



HealthEquity® | WageWorks

# Let's Get Started

Transition Kit

## LET’S GET STARTED

### Welcome to your new COBRA & Direct Bill Platform!

HealthEquity/WageWorks has prepared this “Client Checklist” that will assist you during the transition and implementation process. Over the next several weeks, a number of activities including plan setup based on your program requirements and client account setup on the HealthEquity/WageWorks client portal will be completed. The transition process usually requires ninety (90) days to complete.

For assistance during the transition and implementation process, your Service Delivery Manager or Client Services team is available to support your efforts.

The following checklist outlines the key tasks and information needed by HealthEquity/WageWorks to support the transition of your account(s) for ongoing program management.

### Summary of Transition Activities

<b>90 - 60 Days Prior to Go live</b>		<b>Owner</b>
<b>Communication Materials</b>	Access communications and resource material for this transition by visiting <a href="http://wageworks.com/cprocobra-er/transition/">wageworks.com/cprocobra-er/transition/</a>	<b>Client</b>
<b>Client Plan Setup</b>	Gather, configure, and audit Client Setup details on the new HealthEquity/WageWorks COBRA and Direct Bill portal.	<b>HealthEquity/WageWorks</b>
<b>60 - 30 Days Prior to Go Live</b>		<b>Owner</b>
<b>Web Portal Access</b>	<ul style="list-style-type: none"> <li>• Download the Client Site Guide by visiting <a href="http://www.wageworks.com/cprocobra-er/support/">www.wageworks.com/cprocobra-er/support/</a></li> <li>• Expect an email with a link to your client account, username and password.</li> <li>• Log in and get familiar with the web portal.</li> </ul>	<b>Client</b>
<b>Client Setup Audit</b>	Review and sign-off on client setup options, plans, and rates.	<b>Client</b>
<b>Member Data Transition</b>	Extract, import, and audit member account details on the new HealthEquity/WageWorks COBRA and Direct Bill portal.	<b>HealthEquity/WageWorks</b>
<b>Member Welcome Letter</b>	After member demographic information has been loaded into the new HealthEquity/WageWorks COBRA and Direct Bill portal, your members will be notified of the upcoming change in platform and provided a Member Experience Guide.	<b>HealthEquity/WageWorks</b>

<b>30 Days Prior to Go Live</b>		<b>Owner</b>
<b>Member Invoicing</b>	Members will be sent the first monthly invoice.	<b>HealthEquity/ WageWorks</b>
<b>Product Training</b>	Access our website tutorials by visiting <a href="http://wageworks.com/cprocobra-er/support/">wageworks.com/cprocobra-er/support/</a>	<b>Client</b>
<b>7 Days Prior to Go Live</b>		<b>Owner</b>
<b>New Member Data Transition Period</b>	<ul style="list-style-type: none"> <li>• Inbound Files – Inbound files received the week prior to Go Live will be routed and processed within the new HealthEquity/WageWorks COBRA and Direct Bill platform.</li> <li>• Website – Access to adding a new member via the existing WageWorks Client portal will be disabled. New member data will need to be held and entered on the new HealthEquity/WageWorks COBRA and Direct Bill portal once access is provided.</li> </ul>	<b>Client and HealthEquity/ WageWorks</b>
<b>Go Live</b>		<b>Owner</b>
<b>Bank Filter Update</b>	If you have signed up for direct ACH debit pull of your fee invoice, please note that your finance department needs to add a new bank filter as our premier solution uses a different bank to pull the funds. The new COID is 4943351864. Please forward this information to your internal Finance contact that manages bank accounts. <b>Please note: The COID should be updated on your go-live date, but not before.</b>	<b>Client</b>
<b>Post Go Live</b>		<b>Owner</b>
<b>Final Reports Pulled from BeneDirect</b>	Remember to pull reports from the prior COBRA platform before access is disabled.	<b>Client</b>
<b>Client/Member Access Disabled</b>	<ul style="list-style-type: none"> <li>• Access to <a href="http://benedirect.wageworks.com/">benedirect.wageworks.com/</a> will be available in read-only for 60 days following your Go Live date. . If information is needed beyond that time, please contact your Service Delivery Manager or Client Services team for assistance.</li> <li>• For clients with healthcare services administered by HealthEquity/WageWorks, Single Sign-On (SSO) is available between platforms. However, it will only be setup upon client request after the go-live date.</li> </ul>	<b>HealthEquity/ WageWorks</b>

## Client Support

We're here to help when you need us. Our client services team is available Monday through Friday from 7am to 7pm CT, excluding holidays.

