

Implementation Checklist

Required Documents & Corresponding Instructions

- Complete and submit the Client Company Overview Form**
Completed by Sedera Affiliate/Sales Representative
- Complete and Sign the Service Agreement**
Signed by Employer
- Complete and Sign Exhibit A**
Signed by Employer
- Complete and Sign the Sedera Application(s) - Personal Profile and Health Care Sharing**
Signed by Employee
- Provide Documentation confirming the opening of a Business Bank of Texas Account**
 - 1. Business Bank of Texas Account Application**
 - a. Proof of Business type and associated approved documents
 - b. IRS EIN Confirmation Letter or a W-9
 - c. Copy of Driver's License for any/all signers
 - 2. Complete and Sign ACH Customer Origination Agreement**
 - a. Signed by Employer (page 6)
 - b. Signed by Employer (page 9) only if designating others to initiate ACH transactions
- Complete and Sign the MEC Setup Packet**
Submit to Third Party Administrator (TPA)
- Set up HSA employer and employee accounts with HSA Bank or other preferred vendor**