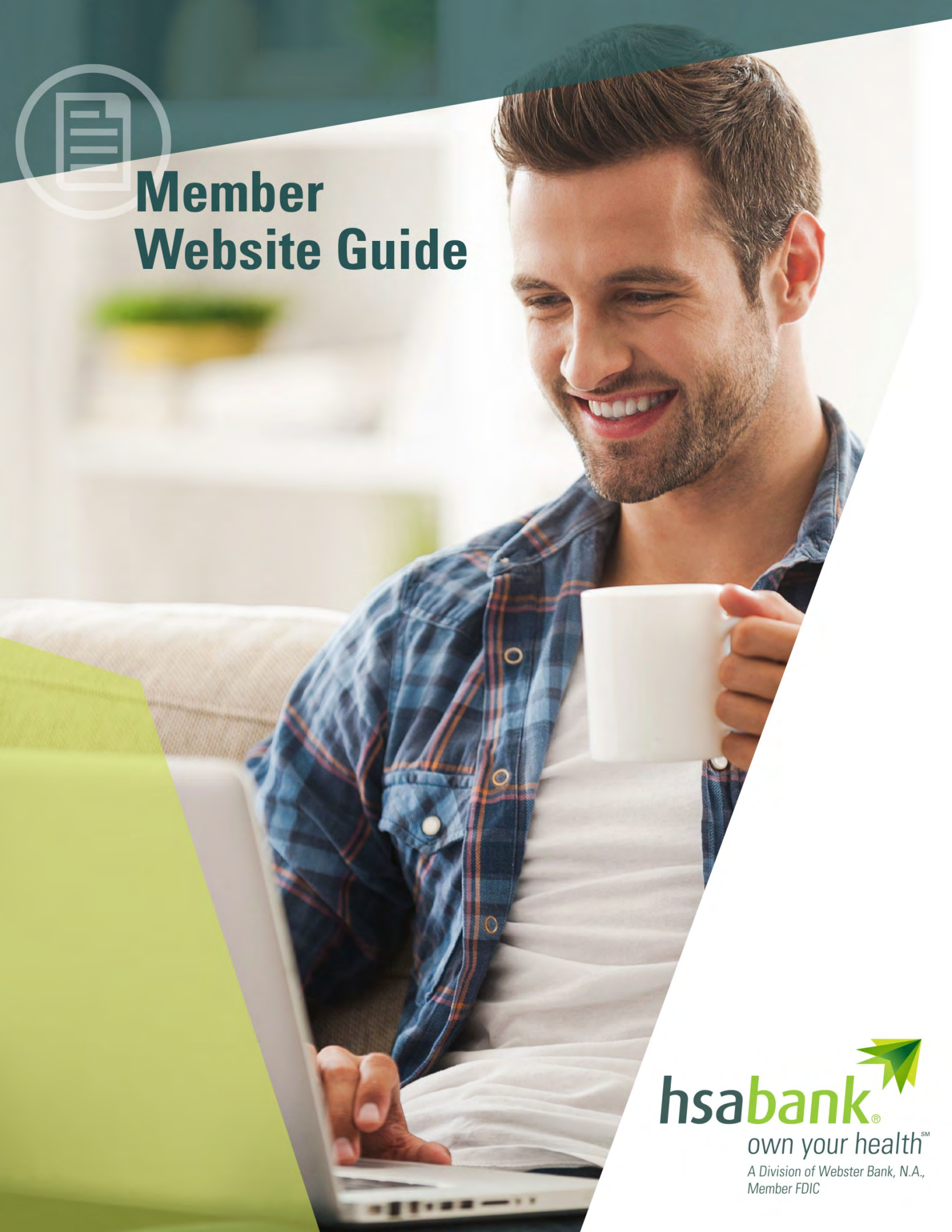




Member Website Guide



hsabank[®] 
own your healthSM
A Division of Webster Bank, N.A.,
Member FDIC

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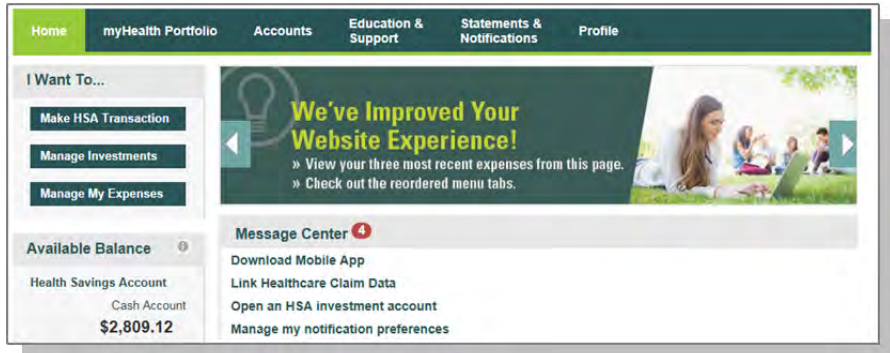
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Member Website Overview

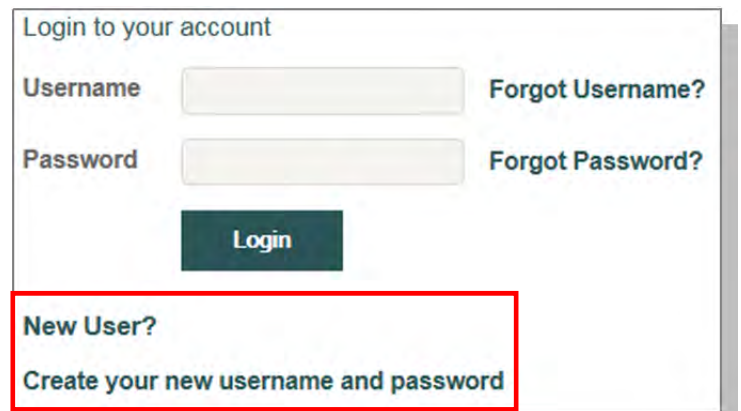
Welcome to HSA Bank! This guide will provide you with details about how to use the Member Website to manage your Health Savings Account (HSA). The Member Website gives you 24/7 online access to manage your account. Some of the key features you may want to take advantage of include:

- Checking your balance and account activity
- Making an HSA Transaction (Online Contribution and Distribution setup)
- Managing your Investments (if applicable)
- Adding an Authorized Signer to your account
- Ordering additional debit cards
- myHealth Portfolio SM



Initial Login Process

To create your account online, go to <https://hscs.hsabank.com>. Select the 'Create your new username and password' link from the bottom of the page.



Step 1:

Enter the identifying information requested on the page.

User Identification

Complete the information below to verify your identity.

First Name*

Last Name*

Zip Code*

SSN or Employee ID* -- OR --

*Required

Step 2:

Answer three security questions.
(The questions shown are sample questions).

Step 3:

Create your Username and Password.

Step 4:

Please read and accept the Esign Consent and Online Services agreements. You must open the agreements and **scroll to the bottom** in order to select the check boxes.

Step 5:

Please enter and confirm your email address to ensure you receive notifications based on your elected preferences.

You will also confirm your delivery method preference for certain bank disclosures and notices.

