

Establishing an IBC HSA-Qualified High Deductible Health Plan (HDHP) and Bancorp HSA



Please note the following submission guidelines apply:

- New Business:** Submit account information 15 days prior to the requested effective date.
Retention Business: Submit account information 30 days prior to the requested effective date.

Checklist for New Business (100+)

- Submit the following information:
 - Copy of UC-2 or an employee census
 - Signed rate quote
 - Member applications and waivers
 - BlueSaver Health Account Solutions Enrollment Addendum (used to enroll employees in Bancorp HSA) located at the following url:
http://www.ibx.com/pdfs/custom/forms_online/general/ibcmemberaddendum_0106.pdf
- Submit information directly to your Broker, Marketing Operations, or IBC Account Executive

Checklist for Retention (100+)

- Submit the signed Benefit Election Form or signed customer letter with:
 - Copy of sold IBC ROAM quote or rate quote with the plan clearly indicated
 - Copies of member applications for new employees or employees changing from PPO to HMO
 - BlueSaver Health Account Solutions Enrollment Addendum (used to enroll employees in Bancorp HSA) located at the following url:
http://www.ibx.com/pdfs/custom/forms_online/general/ibcmemberaddendum_0106.pdf
- Submit this information directly to Marketing Operations

Enrolling Subsequent Members

Non-portal Customers:

Fax applications and BlueSaver Health Account Solutions Enrollment addendums to the IBC Enrollment department (215-238-7076).

Portal Customers:

Follow normal portal enrollment process to enroll employees in an HSA Qualified High Deductible Health Plan
Check box to enroll member in a Bancorp HSA

Notes

Group and member applications are processed as usual
Bancorp HSA enrollment is transmitted electronically to The Bancorp Bank (Bancorp)
Bancorp verifies enrollment and mails a Welcome Kit to account holder
Be certain to send enrollment information to IBC, not Bancorp
Use only the BlueSaver Health Account Solutions Enrollment Addendum available from IBC to enroll employees in Bancorp HSA