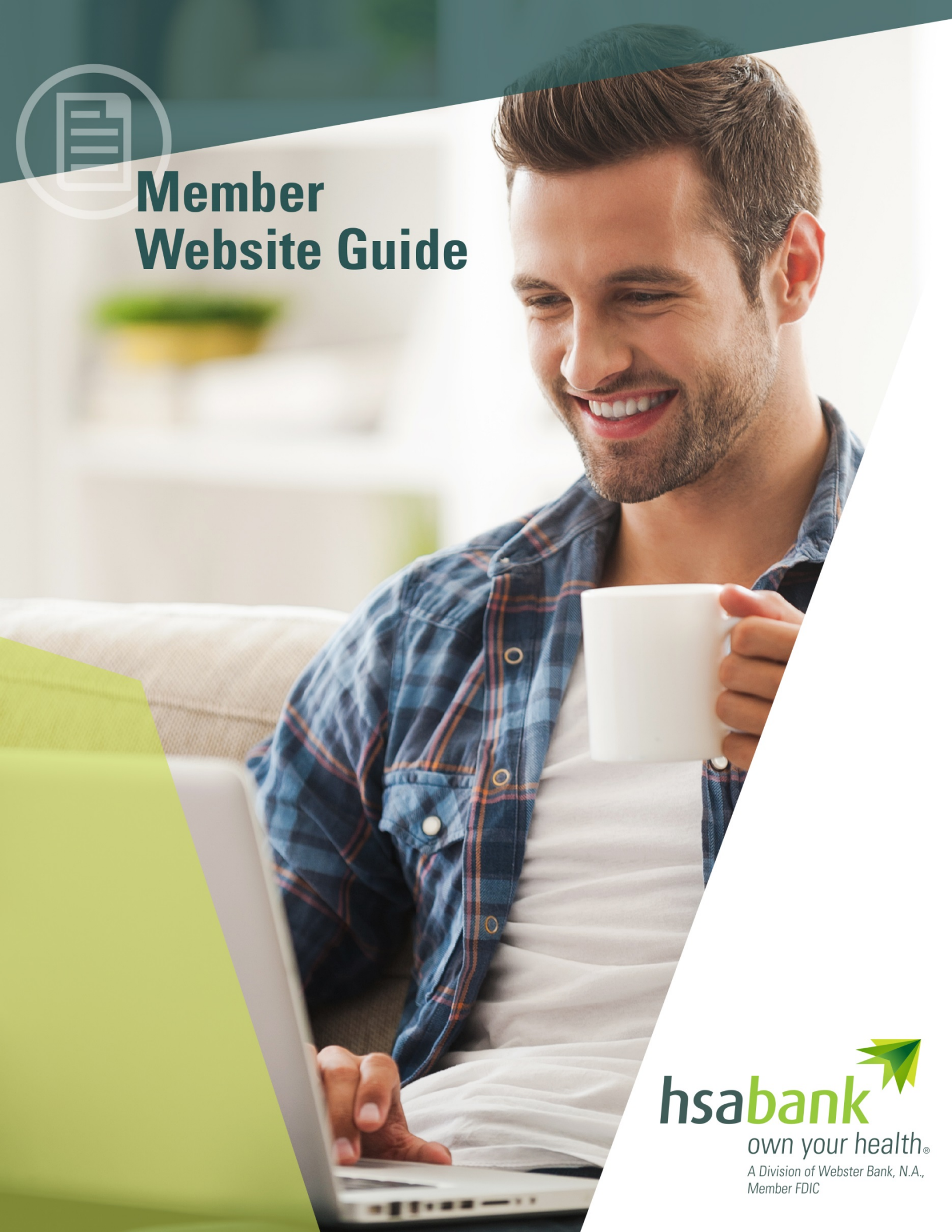




# Member Website Guide



**hsabank**   
own your health.®  
A Division of Webster Bank, N.A.,  
Member FDIC

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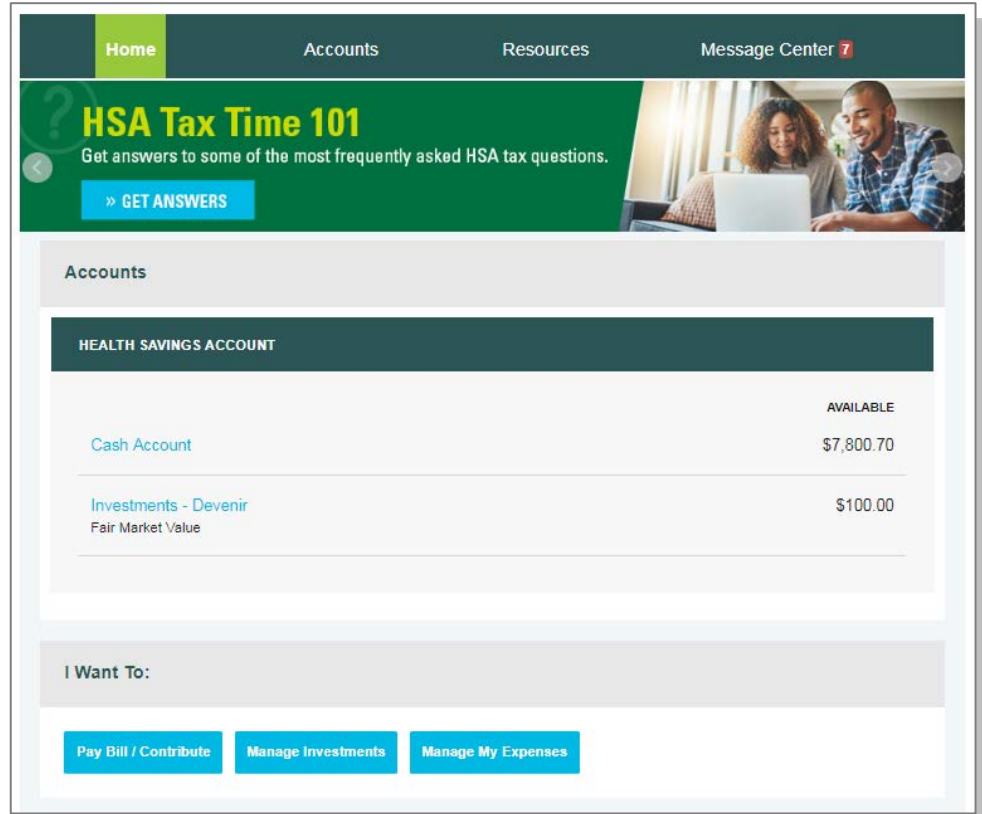
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## Member Website Overview

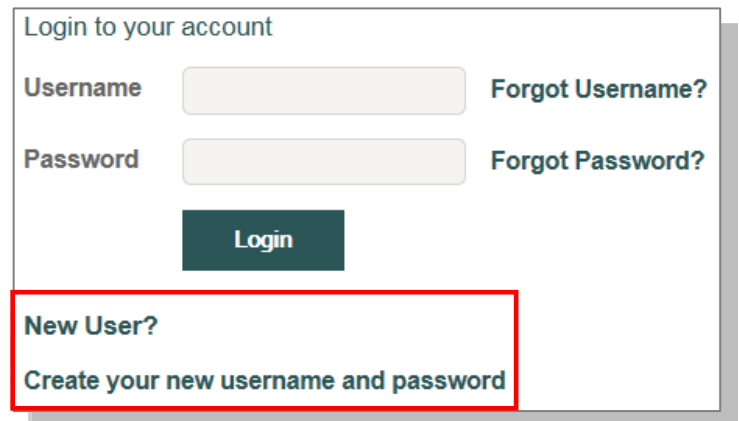
Welcome to HSA Bank! This guide will provide you with details about how to use the Member Website to manage your Health Savings Account (HSA). The Member Website gives you 24/7 online access to manage your account. Some of the key features you may want to take advantage of include:

- 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
- Setting up a Healthcare Savings Goal
- myHealth Portfolio<sup>SM</sup>



## Initial Login Process

To create your account online, go to [www.myhsabankaccount.com](http://www.myhsabankaccount.com). Click the “Create your new username and password” link from the bottom of the page.