Please note: You may update this information later by clicking on the **Statements and Notifications** tab, then **'Update Notification Preferences'**

Statements & Notifications / Update Notification Preferences

Contact Information

Email Address

Confirm Email Address

Please provide a valid and current email address to ensure that you are notified when important documents (such as your HSA Account Summary and Tax Statements) become available on the Member Website. You will need an email address to select any of the optional alerts.

Notifications

You will receive bank disclosures and notices, in addition to the items listed below, based on the delivery method you select below.

Delivery Method Online Paper and Online

For HSA Account Summary HSA Tax Documents

Future Login

When you return to login again, enter the username and password you created in step 3, and click Login. If your account is locked, please contact HSA Bank's Client Assistance Center at 855-731-5220.

Forgot Username/Password

If you have forgotten your username or password, click the appropriate link on the login page. Follow the steps to reset your password and/or recover your username.

Existing User?

Login to your account

Username [Forgot Username?](#)

Password [Forgot Password?](#)

Navigate from the Home Page

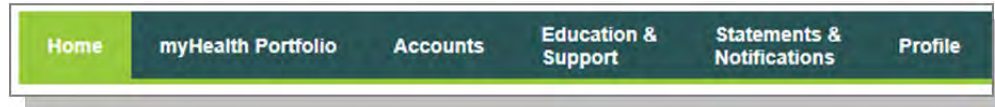
The HSA Bank Home Page will be displayed on your screen each time you log into the site. Each tab from your Home Page offers an easy-to-use navigation system for viewing information on your account.



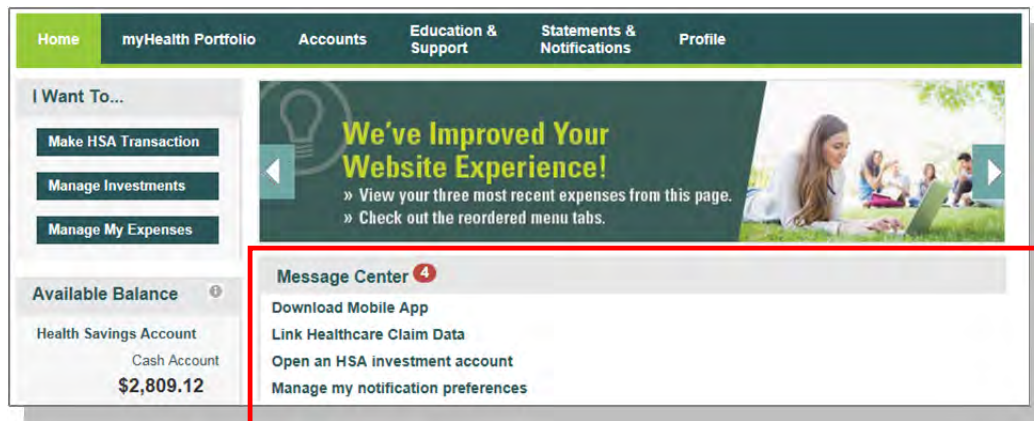
- The left side of the Home Page provides “I Want To...” links to take actions related to your account:
 - a. Make HSA Transaction (Contribution or Withdrawal)
 - b. Manage Investments
 - c. Manage My Expenses

- Starting with the top navigation you may access information via the menu tabs at the top of the screen, additionally there are a number of quick links throughout the body of each page that will be described as part of each tab

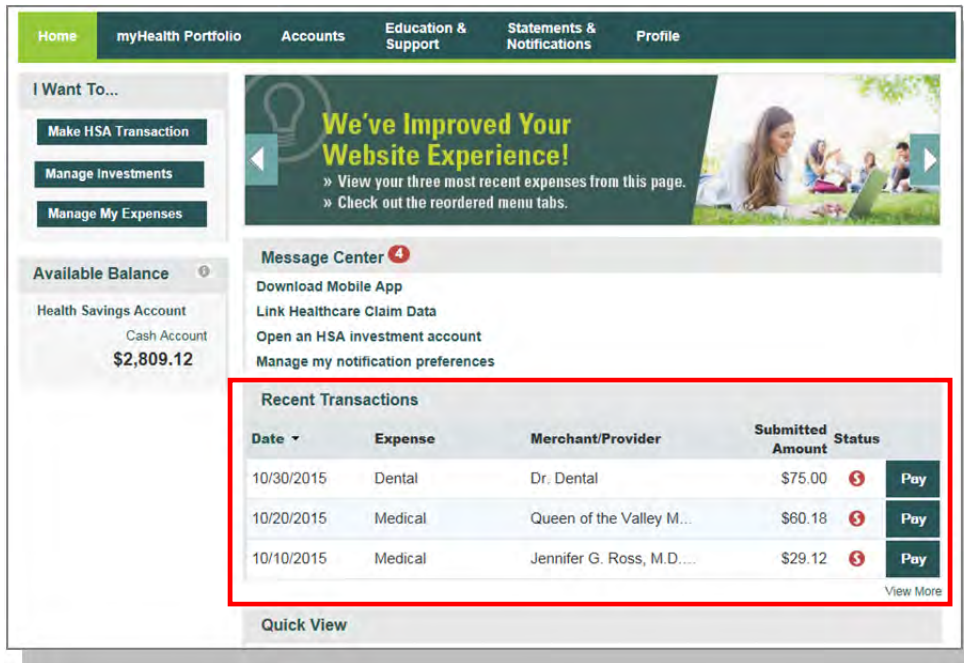
- Home
- myHealth PortfolioSM
- Accounts
- Education & Support
- Statements & Notifications
- Profile



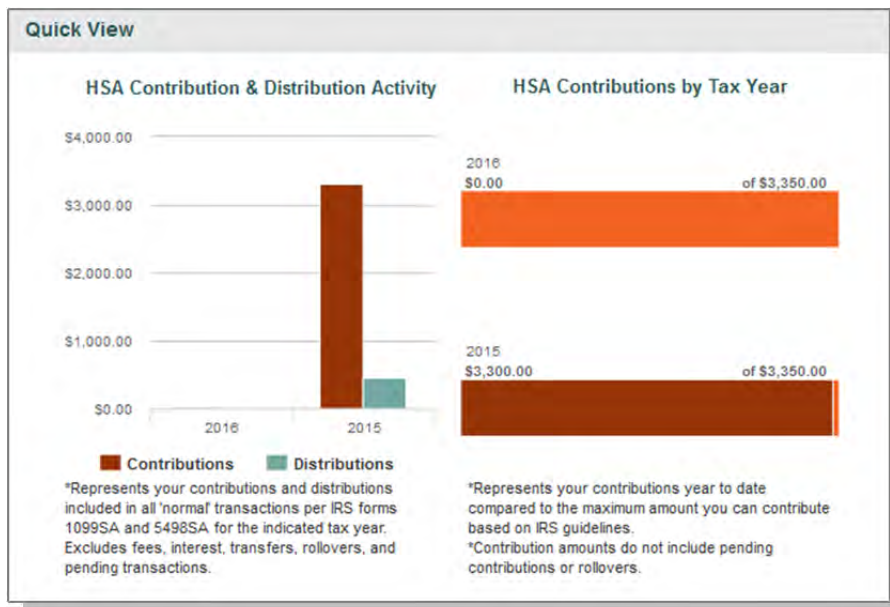
- Your **Message Center** on the homepage helps you stay on top of your account with a variety of notifications or calls to actions, such as a message to alert you once you are eligible to open an investment account, notice of external bank account that need to be validated, or a link to download the Mobile App.
- Click on the bolded text in the message center to navigate you to the page needed to execute the call to action.



