



Health Savings Account

Congratulations! You've made the decision to help your employees save for a healthy future. Now that you will be offering a HealthEquity health savings account (HSA), here are some next steps:

Provide Education in Advance of Open Enrollment

The perceived value of an HSA can be enhanced with an effective communication strategy:

- ▶ Start communicating early to familiarize your employees with the new offering.
- ▶ Consider holding both company-wide and departmental enrollment meetings.
- ▶ Check in frequently to gauge understanding and buy-in.
- ▶ Distribute the **Health Savings Account Eligibility Tip Sheet**.

Send Enrollment Information to CDPHP®

CDPHP will act as an intermediary, receive your employees' enrollment data, and forward it to HealthEquity for implementation.

Receive an Email with Your Employer Welcome Kit

This email will include a link to a website full of valuable information for your use. It will guide you through completing set-up of your HSA, and how to configure your contributions, if you are making any. It also features helpful video tutorials and several employer-specific documents. You will also see a link to the HealthEquity website when you log in to **www.cdphp.com**, to easily manage both your medical plan and your HSA.

Encourage Employees to Keep an Eye on the Mail

- ▶ Employees will receive a welcome kit in the mail with their HealthEquity debit card. Please remind them to be on the lookout for this.
- ▶ Upon the effective plan date, employees should log in to **www.cdphp.com** and click on the HSA Claims Integration link on the right-hand navigation bar to authorize claims integration.
- ▶ Employees can learn more by visiting the **Health Equity website** or the **CDPHP Consumer-Directed Health Hub**.



Work with your broker or CDPHP representative to help you put together what you need to make enrolling your employees as seamless as possible. You can also contact them with additional questions.

