

**BenefitWallet™ Health Savings Account
Employer Discovery Document / Set-up Form**

Complete all requested information and return this document to your Horizon Blue Cross Blue Shield of New Jersey Sales Representative.

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	
3) Expected Number of HSA Accounts	

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4) Who Pays Account Maintenance Fees?

Health plan

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

Yes No *If no, question 6 is n/a.*

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

6) How Will Mellon Receive Employee Contributions and Instructions?

6a: **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.*

6b: **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.*

6c: **N/A:** Employer will not transfer employee contributions to Mellon. Employees will only deposit funds via Mellon deposit slips.

6d: **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.)

6e: **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.)

Instructions to Horizon Sales Representatives:

Email completed document to: Employerssetup@mybenefitwallet.com

Include the following information in the email subject line:

- Group Name
- Group Number
- Group Effective date