

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 (2-99)

- Key the Customer Enrollment Form (CEF) in ROAM and submit with:
 - Employer application
 - Application for New Small-Employer Health Benefits located at the following url:
http://www.ibx.com/pdfs/custom/forms_online/account_installation/ibcgrpapp_broker_flex_11_04.pdf
 - Application for New Small-Employer Health Benefits – Association located at the following url:
http://www.ibx.com/pdfs/custom/forms_online/account_installation/ibcgrpapp_assoc_flex_11_04.pdf
 - Copy of UC-2 or other proof-of-business document
 - Copy of sold IBC ROAM quote with the plan clearly indicated
 - 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
 - Premium check
 - ibxpress authorization (if applicable)
- Submit this information through Account Installation (AI).

Checklist for Retention (2-99) – Paper Only

- Submit the signed Benefit Election Form with:
 - Copy of sold IBC ROAM quote or rate quote with the plan clearly indicated
 - Copies of member applications
 - 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

Checklist for Retention (2-99) – via ROAM

- Submit the signed Benefit Election Form with:
 - Copy of sold IBC ROAM quote with the plan clearly indicated
 - Tracking cover sheet
 - Copies of member applications for HSA
 - 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