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

Please note the following submission guidelines apply:

New Business/Retention: Submit account information to IBC 30 days prior to the requested effective date.

Checklist for New Business (100+)

- ☐ Submit the following information:
  - Employee census
  - Signed rate quote with plan clearly indicated
  - Member applications and waivers
  - Member application for Bancorp HSA located at the following url: http://www.ibx.com/pdfs/custom/broker_group/hsa_app.pdf
- ☐ Submit information directly to your Broker or IBC Account Executive

Checklist for Retention (100+)

- ☐ Submit the signed Benefit Election Form or signed customer letter with:
  - Signed rate quote with plan clearly indicated
  - Copies of member applications for new employees or employees changing from PPO to HMO
  - Member application for Bancorp HSA located at the following url: http://www.ibx.com/pdfs/custom/broker_group/hsa_app.pdf
- ☐ Submit this information directly to your Broker or IBC Account Executive

Enrolling Subsequent Members

Non-portal Customers: Fax applications and member applications for Bancorp HSAs to the IBC Enrollment department (215-238-7067).

Portal Customers: Follow normal portal enrollment process to enroll employees in an HSA Qualified High Deductible Health Plan and check box to enroll member in a Bancorp HSA

Notes

- Send all enrollment information to IBC. Do not send to Bancorp directly.
- Use only the Bancorp HSA application available from IBC to enroll employees in a Bancorp HSA
- IBC Group and member applications are processed in Enrollment (business as usual)
- Bancorp HSA enrollment is transmitted electronically to The Bancorp Bank (Bancorp)
- Bancorp verifies enrollment and mails a Welcome Kit to account holder.

Independence Blue Cross ®

Independence Blue Cross offers products directly, through its subsidiaries Keystone Health Plan East and QCC Insurance Company, and with Highmark Blue Shield — independent licensees of the Blue Cross and Blue Shield Association