Website: [wageworks.com/cprocobra-er/](http://wageworks.com/cprocobra-er/)

For additional questions and support, please contact your Service Delivery Manager or Client Services team.

### WEBSITE TUTORIALS

Get acquainted with the client website by accessing our educational website tutorials. Visit [wageworks.com/cprocobra-er/support/](http://wageworks.com/cprocobra-er/support/) to get started.

## COBRA and Direct Bill Features

When your account with us is up and running, you can enjoy additional service features that enhance the client and member experience.

### CLIENT SERVICES

- 24/7 access to the client website
- Real-time activity tracking and case management
- Automated and enhanced reporting, including compliance reports
- Ability to mask Social Security numbers on reports
- Processing reporting sent to multiple individuals
- Automated plan conversions
- System supports multiple tiers and rates tables
- Member-level rating automation and rate change functionality (small group solution)
- Various levels of security with our system (full access, read-only, etc.)
- Tracking process for dependents who age out of your plan
- Ability to adjust Direct Bill rates each month
- Retroactive billing
- Cost-effective and robust open enrollment services
- Multiple severance methodologies
- Weekly client training webinars

### MEMBER SERVICES

- Mobile account access and management
- 24/7 access to the member and mobile websites
- Same username and password for member and mobile websites
- Real-time and future, scheduled payments (no charges are passed to members who pay via ACH)
- Immediate online elections, including open enrollment and member-level rated plans
- Real-time activity tracking and case management
- View notices in real-time
- Online access to Summary of Benefits (SBCs) and Summary of Plan Descriptions (SPDs)

## Security Protocols

HealthEquity/WageWorks uses cutting-edge technology to enforce strict security protocols on all operating systems, data exchanges, websites, and emails. We will never share information with unauthorized parties, and you can trust that your organization's and members' information is secure.

## Onboarding Questions and Answers

A complete listing of frequently asked questions (FAQs) is available by visiting [wageworks.com/cprocobra-er/faqs/](https://wageworks.com/cprocobra-er/faqs/).

If you are not able to access the link above, please visit [wageworks.com/cprocobra-er/](https://wageworks.com/cprocobra-er/) and click on *FAQs* in the top menu to view the complete listing of FAQs.

## Sample Communications

A copy of all communications is available by visiting [wageworks.com/cprocobra-er/support/](https://wageworks.com/cprocobra-er/support/).

WageWorks W-9

Form **W-9**  
(Rev. October 2018)  
Department of the Treasury  
Internal Revenue Service

**Request for Taxpayer  
Identification Number and Certification**

Give Form to the  
requester. Do not  
send to the IRS.

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type.  
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**WAGEWORKS, INC.**

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor or single-member LLC

C Corporation

S Corporation

Partnership

Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ \_\_\_\_\_

**Note:** Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see Instructions) ▶ \_\_\_\_\_

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) 5

Exemption from FATCA reporting code (if any) N/A

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.  
**15 W SCENIC POINTE DRIVE, SUITE 100**

Requester's name and address (optional)

6 City, state, and ZIP code  
**DRAPER, UT 84020**

7 List account number(s) here (optional)

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

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OR

Employer identification number

9	4	-	3	3	5	1	8	6	4
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**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

**Sign Here** Signature of U.S. person ▶  Date ▶ 1/3/20

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
  - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
  - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
  - Form 1099-S (proceeds from real estate transactions)
  - Form 1099-K (merchant card and third party network transactions)
  - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
  - Form 1099-C (canceled debt)
  - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
- If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.