



## ACS/Mellon Health Savings Account Employer Discovery Document / Set-up Form

Please complete all requested information for each employer setup and submit an electronic copy (*Microsoft Word*) to the HSA Solution Employer Support Team at [HSAEmployerSetup@acs-inc.com](mailto:HSAEmployerSetup@acs-inc.com). The Security Challenge form should be returned along with this document. Alternatively, you may fax the documents to 201-633-0134.

On questions with check boxes, simply double-click on the appropriate box and change the "default value" to "checked"; an X will then populate the box. For questions regarding the payroll process, please contact the HSA Solution Employer Support Team at (201) 553-6305.

Health Plan Name	Horizon Blue Cross Blue Shield of New Jersey
Health Plan Customer ID	502
Employer ID (3-digits assigned by Horizon)	

### General Employer Information

Employer Name	
Employer Address – Line 1	
Employer Address – Line 2	
Employer City	
Employer State	
Employer ZIP Code	
Employer Funding Contact Name	
Employer Funding Contact Phone	
Employer Funding Contact E-mail	
Employer Technical Contact Name (regarding FTP set up)	
Employer Technical Contact Phone	
Employer Technical Contact E-mail	

1) High Deductible Health Plan Effective Date	
2) Number of Eligible Employees	



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3) Expected Number of HSA Accounts

4) Who Pays Account Set-up Fees?

☒ Health plan

5) Who Pays Account Maintenance Fees?

☒ Health plan

6) Will the Employer send contributions (Employer and/or Employee) to Mellon on behalf of the employees?

☐ Yes ☐ No *If no, question 7 is n/a.*

**Note:** Employees always have the option of making deposits to their HSA themselves via deposit slips.

7) How Will Mellon Receive Employee Contributions and Instructions?

*Please refer to the ACS/Mellon Employer Guide for details on the funding/contribution options below. Employers with 150 or less employees use options 7a, 7b, or 7c.*

7a: ☐ **Payroll on the Web (POW!) Method:** A lump sum transfer of funds accompanied by allocation instructions entered and submitted via POW! (Payroll on the Web) application.

**Note:** This option is standard for Employers with less than 150 employees and recommended for groups of any size who anticipate less than 150 accounts.

7b: ☐ **ACH Direct Deposit (via Individual ACH) Method:** Employer transmits funds directly to each employee's account via the Automated Clearing House (ACH). **Note:** The employer will need to set this up with their payroll administrator or banking institution.

7c: ☐ **N/A:** Employer will not transfer employee contributions to Mellon. Employees will only deposit funds via Mellon deposit slips.

7d: ☐ **Excel-to-Text File with FTP Connectivity:** A lump sum transfer of funds accompanied by allocation instructions in a set **Excel spreadsheet** format. (This approach requires FTP connectivity and four to eight weeks set-up time.)

7e: ☐ **Flat File with FTP Connectivity:** A lump sum transfer of funds accompanied by allocation instructions in our HSA Payroll Distribution File format. (This approach requires FTP connectivity and four to eight weeks set-up time.)

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**Security Challenge Questions**

Please complete the attached Security Challenge Form

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**RETURN COMPLETED FORM TO:**

**HSA Solution Employer Support Team**

**Address: 500 Plaza Drive, 9<sup>th</sup> Floor**

**Address: Secaucus, NJ 07094**

**Phone: 201-553-6305**

**E-Mail: [HSAEmployerSetup@acs-inc.com](mailto:HSAEmployerSetup@acs-inc.com)**