HSA Job Aid

Fidelity Health℠

HSA Program Setup Checklist

Overview

This checklist will help you collect the data Fidelity Investments® needs to set up your health savings account (HSA) program within our system and create a more tailored experience for your employees.

Gather the below information to be ready to complete your HSA program setup. We've also included background on how the information you provide will be used.

HSA Program Setup Data

Type of Data	Description	How the Information Is Used
Client Contact Info	• The name, phone number, and email address for each person who will be working with Fidelity for the implementation and the ongoing administration of the HSA program	• This tells us who to work with during the implementation and who to contact if we have questions; as well as who to include in various ongoing communications that we send about the HSA program and product enhancements.
Service Provider Information	• Health & Welfare Benefits Administrator – the name, phone number, and email address to be referenced by employees • Payroll Administrator – the name, phone number, email, and website address to be referenced by employees. Additional contact information for your data transfer contact is needed if you are automating your files. • Current HSA Administrator – the name, phone number, email, and website address to be referenced by employees	• This information is provided to our phone representatives so they can quickly direct your employees to the right provider to get their questions answered. The contact information provided (name, phone, email) should not be for a specific employee, unless that's the preferred resource for your employees to reach out to with questions. • The Fidelity implementation team uses the data transfer contact information to reach out to set up and test the enrollment and contribution files required for the Fidelity HSA®.

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HSA-Eligible Health Plan Information	• HSA-Eligible Health Plan Carrier(s) – the name, phone number, email address, and website address to be referenced by employees • Health plan name, coverage tier names and deductibles, out-of-pocket maximum, and employer contribution details, if applicable, for each coverage tier	• This information is provided to our phone representatives so they can quickly answer your employees' questions or direct them to the right health insurance carrier. This information is also used to support the employee experience in NetBenefits®.
Additional Carrier Information	• FSA Provider (if applicable) – the name, phone number, email address and website address to be referenced by employees	• This information is shared with Fidelity Track and Pay to confirm that the carriers are linked so your employees can aggregate claims data into a single view.
Annual Enrollment Information	• Annual Enrollment start and end date and correction period • How will funding be transmitted to Fidelity? (Wire, ACH, auto debit) • Ongoing payroll frequency	• This information is provided to our phone representatives so they can answer your employees' questions. This information is also used to support the employee experience in NetBenefits.

If you have questions, you can email us at: HSAEnablement@fmr.com

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