**User Identification**

Complete the information below to verify your identity.

First Name\*

Last Name\*

Zip Code\*

SSN or Employee ID\*  -  -   
 -- OR --

\*Required

Next

**Step 1:**

Enter the identifying information requested on the page.

**Step 2:**

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

**Security Questions**

Please enter an answer to any 3 security questions to complete your user setup. To keep your information secure, you will be asked to answer a question to complete sensitive actions within the portal such as resetting a forgotten password.

In which city was your father born?  \*

What is the first name of the eldest of your siblings?  \*

When is your oldest child's birthday (MM/DD)?  \*

\*Required

Next

**Change Username and Password**

Please change your login information.

Username\*   
Your username may contain alphanumeric characters and any of the following special characters: period (.), at sign (@), underscore (\_), and dash (-).

New Password\*   
Your password must have a minimum of 8 characters. It cannot be one of your last 3 passwords. Allowable special characters include: exclamation mark (!), at sign (@), pound sign (#), dollar sign (\$), percentage sign (%), ampersand (&), and asterisk (\*).

Confirm Password\*

\*Required

Submit

**Step 3:**

Create your username and password.

**Step 4:**

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

**Agreements**

You must accept the terms and conditions for this account by reviewing and accepting all agreements listed below.

Esign Consent Agreement	Read and agree	<input checked="" type="checkbox"/> Agreed
Online Services Agreement	Read and agree	<input checked="" type="checkbox"/> Agreed

Fee Schedule

Submit

**Step 5:**

Please enter and confirm your email address to ensure that you receive notifications based on your elected preferences. You can enter your mobile number if you would like to opt in to any text alerts.

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

Note: You may update this information later by clicking the Message Center tab, then clicking Update Notification Preferences in the top right corner of the page.

**Message Center / Update Notification Preferences**

Receive text alerts about your account through your mobile phone! You can configure which notification you would like to receive via text message below. Standard text message rates may apply. Disable text alerts by unchecking the boxes below.

**Contact Information** \*Required

Mobile Number\* ( ) -

Mobile Carrier\* ■    
Your mobile number will be used only for the purpose of servicing your benefit plan account. This information will not be used for any solicitations.

Time Zone\* ■

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.

**Future Login**

When you return to log in again, enter the username and password that you created in step 3 and click Login. If your account is locked, please contact HSA Bank’s Client Assistance Center at 800-357-6246.

**Existing User?**

Login to your account

Username  [Forgot Username?](#)

Password  [Forgot Password?](#)

**Forgot Username/Password**

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

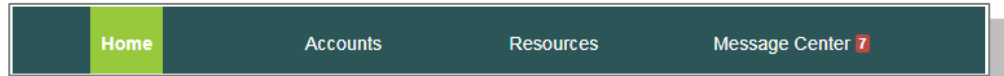


## Navigate from the Home Page

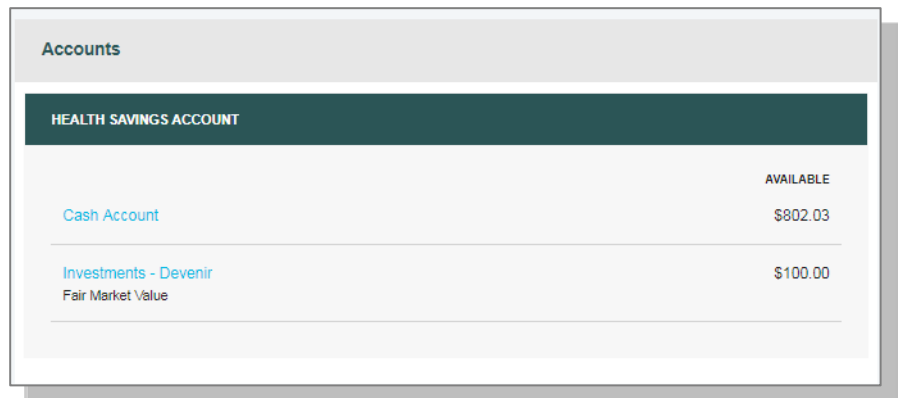
The HSA Bank Home page will be displayed on your screen each time you log in to the site. Each tab from your Home page offers an easy-to-use navigation system for viewing information on your account.

- Starting with the top navigation, you can access information using 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.

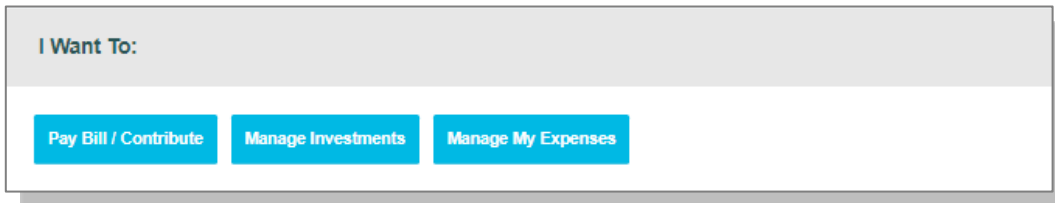
- Home
- Accounts
- Resources
- Message Center



- Your account(s) and balance(s) will conveniently show at the top of the page so that you can easily keep track of your HSA and any investment accounts you have.



- Below your account information, the “I Want To...” links help you to easily take actions related to your account:
  - Pay Bill/Contribute (contribution or withdrawal)
  - Manage Investments (if applicable)
  - Manage My Expenses



- After the I Want To... buttons, you will see a snapshot of your three most recent expenses. You can click the “View full table” link on the bottom right to review all expenses on the myHealth Portfolio tab.

Recent Transactions					
DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
10/10/2018	Medical	AMERICAN CLUB	Dr. Rossenburg	\$45.00	\$ Pay
6/12/2018	Vision	AMERICAN CLUB	Kohler Optometry	\$25.00	\$ Pay
3/23/2018	Dental	AMERICAN CLUB	Dr. Roth	\$50.00	\$

[View full table](#)

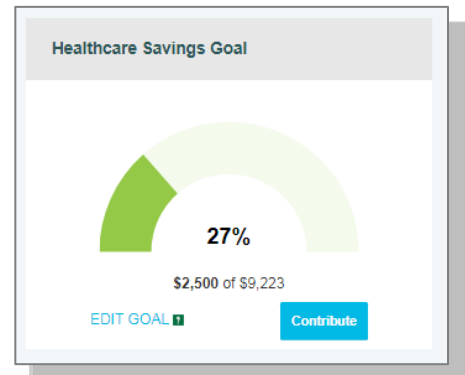
- Click Pay if you paid out of pocket for an expense and need to be reimbursed or to pay a claim manually. If you’ve already done so, the status shows as paid.

