

Client Site Guide

Client Site Guide

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Client Site Access

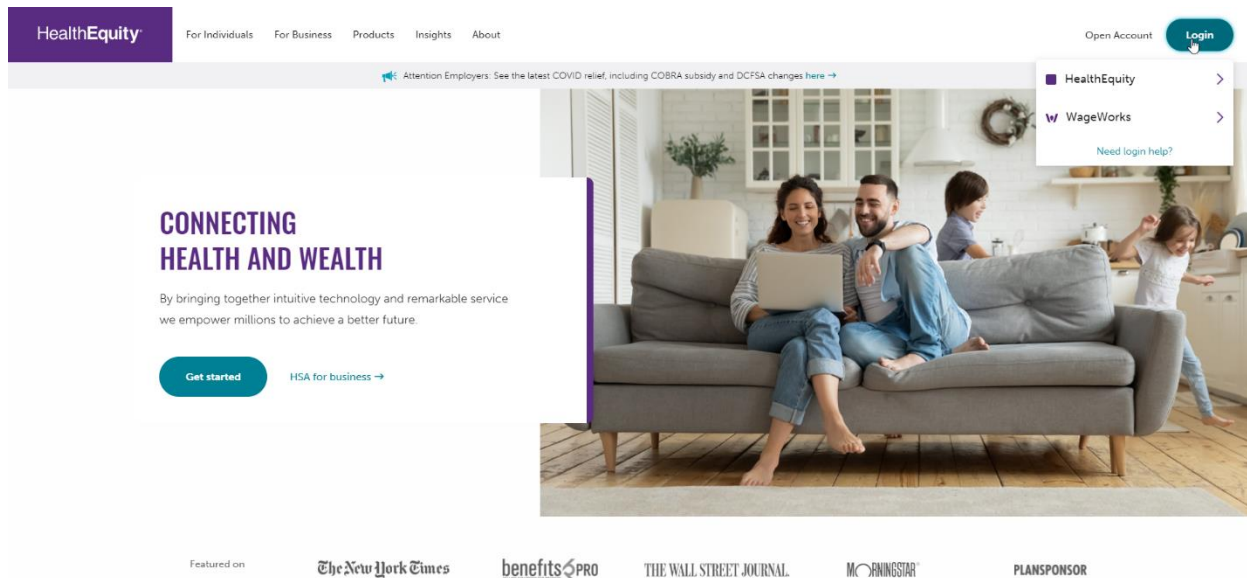
Log on to Client Site

The HealthEquity Client Site features the latest materials and tools to help you communicate with your employees and track your year-to-year participation goals. Additional services (special mailings, customized materials, benefits fair support services, custom reporting) are also available and may be arranged through your HealthEquity Service Delivery team.

As a HealthEquity Program Sponsor you have been given access to the Client (ER) Web Site. By using this site, you can manage eligibility and enrollment such as view your member elections, add newly eligible members, terminate employees, and change elections. You can also obtain reports to assist in the maintenance of your Consumer Directed Benefit Plans.

The Client Site is accessed by visiting HealthEquity.com. In the upper right corner, select *Login* to access the Client Login (boxed in blue below).

Once you select *Client Login*, you will see the Client Site Login page. Here you will enter the Username and Password as provided to you by your Implementation Manager. Please keep your login credentials private and secure.



Change your Administrator Password

Upon your initial login, you will be asked to change your password.

Password Rules: Your new password must be 8-12 Characters long, include at least one letter and one number, and cannot contain your last name, first name or username.

If you forget your Username or Password, select *Forgot Username and Password*. If you still require assistance, please reach out to your Service Delivery team.

Password changes can also be made on demand via the *Change Password* link found in the menu bar at the top right once you have logged into the site.



The screenshot shows the login interface for the HealthEquity WageWorks Employer / Program Sponsor Site. At the top, the HealthEquity WageWorks logo is displayed. Below the logo is a dark grey header bar with the text "EMPLOYER / PROGRAM SPONSOR SITE" in white. The main login area contains a "Username" label above a light blue input field, followed by a "Password" label above a white input field. Below the password field is a link that says "Forgot Username or Password". There is a checkbox with a grey square next to the text "I comply with HIPAA Privacy & Security". At the bottom of the form is a purple "Log In" button.

Dashboard Overview

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

Once logged in, you will see your company’s account details. This 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 Client Site. 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 overview displays three main account sections, each with a progress indicator, key statistics, and a list of reports. The top navigation bar includes links for Participants, Files, Benefits, Company, and Invoices, along with an 'Access Open Enrollment Resources' button.

HEALTH REIMBURSEMENT ARRANGEMENT

As of 08/23/2021 1:01 AM PDT

Plan Ending: 12/31/2019

0% Funds Used

- Total Benefits: \$0
- Total Paid to Date: \$0
- Active Accounts: 0

REPORTS

- Account Activity
- Contributions & Payments
- Enrollment
- Funding
- Invoice
- View All

FLEXIBLE SPENDING ACCOUNT

As of 08/23/2021 1:01 AM PDT

Plan Ending: 12/31/2020

0% Funds Used

- Total Elections: \$67,400
- Total Paid to Date: \$0
- Active Accounts: 41

REPORTS

- Account Activity
- Contributions & Payments
- Enrollment
- Funding
- Invoice
- View All

DEPENDENT CARE FLEXIBLE SPENDING ACCOUNT

As of 08/23/2021 1:01 AM PDT

Plan Ending: 12/31/2021

0% Funds Used

- Plan to Date Contributions: \$0
- Total Paid to Date: \$0
- Active Accounts: 4

REPORTS

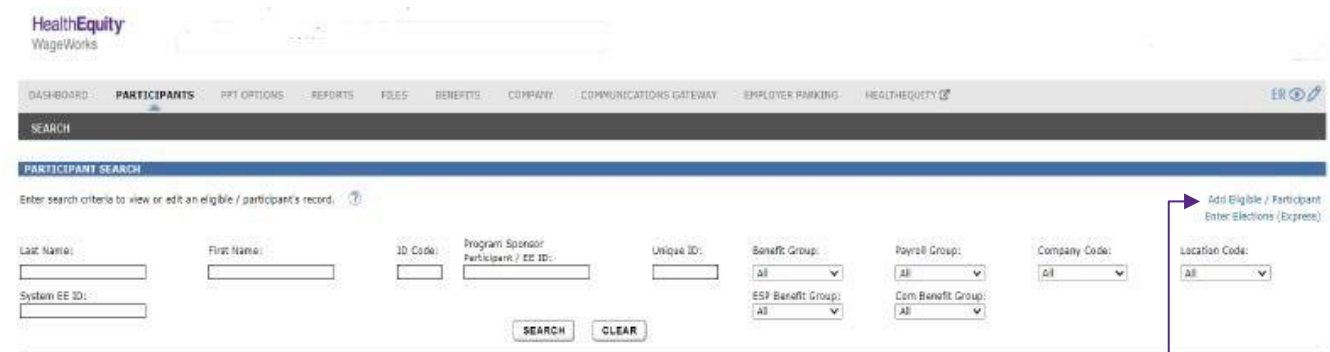
- Account Activity
- Contributions & Payments
- Enrollment
- Funding
- Invoice
- View All

- The dashboard provides a dynamic display of total number of members (not eligible population) 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 HRA, HSA, 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.

Members Tab



When you select *PARTICIPANTS*, you will be automatically taken to the *Participant Search* screen.



Enter Search criteria, such as last name, first name, and/or last four digits of Unique ID. Results appear below.

Click on Add Eligible Member to add a newly eligible employee.

Search for Members

You can search for members and then view or edit¹ their profiles online by:

- Entering data into any of the search fields and selecting *Search*. It is helpful to include a portion of the first and last name to reduce the number of resulting records. Additionally, you can key in the last four of the unique ID that you send to HealthEquity on the Program Sponsor File or the Member/EE ID that you use in your system of record if that data exists in the HealthEquity system.

¹ If your site access includes editing privileges

Add Eligible/Member

If the Member is not yet in the system, you can select *Add Eligible/Member* on the top right corner (seescreenshot above) to add the Member. You will be advised of the Auto Save feature. To acknowledge the notification, select *OK*.

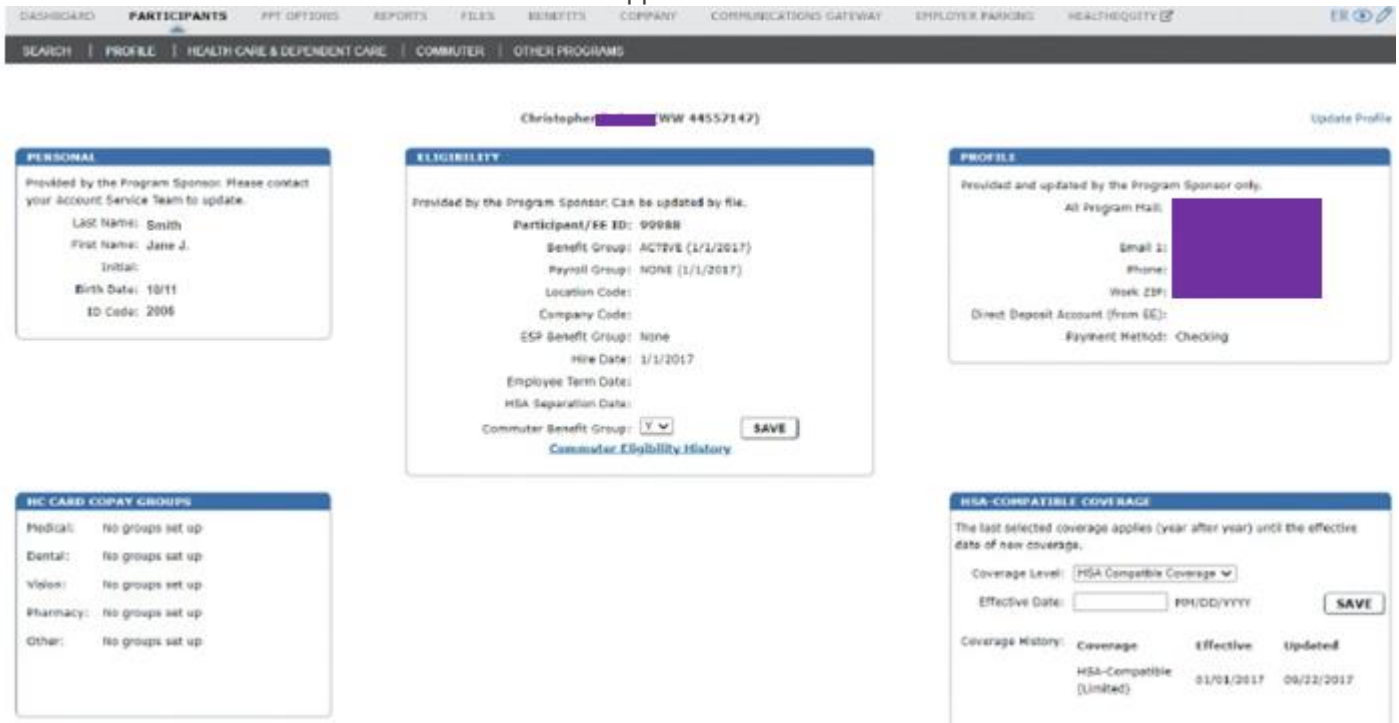
- All fields with an asterisk are required fields. Note – when entering unique ID, please be sure to use the correct and same unique ID in future files for the member.
- Please note that if you currently have an internal HRIS or third-party administrator that handles your eligibility and enrollment, adding and changing eligibility and enrollment data on the HealthEquity Client site can also be facilitated through the Program Sponsor File. Please refer to FILE TAB section of this guide.
- This page will automatically save as you enter data. If you get logged out, a security provision for inactivity, you will return to this page immediately when you log back in.