- Below your Message Center you will see a snapshot of your 3 most recent expenses. You can click on the ‘**View More**’ link to review all expenses on the myHealth PortfolioSM tab.
- Click **Pay** if you paid out of pocket for an expense and need to be reimbursed or to pay a claim manually. If you’ve already done so, the Status in recent expenses will show as paid.



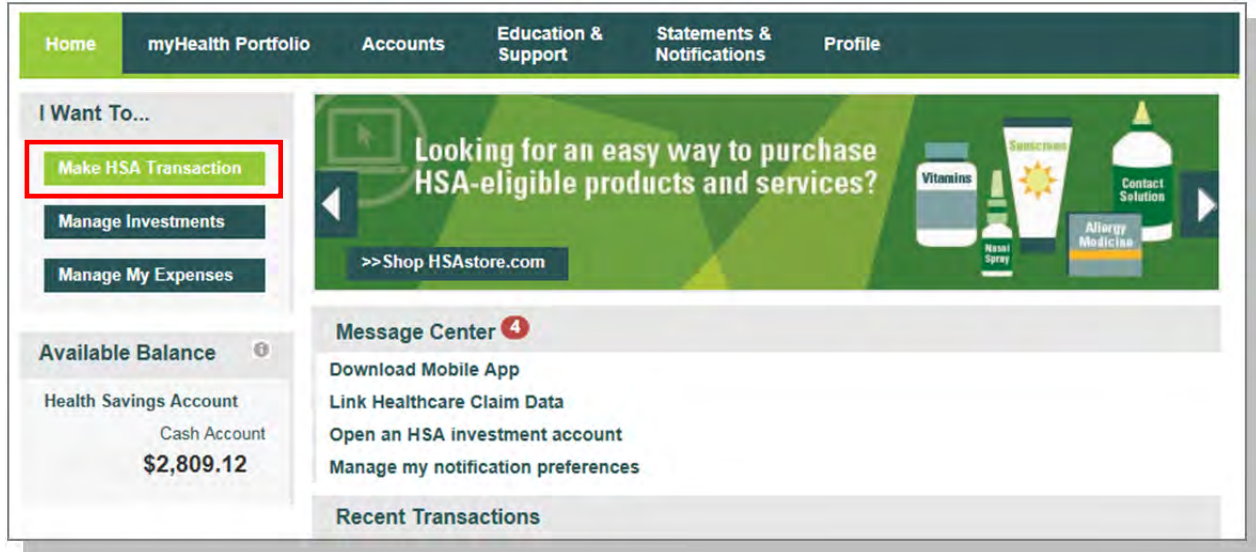
- At the bottom of the Home page is the Quick View section, which graphically displays key metrics, making it easy to track your contributions to date. You can also assess your saver vs. spender habits year-over-year with the contribution and distribution activity graph.



The HSA contribution and distribution graph reflects the maximum contribution limit based upon a Member’s HDHP coverage level (individual or family). Please contact HSA Bank if your contribution limit needs to be updated to reflect your current HDHP coverage level.

I want to... Make HSA Transaction (Withdrawal/Contribution)

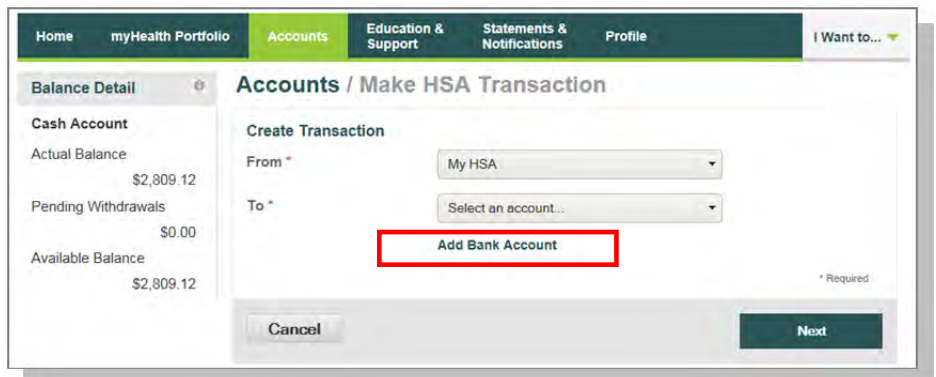
From the left hand side of the home page select **"I Want to... Make HSA Transaction"**. This feature can be used to transfer funds to or from your HSA.



Reimburse Yourself

The best way to reimburse yourself is to establish an Electronic Fund Transfer (EFT) with your external bank account and initiate a transaction from your HSA to your checking or savings account.

If you need to add an external bank account, click on the Add Bank Account link



Add External Bank Account

To add a new account, click on Add Bank Account, complete your banking information, and click on submit. (see Profile section in this guide for additional details)

Add Bank Account ✕

Bank Account Information

Routing Number *

Account Number *

Confirm Account Number *

Account Type * Checking ▾

Account Nickname *

Bank Institution Information

Bank Name *

Bank Address *

City

Select a state ▾

* Required

Cancel **Submit**

Pay Bill

- To provide additional payment flexibility while utilizing your HSA, you have the option to request a distribution check from your account. The check will be sent directly to the payee listed. Please follow the below instructions to successfully submit an online distribution request.

Note: Checks are mailed within 72 hours and take 5-6 days for delivery.

- From the Make HSA Transaction Page, select: My HSA in the **From** field and Someone Else in the **To** field and then click Next .

Accounts / Make HSA Transaction

Create Transaction

From * My HSA

To * Someone Else

Based on your selections, you will be requesting a distribution (withdrawal).

* Required

Cancel Next

Add a Payee

- You can add a new payee or select a previously added payee to send payment to.
- Enter the name of the person to be paid in the **Payee Name** field (information will appear on the printed check for reference).
- Complete the information (this will be who the check is made payable to).
- Include an account number if applicable. The Account Number will also appear on the printed check.
- Complete the address of where the check should be mailed.
- Once you have completed the Payee information, click Next.

Accounts / Make HSA Transaction

Payee Details

Payee * Add a New Payee Select a Saved Payee

Payee Name *
Enter who provided this service (this may be a physician, hospital, etc.)

For
When appropriate, provide the name of the person who received service.

Account Number *
Enter the account number that the payee uses to identify the service or recipient.

Payee Address *
Address Line 1

Address Line 2

Address Line 3

City
Select a state... Zip Code
Enter the address of physician, hospital, etc. who provided the service.

Summary

From My HSA

To Someone Else

Cancel Previous Next

Payment Transaction

- Enter the frequency one-time or schedule and click on Next.

