waiting, reason, employer contributions and employee contributions.

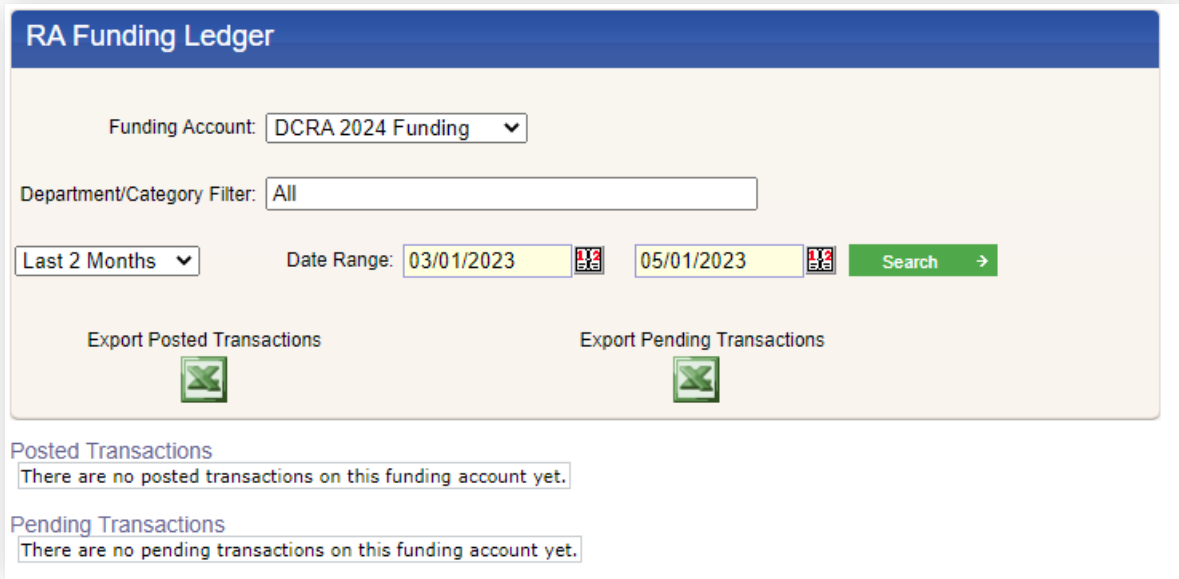
- Most reports have additional filters. After adjusting filters, be sure to click ‘Search’ or ‘Apply Filters.’ Reports can be exported by clicking on the green Excel system.

Reimbursement Account Funding Ledger

The ‘RA Funding Ledger’ is used to track all the incoming deposits to fund an RA account and the debits associated with claim payments. To access this report:

- From the ‘Manage Money’ drop down select ‘RA Funding Ledger’. The following screen will display:





- a. If you have more than one reimbursement plan, select the 'Funding Account' drop down box.
- b. If you have set up categories or departments for employee filtering purposes, use the 'Department/Category Filter.'
- c. Select 2, 3, 6 or 12 months to be reviewed or enter the date range you want to review.
- d. Click the green 'Search' button.
- e. You will be able to download this report by clicking on the Excel icon.

