



Further Transition Microsite Recommendation

CLIENT NAME: HealthEquity

JOB DESCRIPTION: Further Transition Strategy and Communications Plan

PROJECT #: 1658/001

DATE PRESENTED: Aug 10, 2023

NOTES:

- Recommendations may adjust depending on further examination of proposed wires
- Recommendations may adjust based on campaign messaging, look and feel (still in development)
- This is not intended to be an exhaustive list of all website content and linked assets
- All labels and categories are FPO to provide context of information included
- OX still needs to undergo exercise of content organization of specific elements looking at past state vs future state and will include comparing "client support materials" to "key resources"

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I. STRATEGY

Site goals:

- Communicate critical transition information
- Educate on basics of HQY and its platform
- Drive trust and assurance among intended audiences and relevant stakeholders, including Brokers and Health Plan Partners
- Provide transparency to Brokers and Health Plan Partners about client and member experience

Audiences:

- Microsite 1: Clients (Employers)
- Microsite 2: Members (Employees)




Informed by:

- HQY/OX Further Transition Workshop
- HQY Transition Strategy Presentations
- Audit of the prior transition microsites:
 - [CPRO Employer Microsite](#)
 - [CSAM HSA Employer Microsite](#)
 - [CSAM HSA Member Microsite](#)
 - [CSAM RA Employer Microsite](#)
 - [CSAM RA Member Microsite](#)
 - [CPRO Member Microsite](#)
 - [WF1 Aflac Microsite](#)
 - [WF1 TakeCare Microsite](#)

II. CLIENT (EMPLOYER) MICROSITE RECOMMENDATIONS

Page	Hierarchy and Content Elements
Home page (L1)	<p>Purpose: Introduce HQY and give clients an easy-to-understand entry point into all resources they need for the transition to HQY.</p> <ol style="list-style-type: none">1. Navigation to L2 pages:<ol style="list-style-type: none">a. Transition info; Resources; FAQs (Labels FPO)2. Hero<ol style="list-style-type: none">a. Clear headline with intent of what the site is for.3. About Health Equity<ol style="list-style-type: none">a. Introduce HealthEquity and what it means for the audience including #1 value prop/benefit. <Link to HQY.com.>b. HQY Sizzle Video to go here when complete4. Transition timeline/status indicator5. "What's inside"<ol style="list-style-type: none">a. 3-up or similar component that highlights the 3 key areas of the site with a pithy description of each (Transition info; Resources; FAQs)



	<p>6. Universal footer:</p> <p>a. Contact Information: Use the format that was previously included as a link from employer microsite L2 “resource” page.</p>  <p>The screenshot shows a purple header with 'HealthEquity WageWorks'. Below it, on the left, is the text 'NEW HEALTHEQUITY CONTACT INFORMATION' in large, bold, blue letters. On the right, there are four sections of contact information: 'HealthEquity Client Services Phone Team' with the number '844.343.4350' and availability 'M-F 7:00 AM - 7:00 PM (CT)'; 'HealthEquity Client Portal' with the link 'employer.WageWorks.com/Login'; 'HealthEquity Client Services Email Support' with the email 'relationship.management@healthequity.com'; and 'HealthEquity Transition Resources' with the link 'HealthEquity.com/WageWorks/AflacWW'. A small copyright notice is at the bottom left of the banner.</p>
<p>Transition information (L2)</p>	<p>Purpose: Give clear information about what’s happening related to the transition so the user knows what to expect, what to do, and their members’ experience.</p> <p>Page contents:* Includes on-page information and linked content</p> <ol style="list-style-type: none"> 1. Your transition timeline and milestones 2. Transition 101 - guide & webinars (registration and recordings) <p><i>*Full contents tbd based on asset deep dive and reconciliation.</i></p>
<p>Getting Started with HQY (L2)</p>	<p>Purpose: Provide employer onboarding experience related to any products impacted by Further transition.</p> <p>Page contents:* <u>Include or link to necessary</u> information, training, resources, and forms related to onboarding and BAU.</p> <ol style="list-style-type: none"> 1. Portal guide and training 2. Product info 3. Website and portal resources (evergreen reference post-transition, link to OE website, etc.) 4. How-to’s about operational processes like reporting, ordering, etc. 5. Required/mandated/compliance documents 6. HQY FAQs <link>



	<p>7. The member experience</p> <p><i>*Full contents tbd based on asset deep dive and reconciliation.</i></p>
Transition FAQs (L2)	<p>Purpose: Provide information related to most common questions and concerns that clients have regarding the transition.</p> <p>Functionality recommendation: Search</p>

III. MEMBER (EMPLOYEE) MICROSITE RECOMMENDATIONS

Page	Hierarchy and Content Elements
Home page (L1)	<p>Purpose: Introduce HQY and give members access to information and resources they need for the transition.</p> <p>Page contents:* Keep information to one page to reduce need for clicks/searching for content and avoid member abrasion.</p> <ol style="list-style-type: none"> 1. Hero <ol style="list-style-type: none"> a. Clear headline with intent of what the site is for. 2. About Health Equity <ol style="list-style-type: none"> a. Introduce HealthEquity and what it means for the audience including #1 value prop/benefit. <Link to HQY.com.> b. HQY Sizzle Video to go here when complete (if relevant) 3. Transition timeline/status indicator 4. Transition info session webinars (and recordings) 5. Additional member resources <ol style="list-style-type: none"> a. Member guide b. Member portal c. HSA brochure, guidebook d. Investment info e. Forms (ex. distribution request form) f. Sample invoices and statements



	<p>g. HQY mobile app</p> <p>6. Universal footer:</p> <p>a. Contact Information: phone number and email to HQY member service</p>
FAQs (L2)	<p>Purpose: Introduce HQY and give members access to information and resources they need for the transition to HQY.</p> <p>Functionality recommendation: Search</p>

IV. OVERARCHING RECOMMENDATIONS

3. Do not include Further co-branding or language. It is always Health Equity.
4. Use Health Equity favicon.
5. Do not use "HealthEquity speak."
 - o Jargon or acronyms that are familiar to HQY employees may not be familiar to the audience. (ex. EEs, ERs)
6. Navigation labels should use intuitive and clear about what the contents are in relevant language for the audience.
 - o ex. Instead of "Transition," use something like "About Your Transition"
7. Use plain language
 - o ex "UMB custodial resignation letter mailed to any new account holders enrolled since March 19" on member site is can be confusing and cause abrasion
8. Avoid repetition and redundancy.
9. Ensure scannability.
10. Use caution using all caps especially with "HEALTHEQUITY." Can be difficult to read.