Accounts / Make HSA Transaction

Transaction Schedule

Frequency * ⓘ One-time Schedule

Summary

From My HSA

To Someone Else

Buttons: Cancel, Previous, Next

Payment Transaction Details

Accounts / Make HSA Transaction

Transaction Details

Tax Description ⓘ Normal Distribution

Amount * \$

Expense ⓘ

Recipient/Patient ⓘ INVESTMENT TESTONE

Notes

Summary

From My HSA

To Someone Else

Schedule One-time

* Required

Buttons: Cancel, Previous, Next

- Enter the amount, category of the expense, recipient/patient, notes, and click on next.

Transaction Summary and Confirmation

- View the transaction summary and read and agree to the Distribution Disclaimer.
- Confirm the transaction and select Submit or enter another transaction.

Accounts / Transaction Summary

Transaction Summary (1)

From	To	Expense	Amount	
My HSA	Test	Dental	\$1.00	Remove
Total Amount			\$1.00	

Normal Distribution Disclaimer ✔ Agreed ▼

I certify I am the HSA account holder, beneficiary or other individual authorized to execute this distribution request. I am claiming reimbursement only for eligible expenses incurred during the applicable coverage period for myself and/or my legal dependent(s) under the plan. These expenses have not previously been reimbursed or will not be reimbursed under any other benefit plan, and will not be claimed as an income tax deduction. I certify that I am responsible for any consequences resulting from this distribution. I understand that my designated representative or custodian/trustee cannot provide legal advice. I indemnify and agree to hold the custodian/trustee and their designated representative harmless against any liabilities.

I confirm that the financial transaction I am about to initiate is for domestic purposes only and will not be sent internationally.

I have read, understand, and agree to the information and terms above.

Buttons: Cancel, Save for Later, Add Another, Submit

Make a Contribution

To make a post-tax contribution, from the Make HSA Transaction page, select a bank account on file in the **From** field and select My HSA in the **To** field. Note, if you do not have a bank account on file, you can click on 'Add Bank Account' and follow the steps.

Select your contribution schedule:

- One-Time
- Recurring (Schedule)

Tax Year	IRS Maximum	Processed	Scheduled	Pending	Maximum Contribution Available
2015	\$3,350.00	\$3,000.00	\$0.00	\$300.00	\$50.00

If you are making a contribution between January 1st and April 15th, you have the option to contribute to the prior tax year. Use the IRS Maximum Contribution detail presented to determine how much you can contribute for the applicable tax year. Click Next.

On the next screen you will confirm the transaction summary, agree to the contribution disclaimer, and click submit.

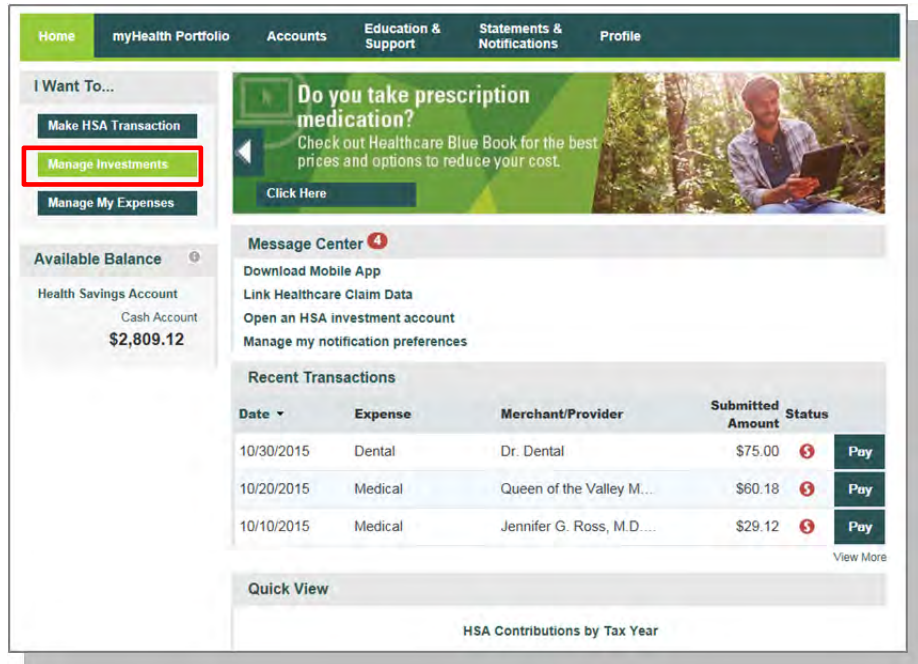
Contributions from your personal external bank account will generally be withdrawn within 2 to 3 business days of your request.

I want to...Manage Investments

This link takes you to the Manage Investments Page where you can open a self-directed investment account if you have met the minimum threshold required in your Health Savings cash account (if applicable).

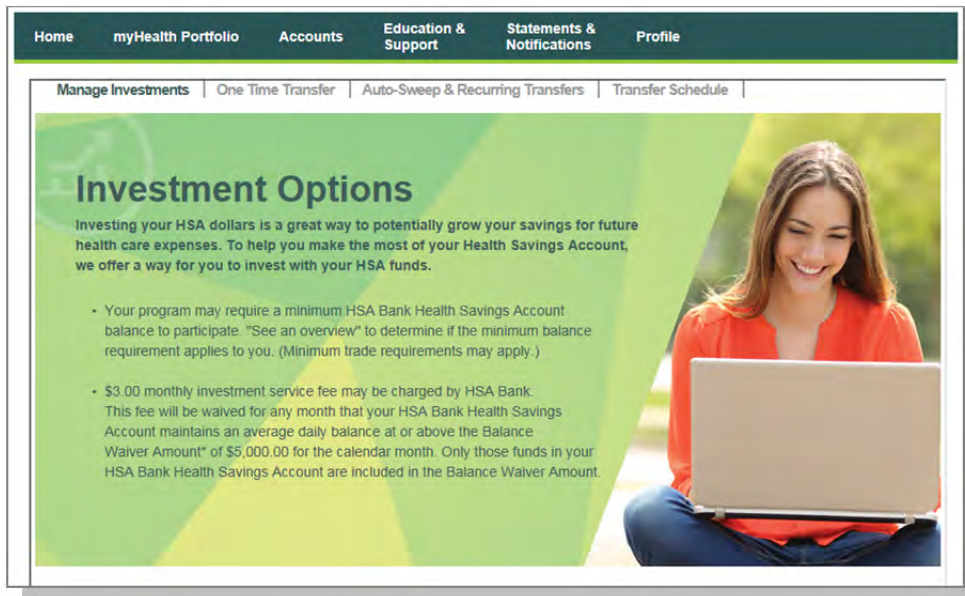
You may also access the Investments page by clicking the **Accounts** tab from the menu bar, and then clicking on the **Investments** tab on the left side panel.

Please note, the link on the homepage to Manage Investments and an overview of the options on the investment page are not available until you have the minimum balance in your HSA health savings cash account (if applicable).



Investments Overview and Options

To understand more about TD Ameritrade or Devenir self-directed investment options, click on the “See an Overview” link.



Click the Enroll Now button to establish a TD Ameritrade or Devenir Self-Directed Investment Account.

Your Investments at a Glance

TD Ameritrade

Gives you access to stocks, bonds, and thousands of mutual funds, plus:

- Provides trade confirmations and account statements
- Lets you set up multiple watch lists so you can monitor the securities you've selected to see how high or low they go
- Trading fees may apply

Trading fees may be applied by TD Ameritrade. [See an overview](#) of the TD Ameritrade investment process.