The screenshot shows the 'PROFILE' form in the HealthEquity system. The form is organized into several sections:

- PERSONAL INFORMATION:** Includes fields for Unique ID or ID#, Last Name*, First Name*, Middle Initial, Birth Date* (Month, Day, Year), Gender* (Male, Female), Mailing Address 1*, Mailing Address 2, City*, State*, Zip Code*, Residential Address 1, Residential Address 2, City, State, Zip Code, Home Address 1, Home Address 2, Home City, Home State, Home Zip Code, and Email Address*.
- EMPLOYMENT INFORMATION:** Includes fields for Employer Name, Employment Hire Date*, Employment Termination Date*, and PSA Separation Date*.
- MEDICAL/PHARMACY COVERAGE:** Includes dropdown menus for Medical, Dental, Vision, Pharmacy, and Other Coverage Groups, and Effective Date fields for each.
- DEPENDENT INFORMATION:** Includes fields for Monthly Subsidy for Full, Part, & Varied (All), Monthly Subsidy for Full, Part, & Varied (All), Monthly Subsidy for Parking (All), Monthly Subsidy for Parking (All), and Total Monthly Cap (All).

Edit Member Profiles

- Once you have located your employee’s record, select the name of the person whose profile you wish to view or edit.
- The Member’s initial *PROFILE* screen will then appear.



Personal Identifying Information (PII): The information shown here contains key identification details. Any changes to a member’s profile may affect the member’s eligibility and experience. For example, entering a termination date will end coverage or change in Benefit Groups may affect eligibility (if Benefit Groups are used in your plan set up).

Eligibility: The information shown in this area can also be updated by changing a member's data on your Program Sponsor File and submitting it to HealthEquity.

Profile: This information is initially provided by the Program Sponsor. HealthEquity has two options for how member addresses are updated at HealthEquity and this decision is typically made by the Client during the implementation stage of the partnership.

Option 1: The Client is the system of record and updates are provided on the Program Sponsor File. With this option, members cannot change their address on their HealthEquity profile. HealthEquity will re-direct members to the Client for address updates.

Option 2: The Client will pass employee address on the Program Sponsor File initially, but the member is responsible for updating the mailing address in their HealthEquity profile. This is the standard HealthEquity option.

Health Care Card copay groups: The information shown in this area will be reflected only if Copay Groups are initially provided via the Program Sponsor File.

The screenshot displays a web-based form for entering participant information. The form is divided into several sections:

- PROFILE:** A header section with the instruction "Enter all available information on the Eligible / Participant." It contains fields for:
 - Participant or Employee ID: 02121212
 - Unique ID or SSN: *****321
 - Last Name: Smith
 - First Name: James
 - Middle Initial: [Empty]
 - Birth Date: Month 01, Day 01
 - Gender: Unknown Male Female
 - Mailing Address 1: 1100 Park Place
 - Mailing Address 2: [Empty]
 - City: San Mateo
 - State: CA
 - Zip Code: 94403
 - Residential Address section (with a note: "The Residential Address is required if a P.O. Box address is supplied as the mailing address (for HSA enrollment only)."):
 - Residential Address 1: [Empty]
 - Residential Address 2: [Empty]
 - City: [Empty]
 - State: [Dropdown]
 - Zip Code: [Empty]
 - Work Address section:
 - Work Address 1: [Empty]
 - Work Address 2: [Empty]
 - Work City: [Empty]
 - Work State: [Dropdown]
 - Work Zip Code: 94456
 - Email Address: 02010@wageworks.com
 - Phone: 850 - 855 - 1212
 - Employment Hire Date: 07 / 01 / 2011
 - Employment Termination Date: [Empty]
 - HSA Separation Date: [Empty]
 - Benefit Group Code: [Dropdown menu with options: FULL-TIME, PART-TIME, CORNA, ACTIVE, EST01120, CEMER, CHS0101, LALMSATE, NEW, RETIRE, TEST009]
 - Benefit Group Effective Date: 07 / 01 / 2011
 - Payroll Group Code: [Dropdown menu with options: AG11, GENERAL, WD-EM, WK, SEWANCY, BHWAC, ACTIVE, SEM, TG1, NONE, TST1, TST2, TST3]
 - Payroll Group Effective Date: 07 / 01 / 2011
 - Location Code: [Empty]
 - Company Code: [Empty]
 - ESP Benefit Group Code: [Dropdown menu with options: NONE, ESPTEST, TEST, SAL, ESPROCP]
 - ESP Benefit Group Effective Date: 07/20/2011
 - ESP Benefit Group End Date: [Empty]
 - Commuter Program Status: Eligible Not Eligible
- INDIVIDUAL COMMUTER SUBSIDY (Replaces Group Subsidy):** Fields for:
 - Monthly Subsidy for Pub. Trans. & Vanpool (\$): [Empty]
 - Monthly Subsidy for Pub. Trans. & Vanpool (%): [Empty]
 - Monthly Subsidy for Pub. Trans. & Vanpool Max (\$): [Empty]
 - Monthly Subsidy for Parking (\$): [Empty]
 - Monthly Subsidy for Parking (%): [Empty]
 - Monthly Subsidy for Parking Max (\$): [Empty]
 - Total Subsidy Cap (\$): [Empty]
- HC CARD COPAY GROUPS:** Fields for:
 - Medical Copay Group: [Dropdown]
 - Dental Copay Group: [Dropdown]
 - Vision Copay Group: [Dropdown]
 - Pharmacy Copay Group: [Dropdown]
 - Other Copay Group: [Dropdown]
 - Effective Dates: [Empty]

Navigation buttons "NEXT" and "CANCEL" are located at the bottom of the form.

- Once you have updated the record, select *Next* at the bottom of the screen to continue, and then select *Save Profile* to save your changes. You may also opt to *Save Profile & Enter Health Care or Dependent Care Enrollment* when you complete this page

Tip: Encourage your members to log into their own accounts to take ownership and update their personal data and address wherever possible if you have elected to have the member be the “system of record”.

Member Enrollment

Quick and Efficient Enrollment Entry

The Client Site allows you to quickly and easily enter eligible members and elections from enrollment forms by using the [Enter Elections (Express)] link. An eligible employee must already have a profile in the system in order to enter enrollments using this feature. All data entered on the page is automatically saved so no data is lost if the user is logged out for inactivity.

Annual Enrollment Processing

During your next annual enrollment process, you will be able to enter eligibility and enrollment on a single page by using the *Add New PPT for Open Enrollment* which can be accessed through the Enter Election (Express) link in the right corner of the web page. Use this page to enter a new member into the system during open enrollment.

This page will automatically save as you enter data. If you get logged out, a security provision for inactivity, you will return to this page in progress immediately when you log back in.

HealthEquity DemoWorks (21180)

DASHBOARD PARTICIPANTS PPT OPTIONS REPORTS FILES BENEFITS COMPANY COMMUNICATIONS GATEWAY EMPLOYER PARKING EMPLOYER TRANSIT

SEARCH | ENTER ELECTIONS (EXPRESS)

ENTER ELECTIONS / ENROLLMENT RECORDS

* indicates a required field

CANCEL SAVE (NOT DONE) SAVE (DONE)

Total = 297 All Eligible Not Enrolled (excluding Termed)

< Previous Page Page 1 of 15 Next Page >

[< Change Display Options](#)

Health Care FSA 2021						
#	Last Name	First Name	PPT / EE ID	Unique ID	Un-Enroll Election Amount*	Coverage Effective Date* HSA-Compatible (Limited Use)
1	Demo	Daisy	unavailable	999110000	<input type="checkbox"/> \$ <input type="text"/>	1/1/2021 <input type="radio"/> Yes <input checked="" type="radio"/> No

Modify/Ending Coverage

While in the member record, you can view enrollments by selecting *Health Care & Dependent Care*. Select *Change* or *Cancel* to modify the coverage period. Modifying the coverage period during common events such as leave of absence, rehire, termination and FSA COBRA can be done by selecting *Change* within the enrollment.

Change if

- suspending coverage due to leave of absence
- extending coverage due to rehire or return from leave of absence

Change if

- terminating coverage
- delete or un-enroll coverage (set coverage end date equal to the coverage effective date)

View or Edit Member Account Detail

Once member profile and enrollments are loaded, you can view or edit the account information. After you have searched and located a member through the Member Tab, select the member’s name and select the sub-links to view account history detail.

ACCOUNT HISTORY Admin (W# 83895578) [BACK](#) [ADD ENROLLMENT](#)

Display: HC FSA DC FSA HSA IRA Health Care Cost

Now displaying HC FSA history for this participant

Plan Type	HC FSA 1018		HC FSA 2017	
	Change	Cancel	Change	Cancel
Coverage Start Date	1/1/2018		1/1/2017	
Coverage End Date	3/31/2019		3/31/2018	
Spend By Date	2/12/2018		2/05/2018	
Claim By Date	3/31/2018		3/31/2018	
Election Amount	\$2,000.00		\$1,000.00	
Change In Election	\$0.00		\$0.00	
Additional Benefit	\$0.00		\$0.00	
Total Benefits	\$2,000.00		\$1,000.00	
Reimburse Payroll Deductions	\$0.00		\$0.00	
Post-Cost Payroll Deductions	\$0.00		\$0.00	
Pre-tax PS Contributions (Election Amount)	\$0.00		\$0.00	
Post-tax PS Contributions (Election Amount)	\$0.00		\$0.00	
Total Contributions (Election Amount)	\$0.00		\$0.00	
Reimburse Contributions (Election Amount)	\$2,000.00		\$1,000.00	
Reimburse Air Contributions	\$0.00		\$0.00	
Pre-tax PS Contributions (Additional Benefits)	\$0.00		\$0.00	
Post-tax PS Contributions (Additional Benefits)	\$0.00		\$0.00	
Total Contributions (Additional Benefits)	\$0.00		\$0.00	
Total Contributions (All)	\$0.00		\$0.00	
Claims Approved / Not Yet Paid (YTD)	\$0.00		\$0.00	
Post Deductions	\$0.00		\$0.00	

Add Enrollment

This page includes a link to *Add Enrollment* which is another location in the site in which you can add a new enrollment to an existing member account. After you enter the Coverage Effective Date and the Date Enrollment Form Signed fields and select *Search*, all plans in which the Member is eligible to enroll will appear. Enter the Annual Election amount and be sure to save the Election.