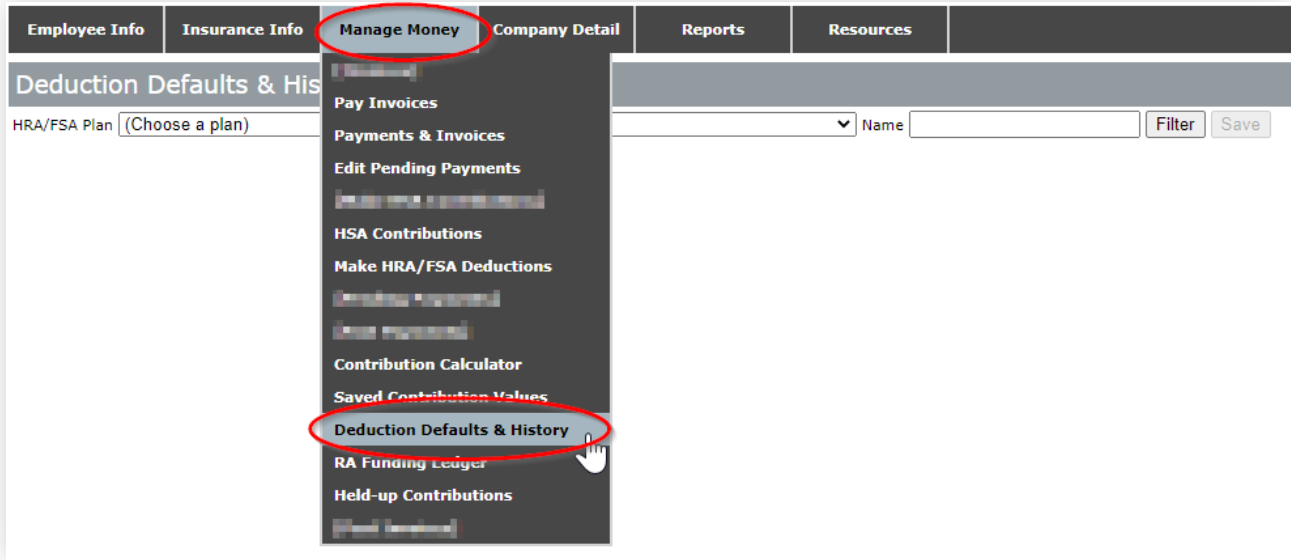
Note: You will export 'Posted Transactions' and 'Pending Transactions' separately; be sure to select the appropriate option for your search. This report will provide you with a ledger view of the plan activity. The ledger shows payment date, member name, employee ID, claim payment type (check, debit card, etc.), the credit or debit amount, and the funding account balance.

Deduction Defaults and History – Reimbursement Accounts Only

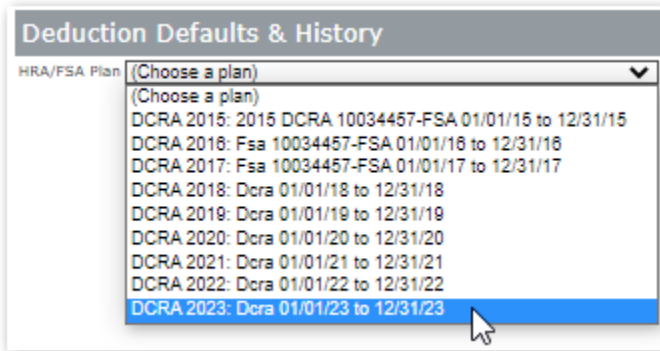
This portal feature will not appear if using assumed payroll deductions. Employers using deduction defaults can make changes to defaults here or within the 'Make HRA/FSA Deductions' section of the portal. Most commonly, this feature is used to view deduction history.

To see the deduction (deposit) defaults or history for your employees:

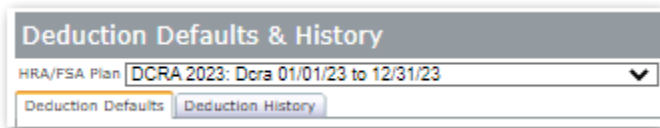
1. From the 'Manage Money' drop down select 'Deduction Defaults and History'. The following screen will display:



2. From the drop down ('Choose a plan'), select the appropriate plan



3. Two tabs appear – 'Deduction Defaults' and 'Deduction History.'



4. Deduction Defaults

Note: Typically used for FSAs

- a. Enter per-pay-period payroll deduction amount in the employee contribution column
- b. Click Save

Deduction Defaults & History

HRA/FSA Plan **DCRA 2023: Dcra 01/01/23 to 12/31/23** Name Filter Save

Deduction Defaults Deduction History

1 2 3 4 5

Plan	Employee Name	Date Range	Election Amount	Employer Contribution	Employee Contribution
Dcra	Aguilar, Benjamin L.	01/01/23 to 12/31/23	\$2,500.00	<input type="text"/>	\$96.15
Dcra	Anderson, Mary A.	01/01/23 to 12/31/23	\$5,000.00	<input type="text"/>	\$192.30



5. Deduction History

- a. Shows list of all deposits by person and date.
- b. Findings can be organized by name or date. To organize alphabetically by name, click the column header 'Name.' To organize by date, click on the column header 'Date.'
- c. To filter findings by date, enter a date in 'From' and 'To.' Then click 'Filter.'