[Enroll Now](#)

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DEVENIR

Lets you invest in historically high-performing mutual funds with:

- No trading fees for a pre-selected group of mutual funds
- Online access to investment account balance, elections, trades and more through HSA Bank's portal
- Access to Morningstar® reports and other planning tools including an HSA asset allocation calculator
- An annual \$24 fee deducted prorata from your investment account balance may apply. To determine if this fee applies to you, click on "See an overview" below.

[View a list](#) of available mutual funds.

[See an overview](#) of the DEVENIR investment process.

[Enroll Now](#)

Manage Existing Self-Directed Investment Account

Once you have a self-directed investment account(s) opened, you will be able to see your Investments at a Glance. To manage your self-directed investment account, click on **Choose an Action** from the drop down under Manage Your Account.

The Manage your Investment Account drop down enables you to transfer funds to and from your investment account and view your account/transactions. You can make a one time transfer, create a schedule of transfers, or set cash balances above a designated amount to sweep over to the self-directed investment account.

Your Investments at a Glance

TD Ameritrade Self-Directed Investment Account ****0107

Fair Market Value As of close of Market 8/12/2015 \$909.06	HSA Bank Account Balance Available for transfer \$101.08	Manage Your Account Choose an Action Choose an Action Make a One-Time Transfer Set up Automatic Investment View Transfer Schedule Access TD Ameritrade
---	---	--

DEVENIR Mutual Fund Investment Account ****-727400

Fair Market Value As of close of Market 8/11/2015 \$0.00	HSA Bank Account Balance Available for transfer \$101.08	Manage Your Account Make a One-Time Transfer
---	---	---

Auto-Sweep Setup

- Under the Auto-Sweep & Recurring Transfers tab, select the Auto-Sweep radio button.
- Enter the sweep threshold; HSA cash account funds exceeding the sweep threshold will automatically be transferred into the specified investment accounts (% must equal 100%).
- The minimum sweep amount is \$25.00. Click continue.
- On the next page, you will be prompted to enter the last 4 digits of your Social Security Number to confirm the transfer details and set up the automatic sweep.

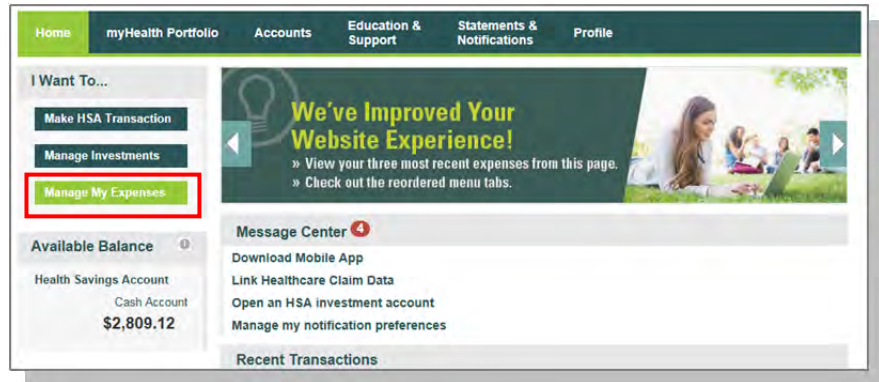
Recurring Transfer Setup

- Under the Auto-Sweep & Recurring Transfers tab, select the Recurring Transfer radio button.
- Select the desired accounts to set up the recurring transfer and specify the transfer amount.
- Select the Frequency and click Continue.

- On the next page, you will be prompted to enter the last 4 digits of your Social Security Number to confirm the transfer details and set up the recurring transfer.

I want to...Manage My Expenses

From the left hand side of the Home page, click on Manage My Expenses if you want to review, add, or export expenses.



myHealth PortfolioSM Dashboard

The Manage My Expenses button will take you to the myHealth PortfolioSM page. This page provides a complete picture of your healthcare expenses. It is a self service dashboard that allows you to:

- Store health expense data and receipts
- File claims or distribution requests
- Initiate a provider payment
- View an easy-to-read snapshot of your healthcare finances with charts and graphs
- Consolidate health expenses and claims from multiple insurance providers (this functionality may not be available to all members)

Further,

- The graph shows expenses by category, status, recipient and merchant provider. To change the view, click on reset graph and select the view you would like to see.

Expense Summary	Total Healthcare Expenses	Total Paid Expenses	Total Unpaid Expenses
	\$1,364.50	\$820.57	\$543.93

Total Eligible to Submit: \$914.35					
Date	Expense	Recipient/Patient	Merchant/Provider	Submitted Amount	Status
10/30/2015	Dental	INVESTMENT TESTTHREE	Dr. Dental	\$75.00	Unpaid
10/20/2015	Medical	INVESTMENT TESTTHREE	Queen of the Valley Med...	\$60.18	Unpaid
10/10/2015	Medical	INVESTMENT TESTTHREE	Jennifer G. Ross, M.D. Inc	\$29.12	Unpaid
10/8/2015	Medical	INVESTMENT TESTTHREE	Family Health Clinic	\$78.23	Paid

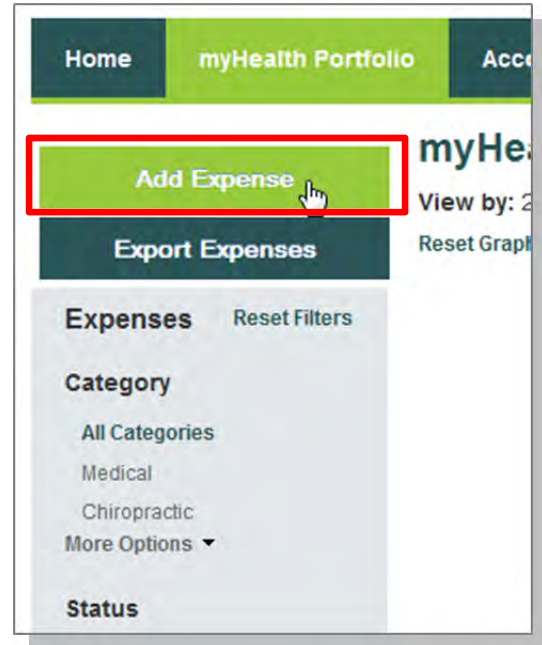
- Details of your expense transactions can be viewed by clicking on any expense.
- You can edit an expense; such as the category, by clicking on **Update Expense**. You also have to option to attach a receipt to the expense for convenient storage and easy access.
- You may also pay an expense by clicking the Pay button.