ENTER ENROLLMENT INFO

* indicates a required field

PROFILE	
Participant or Employee ID:	unavailable
Unique ID or SSN:	*****7777
Last Name:	Demo
First Name:	Dale
Middle Initial:	
Birth Date:	1/1/2000
Mailing Address 1:	15 W Scenic Pointe Dr
Mailing Address 2:	
City:	Draper
State:	UT
Zip Code:	84020
Work Zip Code:	60603
Email Address:	lrussell@healthequity.com
Phone:	(720) 331-7355
Payment Preference:	<input type="radio"/> Direct Deposit <input checked="" type="radio"/> Check

ENROLL IN HC & DC PLAN	
Enrollment Application Information	
Coverage Effective Date: *	<input type="text"/> (MM/DD/YYYY)
Date Enrollment Form Signed: *	<input type="text"/> (MM/DD/YYYY)
Only those plans available for the Coverage Effective Date entered will be displayed below.	
<input type="button" value="SEARCH"/>	

ACCOUNT HISTORY

Dale Demo (WW 57164349)

Display:

- HC FSA
 DC FSA
 HRA
 HSA
 Health Care Card

[Add Enrollment](#)

[Add Funding](#)

Now displaying HC FSA history for this participant

Bold Text = Key Fields Highlighted Text = Key Subtotals

Plan Type	HC FSA2021		HC FSA2020		HC FSA2019	
	Change	Cancel	Change	Cancel	Change	Cancel
Coverage Start Date	1/1/2021		1/1/2020		1/1/2019	
Coverage End Date	12/31/2021		12/31/2020		12/31/2019	
Spend It By Date			12/31/2020		12/31/2019	
Claim It By Date	3/31/2022		12/31/2021		3/31/2020	
Election Amount	\$0.00		\$0.00		\$2,600.00	
Change In Election	\$0.00		\$0.00		\$0.00	
Additional Benefit	\$0.00		\$0.00		\$0.00	
Total Benefits	\$0.00		\$0.00		\$2,600.00	
Pre-tax Payroll Deductions	\$0.00		\$0.00		\$0.00	
Post-tax Payroll Deductions	\$0.00		\$0.00		\$0.00	
Pre-tax PS Contributions (Election Amount)	\$0.00		\$0.00		\$0.00	
Post-tax PS Contributions (Election Amount)	\$0.00		\$0.00		\$0.00	
Total Contributions (Election Amount)	\$0.00		\$0.00		\$0.00	
Remaining Contributions (Election Amount)	\$0.00		\$0.00		\$2,600.00	
Post-tax AH Contributions	\$0.00		\$0.00		\$0.00	
Pre-tax PS Contributions (Additional Benefits)	\$0.00		\$0.00		\$0.00	
Post-tax PS Contributions (Additional Benefits)	\$0.00		\$0.00		\$0.00	
Total Contributions (Additional Benefits)	\$0.00		\$0.00		\$0.00	

Health Care Card Status

Once you have located the employee record, select the member record, and then select *Health Care & Dependent Care* found on the navigation row across the top of the page.

- Then select the “Health Care Card” button found under the Display section on the upper left-hand side of the page.
- You can check on any individual’s card status through the Client Site. HealthEquity cards are issued for three years and the expiration date by card is available to view.

SEARCH | PROFILE | HEALTH CARE & DEPENDENT CARE | COMMUTER

ACCOUNT HISTORY Brandon Doe (WW 49181395) [BACK](#)

Display: HC FSA DC FSA Health Care Card Add Enrollment

Now displaying Health Care Card history for this participant

HEALTH CARE CARDS				CARD ACCOUNT STATUS HISTORY			
Name on Card	ID Code/SSN	Requested	Mailed	Activated	Status	Last 4 Card #	Expires
BRANDON DOE (AH)	3242	3/15/2018			Not Issued		

Your card will be mailed to the address in your Profile within 3 weeks of the Requested date above or before the start of your coverage, **whichever is later.**

CARD SUSPENSION CONTROL

Apply Suspension Rule to this Account Holder: Yes No

Indefinitely Until (Date):

HISTORY

No history records found.

HSA-Compatible Settings

Once you have located the employee record, select the member record, and then select *Health Care & Dependent Care* found on the navigation row across the top of the page. Then select *HSA-Compatible* found under the Display section on the upper left-hand side of the page.

If your plan rules allow, members can move out of an HSA-Compatible FSA to a standard Health Care FSA once their deductible has been met. During implementation, you will decide if you, the Client, will be providing this information to HealthEquity via the Program Sponsor File or if your employees will provide notification directly to HealthEquity once they have met the deductible. You can track updates to the member accounts via the Client Site.

ACCOUNT HISTORY James Smith (21103935) Add Enr

Display: HC FSA DC FSA HRA HSA Health Care Card HSA-Compatible

COVERAGE

This participant currently has **Standard** coverage. Complete coverage history is displayed to the right.

To change this participant's coverage, enter the following:

Standard Coverage
 HSA-Compatible Coverage

Effective Date: MM/DD/YYYY

COVERAGE HISTORY

Your Choice	Effective Date	Updated
Standard	07/20/2011	08/19/2014

HSA / HDHP DEDUCTIBLE FORMS

Received	Processed	Deductible Met	Year	Status	Reason
----------	-----------	----------------	------	--------	--------

Add Funding Feature

This functionality is particularly useful when member contributions (Funding Records) error out or an adjustment is needed to correct a member's Year-To-Date plan contribution. All Client Super Users have access to view and use this feature. Once you have located the employee record, select the member record, then select *Add Funding* in the upper right-hand corner and you will be able to add a one-time funding record for the selected member.

Healthcare and Dependent Care funding (FND) records can be posted to a member's account using the ClientSite > Members > Add Funding feature.

ACCOUNT HISTORY Dale Demo (WW 57164349)

Display: HC FSA DC FSA HRA HSA Health Care Card Add Enrollment
Add Funding

Now displaying HC FSA history for this participant

Follow these simple steps to add a funding record

1. Choose the plan by selecting the appropriate plan under Display.
2. Enter the funding amount
3. Select the funding date

You will be asked to confirm the plan, amount, and funding date. Once confirmed, a Program Sponsor File will be autogenerated and posted so you can see the results on the Files Tab. The file will be sent through all the standard Program Sponsor File validations.

DASHBOARD			PARTICIPANTS			REPORTS			FILES			BENEFITS			COMPANY			COMMUNICATIONS GATEWAY			EMPLOYER PARKING		
SEARCH			PPT SITE MESSAGES			PPT SITE FORMS & DOCS			PROFILE			HEALTH CARE & DEPENDENT CARE			COMMUTER								

ADD FUNDING

Plan		Select One	?
Pre-Tax Payroll Deduction	\$	<input type="text"/>	?
Post-Tax Payroll Deduction	\$	<input type="text"/>	?
Other Post-Tax Participant Contribution	\$	<input type="text"/>	?
Pre-Tax Program Sponsor Contribution (Applies toward Election Amount)	\$	<input type="text"/>	?
Post-Tax Program Sponsor Contribution (Applies toward Election Amount)	\$	<input type="text"/>	?
Pre-Tax Program Sponsor Contribution (Additional Benefit over Election Amount)	\$	<input type="text"/>	?
Post-Tax Program Sponsor Additional	\$	<input type="text"/>	?
Funding Date:		<input type="text"/> (MM/DD/YYYY)	?

Reports

Reports are Organized by Plan Type

FLEXIBLE SPENDING ACCOUNT
As of 08/23/2021 1:01 AM PDT

Plan Ending: 12/31/2020

0%
Funds Used

Total Elections
\$67,400

Total Paid to Date
\$0

Active Accounts
41

REPORTS

- Account Activity
- Contributions & Payments
- Enrollment
- Funding
- Invoice
- View All

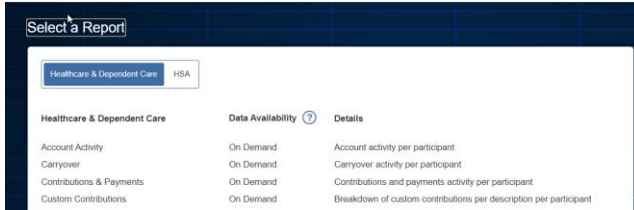
DASHBOARD		PARTICIPANTS		PPT OPTIONS		REPORTS		FILES		BENEFITS		COMPANY	
PICK UP		SCHEDULED		HC & DC		COMMUTER PROGRAMS		OTHER PROGRAMS					

HealthCare & Dependent Care

Healthcare Benefit Reports

- Enrollment Report
- Invoice Report
- Funding Report
- Account Activity Report
- Contributions and Payments Report
- Healthcare Card Report

- Good Will Payments Report
- Unclaimed Checks Report
- Medicare Secondary Payer (MSP) Data report
- Late Repayments Report
- Carryover Report



Commuter Benefits Report

The screenshot shows a navigation bar at the top with options: Employer Transit, Employer Parking, Participants, Files, Benefits, Company, and Invoices. Below this, there are two main sections: TRANSIT and PARKING. Each section displays summary statistics for the current month (Oct 2021) and a previous period (From Sep 2021). The TRANSIT section shows 2 members, \$102 in member savings, \$26 in client savings, and an average election of \$266. The PARKING section shows 1 member, \$45 in member savings, \$11 in client savings, and an average election of \$150. Both sections include a 'REPORTS' list with links for 'Adds, Cancellations & Re-Elections', 'Election', 'Invoice Reports Bundle', 'Payroll', and 'View All'.