- The Quick Links section provides easy access to common actions and fast navigation to frequently used pages, including the Member Website Guide. Clicking any of the links will take you directly to the related page on the website to complete the action or see the information described.

### Quick Links

- [Member Website Guide](#)
- [View Transaction History](#)
- [Order Debit Card](#)
- [Statement Preferences](#)
- [Update HSA Beneficiaries](#)
- [Add HSA Authorized Signer](#)
- [Add External Bank Account](#)
- [Manage Account Alerts](#)
- [Privacy and Opt-Out Notice](#)

- Below the Quick Links section, you will see the Healthcare Savings Goal tool. This interactive tool enables you to set a savings goal for future out-of-pocket medical costs, or both. [Click here for more information on setting up or editing a Healthcare Savings Goal.](#)



- Your Tasks section on the Home page helps you stay on top of your account with a variety of notifications or calls to action, such as a message to alert you once you are eligible to open an investment account (if applicable), a notice of an external bank account that needs to be validated, or a link to download the mobile app.

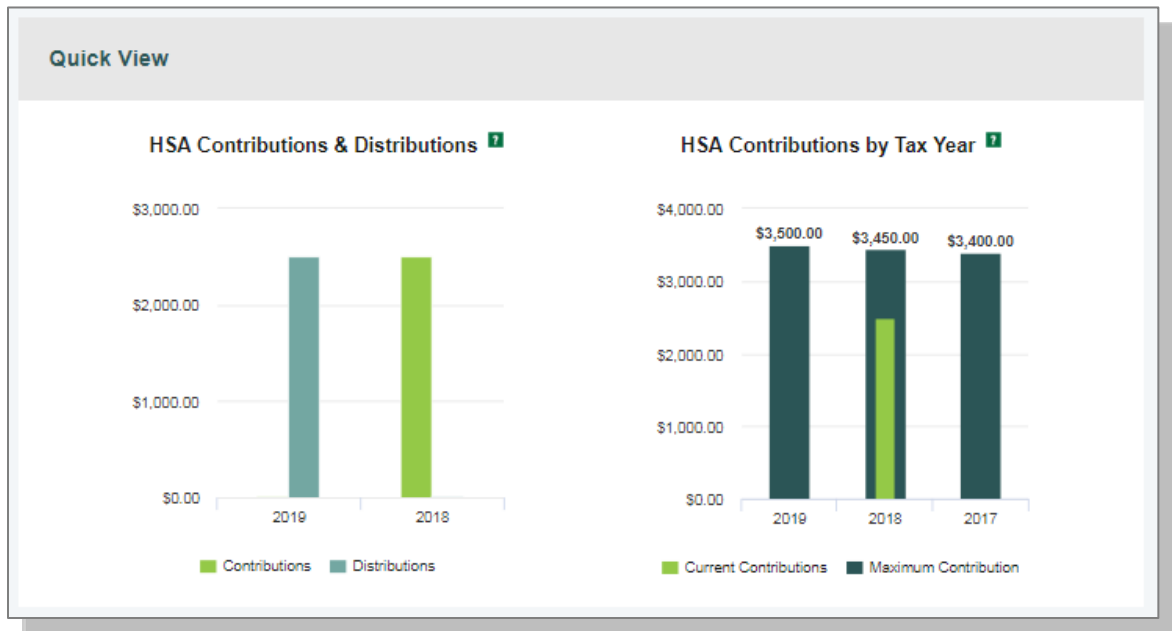
### Tasks 1

To get your money faster, set up a bank account for direct deposit

- Click the bold text in the Tasks section to navigate to the page needed to execute the call to action.



- At the bottom of the Home page is the Quick View section, which graphically displays key metrics that make it easy to track your contributions each year. You can also assess your year-over-year saver vs. spender habits with the HSA Contribution & Distribution Activity graph.

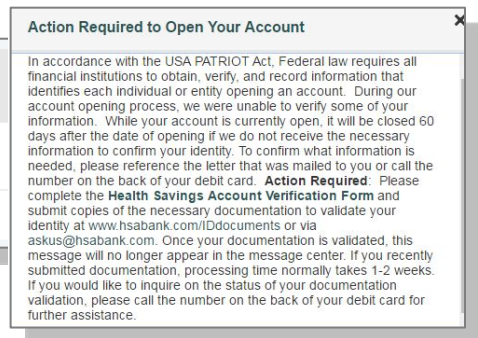
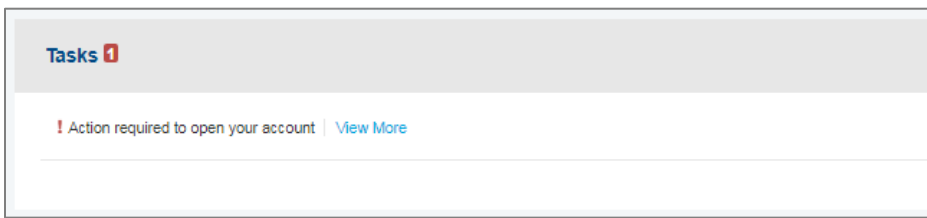


The HSA Contribution & Distribution Activity graph reflects the maximum contribution limit based on a member’s high-deductible health plan (HDHP) coverage level (individual or family). Please contact HSA Bank if your contribution limit needs to be updated to reflect your current HDHP coverage level.

## Tasks

The Tasks section helps you make the most of your account by highlighting action items, such as downloading the mobile app to stay connected to your account on the go or confirming a linked external bank account. Clicking each item brings you to the relevant page or popup with more information.

When first opening your account, you may see a message indicating that action is required to finalize the opening of your account.

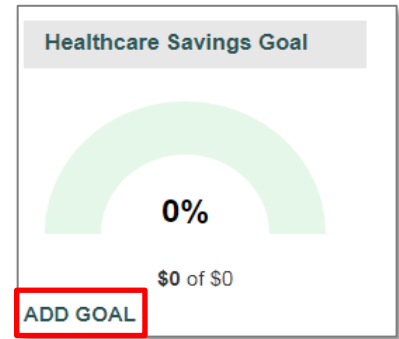


- This message indicates that HSA Bank needs additional documentation to maintain your open account. Clicking View More provides additional information on why we require this and how to submit your documentation.
- You will also receive a letter in the mail with specific information on what is needed from you and how to send us the required documents.

## Healthcare Savings Goal

Looking to save money for current or future healthcare expenses but not sure where to start? The Healthcare Savings Goal tool can help you stay on track to meet your goals and give you an easy visual reminder of how close you are to meeting them.

- To get started, click Add Goal.
- The first step shows three goal options:
  - Save enough to cover my current year out-of-pocket medical costs
  - Build savings for future out-of-pocket medical costs
  - Save for current and future out-of-pocket medical costs
- Select the goal that best meets your needs and click Next.



**Tools & Support / Healthcare Savings Goal**

Update My Healthcare Savings Goal (Step 1 of 3) \* Required

Hi Nora!  
First, you need to set a goal. Once your goal is set, we will help you track your progress.  
Select a goal below to get started.

What are your healthcare savings goals? \*

- Save enough to cover my current year out-of-pocket medical costs
- Build savings for future out-of-pocket medical costs
- Save for current and future out-of-pocket medical costs

- Based on the goal you select, fill in the required fields on the next page. Some of the data shows automatically (such as your current HSA balance), and other fields prepopulate with suggested information.
- When you have entered the information that best reflects your savings goal, click Next.