Date	Expense	Recipient/Patient	Merchant/Provider	Submitted Amount	Status
10/8/2015	Medical	-	-	\$78.23	Paid
9/29/2015	Medical	-	-	\$185.96	Paid
9/29/2015	Medical	-	-	\$185.96	Paid
9/2/2015	Medical	-	-	\$142.63	Unpaid

Expense Details	
Description: Office Visit	Date(s) of Service: 9/2/2015
Source: Online	Expense Amount: \$142.63
Received Date: 9/30/2015	Payable Amount: \$142.63
Upload Receipt(s)	Add Expense Note
Remove Expense	Mark as Paid
	Update Expense

Add Qualified Medical Expenses

- You may want to keep track of expenses paid for with funds other than your HSA Bank Health Benefits Debit Card. To add an expense to your portfolio, click on the Add Expense button on the left hand side of the screen. Keep in mind you can pay for a wide range of IRS-qualified healthcare expenses with your HSA, including many that aren't typically covered by health insurance plans. This includes deductibles, co-insurance, prescriptions, dental and vision care, and more.
- For a complete list of IRS-qualified healthcare expenses, visit irs.gov or hsabank.com/IRSQualifiedExpenses.



- Complete the information regarding the expense and click on Add.
- You also have the ability to attach/upload a healthcare receipt for easy access to it later.
- The expense will be reflected in the graph on the myHealth PortfolioSM dashboard.

The screenshot shows the 'myHealth Portfolio / Add Expense' form. The form is titled 'Expense Information' and contains several input fields:

- Expense Description***: Office Visit
- Date of Service***: 10/07/2015 (with a calendar icon)
- Total Billed Amount @**: \$ 20.00
- Expense Amount***: \$ 20.00
- Provider**: Dr. Z (with a link to 'Add Provider Address')
- Expense**: Medical (dropdown menu)
- Recipient/Patient**: INVESTMENT TESTTHREE
- Receipt**: Upload Receipt
- Source**: Online
- Date Received**: 10/7/2015
- Notes**: Paid in cash (dropdown menu)

 At the bottom of the form, there are two buttons: 'Cancel' on the left and 'Add' on the right. A small asterisk with the word '*Required' is located at the bottom right of the form area.

Pay Expense

Click **Pay** if you paid out of pocket for an expense and need to be reimbursed or to pay a claim manually.

Expense Summary		Total Healthcare Expenses	Total Paid Expenses	Total Unpaid Expenses		
		\$1,200.20	\$742.34	\$457.86		
Total Eligible to Submit:		\$750.05				
Date	Expense	Recipient/Patient	Merchant/Provider	Submitted Amount	Status	
10/7/2015	Medical	-	-	\$78.23	Unpaid	
9/29/2015	Medical	-	-	\$185.96	Paid	
9/29/2015	Medical	-	-	\$185.96	Paid	
9/2/2015	Medical	-	-	\$142.63	Unpaid	Pay
9/2/2015	Pharmacy	-	-	\$10.00	Unpaid	Pay
8/26/2015	Dental	-	-	\$95.00	Unpaid	Pay
7/29/2015	Chiropractic	-	-	\$45.00	Paid	

Export Expenses

To export your expenses to use for other purposes, click on the Export Expenses button on the left side menu bar.

The screenshot shows the 'myHealth Portfolio' dashboard. On the left sidebar, the 'Export Expenses' button is highlighted with a red box. The main area features a donut chart showing the distribution of expenses by category: Medical (orange), Vision (light green), Dental (yellow-green), Chiropractic (dark green), and Pharmacy (teal). Below the chart is a legend with color-coded boxes for each category.

Sample Excel Expense Export

Expense ID	Expense Category	Expense Description	Recipient, Merchant, Submitter	Expense Status	Expense Description	EOB Num	Source	Date Recd	Date(s) of Total Bill	Expense Amount	Payable Amount	Notes	Payee	Provider #	Provider Name
8454	7/7/2015	Other		20	Paid	doctor	Online	7/7/2015	7/7/2015	20	20	0			

Accounts

Account Summary (balances)

The Account Summary on the Accounts tab shows the Health Savings Cash Account Available Balance and the self-directed Investment Balance (if applicable).

The screenshot shows the 'Accounts / Account Summary' page for a Health Savings Account. The account number is 30315231. The available cash balance is \$2,809.12 and the investment balance is \$0.00.

Available Cash Balance	Investment Balance
\$2,809.12	\$0.00

Account Activity

The Account Activity page provides transaction details for your account. You can export transactions using the Export button. You can also see details of a specific transaction by clicking on the individual transaction.

The screenshot shows the 'Accounts / Account Activity' page for 'My HSA'. It displays a list of processed transactions with columns for Requested/Processed Date, Description, Method, Contribution (Deposit), Distribution (Withdrawal), and Available/Actual Cash Balance. There is also an 'Export' button and a 'Pending Transactions' section which is currently empty.

Processed Date	Description	Method	Contribution (Deposit)	Distribution (Withdrawal)	Actual Cash Balance
11/30/2015	Interest	None	\$0.23		\$2,809.12
11/05/2015	Transfer Cash to Investment	None		\$17.00	\$2,808.89
10/31/2015	Interest	None	\$0.22		\$2,825.89
10/22/2015	Participant Contribution	EFT	\$150.00		\$2,825.67
10/22/2015	Participant Contribution	EFT	\$150.00		\$2,675.67
10/08/2015	Distribution	Check		\$78.23	\$2,525.67
09/30/2015	Interest	None	\$0.24		\$2,603.90
09/29/2015	Distribution	Check		\$185.96	\$2,603.66
09/29/2015	Distribution	Check		\$185.96	\$2,789.62
09/08/2015	Transfer Cash to Investment	None		\$25.00	\$2,975.58

HSA Contributions by Tax Year

You can view HSA Contributions by Tax Year by clicking on the link on the bottom left hand side of the Account Activity screen.

HSA Contributions By Tax Year [View Example](#)

Tax Year	IRS Maximum	Contributions	Contributions from Future Years	Rollover	Remaining Contribution Amount *
2015	\$3,350.00	\$3,300.00	\$0.00	\$0.00	\$50.00

* Contributions for Prior Year are not included in the Remaining Contribution Amount.

Investment Account

10/22/2015	Participant Contribution	EFT	\$150.00	\$2,825.67
10/22/2015	Participant Contribution	EFT	\$150.00	\$2,675.67
10/08/2015	Distribution	Check	\$78.23	\$2,525.67
09/30/2015	Interest	None	\$0.24	\$2,603.90
09/29/2015	Distribution	Check	\$185.96	\$2,603.66
09/29/2015	Distribution	Check	\$185.96	\$2,789.62
09/08/2015	Transfer Cash to Investment	None	\$25.00	\$2,975.58

1 | 2 > Next >>

Education & Support

Account Education

The **Account Education** page will help answer your Health Savings Account questions and make the most of your account. The short videos will provide a demo of the member website, including how to make HSA distributions and contributions.

The links in the *'Make the Most of your HSA Dollar'* and *'Your Health Lifestyle'* sections will connect you to the online information and tools you need to manage your healthcare and related expenses.