- Election Report
- Payroll Report
- Pay Me Back Report
- Credits Report
- Adjustments Report
- Lost Pass Count Report
- Commuter Card Report
- Client Parking Adds, Re-Enrolls & Terms Report
- Client Parking Report
- Forfeiture
- Other Checks (Invoice Detail)
- Unclaimed Checks Report

The screenshot shows a dropdown menu titled 'Select a Report' with a search icon. The menu is open to the 'Commuter Programs' section. It is organized into three columns: 'Commuter Programs Reports', 'Data Availability', and 'Details'. The 'Commuter Programs Reports' column lists various report types. The 'Data Availability' column indicates the frequency of data updates for each report. The 'Details' column provides a brief description of each report's content.

Commuter Programs Reports	Data Availability	Details
Adds, Cancellations, and Re-Elections	On Demand & Monthly	Adds, Cancels and Re-Elections for the benefit month.
Adjustments	Monthly	Invoice adjustments made for a prior benefit month.
Applied Credits	Monthly	Participant credit activity during the past month.
Available Credits	On Demand	Available credits for each participant by benefit and credit type.
Commuter Card	On Demand	Balance and activity for participants with a Commuter Card.
Commuter Orders Exceeding Limits	On Demand	Commuter Orders Exceeding Limits Report.
Commuter Ordinance Tracking Report	On Demand	Commuter Ordinance Tracking Report

Other Program Reports

Participants ▾ Files ▾ Benefits ▾ Company ▾ Invoices

LIFESTYLE

As of 08/23/2021 2:47 AM PDT

Plan Year 2021

71%

Funds Used

Benefits Paid Annual
\$426

Active Members
1

Eligible Members
1

REPORTS

Activity

Eligibility

Payroll Reimbursement

[View All](#)

FITNESS REIMBURSEMENT PROGRAM

As of 08/23/2021 2:47 AM PDT

Plan Q3 2021

0%

Funds Used

Benefits Paid Quarterly
\$0

Active Members
0

Eligible Members
7

REPORTS

Activity

Eligibility

Payroll Reimbursement

[View All](#)

- Eligibility Report
- Activity Report Payroll
- Reimbursement Report

Select a Report

Other Programs Reports	Data Availability ⓘ	Details
Activity	On Demand	Participants who filed claims
Eligibility	On Demand	Participants who are eligible for benefits
Funding	Daily	Plan and payment info to back up funding requests
Good Will Payments	Monthly	Exception payments not funded from plan / participant accounts
Payments	On Demand	Payments issued to participants
Payroll Reimbursements	On Demand	Participants with claims OK to pay
Unclaimed Checks	Quarterly	Payments issued but not cashed per participant

Descriptions for each report type are available on the report legend located by selecting a specific report name.

NOTE: Output results on file uploading/processing details are located in the *Files* tab.

Viewing Reports

- Select the name of the report to view details and generate a report.
- Select the required parameters from the drop-down list.
- Choose to *Display* the report online (note there may be multiple pages) or *Download* into a spreadsheet.
- Most reports have several columns – scroll right to view all available data.

The screenshot shows a web interface for generating reports. At the top, there are three tabs: "Enrollment", "On Demand", and "Enrollment / election info per participant" (with a help icon). Below the tabs, a message states "All fields are required unless otherwise noted." The main area contains several filter fields:

- Plan Name: Health Care FSA 2021 (HC FSA) - 1/1/21 to 12/31/21
- As Of Date: 8/23/2021 (with a calendar icon) and a red warning: "Date parameter will not be used for recurring scheduled reports"
- Report Type: Full Report
- ID Code Display: Last 4 Digits
- Benefit Group: All (32)
- Payroll Group: All (19)
- Company Code: All (215)
- Location Code: All (486)
- Primary Sort: Last Name
- Secondary Sort: First Name
- Report Format: Excel
- Total By: All

At the bottom right, there are three buttons: "Generate Report", "Schedule One Time", and "Schedule Recurring".

Please note that the personal data in the reports is sensitive information; login credentials with access to this data should be carefully managed to protect confidentiality.

Reports – Healthcare Overview

Report Name	Description of Report	Availability
Account Activity	<p>Two versions, both include plan year-to-date totals for all payments, posted account funding and member account balances:</p> <ul style="list-style-type: none"> * Enrollment changes – lists members with a change in enrollment during dates entered * All – all plan members <p>The Account Activity Report displays the account activity including payments, funding, and balances for each account holder. It has a number of filter criteria fields which may be used; there are also a number of primary and secondary fields that the report may be sorted by. The report may be displayed online or downloaded into a spreadsheet. The report has a detailed legend which explains the content of the report, its purpose, and its usage.</p>	On Demand
Carryover	<p>This report details the carryover activity from one plan year to the next and the actions taken by members or the program sponsor.</p>	On Demand
Contributors & Payments	<p>The Contributions & Payments Report will display contributions posted, payments issued, and repayments posted during the date range entered. It has a number of filter criteria fields which may be selected using the drop-down boxes; there are also a number of primary and secondary fields that the report may be sorted by. The report may be displayed online or downloaded into a spreadsheet. Once the report is downloaded, all columns are available for filtering or sorting the data.</p>	On Demand
Custom Contributions	<p>Use this report to review contributions of the specified type. The contribution type is specified in the Custom Contribution Description field of the Program Sponsor File funding record.</p>	On Demand
Detailed Contributions	<p>Use this report to compare payroll deductions taken/reported via file to payroll deductions posted. If your reported amounts are greater, the difference can likely be found in rejected funding records (which may be viewed under the Files tab of this site).</p>	On Demand

<p>Enrollment</p>	<p>Provides profile and elections data as of the date the report is generated. It has a number of filter criteria fields which may be used; there are also a number of primary and secondary fields that the report may be sorted by.</p> <p>In the Summary section, counts and percentages will be displayed for the Members and Accounts. Payroll funded Elections and additional benefits (such as Client contributions) will show as dollar values, along with their totals.</p>	<p>On Demand</p>
<p>Funding</p>	<p>Summarizes account activity based on issued payments. This report is available to you via the Client Site every Monday morning. A designated contact person from your company will receive an email each Monday or first business day of the week, reminding you of weekly funding due. This report provides you with the transaction amounts that occurred during the prior week. It also informs you of the “Funding Due this Week” amount which can be found on the invoice.</p> <p>It can be reconciled with the Contributions & Payments Report for the same time period. The Contributions & Payments Report is the employee level report that supports the amounts being requested on the Funding Report.</p>	<p>Weekly or Daily</p>
<p>Good Will Payments</p>	<p>This report includes detailed information for payments made to the member without affecting the member account balance but are to be invoiced back to you. These payments are NOT included in the Funding Report or the Invoice Report. Use this report to reconcile against your invoice for Good Will Payments.</p>	<p>Monthly</p>
<p>Health Care Card</p>	<p>Summarizes Health Care Card information, including card status and the amount of unverified card transactions for each member.</p>	<p>On Demand</p>
<p>Invoice</p>	<p>Lists each member enrolled in a specific program that is billable for the applicable billing period. The sum of members in each category correlates to the monthly invoice. The report shows the names of the plan members, sorted by Plan (Health Care Reimbursement Accounts, Dependent Care Reimbursement Accounts, etc.)</p>	<p>On Demand</p>
<p>Late Repayments</p>	<p>This report includes and summarizes all late repayments processed during the specified date range. Repayments are considered late if received after the accounting close date (35 days past the claims deadline for any plan).</p>	<p>On Demand</p>

Paid Claims	Use this report to distinguish claims paid for a member, spouse, or other dependent.	On Demand
Unclaimed Checks	This report includes all uncashed member check payments that have been returned to you for reimbursement. Funds are returned to you on a quarterly basis for those checks that have remained uncashed or voided but not reissued after 18 months since the original check issue date. This report is generated on a quarterly basis for the previous quarter and will be available within the first week following the end of each quarter. Use this report to reconcile the funds you have received for uncashed member checks.	Quarterly
Medicare Secondary Payer (MSP) Data Report	This report includes data discrepancies received from the response file from the Center for Medicare Services (CMS). These data discrepancies usually occur when CMS cannot find matching records between the data provided via the PSF by you and the data CMS already has on file. MSP reporting is required for all eligible HRA members and their dependents. The data is conveyed to CMS on your behalf.	

Commuter

Each report is available either “On-Demand”, which provides real-time enrollment for the current benefit month, or “Monthly”, which provides data for any benefit month selected. The monthly reports are available on the first business day following the monthly commuter cutoff. Each report can be downloaded in spreadsheet format. In addition, payroll reports can be downloaded in eight (8) pre-defined payroll layouts, for vendors such as ADP, PeopleSoft and Dayforce.

Report Name	Description of Report	Availability
Adds, Cancellations, and Re-Elections	This report provides information about election changes at the benefit level for a selected benefit month.	On Demand and Monthly
Adjustments	Credit and payroll adjustments made in the previous month.	Monthly
Applied Credits	Displays all credit activity during the past month including credits earned, applied, and balance for each member.	Monthly
Available Credits	Use this report to view members' available credits by benefit type for Transit, Vanpool, and Parking as well as by Active and Inactive Members.	On Demand
Commuter Card	Use this report to view card information for members with a Transit and/or Parking Commuter Card including number of cards issued and activated, Card Balance, Card Expiration, and Card Use By dates.	On Demand
Commuter Orders Exceeding Limits	Use this report to determine which members need to be contacted about updating their order so they fall within the monthly limits of their assigned commuter benefit group.	On Demand
Commuter Ordinance Tracking	Use this report to provide evidence of commuter benefit notification to and/or responses from qualified employees	On Demand
Election	Elections for the upcoming benefit month.	On Demand and Monthly
Forfeiture	Use this report to view member level detail for the Forfeiture Credits line item on your monthly commuter invoice.	Monthly
Invoice Reports Bundle	Use the reports in the Commuter Invoice Reports Bundle to reconcile the monthly Commuter Funding Invoice.	Monthly
Lost Pass Count	Use this report to monitor the count of lost passes for members.	On Demand
Other Checks (invoice detail)	This report provides employee level detail regarding the OTHER CHECKS line item on a Commuter invoice.	Monthly
Member Billing	Use this report to as back up for the detail regarding the Administration Fee line item on the monthly commuter invoice.	Monthly

Pay Me Back	Use this report to view Pay Me Back balances for your members and any claims paid for the invoicing period.	Monthly
Payroll	All payroll activity for the upcoming benefit month: elections, Client subsidies, credits, adjustments, payroll deductions and reimbursements.	Monthly
Unclaimed Checks	List of all uncashed member check payments returned to the Program Sponsor for escheatment purposes.	Quarterly

Note: Payroll Reports include the following options:

- Standard – Includes all billable members.
- Full Plus Stops – Includes all payroll deduction records, regardless of Change Indicator. Contains members who are stopping deductions in the current period.
- Changes Only – Includes only payroll deduction records with a Change Indicator-Add, Change, Stop.
- Full – Includes all non-zero payroll deduction records, regardless of Change Indicator.
- File Download
- One Member Only

Payroll reports can be downloaded in eight (8) pre-defined payroll layouts, for vendors such as ADP, PeopleSoft and Dayforce.

