YOUR BENEFITS RESOURCE LIBRARY

Discovery Benefits®

Please note: We are not able to customize the materials on this list. We have found that providing consistent materials to participants through our website, portals and other channels reduces confusion and leads to a better overall participant experience.

EMPLOYER RESOURCES	
RESOURCE TITLE	**DESCRIPTION**
FLEXIBLE SPENDING ACCOUNTS (FSAs)	
Employer-Funded FSA Handout	This handout covers some important facts employers need to know if they are considering funding employee FSAs.
FSA Employer Guide	This guide outlines the basics of FSAs and details the services provided by Discovery Benefits.
HEALTH SAVINGS ACCOUNTS (HSAs)	
Adding an HSA — Renewal or Mid-year	This resource outlines the items employers should consider when adding an HSA.
Benefits of an HSA Video	This video walks employers through all the benefits of offering an HSA.
HealthcareBank Custodial Agreement	This is the agreement your HSA participants will need to read and agree to on their consumer portal before they can access their account funds.
HSA Brochure — Employers	This brochure outlines the benefits of offering a Discovery Benefits HSA.
COMMUTER BENEFITS	
Commuter Benefits FAQ — Employers	This FAQ answers the most common questions we receive from employers related to commuter benefits.
SmartCommute Program Employer Handout	This handout gives employers with participants in Washington, D.C. information about our commuter benefit solution specific to the area.
HEALTH REIMBURSEMENT ARRANGEMENTS (HRAs)	
HRA FAQ	This FAQ was designed to answer common questions we receive from employers related to HRAs.
HRA Plan Design Options	This document outlines various HRA plan design options as well as examples of how each works.
MSP Reporting FAQ	Certain HRAs may be subject to MSP Reporting requirements. This FAQ helps answer some common questions related to those requirements.

BENEFITS (GENERAL)	
Benefits Consumer Portal Demo	This video walks through the portal consumers use to manage their benefits.
Benefits Participant Experience Handout - High-Tech Henry	This document outlines how a high-tech participant might interact with their benefits, including the most common communications they can expect to receive from Discovery Benefits.
Benefits Participant Experience Handout - Low-Tech Lisa	This document outlines how a low-tech participant might interact with their benefits, including the most common communications they can expect to receive from Discovery Benefits.
Guide for Current Plan Year Takeover	This document is meant to guide employers through a plan takeover for their current plan year.
Guide for Previous Plan Year Takeover (Grace Period)	This document is meant to guide employers through a plan takeover for their previous plan year if they have a grace period.
Guide to Creating a Recurring Contribution Schedule	This document outlines the steps for setting up a recurring Contribution File through the employer portal.
Guide for Previous Plan Year Takeover (Run-out)	This document is meant to guide employers through a plan takeover for their previous plan year if they have a run-out period.
Guide to Enrollment and Contribution File Importing	This document is meant to guide employers through participant enrollment via the file import method.
Guide to Enrolling Participants by Key-in Method	This document is meant to guide employers through participant enrollment via the key-in method.
Guide to Funding and Reporting	This document outlines the different types of funding options for FSAs, HRAs and Commuter Benefits.
Guide to On Demand Reporting	This guide explains the various reports that employers can access on demand through the employer portal.
Guide to Updating Participant Status	This document is meant to guide employers through the process of changing an employee's status based on a leave of absence or termination.
Introduction to LEAP Video	This video provides a quick tutorial of the main features of LEAP, your single sign-on portal.
Quickstart Employer Guide	This guide quickly summarizes the information employers can find on the Employer Portal.
Participant Welcome Email	This is the welcome email your participants will receive from Discovery Benefits.
Sample Administrator Change Announcement	This is a sample announcement you can use to communicate to your employees that you have switched benefits administrators.

PARTICIPANT RESOURCES

RESOURCE TITLE	DESCRIPTION
FLEXIBLE SPENDING ACCOUNTS (FSAs)	
Deductible Verification Form	This form is used to help participants in a Combination FSA verify that their deductible has been met.
FSA Calculator	This is a tool that helps participants determine how much to set aside in their FSA.
FSA Data Collection Worksheet	This is an internal document participants use to communicate FSA data to their employer.

