Information Needed for HSA Implementation

Company Information

- ☐ Company Address/Contact Information
- ☐ Company Federal Tax ID (EIN)
- ☐ Whether the Client or Risk Strategies will be billed for HSA services
- ☐ Name and Contact information for individual who will be signing the Business Associate Agreement Contract for the client
- ☐ Main HR and Finance Contact information
- ☐ Completed HSA ACH Transfer Form

Plan Information

- ☐ Date HSA services will become effective with BASIC NEO
- ☐ Number of W-2 employees, HSA-eligible employees, and HSA participants (approximate numbers)
- ☐ Pay cycles
- ☐ Whether any affiliated employers will also be covered under the HSA plan
  - If yes, will need company name and Tax ID (EIN)

Plan Design Specifics

- ☐ Whether there are employer contributions to the HSA, and if so, how frequently they are made
- ☐ Plan number
- ☐ Whether employees are offered additional taxable compensation for waiving coverage under the group health plan
- ☐ Whether the Client also offers an Health FSA and/or HRA
- ☐ Whether employees pay pre-tax for Health, Dental, or Vision insurance, Short- or Long-Term Disability, or Group Term Life insurance