1. ADP Payroll File Format - 4 Code (Changes) - this is a Changes Only file in .CSV format that includes the following fields: Company Code, Batch ID, Employee ID, Deduction Code, Monthly Deduction Amount
2. ADP Payroll File Format - 4 Code (Full) - this is a Full file in .CSV format that includes the following fields: Company Code, Batch ID, Employee ID, Deduction Code, Monthly Deduction Amount
3. Ceridian - H&W (Full Plus Stops) - this is a pipe-delimited Full Plus Stops file in .TXT format that includes the following fields: Last Name, First Name, Employee ID, Company Code, Change Flag, Monthly Transit Pre-tax Amount, Monthly Transit Post-Tax Amount, Monthly Parking Pre-tax Amount, Monthly Parking Post-Tax Amount
4. Ceridian - Day force (Changes) - this is a Changes Only file in .CSV format that includes the following fields: Deduction Type, Benefit Month, Deduction Stop Date, Monthly Deduction Amount
5. PeopleSoft Payroll File Format - this is a Changes Only file in .CSV format that includes the following fields: Employee ID, Deduction Code, Combined Pre-tax Monthly Amount, Combined Post-Tax Monthly Amount, Last Name, Change Indicator
6. ADP Payroll File Format - this is a Full Plus Stops file in .CSV format that includes the following fields: Employee ID, Benefit Month, Combined Pre-tax Monthly Amount, Combined Post-Tax Monthly Amount, Change Indicator.
7. Paychex File Format (Full) - this is a Full Plus Stops file in .TXT fixed length format that includes the following fields: Employee ID, Deduction Type (Pre-Tax or Post-Tax), Stop Indicator, Monthly Deduction Amount
8. Paychex File Format (Changes) - this is a Changes Only file in .TXT fixed length format that includes the following fields: Employee ID, Deduction Type (Pre-Tax or Post-Tax), Stop Indicator, Monthly Deduction Amount

Reports – Other Programs

Report Name	Description of Report	Availability
Activity	Use this report to monitor actual participation in this program.	On Demand
Eligibility	Use this report to monitor eligibility and estimate benefits costs based on anticipated participation.	On Demand
Invoice	This report is used to view member invoice information.	Monthly
Payroll Reimbursements	Use this report to identify reimbursement amounts that need to be entered into your payroll system to issue reimbursements to members in their paychecks.	On Demand

Files Tab

Note: The sub-tabs FILES, ELIGIBILITY AND COMMUTER PAYROLL may or may not appear based upon the types of Reimbursement Accounts you offer to your Members.

Program Sponsor File

The *Program Sponsor File* sub-tab presents the file management screens. Program Sponsor Files (PSF) may be submitted via FTP (optimal method for large files) or uploaded to the Client site.

Your company’s management contact may be set up to receive file processing notifications if preferred. The file management contact should verify successful record processing of each file on a timely basis. Your Service Delivery team will be able to assist with any questions about file processing, and particularly with any errors which need to be resolved.

Upload File

The *Upload File* feature allows for the Program Sponsor Files (PSF) to be loaded (these may include one or more of Eligibility, Enrollment, and Funding records).

TIP: After uploading a file, do NOT use your browser’s *Refresh* icon to refresh the screen – this will result in a duplicate upload. Instead select *Program Sponsor File* in the header bar.

All files which have been loaded to date, whether they are received via FTP or the File Upload method, along with the file processing results (counts of good records and error records), are displayed at the bottom the screen.

The screenshot shows the 'PROGRAM SPONSOR FILE' section of the application. It includes a navigation bar with tabs like DASHBOARD, PARTICIPANTS, PPT OPTIONS, REPORTS, FILES, BENEFITS, COMPANY, COMMUNICATIONS GATEWAY, EMPLOYER PARKING, and HEALTHEQUITY. Below the navigation, there are sub-tabs: PROGRAM SPONSOR FILE, ELIGIBILITY, HC & DC ENROLLMENT, HC & DC PAYROLL, COMMUTER PAYROLL, FILE SCHEDULES, COMPLINK FILES, CARRIER CLAIM FILES, and CARRIER CLAIM FILE S.

The main content area is titled 'PROGRAM SPONSOR FILE' and is divided into two panels:

- UPLOAD FILE:** Contains a list of 5 steps:
 - Click the Browse button and select the file you want to upload.
 - Click the Upload File button to submit your file.
 - Your file will be processed and results will be posted to this page by the next business day.
 - File processing results email will be sent to the Files Distribution List.
 - Contact your Account Service Manager if you have any questions.
 Below the steps is a file selection area with a 'Choose File' button, a text box showing 'No file chosen', and an 'UPLOAD FILE' button.
- ABOUT THE PROGRAM SPONSOR FILE:** Contains a table of record types and their recommended frequencies.

Record *	Description	Recommended Frequency
PRD	Profile / Eligibility	Daily to Weekly
EPRO	Extended Profile	As Needed
ENR	Enrollment	Daily to Weekly
FND	Funding	Daily to Weekly
MID	Member ID	Daily to Weekly
ESPL	ESP Eligibility	Daily to Weekly
MSP	Medicare Secondary Payer Reporting	Quarterly
COPAY	Health Care Card Copay Groups	As Needed
MIG	Migration Data	One-time
AAT	Associated Account Type	As Needed
DEP	Dependent	Daily to Weekly

 Below the table is a note: '* Some record types may not be applicable your group, depending on what benefits you offer.' and a 'DOWNLOAD FILE GUIDE' button.

At the bottom of the interface, there is a 'SEARCH ALL FILE RECORDS' button.

Reported Errors

Selecting the *Report Icon* for each file on the far right of the Submitted Files page to see the file output including errors and advisories.

SUBMITTED FILES														# of Rows: 20		Page: 1 of 10		
Name	Date/Time	Status	PRD	EPRO	ENR	FMD	MED	ESPL	MSP	COPAY	MEG	ESD	AAT	Total Records	TRA	Total Errors	Total Advisories	Report
PSF_21180_GHRA_PSQ145107_File1.09052013-012046.upd	9/5/2013 3:26:31 AM	Rejected	0	0	0	0	0	0	0	0	0	0	0	0	-	0	0	
PSF_21180_20100109_PRO_ENR_file6.00052013-011018.UPO	9/5/2013 1:19:25 AM	Rejected	4	0	6	0	0	0	0	0	0	0	0	10	-	6	0	
PSF_21180_20100109_PRO_ENR_file8.00152013-000752.UPO	8/15/2013 12:07:52 AM	Rejected	4	0	6	0	0	0	0	0	0	0	0	10	-	5	1	
PSF_21180_20100109_PRO_ENR_file9.07172013-232316.UPO	7/17/2013 11:23:18 PM	Rejected	4	0	6	0	0	0	0	0	0	0	0	10	-	5	1	
PSF_21180_20100109_PRO_ENR_file7.06272013-234315.upd	6/27/2013 11:43:15 PM	Rejected	4	0	6	0	0	0	0	0	0	0	0	10	-	5	1	
PSF_21180_20130627_PRO_ENR.06272013-232531.UPO	6/27/2013 11:25:30 PM	Rejected	4	0	6	0	0	0	0	0	0	0	0	10	-	5	0	
PSF_21180_20100109_PRO_ENR_file11.06272013-035614.upd	6/27/2013 3:56:13 AM	Rejected	4	0	4	0	0	0	0	0	0	0	0	8	-	3	1	
PSF_21180_20100109_PRO_ENR_file10.06272013-035235.upd	6/27/2013 3:52:32 AM	Rejected	4	0	4	0	0	0	0	0	0	0	0	8	-	3	1	
PSF_21180_20100109_PRO_ENR_file9.06272013-034243.upd	6/27/2013 11:26:52 AM	Rejected	4	0	4	0	0	0	0	0	0	0	0	8	-	3	1	
PSF_21180_20100109_PRO_ENR_file8.06272013-025620.upd	6/27/2013 2:56:44 AM	Posted	4	0	4	0	0	0	0	0	0	0	0	8	-	3	1	
PSF_21180_20100109_PRO_ENR_file6.06272013-023613.UPO	6/27/2013 2:44:53 AM	Rejected	4	0	6	0	0	0	0	0	0	0	0	10	-	6	1	
PSF_21180_20100109_PRO_ENR.06272013-023328.UPO	6/27/2013 2:13:28 AM	Rejected	4	0	6	0	0	0	0	0	0	0	0	10	-	5	0	
PSF_21180_20100109_PRO_FILE5.06272013-020436.upd	6/27/2013 2:17:36 AM	Posted	2	0	0	0	0	0	0	0	0	0	0	2	-	0	0	
PSF_21180_20100109_PRO_FILE4.06272013-015258.upd	6/27/2013 11:24:43 AM	Posted	2	0	0	0	0	0	0	0	0	0	0	2	-	0	0	
PSF_21180_20100109_PRO_FILE4.06272013-015254.upd	6/27/2013 11:24:27 AM	Posted	2	0	0	0	0	0	0	0	0	0	0	2	-	0	0	
PSF_21180_20130626_PRO_ENR_FILES.06272013-014911.upd	6/27/2013 1:49:07 AM	Rejected	2	0	2	0	0	0	0	0	0	0	0	4	-	2	0	
PSF_21180_20130626_PRO_ENR_FILE1.06272013-014132.upd	6/27/2013 1:41:24 AM	Rejected	2	0	2	0	0	0	0	0	0	0	0	4	-	2	0	
PSF_21180_20100109_PRO_FILE2.06272013-014012.upd	6/27/2013 1:40:14 AM	Posted	2	0	0	0	0	0	0	0	0	0	0	2	-	0	1	
psf_21180_20130306_test-20130314-012150.upd	3/14/2013 2:08:18 AM	Rejected	0	0	1	0	0	0	0	0	0	0	0	1	-	0	1	
psf_21180_20130306_test-20130306-232739.upd	3/7/2013 12:22:53 AM	Rejected	0	0	1	0	0	0	0	0	0	0	0	1	-	0	1	

Any record that is Rejected, shows an Error, or an Advisory, will require further attention. Select *Guide to File Errors and Advisories* for a detailed description of each error and the recommended action to correct it.