**Tools & Support / Healthcare Savings Goal**

Saving for Current and Future Expenses (Step 2 of 3) \* Required

Help us understand what you need to save. First, we will look at your current savings:

Your current HSA balance is \$ 0.00

Do you have other savings to include toward your target healthcare savings?

Next, we will look at your annual expenses:

What is your annual health plan deductible?\*

Do you have other anticipated medical costs this year?\*

Now that we know your current savings, tell us about your future savings goals:

What is your target savings?\*

What year do you plan to start using the money you've saved?\*

Finally, tell us your thoughts on your investing your savings with your HSA:

Are you planning on investing a portion of your HSA?\*  Yes  No

What is your anticipated annual rate of return?\*  %

- In the final step, review your goals. You can click the “How was my goal calculated?” link for more information or Previous if you would like to go back and change any information.
- When you are ready to finalize your goal, click Save My Goal.

### Tools & Support / Healthcare Savings Goal

**Goal Amount (Step 3 of 3)** \* Required

Based on the information you've provided, here are your goals: How was my goal calculated?

Future Savings Goal	\$124,850.00
Annual Goal	\$6,693.69
Monthly Goal	\$557.81

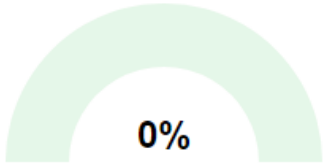
When reviewing your savings goals, please keep in mind that your actual annual contribution amount should not exceed the applicable IRS maximum limits for your health savings account. Saving over multiple years can help you reach your long-term goals.

Please note: The calculated goal is intended to be used as a guide and does not constitute financial advice. Contact your financial or tax adviser for advice specific to your situation.

Cancel
Previous
Save My Goal

- Once your goal is saved, you can edit it at any time by clicking Edit Goal.
- Clicking the Contribute button makes it easy to contribute money from your external bank account to your HSA.
  - **In order to avoid a 6% excise tax on excess contributions, please calculate your annual HSA contribution amount to ensure that it does not exceed the IRS’ annual contribution limits. If you are age 55 or older, and not enrolled in Medicare, you are eligible for a catch-up contribution of \$1,000.**

### Healthcare Savings Goal



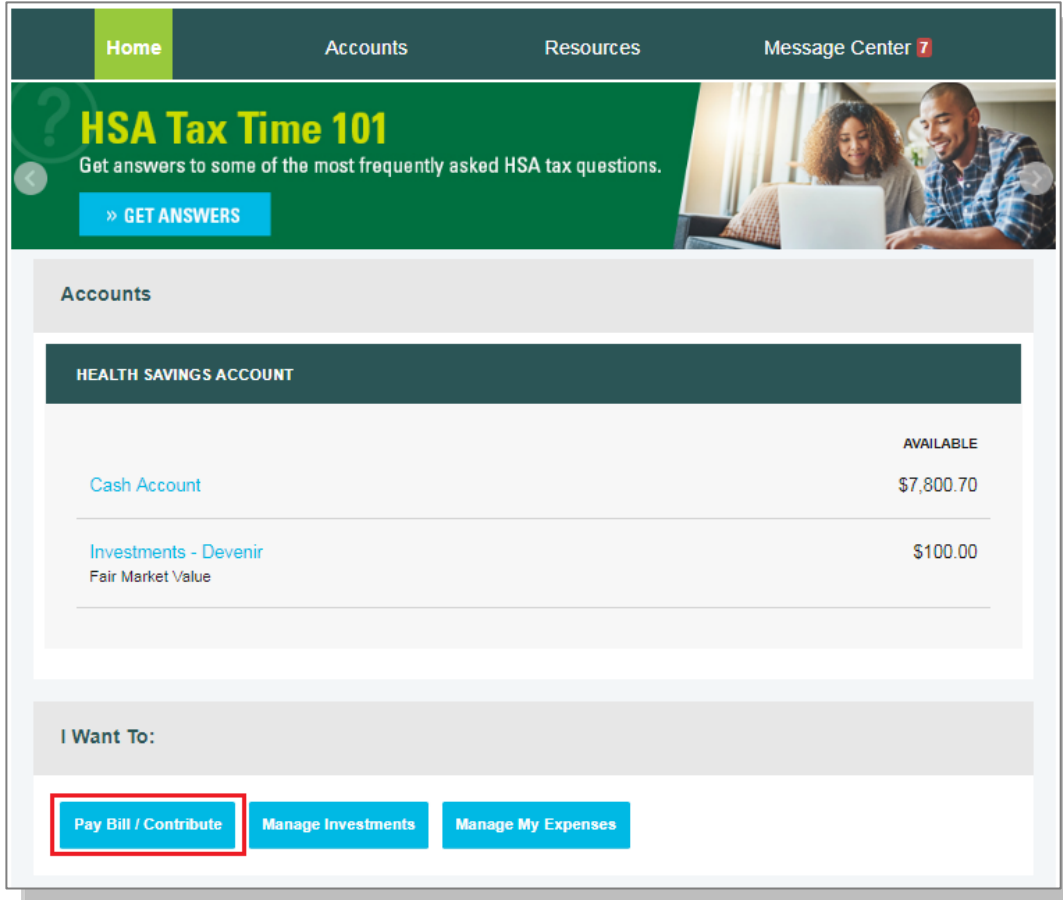
0%

\$0 of \$124,850

EDIT GOAL
Contribute

## I Want To...Pay Bill/Contribute (Withdrawal/Contribution)

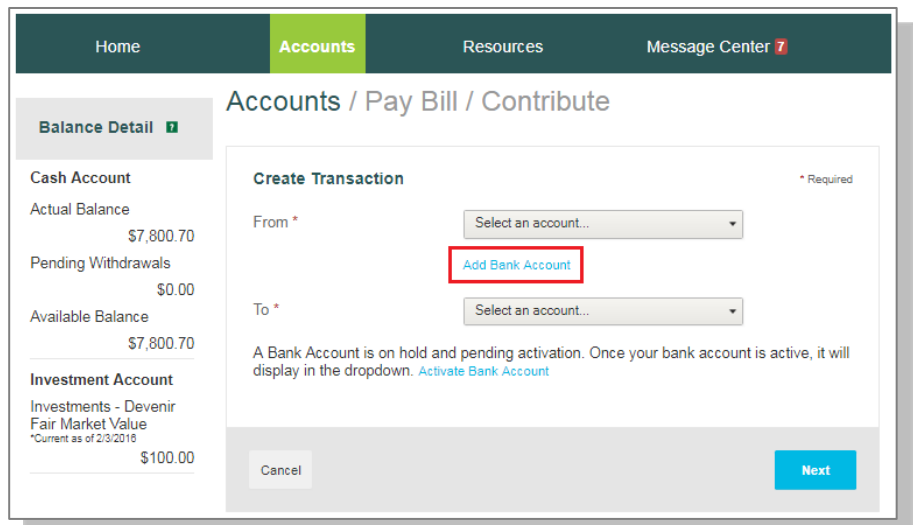
From the buttons under your account balance(s), select Pay Bill/Contribute. This feature can be used to transfer funds to or from your HSA.



### 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 Add Bank Account and follow the instructions below.



## Add External Bank Account

To add a new account, complete your banking information on the “Add Bank Account” popup and click Submit. (See the [Profile section](#) for additional details.)