The screenshot shows the HSA Bank website interface. At the top is a navigation bar with the following items: Home, myHealth Portfolio, Accounts, Education & Support (highlighted in green), Statements & Notifications, Profile, and I Want to... with a dropdown arrow. Below the navigation bar is a sidebar on the left with 'Account Education' (highlighted) and 'Tools & Support'. The main content area is titled 'Education & Support / Account Education'. It features a video player with a thumbnail showing a man and a child, titled 'Introduction to Health Savings Accounts (HSAs) Member Website'. Below the video player are four columns of links:

- GET TO KNOW YOUR HSA**
 - How to Use Your HSA
 - Member Website Guide
 - HSA Bank Mobile App
 - myHealth Portfolio
 - Individual Online HSA Contributions
 - Individual Online HSA Distributions
 - Frequently Asked Questions
 - Video: How to Navigate HSA Bank's Member Website
 - Video: How to Request HSA Distributions and Contributions
- MAKE THE MOST OF YOUR HSA DOLLAR**
 - Healthcare Bluebook
 - Medical Cost Advocate
 - HSA Savings Calculator
- YOUR HEALTHY LIFESTYLE**
 - Mayo Clinic Health Information
 - WebMD
 - WorldCare
- SAVE FOR THE FUTURE**
 - Investment Options
 - TD Ameritrade Self-Directed Brokerage Option
 - DEVENIR Self-Directed Mutual Fund Program
- IRS & TAX INFORMATION**
 - Annual IRS Contribution Limits
 - IRS-Qualified Medical Expenses
 - Reporting Your HSA on Your Taxes

Tools & Support

The **Tools & Support** page will provide you with forms, quick links, and a handy ‘How Do I?’ section that will quickly navigate you to the place you need to go in order to manage your account.

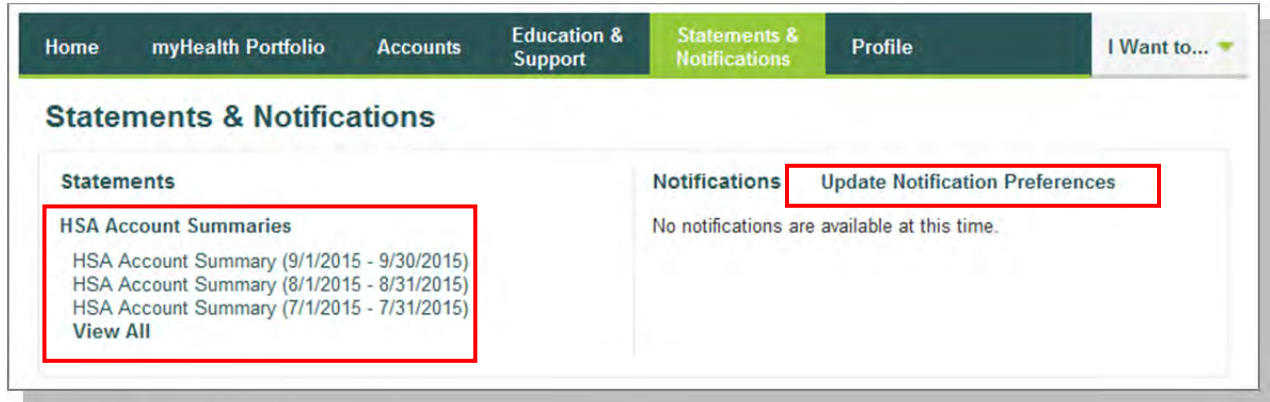
The screenshot displays the 'Education & Support / Tools & Support' page. The navigation bar includes 'Home', 'myHealth Portfolio', 'Accounts', 'Education & Support', 'Statements & Notifications', and 'Profile'. A sidebar on the left contains 'Account Education' and 'Tools & Support'. The main content area is organized into three columns:

- Documents & Forms:**
 - Forms:**
 - Authorized Representative HIPAA Form
 - Automatic Orthodontia Request Form
 - Coverage Level Update Form
 - Expense Eligibility List
 - HSA Contribution Form
 - HSA Death Beneficiary Form
 - HSA Death Distribution Form
 - HSA Direct Rollover-Transfer Form
 - HSA Distribution and Closure Form
 - HSA Verification Form
 - Medical Necessity Form
 - Name Change Request Form
 - Recurring Dependent Care Request Form
 - Reimbursement Request Form
 - HSA Tax Documents
 - Plan Summaries:**
 - Health Savings Account Plan Rules
 - Health Savings Account Plan Descriptions
 - Health Savings Account Plan Details
 - Health Savings Account Plan Documents
 - Rules & Agreements:**
 - Esign Consent Agreement
 - Online Services Agreement
 - Contact Us:**
 - HSA Bank Client Assistance Center
 - P.O. Box 939
 - Sheboygan, WI 53082
 - Phone: (855) 731-5213
 - Fax: (877) 851-7041
 - Email: askus@hsabank.com
- How Do I?:**
 - Change Payment Method
 - Update Notification Preferences
 - Download Mobile App
 - Update HSA Coverage Level
 - View Fee Schedule
- Quick Links:**
 - Explanation of HSA Bank Health Savings Account Fee and Statement Changes
 - Learn About FDIC Insurance Coverage
 - Member Website Guide
 - Privacy and Opt-Out Notice
 - Security
 - Website Demos

Statements & Notifications

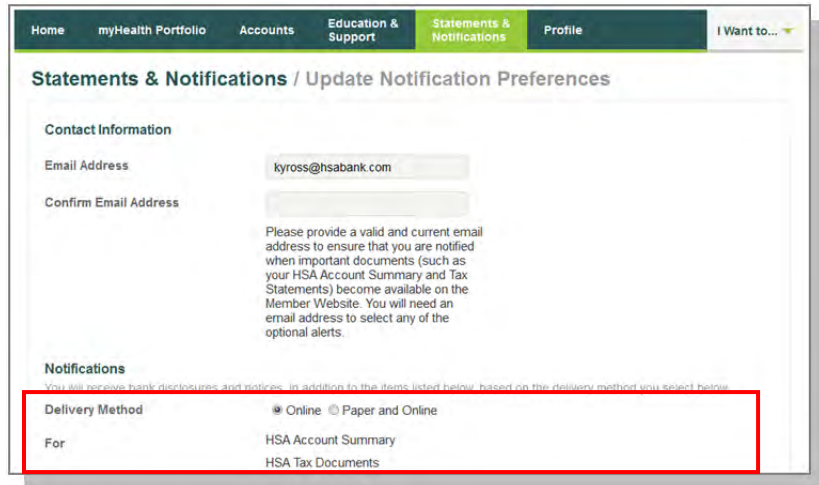
Statements

The **Statements & Notifications** tab provides access to statements and tax documents, and the ability to Update Notification Preferences. Click on the link to the statement you want to view. You may also print the statement.




Delivery Preferences

- Click on **Update Notification Preferences**.
- Under the notification section, you can view or change your delivery method preference for account summaries, tax forms, and certain bank disclosures and notices.



Notification Alerts

Under the delivery preference section, you will see Alert Options. Expand the notification categories to set, edit, or turn off notifications as appropriate.