Below is an example of a Results report. You can select the small blue numbers below the *Count* column to view the records that caused the file upload to result in errors. Any record that posts results as Rejected or shows errors should be reviewed and corrected records uploaded.

File: PSF_21180_20100109_PRO_ENR_file6.00152013-000752.UPO

Records	New Profiles	New Enrolls	Employment Terms	COR Inactives	PRD	EPRO	ENR	FMD	MED	ESPL	MSP	COPAY	MEG	ESD	AAT	TRA
Posted	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Posted w/Advisory	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rejected	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Received	0	0	0	0	0	4	0	6	0	0	0	0	0	0	0	0

Reconciliation Totals

File Totals	Type	Total Received	Total Amount	Total Posted Records	Total Posted Amount	Total Rejected Records	Total Rejected Amount
ENR		8	\$12,000.00	0	\$0.00	8	\$12,000.00
ENR-DCPSA2013		2	\$4,000.00	0	\$0.00	2	\$4,000.00
ENR-HCPSA2013		4	\$8,000.00	0	\$0.00	4	\$8,000.00

[GUIDE TO FILE ERRORS AND ADVISORIES](#)

Severity	Message	Count	Download
B101	only one enrollment is allowed at a time for this plan type.	1	DOWNLOAD
B101	The Benefit Group this employee is assigned to, COSRA, is not eligible for the Plan Code HCPSA2013.	3	DOWNLOAD
Error	The Plan Code, DCPSA2013, is not valid for this employee.	2	DOWNLOAD

To view the records that require attention, you may select the Count number, or download the information into spreadsheet using the *Download* button.

When errors do occur, there are several options in correcting them:

- Correct the errors on the subsequent file upload
- Upload just the corrected records (this is the preferred method as there will be a record of the change located within the Files tab)
- Manually change the employee’s record within the Client Site (if using this method, please be aware that the change will not appear within the Files tab.)

A Guide to File Errors and Advisories is in the Reconciliations Total section. This guide can be used to collect error and advisory descriptions and how to resolve, if applicable.

Reconciliation Totals [?](#)

Type	Total Received	Total Amount	Total Posted Records	Total Posted Amount	Total Rejected Records	Total Rejected Amount
ENR	12943	\$5,300,919.75	12939	\$5,299,419.75	4	\$1,500.00
ENR-DCFSA2021	619	\$1,604,243.57	619	\$1,604,243.57	0	\$0.00
ENR-HCFSA2021	2806	\$3,695,676.18	2803	\$3,695,176.18	3	\$1,500.00
ENR-HSA	9518	\$0.00	9517	\$0.00	1	\$0.00

[GUIDE TO FILE ERRORS AND ADVISORIES](#)

File Record Search

To search for each instance of a Member’s record, either in one particular uploaded file or throughout every uploaded file, select *Search* on the main *Program Sponsor File* screen.

MIG Migration Data (HC & DC) One-time

AAT Associated Account Type (HRA) As Needed

[Click here to download the Program Sponsor File Guide](#)

[SEARCH ALL FILE RECORDS](#)

SUBMITTED FILES [?](#)

First | Previous | Next | Last # of Rows: 20 Page: 1 of 13

Name	Date/Time	Status	PRO	EPRO	ENR	FND	MED	ESPL	MSP	COPAY	MIG	ERO	AAT	Total Records	TBA	Total Errors	Total Advisories	Total Reports
PSF_21188_20120201_PRO_BACCTWspChar.10092014-231324.upd	10/8/2014 11:23:38 PM	Rejected	1	0	0	0	0	0	0	0	0	0	0	1	-	1	0	0
PSF_21188_2014102_10022014-125733.txt	10/2/2014 1:13:57 PM	Rejected	0	0	0	1	0	0	0	0	0	0	0	1	-	1	0	0
PSF_21188_20120201_PRO_UPD.00092014-231409.upd	9/9/2014 11:14:22 PM	Posted	1	0	0	0	0	0	0	0	0	0	0	1	-	0	0	0

BASHBOARD PARTICIPANTS REPORTS **FILES** BENEFITS COMPANY COMMUNICATIONS GATEWAY EMPLOYER BANKING EMPLOYER TRANSIT

PROGRAM SPONSOR FILE CLOSURE COMMITTEE/PAYROLL FILE SCHEDULES GARNER CLAIM FILLS GARNER CLAIM FILE SETUP

FILE RECORDS SEARCH

Search by File:
 File Name: File Status: Received From: Received To:

Search by Record:
 Record Type: Record Status: Plan:

Eligible / Participants:
 Last Name: First Name: Program Sponsor:
 Unique ID: PT/EE ID: ID Code*:
 Benefit Group: Payroll Group: Location: Company:

*ID Code = one of the following: (1) last 4 digits of the Social Security Number, (2) last 4 digits of the Participant / Employee Number (assigned by the program sponsor); or (3) any other 4-digit code provided by the program sponsor for this file / participants.

Here, you can choose the file to search in, or search in all files. Enter your search criteria and select *Search* to begin the record retrieval.

The status of uploaded files will display as:

- Received – The file was received and will soon be processed.
- Rejected – The file has been processed with no records posted to production because the file did not meet the quality control standards.
- In Process – The file is in queue for non-rejected records to be posted to production.
- Posted – The file has been processed and all non-rejected records have been uploaded and posted into production.
- On Hold – The file is being held. Please contact your Service Delivery team for more information.

File posting email notifications can be setup such that you can identify an internal team member to receive an email each time a file is posted. This can be configured under the *Company* tab, and the *Contacts* sub-tab. This is an important feature to take advantage of so you can closely monitor the status of incoming files.

Benefits Tab

Plans and/or Benefit Groups

Plan and Benefit designs are setup for you by your Implementation Manager or Service Delivery team, based on your Plan Survey Document. You have access to view the page in order to validate the plan setup (for instance, an account feature that is new to your company such as the HC FSA Carryover or the addition of an HSA).

This area of the system is divided between Plan designs and Benefit Groups.

Plan

It is the Clients' responsibility to provide information to their employees, such as the eligible expense rules, annual plan maximums, plan year dates, and run-out periods. However, you will have an Implementation Manager or Service Delivery team at HealthEquity who will enter Plans in the system or make changes to the existing plan for you.

Benefit Group

If your company has different eligibility rules for certain groups of employees, such as Hourly, Salaried, etc., your plan set up will include these Benefit Groups. You may add a new Benefit Group to your Plan design, should your company introduce a new eligibility group. When you create a new Benefit Group, be sure to set up the new group in the Client Site prior to sending data for that Benefit Group on the PSF file. Each of your employee records should be associated to the appropriate Benefit Group in order for the plan to function according to the respective rules that have been set up for each Benefit Group.

DISPLAY	PROGRAM NAME	CODE	TYPE	CREATED	START DATE	END DATE
1	HealthCare2006 Benefit Group	HCFSA2006	HC FSA	9/6/2006	1/1/2006	12/31/2006
		Offered	As Of	Until	OE Start	OE End
	Active	Yes	01-Jan-06	31-Dec-06	01-Oct-05	01-Nov-05
2	Health Care FSA 2008 Benefit Group	HCFSA2008	HC FSA	6/20/2008	1/1/2008	12/31/2008
		Offered	As Of	Until	OE Start	OE End
	Active	Yes	01-Jan-08	31-Dec-08	01-Nov-07	15-Nov-07
3	Dependent Care 2008 Benefit Group	DCFSA2008	DC FSA	6/20/2008	1/1/2008	12/31/2008
		Offered	As Of	Until	OE Start	OE End
	Active	Yes	01-Jan-08	01-Dec-08	01-Nov-07	15-Nov-07
4	Health Care FSA 2012 Benefit Group	HCFSA2012	HC FSA	6/18/2012	7/1/2012	6/30/2014
		Offered	As Of	Until	OE Start	OE End
	Active	Yes	01-Jan-12	30-Jun-14	01-Jun-12	30-Jun-12

To review the plan rules, select the *Plan Name*. There are additional options and plan rules found below the OFFERED column. Select *YES* to view those options. It is important to review the current plan setup with your Implementation Manager or Service Delivery team.

Rules for Eligible [Expenses], Eligible [Dependents], and Qualifying Events [Changes] are also stored in this area and you can view them by selecting *Programs Only (with Limits)* on the display list. These rules do not apply to the Commuter product.

DASHBOARD PARTICIPANTS PPT OPTIONS REPORTS FILES **BENEFITS** COMPANY COMMUNICATIONS GATEWAY EMPLOYER PARKING HEALTHEQUITY

BENEFIT PROGRAMS | COMMUTER | PAYROLL | HC COPAYS | HC CARD SUSPENSION | SPECIAL HC CARD RULES

BENEFIT PROGRAMS
Select a program or benefit group combination to update the display.

Display by: Programs & Benefit Groups Benefit Groups & Programs Programs Only (w/ Lists) Benefit Groups Only

Add Benefit Group: Standard | Commuter | ESP
Add Plan / Program: HC & DC | Transit | Parking | ESP

Click on the Program Name or Benefit Group to view its set-up. Click on the Offered value to view those rules.

SAVE DISPLAY ORDER

Now displaying by Programs Only (w/ Lists).

PROGRAMS ONLY (W/ LISTS)										
Display	Program Name	Code	Type	Payment	Created	Start Date	End Date	Lists		
7	Transit	TRANSIT	TRANSIT		01-Apr-16	15-Sep-20				
10	Healthcare FSA 2021	HC FSA2021	HC FSA	7	11-Sep-20	01-Jan-21	31-Dec-21	Expenses	Dependents	Changes
11	Dependent Care FSA 2021	DC FSA2021	DC FSA	4	11-Sep-20	01-Jan-21	31-Dec-21	Expenses	Dependents	Changes
12	Parking	PARKING	PARKING		15-Sep-20	15-Sep-20				

INACTIVE PLANS										
Display	Program Name	Code	Type	Payment	Created	Start Date	End Date	Lists		
1	HealthCare2006	HC FSA2006	HC FSA	1	06-Sep-06	01-Jan-06	15-Mar-07	Expenses	Dependents	Changes
2	Health Care FSA 2008	HC FSA2008	HC FSA	1	26-Jan-08	01-Jan-08	31-Dec-08	Expenses	Dependents	Changes
3	Dependent Care 2008	DC FSA2008	DC FSA	1	26-Jan-08	01-Jan-08	31-Dec-08	Expenses	Dependents	Changes
4	Health Care FSA 2013	HC FSA2013	HC FSA	1	16-Jan-13	01-Jul-13	15-Sep-14	Expenses	Dependents	Changes
4	Health Care FSA 2014	HC FSA2014	HC FSA	1	25-Aug-13	01-Jul-14	15-Sep-15	Expenses	Dependents	Changes
5	Health Care FSA 2012	HC FSA2012	HC FSA	1	16-Jan-13	01-Jul-12	15-Sep-13	Expenses	Dependents	Changes
6	DC FSA2013	DC FSA2013	DC FSA	1	25-Aug-13	01-Jan-13	31-Dec-13	Expenses	Dependents	Changes
8	Health Care FSA 2018	HC FSA2018	HC FSA	1	15-Mar-18	01-Jan-18	31-Dec-18	Expenses	Dependents	Changes
9	Dependent Care FSA 2018	DC FSA2018	DC FSA	1	15-Mar-18	01-Jan-18	31-Dec-18	Expenses	Dependents	Changes

SAVE DISPLAY ORDER

Note: Benefit Group does not apply to Commuter setup. Commuter is automatically offered to all benefit groups. Eligibility in the plan is determined by the employee's individual profile record.

