



2561 Bernville Road, Reading, PA 19605 Ph: (888) 769-8696 Fax: (610) 678-6818

First HSA Employer Enrollment Process

**Employer must determine whether they will be sending in employee data via batch file. All Groups over 50 must submit data via batch file. This method is optional for groups smaller than 50 enrollees. Should Employer select this method they must contact First HSA for Required Data Format and email address.*

Step 1: Distribute First HSA Information to Employees

- Brochures, First HSA Application
- Each enrollee must complete a First HSA application.

Step 2: Determine Method of Contributions

- Employee Payment (non-payroll): Individual Check or Direct Deposit
- Payroll Deduction: Employer Check (Groups below 50 Only) or Electronic Funds Transfer (EFT) initiated by employer
- Contact First HSA for EFT Instructions

Step 3: Collect Applications

- Check applications for required data, i.e. signatures, SSN, DOB's physical address, driver's license numbers, etc.
- Complete First HSA Set Up Form

Step 4. Submit Applications to First HSA

- Send applications along with initial contribution to First HSA at 2561 Bernville Rd., Reading, PA 19605. Attn: Processing Dept.
- Service fees may be paid up front and submitted with initial contributions.

Step 5: Welcome Kits

- Each employee will receive a "Welcome Kit" containing their personal account information.
- Visa check cards and free checks should arrive within 10 business days.
- Each employee will receive quarterly bank statements via electronically or paper (depending on plan type selection) detailing contributions, distributions, and interest earned. An image copy of checks drawn on HSA will also be provided with statement.