The screenshot shows a form titled "Add Bank Account" with two main sections: "Bank Account Information" and "Bank Institution Information".

- Bank Account Information:** Includes fields for Routing Number, Account Number, Confirm Account Number, Account Type (with a dropdown menu set to "Checking"), and Account Nickname.
- Bank Institution Information:** Includes fields for Bank Name, Bank Address (with sub-fields for Address Line one, City, and a dropdown for "Select a state..."), and Zip Code.

At the bottom of the form are "Cancel" and "Submit" buttons.

## 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 Pay Bill / Contribute page, select “My HSA” from the “From” dropdown and “Someone Else” from the “To” dropdown, and then click Next.

The screenshot shows a form titled "Accounts / Pay Bill / Contribute" with a section titled "Create Transaction".

- Create Transaction:** Includes two dropdown menus: "From" (set to "My HSA") and "To" (set to "Someone Else").

Below the dropdowns, it states: "Based on your selections, you will be requesting a distribution (withdrawal)."

At the bottom of the form are "Cancel" and "Next" buttons.

### 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 (this will be to whom the check is made payable).
- Optionally, you can include the name of the person who received the service in the “Who is this for?” field.
- Enter the account number of the payee; this will also appear on the printed check.
- Complete the payee address for where the check should be mailed.
- If this payee may be used again, leave the “Save new payee information” box checked.
- Otherwise, uncheck it if you do not want this payee’s information saved.
- Once you have completed the payee information, click Next.

#### Accounts / Pay Bill / Contribute

**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.)

Who is this 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.  
 Save new payee information

**Summary**

From **My HSA**

To **Someone Else**

Cancel
Previous
Next

### Payment Transaction

- Enter the frequency (one-time or schedule, for a recurring payment) and click Next.

#### Accounts / Pay Bill / Contribute

**Transaction Schedule**

Frequency \*  One-time  Schedule

**Summary**

From **My HSA**

To **Someone Else**

Cancel
Previous
Next



## Payment Transaction Details

**Accounts / Pay Bill / Contribute**

**Transaction Details** \* Required

Tax Description ⓘ Normal Distribution

Amount \*

Expense ⓘ

Recipient/Patient ⓘ  Nora Abdo

Notes

**Summary**

From My HSA

To Someone Else

Schedule One-time

Enter the amount of the expense, the expense category, the recipient/patient, and any notes, and then click Next.

## Transaction Summary and Confirmation

- View the transaction summary and read and agree to the Normal Distribution Disclaimer.
- Confirm the transaction and click Submit or enter another transaction by clicking Add Another.

**Accounts / Transaction Summary**

**Transaction Summary (1)**

From	To	Expense	Amount	
My HSA	Test	Dental	\$1.00	<input type="button" value="Remove"/>
<b>Total Amount</b>			\$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.

## Make a Contribution

To make a post-tax contribution, from the Pay Bill / Contribute page, select a bank account on file from the "From" dropdown and select "My HSA" from the "To" dropdown.

*Note: If you do not have a bank account on file, you can click Add Bank Account and follow the steps in the section, [Add External Bank Account](#) in this guide.*

**Home** **Accounts** Resources Message Center 7

**Accounts / Pay Bill / Contribute**

**Balance Detail** ⓘ

**Cash Account**

Actual Balance \$7,800.70

Pending Withdrawals \$0.00

Available Balance \$7,800.70

**Investment Account**

Investments - Devenir Fair Market Value \*Current as of 2/3/2018 \$100.00

**Create Transaction** \* Required

From \*

[Update Bank Account](#)

To \*

A Bank Account is on hold and pending activation. Once your bank account is active, it will display in the dropdown. [Activate Bank Account](#)

Based on your selections, you will be requesting a contribution (deposit).

- Select your contribution schedule:
  - One-time
  - Schedule (recurring)

Accounts / Pay Bill / Contribute

**Transaction Schedule**

Frequency \*  One-time  Schedule

Schedule \*  Monthly  Weekly

Day:  of every  month(s)

On the:   of every  month(s)

Start Date \*

End Date  None  End by

**Summary**

From: Test Account / Checking (xxxx9999)

To: My HSA

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

Select the tax year (if applicable), enter the amount, and add any notes if needed. Click Next.

On the next screen, confirm the transaction summary, agree to the contribution disclaimer, and click Submit.

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

Accounts / Pay Bill / Contribute

**Transaction Details** \* Required

Tax Year \*

Amount \* \$

Notes

IRS Maximum Contribution Amount

TAX YEAR	IRS MAXIMUM	PROCESSED	SCHEDULED	PENDING	MAXIMUM CONTRIBUTION AVAILABLE
2018	\$3,450.00	\$0.00	\$0.00	\$2,500.00	\$950.00
2017	\$3,400.00	\$0.00	\$0.00	\$0.00	\$3,400.00

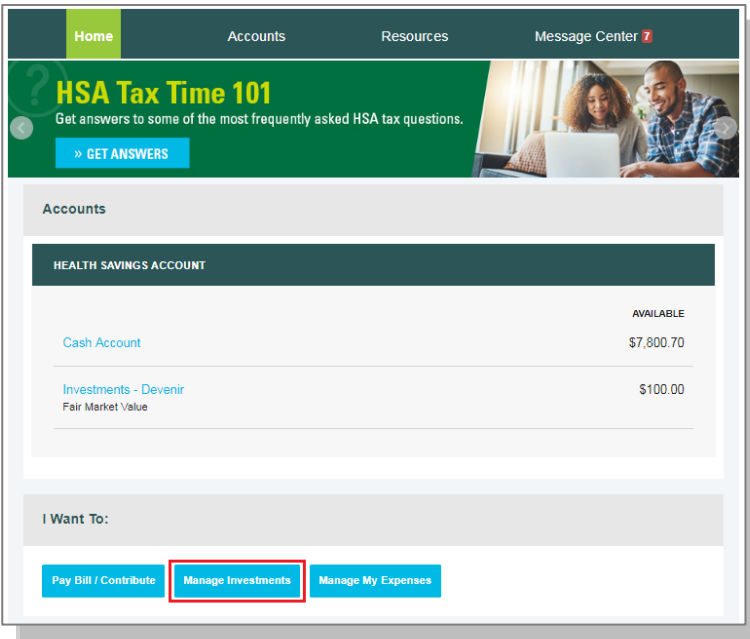
**Summary**

From: Test Account / Checking (xxxx9999)

To: My HSA

Schedule: Scheduled

## I Want To...Manage Investments



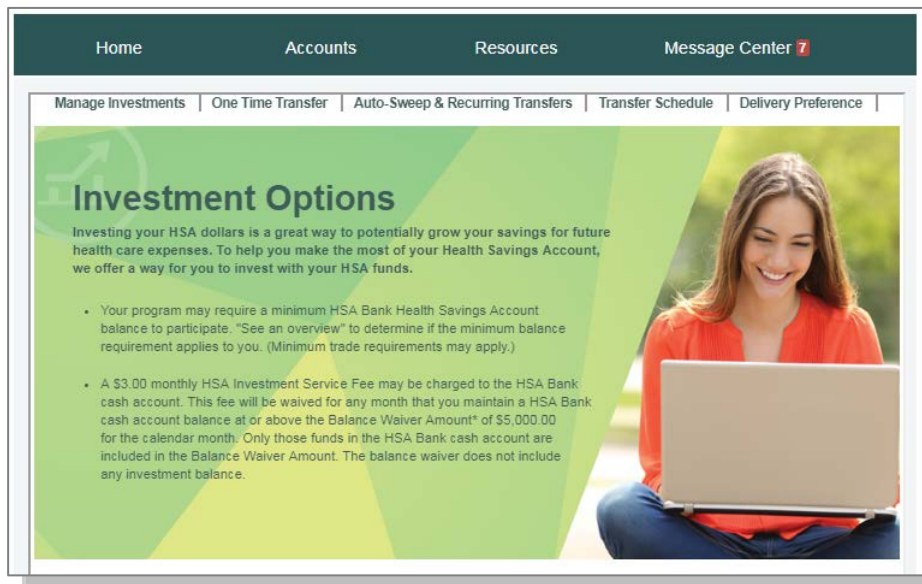
This link takes you to the Manage Investments page, where you can open a self-directed investment account if you have met the minimum threshold required in your HSA (if applicable).

