

HRA Implementation Checklist

for implementing HealthEquity Integrated Health Reimbursement Arrangements

Eligibility

Employers send enrollment information to Providence Health Plan (PHP). When processed, PHP sends that eligibility to HealthEquity. Eligibility files are sent daily.

Once everything is set up in both PHP's and HealthEquity's system, PHP will send claims information to HealthEquity on a weekly basis.

Claims

What HealthEquity® needs to get started

• Employer submits the New Business Form to HealthEquity.

What Providence Health Plan needs to get started

- Employer/producer completes PHP's Master Contract Application including the HRA product selection, and submits it to their PHP Sales Team.
- Employer submits enrollment information.
- If there are any employees that are not eligible for an HRA account, e.g. sole proprietors, partners and more-than-2% Subchapter S corporation shareholders, a list of these employees must be provided to PHP so eligibility will not be sent to HealthEquity. Any questions regarding HRA account eligibility should be directed to HealthEquity.
- Employer/producer needs to inform PHP if the group already has HealthEquity accounts with another carrier.

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What's next?

- HealthEquity will contact the employer to schedule a convenient time to discuss the steps to implement the HRA. (usually within 2-3 business days after the <u>New</u> Business Form is received)
- HealthEquity will work with the employer to complete an Employer Application to determine and finalize the HRA plan design and funding arrangements.
- Once the HRA plan design and funding arrangements have been finalized,
 HealthEquity will set up the accounts and send welcome kits, including debit cards if
 applicable. (confirm debit card turnaround with HealthEquity when finalizing the
 HRA set up)
- PHP will set the group up in our system and send the group and employee information to HealthEquity in our daily eligibility file. (usually 10-15 days from the date Underwriting approves the new group)
- If employees currently have a HealthEquity account, or have had one in the past, they will need to contact HealthEquity directly with any changes to their personal information such as address, email, name, or changes to those authorized to access the account.

HealthEquity® Support and Resources

Implementation Help -

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

Broker Sales Team 877-949-6727 <u>brokersales@healthequity.com</u>

Employer/Member Account Set Up onboarding@healthequity.com

Post Implementation Help -

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

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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.

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