Payroll Deduction Tool

The Payroll Deduction Tool is a convenient functionality that allows Clients to post contributions to Health Care and Dependent Care Flexible Spending Accounts and HRAs in a systematic manner in lieu of sending payroll funding files to report employee contributions on a pay period basis. It is based on a payroll calendar that you provide for each calendar year. This tool enables you to post payroll deductions for any pay date that falls within a plan's period. Deductions are calculated based on the number of non-skipped pay dates remaining until the plan end date.

Participants | Files | Benefits | Company | Invoices

HEALTH REIMBURSEMENT
As of 08/23/2021 1:01 AM
Plan Ending: 12/31/2019

- Benefits Programs
- Payroll
- HRA Interest
- HC Copays

PAYROLL GROUPS

Payroll Deduction Tool (HC & DC)

Click on the Payroll Group to view its set-up.
* indicates a required field

DISPLAY*	PAYROLL GROUP	CODE	DEFAULT	HC & DC # PAY PERIODS	HC & DC # DEDUCTIONS	HC & DC AUTO FUNDING	HC & DC CALENDAR(S) SAVED	HRA # PAY PERIODS	HRA # CONTRIBUTIONS	HRA AUTO FUNDING	HRA CALENDAR(S) SAVED	COM # PAY PERIODS	COM # DEDUCTIONS	COM CALENDAR(S) SAVED
4	Default Payroll Group(None)	NONE	Yes	0	0	No		0	0	No		0	0	
5	TEST1	TEST	No	11	10	No	2021, 2022	0	0	No		0	0	
6	ACTIVE123	ACTIVE123	No	0	0	No		0	0	No		0	0	

Each year, the payroll calendar must be setup to reflect the new pay periods. Select a *Payroll Group*, and then select *Add new HC & DC Calendar* or *HRA calendar*. Simply select a Calendar year in the drop down, select a frequency, and indicate the first payroll date of the year. Then select *Create Calendar*, and then *Save*.

PAYROLL GROUP

[EXIT](#) [RESTORE](#) [SAVE](#)

[Add New HC & DC Calendar](#) | [Add New HRA Calendar](#) | [Add New Commuter Calendar](#)

BASICS

* indicates a required field

Group Name* : [Default Payroll Group(None)]

Group Code* : [NONE]

Group Description : [Default Payroll Group(None)]

Default* Yes No

Auto Funding (HC & DC) Yes No

Auto Funding (HRA) Yes No

Note: Payroll Group does not apply to Commuter Order Model setup.

Posting Deductions

Posting FSA contributions must be completed on a pay frequency basis in order for reports to reflect accurate data and to ensure that members, especially Dependent Care FSA members, have access to benefits.

Tip: Set up a calendar reminder to ensure you post deductions to member accounts timely and ensure you have a secondary back up who knows how to execute this process in your absence.

Important Note: The Client is required to take action to post deductions and complete the process. It will not happen automatically unless auto funding is selected. If auto funding is selected, then a payroll file (PSF) will be automatically generated and loaded based on the payroll dates, but the Client can still update and should review for accuracy.

Steps

1. From the Payroll Deduction Tool page, select *Post Deductions* on the right-hand side of the page.
2. In the HC & DC DEDUCTIONS section of the page (boxed in blue), select the appropriate values in each field and then select *DISPLAY*.
3. Review the employee deductions at the bottom of the page for accuracy. Make any necessary changes and select *Select All*. Check marks will appear next to each employee's name to indicate the records that will post.
4. Select *Submit Selected Deductions*.

HC & DC PAYROLL DEDUCTIONS

This tool enables you to post payroll deductions for any pay date that falls within a plan's period. Deductions are calculated based on the number of non-skipped pay dates remaining until the plan end date.

Payroll Group: TEST
Calendar Year: 2021
Pay Date: 09/03/2021
Plan: FSA2021

Display Reference Fields:
 Last Name
 First Name
 PPT / EE ID
 Unique ID

Display / Sort Order:

SELECT DEDUCTIONS TO SUBMIT FOR POSTING

The display below includes all participants in the selected plan, including those who have already had deductions posted for the selected pay date via this tool.

You may not want to post payroll deductions for displayed participants:

- With a Coverage Effective Date in the future
- With an Employment Term Date in the past
- With a Coverage End Date in the past

Select or de-select payroll deductions below as appropriate according to your policies.

Records	Returned	To Be Submitted	Already Submitted	TOTAL
Deductions	1	0	0	0
	\$0.00	\$0.00	\$0.00	\$0.00

Payroll deductions selected below will be posted to participant accounts -- on the later of the Pay Date or today -- as pre-tax payroll deductions. You will have an opportunity to confirm and download the selected payroll deductions after you click the button below and before these records are posted. Once payroll deductions are submitted for posting using this tool, they cannot be adjusted or cancelled.

The only way to change any payroll deduction submitted for posting using this tool is to submit a Funding Record via the Program Sponsor File. To increase/decrease a deduction, the adjustment record will need to contain the difference (a positive or negative amount) between the deduction posted via this tool and the desired amount. You may also add/subtract the adjustment amount from the next Pay Date's deduction posted using this tool (with resulting effect delayed until that next Pay Date).

NO PAYROLL DEDUCTIONS SUBMITTED FOR POSTING FOR THIS PAY DATE Select All

Last Name	First Name	PPT / EE ID	Unique ID	Termination Date	Coverage Effective Date	Coverage End Date	Election Amount	Total Contributions (Election Amount)	Balance to Election Amount (+)	Remaining Pay Periods (?)	Calculated Deduction (=)	Post This Amount	Select To Post
Demo	Member	unavailable	*****1234		01-Jan-21	15-Mar-22	\$0.00	\$0.00	\$0.00	8	\$0.00	\$0.00	<input type="checkbox"/>

Automatic Card Suspension Feature

Please note: Our experience and best practice is to NOT suspend cards when a member has unsubstantiated card transactions. We turn this feature off for all new clients, unless the client requests to have it turned on.

The Automatic Card Suspension feature ensures compliance by requiring all card transactions to be verified or paid back to the plan. The Automatic Card Suspension feature is standard in the HealthEquity system. If there is an unverified transaction that requires action, the account holders will be notified via email or monthly by mail if there is no email address on file.

The Automatic Card Suspension feature automatically suspends Health Care Card privileges whenever the amount of outstanding unverified card transactions paid from a plan exceeds the designated threshold (% of outstanding unverified card transactions compared to available balance in plan).

With suspended card privileges, the member will be able to access benefits by filing claims (where automatic repayments can be deducted from plan payments to resolve outstanding unverified card transactions).

Card privileges will be suspended on the member and all dependent cards and on all plans associated with the card (including HSA, if applicable), which could impact other Health Care accounts associated to the card should they apply, i.e., Health Savings Account or Health Reimbursement Arrangements.

Card privileges will be automatically reinstated once outstanding unverified card transactions no longer account for more than the selected percentage of available balance on any particular plan (such as after receipts and/or repayments are processed).

Member Site

Welcome Lightbox

Your access to the HealthEquity Client Site allows you to customize the Welcome Message which is displayed on the Member site as they log into their HealthEquity account.

The screenshot displays the HealthEquity WageWorks member site interface. At the top, there is a navigation bar with various menu items including 'DASHBOARD', 'PARTICIPANTS', 'PPT OPTIONS', 'REPORTS', 'FILES', 'BENEFITS', 'COMPANY', 'COMMUNICATIONS GATEWAY', 'EMPLOYER PARKING', 'CFMS', and 'HEALTHEQUITY'. Below this is a sub-navigation bar with 'BENEFITS PROGRAMS', 'COMMUTER', 'PAYROLL', 'HC COPAYS', 'HC CARD SUSPENSION', and 'SPECIAL HC CARD RULES'. The main content area is divided into several sections:

- HRA PROGRAM SPONSOR CONTRIBUTIONS:** A form with dropdown menus for 'Payroll Group' (BI-WEEKLY), 'Calendar Year' (2021), and 'Pay Date' (05/25/2021). It also includes a 'Plan' dropdown (HRA3) and a 'Note: Auto Funding in this Payroll Group. No deductions posted prior to funding process will result in funding deductions for this Pay Date.' There are checkboxes for 'Display Reference Fields' (Last Name, First Name, PPT / EE ID, Unique ID) and buttons for 'DISPLAY' and 'DOWNLOAD'.
- NEW ALERTS & MESSAGES:** A lightbox with a red notification icon and the text: 'Action Item • September 23, 2013. When was the last time you did something good for yourself? Check out the new WageWorks Health & Wellness Tools in the Resource Center. Get healthy recipes, tips, and information any time.' It features two buttons: 'GO TO NOW' and 'REMIND ME LATER'.
- NO CONTRIBUTIONS SUBMITTED FOR POSTING FOR THIS PAY DATE:** A table with columns: Last Name, First Name, PPT / EE ID, Unique ID, Termination Date, Coverage Effective Date, Coverage End Date, Election Amount, Total Contributions (Election Amount), Amount to Election Amount (+), Remaining Pay Periods (?), Unassigned Contribution (=), and Postings Amount. The table is currently empty.

You can enter messages using regular text; however, you will not be able to reflect indentation, bold font, italics, or any other type of formatting tools, unless you use HTML codes. Entering text using HTML formatting allows you to insert indentations, bold fonts, etc.

`` Text following will be in bold font.

`` Turns off bold and returns to default font setting.

`
` Line break will follow. If you would like more than one line break, enter additional codes.

`<P>` Paragraph space will follow. This automatically creates two returns for you.

`<I>` Text following will be in Italics.

