



Flexible Spending Account (FSA)

A simple way to save.

See back page for additional information on your plan.

Welcome!

Your FSA has successfully been opened at HealthEquity. Your FSA can be used to help pay for eligible medical expenses, as outlined on the back of this letter. FSAs help you save in these ways:

- Your entire elected amount for the year is available to use at the beginning of the plan year
- FSA funds deducted from payroll are pre-tax
- Funds used for eligible medical expenses are not taxed as income¹

Get started

Managing your account is easy! We provide the tools and resources needed to help you maximize your health savings. Log in to your account to check your balance, submit eligible claims and upload receipts or documentation.

Helpful support for you, available every hour of every day

Our team of specialists are available 24 hours a day, providing you with the insight and tools you need to optimize your health accounts. Call us anytime.

¹FSAs are never taxed at a federal income tax level when used appropriately for eligible medical expenses. Also, most states recognize FSA funds as tax-free with very few exceptions. Please consult a tax advisor regarding your state's specific rules. | HealthEquity does not provide legal, tax or financial advice. Always consult a professional when making life-changing decisions. For those participating in a flexible spending account or health reimbursement, in addition to restrictions imposed by law, your employer or plan sponsor may limit what expenses are eligible for reimbursements. It is the member's responsibility to ensure that expenses submitted are qualified under the law, and if applicable, your employer's plan.

²Activate and manage your account on the HealthEquity Mobile app or HealthEquity website today.

HealthEquity Mobile App

Manage your account and get 24/7 help with the HealthEquity Mobile App.²



Passkey authentication

You'll need to set up a passkey on mobile or web. It's required for all future logins.

Learn more: HealthEquity.com/loginhelp

Contact Us

[Member Service phone number
- variable based on product configuration]

[Member Portal URL
- variable based on product configuration]

FSA details

How it works:

- 1 Visit Medical/Dental/Vision/Rx Provider**
Visit your provider and present your insurance ID card.
- 2 Provider bills for services**
Your provider will send claims to your health plan for processing or may bill you directly.
- 3 Pay your provider**
Use HealthEquity's convenient online member portal or mobile app to pay your provider using FSA funds.
- 4 Qualify your expense**
In some instances, you may be asked to provide an itemized receipt or explanation of benefits (EOB) to verify that an expense is eligible.

NOTE: Sign up for electronic funds transfer (EFT) to get reimbursed sooner and to avoid the \$2.00 check fee for payments to members.

Please refer to your plan documents for complete details

Your FSA

Account name:

Election amount:

End date to incur expenses:

End date to submit expenses:

Rollover:

Eligible expenses:

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Health and Wealth**