You can also access the Manage Investments page by clicking the Accounts tab from the menu bar and then clicking the Investments tab on the left-side panel.

Note: the Manage Investments link on the Home page and an overview of the options on the Manage Investments page are not available until you have the minimum balance in your HSA (if applicable).

## Investments Overview and Options

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



*Investment accounts are not FDIC insured, and they are not bank guaranteed. Investment accounts are not a deposit account or an obligation of HSA Bank, and they may lose value. They are not guaranteed by any federal government agency. Performance data and ratings represent past performance and are not a guarantee of future results. Investment returns and principal value will fluctuate and investors' shares, when sold, may be worth more or less than their original cost.*

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](#)

Brokerage services are provided by TD Ameritrade, Inc., member FINRA/SIPC/NFA. TD Ameritrade is a trademark jointly owned by TD Ameritrade IP Company, Inc. and the Toronto-Dominion Bank used with permission.

**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, select “Choose an Action” from the dropdown under “Manage Your Account”.

The “Manage Your Account” dropdown enables you to transfer funds to and from your investment account and view your account and 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 <b>\$909.06</b>	HSA Bank Account Balance Available for transfer <b>\$101.08</b>	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 <b>\$0.00</b>	HSA Bank Account Balance Available for transfer <b>\$101.08</b>	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 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 four digits of your Social Security number to confirm the transfer details and set up the automatic sweep.
- *Note: If you need to transfer funds back to your cash account to pay for IRS-qualified medical expenses, you must temporarily suspend your sweep or the funds will be swept back into the investment account.*

Select one of the following options:

I want to set up Auto-Sweep:

I want to set up a Recurring Transfer:

---

Select the account you want to transfer from: HSA \*\*\*\*5376

Indicate the percentage you wish to distribute to your account(s): 100 % Devenir \*\*\*\*\*811640

Sweep Threshold:  Minimum \$ 100

HSA cash account funds exceeding the Sweep threshold will automatically be transferred into the specified investment account(s)

**Minimum Sweep: \$25.00**

Minimum amount that will be transferred from your HSA to the specified investment account(s) when you exceed the Sweep Threshold.

Cancel >> Continue

### 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.

Select one of the following options:

I want to set up Auto-Sweep:

I want to set up a Recurring Transfer:

---

Select the account you want to transfer from: HSA \*\*\*\*4516 Available balance: \$990.06 as of 8/5/2015

Select the account you want to transfer to: Ameritrade \*\*\*\*0107 Available balance: \$0.00 as of 8/5/2015

Transfer Amount: 25 Minimum \$ 25

Frequency: BiMonthly

1st and 15th of each month

Cancel >> Continue

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

**Confirm your Transfer(s)**

Review the details of your transfer(s) below. To confirm your transfer(s), provide the last four digits of your Social Security Number and click the Confirm button below.

Social Security Number (last four digits):

Cancel >>CONFIRM

---

**Transfer Details**

From Account: HSA \*\*\*\*4516

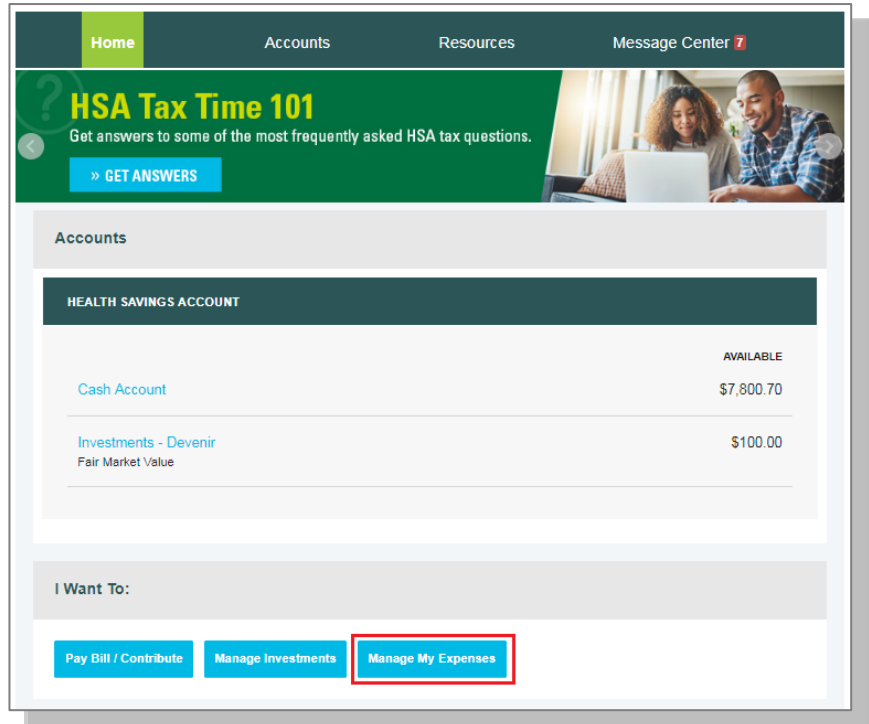
To Account(s): Ameritrade \*\*\*\*0107

Transfer Amount: \$25.00

Frequency: BiMonthly : Transfer will be scheduled on 1st and 15th of every month

## I Want To...Manage My Expenses

From the buttons under your account balance(s), click Manage My Expenses if you want to review, add, or export expenses.