Alert	Email 
Claim Alerts	
Contribution Alerts	
Contribution posted to your HSA	<input checked="" type="checkbox"/>
HSA available cash balance is below \$ <input type="text"/>	<input type="checkbox"/>
HSA contributions year-to-date are within \$ <input type="text" value="3,000"/> of the IRS maximum	<input checked="" type="checkbox"/>
Investment Alerts	
Eligible to open a HSA investment account <small>Automatically sent based on whether or not you have an email address</small>	Emailed
Payment Alerts	
Payment issued out of your account	<input type="checkbox"/>
Withdrawal from your HSA exceeds \$ <input type="text" value="200.00"/>	<input checked="" type="checkbox"/>
Statement Alerts	
HSA Account Summary is available online <small>Automatically sent based on whether or not you have an email address</small>	Emailed
HSA tax documents are available online <small>Automatically sent based on whether or not you have an email address</small>	Emailed
Debit Card Alerts	
Debit Card has been mailed	<input type="checkbox"/>

*Required

Profile

Profile Summary

The **Profile** tab will assist with reviewing your personal demographic information, along with offering the functionality to add an external bank account for online contributions and distributions from your HSA. Use the profile tab to view your setup details.

In addition to updating your demographic information, you can add dependents, beneficiaries, and/or authorized signers to your account.

Update Profile

Use the Profile link to update your address, phone number, email address, marital status, and gender. If your name has changed, please complete the Name Change Request Form located within the **Tools & Support** page under the **Education & Support** tab.

The screenshot shows the 'Profile / Profile Summary' page. The navigation bar includes: Home, myHealth Portfolio, Accounts, Education & Support, Statements & Notifications, Profile (highlighted), and I Want to... (dropdown). The left sidebar has: Profile (highlighted), Banking, and Login Information. The main content area is titled 'Profile / Profile Summary' and contains the following information:

Profile	Update Profile	Dependents	Add Dependent
INVESTMENT TESTTHREE 605 N 8TH ST SHEBOYGAN, WI 53081 (888) 888-8888 cemartin@hsabank.com		No dependents	
Gender	Marital Status	Beneficiaries	Add Beneficiary
Female	Single	No beneficiaries	
Employer ID	Employee ID	Authorized Signers	Add Authorized Signer
888994588	9000902618	No Authorized Signers	

Add Dependents

Use the Add Dependent link to add, view or update dependents. Dependents added will appear in myHealth PortfolioSM and the Make HSA transaction pages.

Add Beneficiary

You may designate a beneficiary to receive your Health Savings Account assets in the event of your death. If you are married and domiciled in a community property state, you may designate your spouse as primary beneficiary via the website. However, if you designate a non-spouse primary beneficiary, you must submit a beneficiary form with the notarized consent of your spouse.

The screenshot shows the 'Profile / Profile Summary' page with a red box highlighting the 'Dependents' and 'Beneficiaries' sections. The page shows the following information:

Profile	Update Profile	Dependents	Add Dependent
PVT TEST 31 TEST STREET CITY, ST 00000 EMAIL@HSABANK.COM		No dependents	
Gender	Marital Status	Beneficiaries	Add Beneficiary
Unspecified	Unspecified	No beneficiaries	
Participant Account ID		Authorized Signers	Add Authorized Signer
XXXXXXXX		TEST TEST	
		Birth Date: 1/1/1900	
		View / Update	

Add Authorized Signer

An authorized signer may be added through the Profile tab. Authorized Signers can access the account and submit updates on the account. Additionally, authorized signers normally get an HSA Bank Health Benefits Debit Card.

- Navigate to the Profile screen and click **Add Authorized Signer**.
- Complete the information and click on Submit button.

Banking/Cards

You can view HSA Bank Health Benefits Debit Card information, report lost and stolen cards, and request a replacement card on the Banking/Cards page.

Report a Lost or Stolen Card

- Submit the form to get a replacement card and cancel the Lost/Stolen card.

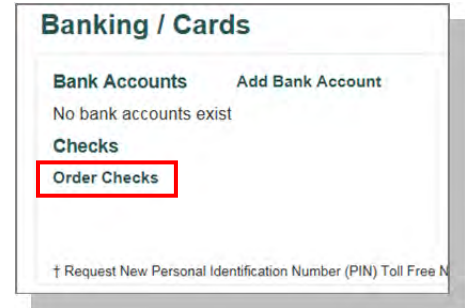
Order a Replacement Card

- Confirm your information is accurate and then click submit to order a Replacement Card. A card issuance fee may apply; please refer to your HSA Bank Fee and Interest Rate schedule for further information.

Order Checks (optional – fees may apply)

From the Profile screen and Banking/Cards tab, click on Order Checks.

- Complete the check order and click on the Order Checks button at the bottom of the page. The fee for the checkbook will be withdrawn from your HSA cash account. Please refer to your HSA Bank Fee and Interest Rate schedule for further information.



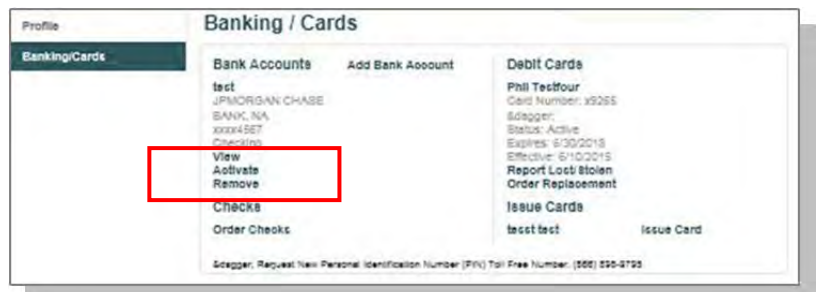
Add External Bank Account

- You must have an active external bank account on file in order to make an online contribution to or reimburse yourself from your HSA. If you need to set up your external bank account, click on the **Banking/Cards** tab.
- Click on the Add Bank Account link and enter the information regarding your checking or savings account and Financial Institution name and address. Click Submit button at the bottom of the screen.
- After you have submitted the account, HSA Bank will send a small deposit to your account within three (3) business days to verify your banking information.
- Once the deposit is received in your external account, you will validate your banking information using the steps below.

The screenshot shows the 'Banking / Add Bank Account' form. It has a navigation bar with 'Home', 'myHealth Portfolio', 'Accounts', 'Education & Support', 'Statements & Notifications', 'Profile', and 'I Want to...'. The form is divided into two main sections: 'Bank Account Information' and 'Bank Institution Information'. The 'Bank Account Information' section includes fields for 'Routing Number *', 'Account Number *', 'Confirm Account Number *', 'Account Type *' (with a dropdown menu set to 'Checking'), and 'Account Nickname *'. The 'Bank Institution Information' section includes fields for 'Bank Name *', 'Bank Address *' (with sub-fields for 'Address Line 1', 'City', 'Select a state...', and 'Zip Code'). There are 'Cancel' and 'Submit' buttons at the bottom. A '*Required' label is visible in the bottom right corner.

Validate External Bank Account

- Navigate to the **Banking/Cards** section of the **Profile** tab.
- Click on **Activate** under your bank account information.
- You will need to activate the account by entering the amount of the transaction from your checking/savings account.



- Enter the amount of the small transaction (\$0.01 to \$1.99) to your checking or savings account from Webster Bank in the amount field and click on submit.
- This account will now be available for direct deposit.

Banking / Activate Bank Account

Activation Details

To activate this bank account you must verify the amount that was deposited to the account below. You are allowed only five attempts before the account will be locked.

Bank Name JPMORGAN CHASE BANK, NA

Routing Number xxxx0337

Account Number xxxx#567

Amount * \$ |

Enter the amount deposited into your account.

Cancel **Submit**