FSA Employee Handout	This is a brief resource that can be used to educate employees on the basics of an FSA.
FSA Employee Guide	This is a detailed guide outlining the ins and outs of FSAs to employees.
FSA Employee Guide with Rollover Information	This is the same as the standard FSA Employee Guide but contains information about the ability to roll over funds into the next plan year.
FSA FAQ — Participants	This FAQ answers commonly asked questions we receive from participants about the FSA.
Guide to Combination FSAs	This guide provides a quick resource for participants wanting to learn more about a Combination FSA and the expenses that are eligible under this plan.
Guide to Limited FSAs	This guide provides a quick resource for participants wanting to learn more about a Limited FSA and the expenses that are eligible under this plan.
Recurring Dependent Care Request Form	This form allows participants to receive recurring reimbursement for dependent care expenses.
HEALTH SAVINGS ACCOUNTS (HSAs)	
HSA Blocked Account Verification Form	This form must be filled out by HSA participants as part of the USA PATRIOT Act's identity verification process.
HSA Calculator	This is a tool that helps participants determine how much to set aside in their HSA.
HSA Contribution Form	This form allows participants to make a deposit into their HSA.
HSA Data Collection Worksheet	This is an internal document participants use to communicate HSA data to their employer.
HSA Distribution Request Form	This form allows participants to request a withdrawal from their HSA.
HSA Employee Guide	This is a detailed guide outlining the ins and outs of HSAs to employees.
HSA Employee Handout	This is a brief resource that can be used to educate employees on the basics of an HSA.
HSA FAQ — Participants	This FAQ answers commonly asked questions we receive from participants about the HSA.
HSA Investment Options	This site from our custodian shows the investment options available to HSA participants.
HSA Transfer Handout	This handout outlines the benefits of consolidating HSA funds into one account.
HSA Transfer Request Form	This form allows participants to transfer HSA funds from a prior HSA to their current HSA.
The HSA for Investors Video	This video describes the benefits of investing HSA funds to participants.
The Smarter Way to Use Your HSA Video	This video gives participants tips on maximizing their benefits with their HSA.
Why Participate in an HSA Video	This video explains to participants the many reasons it is beneficial to participate in an HSA.
COMMUTER BENEFITS	
Commuter Benefits Employee Handout	This resource can be used to educate employees on the basics of Commuter Benefits.
Commuter Benefits FAQ — Participants	This FAQ answers commonly asked questions we receive from participants about Commuter Benefits.
Commuter Benefits Payroll Deduction Worksheet	This is an internal document participants use to communicate commuter data to their employer.
Guide to the SmartCommute Program	This guide provides step-by-step instructions for participants in D.C. on how to use their commuter benefits with Discovery Benefits' SmartCommute Program.

HEALTH REIMBURSEMENT ARRANGEMENTS (HRAs)	
HRA Employee Attestation Form	This is an internal document participants use to communicate HRA data to their employer.
HRA Opt-Out/Waiver Form	This is a form participants use to opt out of participation in an HRA.
BENEFITS (GENERAL)	
Authorized Representative Form	This form is used by participants to authorize the release of their medical information to a named representative.
Consumer Claims Sync Click-Through Demo	This interactive demo allows participants to see how the Claims Sync feature works.
Consumer Claims Sync FAQ	This resource answers commonly asked questions about our Claims Sync feature.
Guide: How to Log in to Your Account — Benefits	This guide walks participants through the process of logging in to their online account.
Guide to the Benefits Debit Card	This guide provides participants with information on using their Discovery Benefits debit card.
Guide to Filing Claims	This guide outlines methods participants can use to file claims.
Guide to Substantiating Debit Card Transactions	This guide explains the process of submitting documentation for debit card transactions.
Medical Necessity Form	This is the form participants fill out when submitting a claim for a dual-purpose expense.
Mobile Application Click-Through Demo	This interactive demo allows participants to test out the Discovery Benefits mobile application.
Mobile Application Handout	This handout introduces participants to the Discovery Benefits mobile application.
Out-of-Pocket Reimbursement Request Form	This form allows participants to request reimbursement for eligible expenses paid out of pocket.
Providing Receipts for Debit Card Expenses	This video walks participants through the process of submitting documentation to show the eligibility of a debit card expense.