



Certified Health Savings Adviser (CHSA®)

Terms and Conditions

Prerequisites for CHSA®

Individuals must be currently employed or have two years of work experience in either the financial services or human resources/benefits industry to earn the Certified Health Savings Adviser (CHSA®).

Benefits of the CHSA®

In addition to the knowledge and information provided in the CHSA® program, individuals who successfully complete the CHSA® (via a live training or an online, self-study) and successfully complete the examination receive the following:

- Certificate of Designation;
- Listing in Access Point HSA's "*CHSA® Designee Search Directory*", which is public and accessible to the public via www.accesspointhsa.com;
- Complete access to Access Point HSA's online provider database *HSA Vista®*;
- Access to CHSA® webcasts and other CHSA®-only communications and emails;
- Continued Q&A support from Access Point HSA.

Minimum Examination Score

The minimum passing score on the CHSA® examination is seventy-percent.

Annual Continued Education (CE) & Designation Renewal

Due to continuous changes in the employer-sponsored health care marketplace and adjustments to the rules and regulations surrounding health savings accounts, the CHSA® designation requires annual continuing education and recertification. The renewal is established by the designation award date, rather than a calendar year.



It is required that CHSA® designees, within thirty days prior to the anniversary date of their attainment of their CHSA® designation:

- Participate in an approximate 30-minute, online, self-study CE training program, which brings the designee up-to-date on changes that have occurred during the previous twelve months regarding health savings accounts and related subjects;
- Earn a minimum score of 70% on the multiple-choice CE examination that is also administered online;
- Sign an *Attestation Form of Good Conduct*; and
- Remit a non-refundable fee of \$95.00.

The \$95.00 fee is required to retain the CHSA® designation for an additional twelve-month period. This fee must be remitted prior to expiration of the designation's active status. Late payments (30 days past the due date) are subject to a \$25 non-refundable reinstatement fee.

Individuals who complete all the above-mentioned requirements maintain all the rights and privileges provided with the CHSA® designation. Individuals who do not meet these requirements are no longer authorized by Access Point HSA to use the CHSA® designation marking.

Renewal Notifications

Access Point HSA will provide designees – beginning 60 days prior to expiration of the designee's active status – a renewal notice and link to the approximate 30-minute, online, self-study Continuing Education training program.

Failure to Renew

An individual who allows his or her CHSA® designation to lapse by more than 60 days will immediately relinquish all rights and privileges associated with his or her CHSA® designation. Designees can request re-instatement in writing. Access Point HSA reserves the right to reinstate on a case-by-case basis. A re-instatement late penalty of \$100 will be assessed. Re-instatement fees may be waived on a case-by-case basis upon approval by Access Point HSA.