Deduction Defaults & History

HRA/FSA Plan **DCRA 2023: Dcra 01/01/23 to 12/31/23**

Deduction Defaults Deduction History




From:  To:  Filter

- d. After filtering by date, you can still organize the findings alphabetically by clicking on the column header 'Name.'
- e. Filtered or unfiltered Deduction History results can be exported to Excel. Simply click on the green Excel symbol

Deduction Defaults & History

HRA/FSA Plan **DCRA 2023: Dcra 01/01/23 to 12/31/23**

Deduction Defaults Deduction History

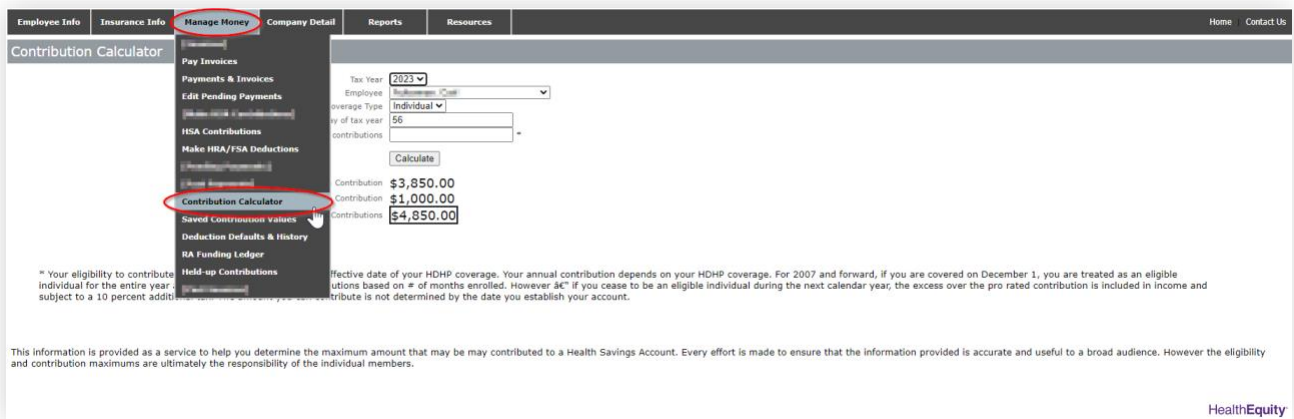
From:  To:  Filter 

Contribution Calculator*

This feature is primarily used to calculate prorated contribution limits. Proration may be needed if someone changes coverage tiers mid-year or is only eligible to make contributions for a portion of the year.

To calculate contribution maximums:

1. From the 'Manage Money' dropdown select 'Contribution Calculator'. The following screen will display:



2. Select the tax year from the 'Tax Year' drop down
3. Select the employee from the 'Employee' drop down
4. Select the coverage type from the 'Coverage Type' drop down (i.e. Self, Family)
5. Enter the appropriate number of months
6. The age will default based on the employee selected
7. Click Calculate

Note: If someone changed coverage tiers mid-year, complete the process twice – Number of months at 'self' and number of months at 'family.'

The Contribution Calculator is using the IRS-allowable contributions by coverage type and additional catch-up contribution if the person is 55 and older. **Note:** 'Allowed catch-up contribution' is the total based on the employee's age as of the last day of the selected tax year.

* The Contribution Calculator is provided as a service to help you determine the maximum amount that may be may contributed to a Health Savings Account. Every effort is made to ensure that the information provided is accurate and useful to a broad audience. However the eligibility and contribution maximums are ultimately the responsibility of the individual members.

Section 5 - Resources

The resources section of your employer portal contains forms for both the employer and the employee to use to manage their account. Sample forms and upload templates are also included.