FSA Implementation Checklist

for implementing HealthEquity Integrated Flexible Spending Accounts

Eligibility

Providence Health Plan does not collect and provide eligibility for these accounts; employers work directly with HealthEquity to set up and maintain FSA eligibility.

Claims

Once everything is set up in HealthEquity's system, they will send PHP a list of the members they need claims information for. PHP then sends HealthEquity a weekly file with any corresponding claims data.

What HealthEquity® needs to get started

- Employer submits the New Business Form to HealthEquity.
- Employer provides FSA eligibility using HealthEquity's template, uploading the information through the Employer Portal.

What Providence Health Plan needs to get started

- Employer/producer completes PHP's Master Contract Application including the FSA product selection, and submits it to their PHP Sales Team.

What's next?

- HealthEquity will contact the employer to schedule a convenient time to review and finalize the FSA plan design, and set up funding arrangements. (usually within 2-3 business days after the New Business Form is received)
- Once the plan design and funding arrangements have been finalized, HealthEquity will set up the employee accounts and send welcome kits, including debit cards if applicable.

- To ensure debit cards are received by the effective date, please allow 4 weeks processing time, once the employee elections have been received.

HealthEquity® Support and Resources

Implementation Help –

Sales Resources website – for useful information, videos, and forms.

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

Employer/Member Account Set Up
onboarding@healthequity.com

Post Implementation Help –

Broker Services
800-819-5852
brokerservices@healthequity.com

Employers
866-382-3510
employerservices@healthequity.com

Members
877-873-9366
memberservices@healthequity.com

Providence Health Plan Support and Resources

Sales Resources website

Please contact your Sales Team with additional questions.