

# Health Savings Account Employer Setup Form



**Directions for producers:** Please complete and submit an electronic copy to your health plan along with the new or renewal paperwork. For questions about the BenefitWallet payroll process, please contact the BenefitWallet Employer Support Team at 866.712.4551.

**Health plans:** Please return to the Employer Support Team at [EmployerSetup.mybenefitwallet@conduent.com](mailto:EmployerSetup.mybenefitwallet@conduent.com). Alternatively, you may fax the documents to 201.633.0134.

\* = REQUIRED FIELD

Health plan name*	
Health plan customer ID*	
Account executive/account manager*	
AE/AM email*	
AE/AM phone number*	

## General employer information

Employer ID (to be assigned)	
Sub-account number (to be assigned)	
<b>Employer name*</b>	
Employer address – line 1*	
Employer address – line 2	
Employer city, state, and zip*	
<b>Employer funding contact name*</b>	
<b>Employer funding contact phone*</b>	
<b>Employer funding contact e-mail*</b>	
Employer technical contact name (FTP set up)	
Employer technical contact phone	
Employer technical contact e-mail	
<b>High deductible health plan effective date*</b>	
1 <sup>st</sup> contribution file date	

## Implementation design decisions:

Number of eligible employees	
Expected number of HSA accounts	

1) Account maintenance fees\*:

Employer paid (**Billing agreement required if Employer paid. Agreement is found on-line on the employer portal at [www.mybenefitwallet.com](http://www.mybenefitwallet.com)**)

Employee paid

2) How will BenefitWallet receive employee contributions and instructions?

Please refer to the BenefitWallet Employer Guide for details on the funding/contribution options below. Employers with 50 or less employees use options 2a, 2b, or 2d.

2a: **Payroll on the Web (POW!):** A lump sum transfer of funds accompanied by allocation instructions entered and submitted via POW! (Payroll on the Web) application.

**Note:** This option is standard for Employers with less than 50 employees and recommended for groups of any size who anticipate less than 50 accounts. This option is limited to groups with 150 accounts or less.

2b: **Funding File Upload:** A lump sum transfer of funds accompanied by text file providing allocation instructions uploaded via web application.

**Note:** This option is available to employers of any size; recommended for those over 50 and under 500 employees

2c: **Flat File (layout):** A lump sum transfer of funds accompanied by allocation instructions in our HSA Payroll Distribution File format.

**Note:** This approach requires FTP connectivity and four to eight weeks set-up time. Technical contact information is required to initiate this.)

2d: **Individual ACH Transactions:** Employer transmits funds directly to each employee's account via the Automated Clearing House (ACH).

**Note:** The employer will need to set this up with their payroll administrator or banking institution.

2e: **N/A:** Employer will not transfer employee contributions to BenefitWallet. Employees will only deposit funds via BenefitWallet deposit slips or online.

3) Will more than one payroll source be used to send contributions and require separate reconciliation?

**Note:** This is not common, and may require additional set-up steps.

Yes

No

N/A

Primary contact signature: Electronic signature acceptable	
Print:	
Title:	
Date:	