

How to ENROLL GROUPS AS A BROKER

HealthEquity has worked closely with brokers for over 15 years so we understand the need for flexible, convenient options when it comes to enrolling groups. We provide four easy ways to enroll your clients:

OPTION 1

ENROLL YOUR GROUPS OVER THE PHONE

Our inside sales team would be happy to help you enroll your groups and walk you through the process. Give us a call at 866.260.9441.

OPTION 2

ENROLL YOUR GROUPS ONLINE

1. Visit [HealthEquity.com/brokers/](https://www.healthequity.com/brokers/) and select the “Enroll a group” button.
2. Complete the enrollment forms.
3. Our broker services team may reach out to you for further information if necessary.

OPTION 3

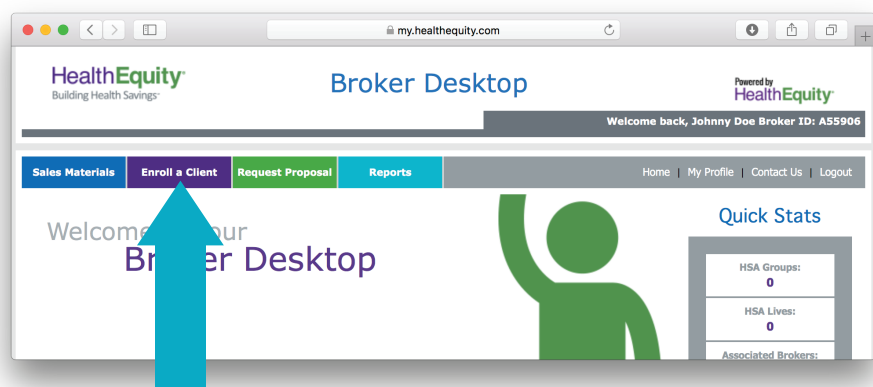
ENROLL YOUR GROUPS THROUGH THE BROKER PORTAL (broker registration required*)

1. Login to your broker portal at <https://my.healthequity.com/>.
2. Find the navigation bar on the top left corner of your screen, just below the HealthEquity logo.
3. Click the purple “Enroll a Client” button.
4. Click the green “Begin” button and follow the prompts to finish the enrollment process.

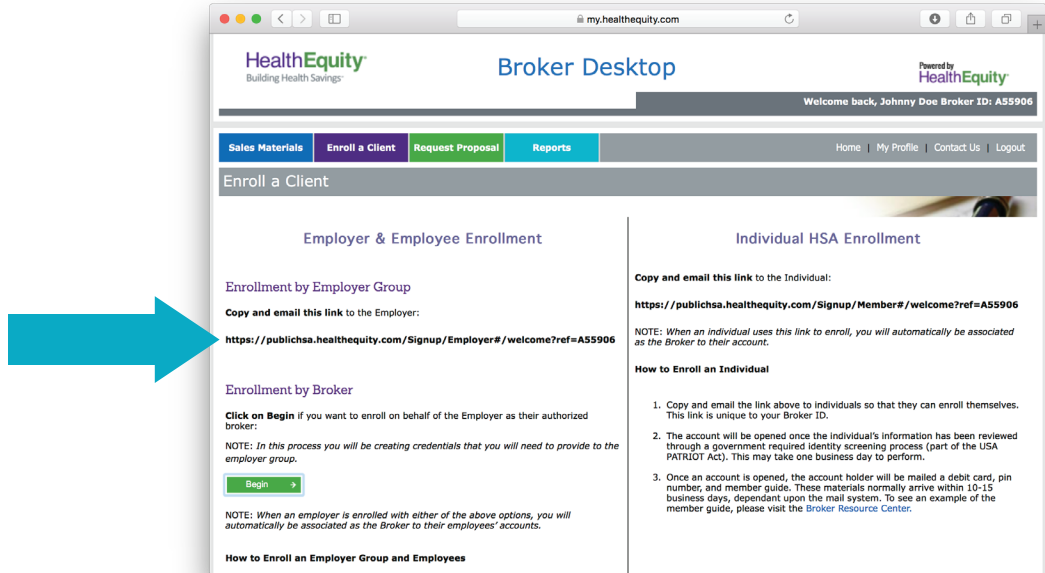
OPTION 4

GROUP SELF-ENROLLMENT (broker registration required*)

1. Login to your broker portal at <https://my.healthequity.com/>.
2. Find the navigation bar on the top left corner of your screen, just below the HealthEquity logo.
3. Click the purple “Enroll a Client” button.



4. On the left side of the screen find the “Employer & Employee Enrollment” section and the subheading “Enrollment by Employer Group”. Under this subheading, you’ll find your dedicated enrollment link.



The screenshot shows the HealthEquity Broker Desktop interface. The page title is "Broker Desktop" and it says "Welcome back, Johnny Doe Broker ID: A55906". There are navigation tabs for "Sales Materials", "Enroll a Client", "Request Proposal", and "Reports". The "Enroll a Client" section is active, showing two main options: "Employer & Employee Enrollment" and "Individual HSA Enrollment". Under "Employer & Employee Enrollment", there is a sub-section for "Enrollment by Employer Group" with a "Copy and email this link to the Employer:" instruction and a URL: <https://publichsa.healthequity.com/Signup/Employer#/welcome?ref=A55906>. Below this is an "Enrollment by Broker" section with a "Begin" button. A blue arrow points to the "Enrollment by Employer Group" section.

Your link will look like the link below but will have your unique broker ID at the end, replacing the bold, purple portion:

<https://publichsa.healthequity.com/Signup/Employer#/welcome?ref=A00000>

Any group that enrolls using your dedicated link will be automatically tied to your broker portal account.

5. Send this link to your clients and they'll be automatically tied to your broker account when they enroll.



*** Register as a broker today!**

You can create a free broker account in less than five minutes at:
HealthEquity.com/Brokers