FSA and HSA Enrollment

Interface Requirements Specification

# Cornerstone Home Lending

# Contact Information

## Customer Contact

|  |  |  |
| --- | --- | --- |
| **Name** | **Phone** | **Email** |
| **Denise Magee** |  | [DMagee@houseloan.com](mailto:DMagee@houseloan.com) |

## Vendor Contact

|  |  |  |
| --- | --- | --- |
| **Name** | **Phone** | **Email** |
| **JR Grubbs** |  | [JR.Grubbs@FMR.COM](mailto:JR.Grubbs@FMR.COM) |

## Integration Contact

|  |  |  |
| --- | --- | --- |
| **Name** | **Phone** | **Email** |
| **Lea King** |  | **lking@tekpartners.com** |

# Revision History

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Date | Version | Revision Description | Comments | Author |
| 1 | 12/31/2020 | 1.01 | Initial Draft |  | Lea King |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |

# Customer Confirmation

HSA

1. **Vendor Name:**Fidelity
2. **Confirm Group or Plan Number:**

77277

1. **Will you have employees that are active in multiple component companies?**

☒ No ☐ Yes

1. **Are there any Employee Types, Pay Groups, Org Levels, etc. that need to be excluded?**

☒ No ☐ Yes

If Yes, please list field and values to exclude or include *(whichever is a shorter list)*:

Groups to exclude

1. **What kind of HSA Files would you like us to Create?**

|  |  |  |
| --- | --- | --- |
| **Type** | **Employees to Include** | **Notes** |
| ☒ **FSA and HSA** **Enrollment** | Employees Active on Applicable Deduction Code | Click here to enter text. |
| *This file will typically only include the Demographic information for Eligible Employees* | | |

1. **Please include the applicable UltiPro Deduction/Earning Codes for each that apply:**

|  |  |
| --- | --- |
| **Code** | **Desc** |
| HSAF | Family 2x |
| HSAF1 | Family 1x |
| HSAFE | Family Exec |
| HSAI | Individual 2x |
| HSAI1 | Individual 1x |
| HSAIE | Individual Exec |
| HSACF | Catch up Family 2x |
| HSCF1 | Family Catch Up 1x |
| HSCFE | Family Catch Up Exec |
| HSACI | Catch up Individual 2x |
| HSCI1 | Individual Catch Up 1x |
| HSCIE | Ind Catch Up Exec |
| R | Flex Med x2 |
| U | Flex Child x2 |
| V | Flex LTD x2 |
| 62 | Flex Med x1 |
| 72 | Flex Child x1 |
| 73 | Flex LTD x1 |

|  |
| --- |
| Note from client - We are set up to take deductions each payroll (x2) |
| or once a month on the 15th commission payroll (x1) |

1. **Open Enrollment Option = we will build two Open Enrollment Sessions – one Active and one Passive.**

**What type of enrollment will you be offering?**

☐ Active ☐ Passive

*An ACTIVE session requires all employees to go in and make an election. If an employee does not re-elect their benefit, they will be dropped from that benefit. Since this is a changes-only file, we need to know if to include the employee with a coverage stop date, or if they will be termed by omission from the file. We do not need to worry about the passive file since this is a full file, and we will send a coverage stop date automatically.*

**If an employee stops their current benefits during an ACTIVE Open Enrollment, would you like to include them on the file with a stop date?**

☒ No ☐ Yes

1. **Do you allow for future-dated coverage START dates on the file?**

☒ No ☐ Yes

If Yes, please include the number of days in the future that are accepted (ex. 30 days):

Click or tap here to enter text.

1. **Do you allow for future-dated coverage STOP dates on the file?**

☒ No ☐ Yes

If Yes, please include the number of days in the future that are accepted (ex. 30 days):

Click or tap here to enter text.

1. **Do you require a minimum coverage start date on the file (Ex. We cannot send any effective dates older than 1/1/2018 on the file)? If so, what is that date?**

**01/01/2021**

# Mapping/Notes to Developer

File format – fixed length text

Changes only

1 file but 3 sections on layout doc.

Header

FSA – see RAE record layout section

HSA – see HS record layout section

Term logic – changes only file so only those with changes should be sent. The terms would then only be sent once based on the audit date and then drop off.

OE sessions should be full files and not contain any terms.