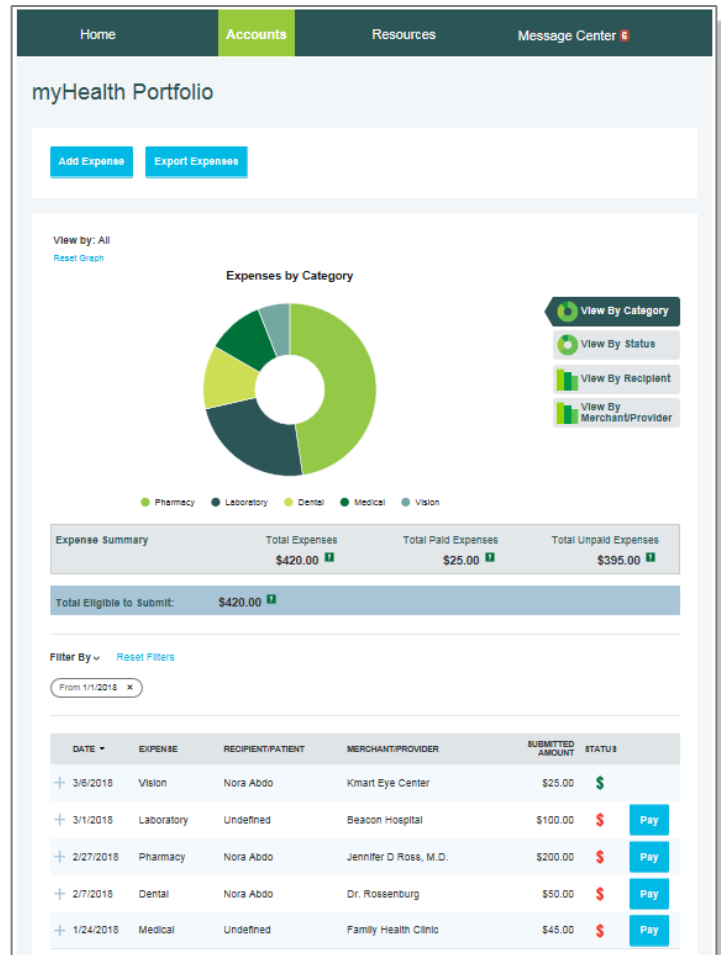
## myHealth Portfolio<sup>SM</sup> Dashboard

The Manage My Expenses button takes you to the myHealth Portfolio page, which can also be found under the Accounts tab in the top menu. This page provides a complete picture of your healthcare expenses. It is a self-service dashboard that enables 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 Reset Graph and select the view you would like to see.





DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
10/21/2018	Other	AMERICAN CLUB	Uber	\$13.00	\$ Pay
10/10/2018	Medical	AMERICAN CLUB	Dr. Rossenburg	\$45.00	\$
9/5/2018	Pharmacy	AMERICAN CLUB	Family Health Clinic	\$32.00	\$
6/12/2018	Vision	AMERICAN CLUB	Kohler Optometry	\$25.00	\$ Pay

**Expense Details**

Description: Eye exam      Date(s) of Service: 6/12/2018

Source: Online      Total Billed Amount: \$25.00

Expense Amount: \$25.00      Received Date: 11/5/2018

Payable Amount: \$25.00

---

[Upload Receipt\(s\)](#)      [Add Expense Note](#)      [Mark as Paid](#)  
[Remove Expense](#)      [Update Expense](#)

- Details of your expense transactions can be viewed by clicking any expense.
- You can edit an expense, such as the category, by clicking Update Expense. You also have to option to attach a receipt to the expense for convenient storage and easy access.
- You can also pay an expense by clicking the Pay button or clicking Mark as Paid if you paid the expense out of pocket.

## Add Qualified Medical Expenses

- You may want to keep track of expenses paid with funds other than your HSA Bank Health Benefits Debit Card. To add an expense to your portfolio, click the Add Expense button at the top of the myHealth Portfolio<sup>SM</sup> page. Keep in mind that 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, coinsurance, prescriptions, dental and vision care, and more.



For a complete list of IRS-qualified healthcare expenses, visit [irs.gov](https://irs.gov) or [hsabank.com/IRSQualifiedExpenses](https://hsabank.com/IRSQualifiedExpenses).

- Complete the information regarding the expense and click Pay Expense Now or Save For Later.
- You also have the ability to upload a healthcare receipt for easy access to it later by clicking Upload Receipt.
- The expense will be reflected in the graph on the myHealth Portfolio dashboard.

myHealth Portfolio / Add Expense

**Expense Information** \*Required

Expense Description\*

Date of Service\*

Total Billed Amount

Expense Amount\*

Provider   
[Add Provider Address](#)

Expense

Recipient/Patient  Nora Abdo  Nathan Abdo

Receipt [Upload Receipt](#)

Source

Date Received

Notes

### 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 Expenses	Total Paid Expenses	Total Unpaid Expenses
		\$605.01	\$25.01	\$580.00
<b>Total Eligible to Submit:</b>		<b>\$605.00</b>		

Filter By [Reset Filters](#)

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS	
+ 6/6/2019	Medical	Nora Abdo	Dr. Roth	\$40.00	\$	<b>Pay</b>
+ 6/5/2019	Pharmacy	Nora Abdo	Beacon Hospital	\$0.01	\$	
+ 6/2/2019	Dental	Nathan Abdo	-	\$25.00	\$	<b>Pay</b>

### Export Expenses

To export your expenses to use for other purposes, click the Export Expenses button at the top of the page.

myHealth Portfolio

Add Expense
**Export Expenses**

### Sample Excel Expense Export

Expense ID	Expense Date	Expense	Recipient/Patient	Merchant/Provider	Submitted Amount	Expense Status	Description	Expense Description	EOB Number	Source	Date Received	Date(s) of Service	Total Billed Amount	Expense Amount	Pa
97477	2/7/2018	Dental	Nora Abdo	Dr. Rossenbug	50	Unpaid		Teeth cleaning		Online	3/12/2018	2/7/2018	150	50	
97478	3/1/2018	Laboratory	Undefined	Beacon Hospital	100	Unpaid		Lab test		Online	3/12/2018	3/1/2018	200	100	
97479	1/24/2018	Medical	Undefined	Family Health Clinic	45	Unpaid		Check up		Online	3/12/2018	1/24/2018	200	45	
97480	3/6/2018	Vision	Nora Abdo	Kmart Eye Center	25	Marked as Paid		Eye exam		Online	3/12/2018	3/6/2018	125	25	
97481	2/27/2018	Pharmacy	Nora Abdo	Jennifer D Ross, M.D.	200	Unpaid		Prescriptions		Online	3/12/2018	2/27/2018	600	200	

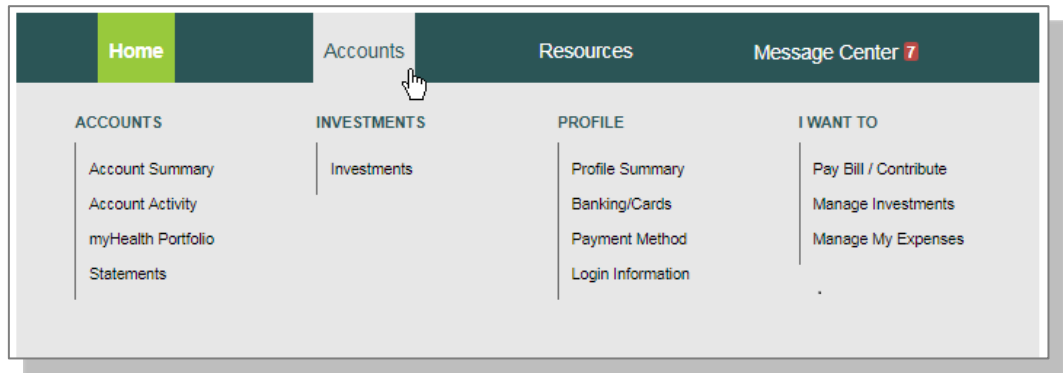
## Accounts

### Accounts Tab

On the main menu at the top of the page, hovering over the Accounts tab will show a full listing of pages you can access to manage your account, organized under three different headers. The I Want To options are also accessible from this menu on the far right.