`</I>` Turns off italics and returns to default font setting.

To customize the welcome message or add additional messages for your employees, select the *Benefits* tab, and then select *Member Site Messages*.

Display	Message Header	Type	Last Updated On	Last Updated By
	BENEFITS TO BENEFIT YOU (AND YOUR FAMILY)	Welcome	7/3/2012	WW_CFA
	Benefit Group	Displayed	As Of	Until
	ACTIVE	Yes	03-Jul-12	

You can add future messages for some or all employee groups, by selecting *Add a Message*.

Enter a message header within the [Header] field.

Enter your message in the [Message] field, using either HTML codes or regular text (remember there will be no formatting available if you use regular text).

Select a date range over which the message should display and enter the start date and end date of your message. Messages with no end date will continue to display indefinitely.

Determine whether the message is directed toward all Benefit Groups or just some of your Benefit Groups. Use the check boxes to indicate which Groups will see the message.

Select *Save* when you are finished.

Select *Save Display Order* after you have entered numbers into the Display field, to determine the order in which multiple messages should display on-screen.

Company Tab

The Company Tab provides information regarding your HealthEquity Service Delivery team, as well as the designated contacts at your company.

Service

The *Service* tab allows you to review a listing of your HealthEquity contacts, and a description of their roles relative to your Reimbursement Accounts.

Contacts

The *Contacts* tab provides you with a list of responsibilities and Client Site access levels that you can assign to different team members at your company to assist with the program administration.

To grant access to additional members of your Benefits Team:

1. Select *Add New Contacts* from within the Active Contacts List
2. Complete the CONTACT INFO section for each team member. Note the fields with an asterisk (*) are required fields.
3. Subscribe notifications for each team member in the Distribution Lists section.
4. Select the appropriate access levels in the Site Access section of the page.
5. Establish a username and password for each team member. The password you initially create is a temporary password that will require the team member to change and establish a new one upon the initial login.
6. Then select *Save*.

To remove a Contact's responsibilities, enter an end date into the Cancel All field. Remember to Cancel a Contact's responsibilities in the event they leave your company's employment.

CONTACTS

Display: Program Sponsor (Select Above) | Active Contacts | Expired Contacts

PROGRAM RESPONSIBILITIES

Responsibility	HC & DC Contact	Commuter Contact
Program Owner	HR Administrator	HR Administrator
Benefits Service Center	HR Administrator	HR Administrator
Participant Escalations	HR Administrator	HR Administrator
Eligibility File	HR Administrator	HR Administrator
Enrollment File	HR Administrator	Not Applicable
Payroll Deductions File (to WW)	HR Administrator	HR Administrator
Payroll Deductions (from Paychecks)	HR Administrator	Not Applicable
Benefits Funding	HR Administrator	HR Administrator
Invoicing	HR Administrator	HR Administrator
Plan Documents	HR Administrator	Not Assigned
Nondiscrimination Testing	HR Administrator	Not Applicable
Uncashed Checks (Escheatment)	HR Administrator	HR Administrator
Participant Account Funding	Not Applicable	Not Assigned

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ACTIVE CONTACTS

Name	Employer Newsletter	Commuter Fare Alerts	Employer Site Access	Service Site Access	View / Edit
HR Administrator	No	No	Super	No	View / Edit

Return to the Contacts main page to update the responsibility listing to ensure that HealthEquity contacts the correct individuals for specific action items such as Member Escalations and Benefit Funding processing. If you only enter one Responsibility contact, that one contact will pre-populate as the contact for all other responsibilities.

PROGRAM RESPONSIBILITIES

Responsibility	HC & DC Contact	Commuter Contact	ESP Contact
Program Owner	HR Administrator	HR Administrator	Not Assigned
Benefits Service Center	HR Administrator	HR Administrator	Not Assigned
Participant Escalations	HR Administrator	HR Administrator	Not Assigned
Eligibility File	HR Administrator	HR Administrator	Not Assigned
Enrollment File	HR Administrator	Not Applicable	Not Applicable
Payroll Deductions File (to WW)	HR Administrator	HR Administrator	Not Applicable
Payroll Deductions (from Paychecks)	HR Administrator	Not Applicable	Not Applicable
Benefits Funding	HR Administrator	HR Administrator	Not Assigned
Invoicing	HR Administrator	HR Administrator	Not Assigned
Plan Documents	HR Administrator	Not Assigned	Not Assigned
Nondiscrimination Testing	HR Administrator	Not Applicable	Not Applicable
Uncashed Checks (Escheatment)	HR Administrator	HR Administrator	Not Assigned
Participant Account Funding	Not Applicable	Not Assigned	Not Applicable

Locations

If your company has locations or divisions, your Implementation Manager or Service Delivery team can direct you to the correct data field on the Program Sponsor Files to enter them for your employee population during the Implementation process. Locations are helpful in sorting your reports.

Should your company acquire a new location, or create a new location, you can add the location simply by adding the new location code to your Program Sponsor Files.

By using Location Codes, Clients can filter reports for purposes of conducting a commuter analysis, Which will help you understand where your participation is concentrated nationwide. In addition, your member’s experience when enrolling for Commuter parking (if offered) allows our GeoMapping functionality to identify and display known parking garages near their place of work. Select *Locations* to review current location codes used by your company.

The screenshot displays a web interface for managing location codes. At the top, there is a navigation menu with options: DASHBOARD, PARTICIPANTS, REPORTS, FILES, BENEFITS, COMPANY (highlighted), COMMUNICATIONS GATEWAY, EMPLOYER PARKING, and EMPLOYER TRANSIT. Below this is a sub-menu with SERVICE, CONTACTS, LOCATIONS (highlighted), CONTRACTS, and SET-UP.

The main content area is titled 'LOCATION CODES' and contains a section for 'ASSIGNED LOCATION CODES'. This section features a table with the following data:

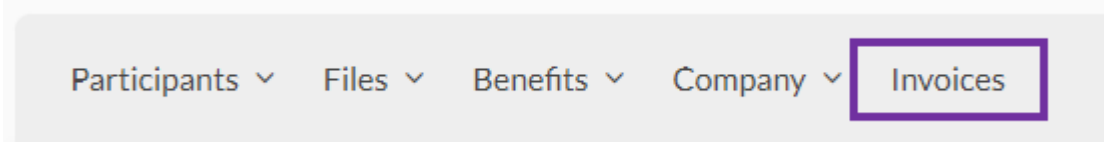
#	Location Code
1	3377650-12
2	00001
3	101
4	11
5	2&Y
6	55567

Below the table is a section titled 'ABOUT LOCATION CODES' with the following instructions:

- Many reports offer the option to sort or select employee records by Location Code.
- Your Location Codes are managed through the Profile record of the Program Sponsor File.
- To start using Location Codes:** Simply populate the Location Code field of each employee record on your Program Sponsor File.
- To add a new Location Code:** Enter the new code in the Location Code field of any employee in your Program Sponsor File.
- To change an employee's Location Code:** Change the value in the Location Code field of the employee's record in your Program Sponsor File.
- Requirements:** Location Codes can be up to 40 alphanumeric characters in length.

HealthEquity Invoices

Invoices and credit memos issued to your organization can be found under the Invoices tab.



The Invoice File Search gives users the flexibility to filter based on Document Type, Program, Date Range, or a Document Number (i.e., Invoice Number).

INVOICE FILE SEARCH

SEARCH CRITERIA

Enter search criteria to view or download an invoice copy. [?](#)

Document Type: Program: From Date: To Date: Document Number:

After the selection has been made in the Invoice File Search, the results will appear under the search engine. The hyperlink under File Name can be used to download the invoice for viewing.

INVOICE FILE SEARCH

SEARCH CRITERIA

Enter search criteria to view or download an invoice copy. [?](#)

Document Type: Program: From Date: To Date: Document Number:

SEARCH RESULTS - Select the document File Name to view or download the document PDF. Document copies are available 1-2 days after the document date.

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FILE NAME	DOCUMENT NUMBER	DOCUMENT TYPE	PROGRAM	DOCUMENT DATE
INV3117429_42146_Funding_FSA-HRA_10182021.pdf	INV3117429	Funding	FSA/HRA	10/18/2021
INV3100830_42146_Funding_FSA-HRA_10122021.pdf	INV3100830	Funding	FSA/HRA	10/12/2021
INV3090564_42146_Funding_FSA-HRA_10042021.pdf	INV3090564	Funding	FSA/HRA	10/04/2021
CM97742_42146_Funding_FSA-HRA_09302021.pdf	CM97742	Funding	FSA/HRA	09/30/2021
INV3078386_42146_Funding_FSA-HRA_09272021.pdf	INV3078386	Funding	FSA/HRA	09/27/2021
INV3053556_42146_Funding_FSA-HRA_09202021.pdf	INV3053556	Funding	FSA/HRA	09/20/2021
INV3040840_42146_Funding_FSA-HRA_09132021.pdf	INV3040840	Funding	FSA/HRA	09/13/2021
INV3027000_42146_Funding_FSA-HRA_09072021.pdf	INV3027000	Funding	FSA/HRA	09/07/2021
CM96370_42146_Funding_FSA-HRA_08312021.pdf	CM96370	Funding	FSA/HRA	08/31/2021
INV3016097_42146_Funding_FSA-HRA_08302021.pdf	INV3016097	Funding	FSA/HRA	08/30/2021

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HealthEquity Media Gallery

The HealthEquity Open Enrollment Toolkit is available to you online and is a great source during your open enrollment period or when you want to communicate the benefits available to your employees. We offer you a wide variety of educational and promotional flyers, posters, pamphlets, flyers, webinars, and DIY presentations which are all available to download at HealthEquity.com/oetoolkit.

HealthEquity For Individuals For Business Products Insights About Open Account Login

For Business | Open Enrollment Toolkit

ELEVATE THE EXPERIENCE

Open enrollment season brings incredible opportunity to engage your people. Let us help you deliver the right message at the right time.

PLANNING

Discover simple strategies that can help you boost adoption, capture re-enrollment and inspire your people to achieve more.

[Start planning →](#)

ON-DEMAND WEBINARS

Equip your people with tips and tricks to get more from their benefits. Plus, live chat with a human is available seven days a week.

[Explore webinars →](#)

Media gallery

Browse our library of flyers and other collateral. You'll find jargon-free messaging that reinforces the value of the benefits you offer.

HSA FSA DCFSA LPFSA HRA Commuter

Flyers



Browse our library of flyers and other collateral. You'll find jargon-free messaging that reinforces the value of the benefits you offer.


Webinars



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 **Benefits Explained: Which Account Is Right for Me?**


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