

4 WAYS TO CONTRIBUTE

to employees' HSAs



HealthEquity offers 4 hassle-free ways to make contributions

(for both employee payroll deductions and employer contributions to HSAs).

1. CONTRIBUTION DEFAULTS

In your HealthEquity employer portal, set your contribution amounts to the employee accounts as contribution defaults. The next time you fund employees' accounts, simply use your contribution defaults. Defaults can be edited or cleared if you need to make changes. You can change the employee listing to see current employees or expand to include inactive employees. See the two payment options below.

2. CONTRIBUTION FILES BY EMPLOYER

In your HealthEquity employer portal, upload a file that includes your employer and/or employee HSA contribution amounts. The Resources section in the portal includes a simple Excel template to use to create your own file. See the two payment options below.

3. PRE-PAID DEPOSITS (PPD)

The free PPD funding option allows you to run a report in your HealthEquity employer portal that shows routing and account numbers for each participating employee. Simply give this information to your bank or payroll partner to make recurring employee payroll and/or employer HSA contributions. Contact HealthEquity Employer Services by phone or e-mail to set up this feature.

4. CONTRIBUTION AND DEDUCTION FILES

HealthEquity will partner with your payroll or benefits administrator to set up an automatic file to receive your contributions and deductions. While HealthEquity will not charge a fee for this option, your payroll or benefits administration company may have a fee.

The contribution wizard gives helpful warnings to alert you about potential over contributions, employees who may not have passed the required identity verification, and employees that might have been inadvertently skipped.



HealthEquity

15 West Scenic Pointe Drive
Draper, UT 84020 | www.HealthEquity.com



2 hassle-free payment options

1 Set up a verified electronic funds transfer (EFT) account in your employer portal. Schedule automatic payments using EFT, allowing payments as early as the following business day or as late as April 15th of the following year. You can add multiple accounts—for example, one account for employer contributions and another for employee payroll deductions.

2 Send a check payable to HealthEquity:
HealthEquity, Inc.,
15 W Scenic Pointe Dr
Draper, UT 84020

Important note: Prior to sending a check, ensure you have allocated the contributions to employee accounts in the employer portal.

Payroll deduction made easy

You can upload your payroll deduction form and instructions on the employer portal. This custom information will be pushed to display on your employees' member portal for convenient access. If you need a payroll deduction form, download our standard form that you can customize at http://resources.healthequity.com/Forms/EE_HSA_payroll_deduction_form.pdf.



THE COMPLETE EMPLOYER PORTAL GUIDE

Your HealthEquity employer portal is your anytime, one-stop resource for easily managing participating employees, contributions, and more.

Access the HealthEquity employer portal guide at:
HealthEquity.com/employerportalguide

FOR ASSISTANCE

Contact HealthEquity Employer Services,
7 am - 7 pm Central Monday through Friday

866.382.3510
employerservices@healthequity.com