The Accounts pages include:

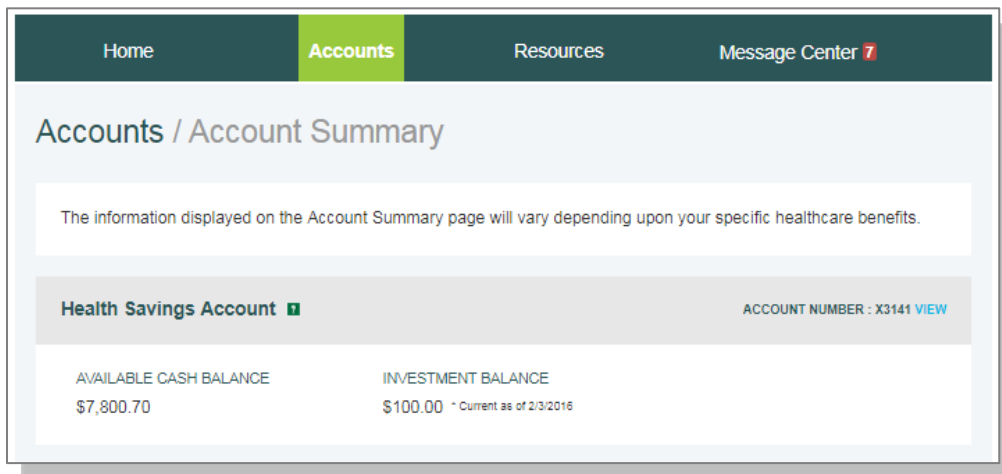
- Accounts
  - Account Summary
  - Account Activity
  - [myHealth Portfolio](#)
  - [Statements](#)
- Investments
  - [Investments](#)
- Profile\*
  - Profile Summary
  - Banking/Cards
  - Payment Method
  - Login Information



\*Profile information and links to these pages can also be accessed by hovering over your name at the top right corner of any page you are on.

### Account Summary (Balances)

The Account Summary page shows the Health Savings Account available cash balance and the self-directed investment balance (if applicable).



## 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 the individual transaction.

Home
Accounts
Resources
Message Center 7

### Accounts / Account Activity

My HSA

**Balance Detail**

CASH ACCOUNT		INVESTMENT ACCOUNT	
Actual Balance	\$7,800.70	Investments - Devenir	
Pending Withdrawals	\$0.00	Fair Market Value <small>*Current as of 2/3/2018</small>	\$100.00
Available Balance	\$7,800.70		

**Transactions**

Export

**PENDING TRANSACTIONS**

REQUESTED DATE	DESCRIPTION	METHOD	CONTRIBUTION (DEPOSIT)	DISTRIBUTION (WITHDRAWAL)	AVAILABLE CASH BALANCE
There are no records to display.					

**PROCESSED TRANSACTIONS**

PROCESSED DATE	DESCRIPTION	METHOD	CONTRIBUTION (DEPOSIT)	DISTRIBUTION (WITHDRAWAL)	ACTUAL CASH BALANCE
+	02/28/2019	Interest	None	\$0.90	\$7,800.70
+	01/31/2019	Interest	None	\$1.31	\$7,799.80
+	01/22/2019	Distribution	EFT	\$2,499.00	\$7,798.49
+	01/09/2019	Transfer Participant Contribution	Check	\$7,000.00	\$10,297.49
+	01/03/2019	Fee Distribution	EFT	\$2.50	\$3,297.49
+	12/31/2018	Interest	None	\$0.28	\$3,299.99
+	12/04/2018	Fee Distribution	EFT	\$2.50	\$3,299.71
+	11/30/2018	Interest	None	\$0.18	\$3,302.21
+	11/13/2018	11/05/2018 Employer Contribution	EFT	\$2,500.00	\$3,302.03
+	11/02/2018	Fee Distribution	EFT	\$2.50	\$802.03

1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | ... >
Next >>

## HSA Contributions by Tax Year

You can view HSA contributions by tax year by clicking the link on the bottom of the Account Activity screen.

PROCESSED TRANSACTIONS

PROCESSED DATE	DESCRIPTION	METHOD	CONTRIBUTION (DEPOSIT)	DISTRIBUTION (WITHDRAWAL)	ACTUAL CASH BALANCE
+ 02/28/2019	Interest	None	\$0.90		\$7,800.70
+ 01/31/2019					\$7,799.80
+ 01/22/2019					\$7,798.49
+ 01/09/2019					\$10,297.49
+ 01/03/2019					\$3,297.49
+ 12/31/2018					\$3,299.99
+ 12/04/2018					\$3,299.71
+ 11/30/2018	Interest	None	\$0.18		\$3,302.21
+ 11/13/2018	11/05/2018 Employer Contribution	EFT	\$2,500.00		\$3,302.03
+ 11/02/2018	Fee Distribution	EFT		\$2.50	\$802.03

1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | ... >

Next >>

HSA Contributions By Tax Year

HSA Coverage Level

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

TAX YEAR	IRS MAXIMUM CONTRIBUTIONS	CONTRIBUTIONS FROM FUTURE YEARS	ROLLOVER	REMAINING CONTRIBUTION AMOUNT *
2019	\$3,500.00	\$0.00	\$0.00	\$3,500.00
2018	\$3,450.00	\$2,500.00	\$0.00	\$950.00
2017	\$3,400.00	\$0.00	\$0.00	\$3,400.00

## Profile Summary

The Profile page assists with reviewing your personal demographic information and offers the functionality to add an external bank account for online contributions and distributions from your HSA. Use the Profile page to view your setup details.

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

## Update Profile

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

### Profile / Profile Summary

<div style="display: flex; justify-content: space-between; align-items: center;"> <span><b>Profile</b></span> <span style="border: 1px solid red; padding: 2px 5px;"><a href="#">Update Profile</a></span> </div> <p><b>AMERICAN CLUB</b>                  Home Address: 605 N 8TH ST, SHEBOYGAN, WI 53081, United States                  Mailing Address: 605 N 8TH ST, SHEBOYGAN, WI 53081, United States                  (920) 803-4100                  smedinger@hsabank.com</p> <p><b>GENDER</b>: Unspecified  <b>MARITAL STATUS</b>: Unspecified</p> <p><b>USERNAME</b>: aclub1237  <b>PARTICIPANT ACCOUNT ID</b>: 9000001868</p>	<div style="display: flex; justify-content: space-between; align-items: center;"> <span><b>Dependents</b></span> <span style="border: 1px solid red; padding: 2px 5px;"><a href="#">Add Dependent</a></span> </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <p><b>YACHT CLUB</b>                      Birth Date: 5/12/2000                      Student: No  <a href="#">View / Update</a></p> </td> <td style="width: 50%; padding: 5px;"> <p><b>GARDEN CLUB</b>                      Birth Date: 2/6/1998                      Student: No  <a href="#">View / Update</a></p> </td> </tr> </table>	<p><b>YACHT CLUB</b>                      Birth Date: 5/12/2000                      Student: No  <a href="#">View / Update</a></p>	<p><b>GARDEN CLUB</b>                      Birth Date: 2/6/1998                      Student: No  <a href="#">View / Update</a></p>		
<p><b>YACHT CLUB</b>                      Birth Date: 5/12/2000                      Student: No  <a href="#">View / Update</a></p>	<p><b>GARDEN CLUB</b>                      Birth Date: 2/6/1998                      Student: No  <a href="#">View / Update</a></p>				
<div style="display: flex; justify-content: space-between; align-items: center;"> <span><b>Beneficiaries</b></span> <span style="border: 1px solid red; padding: 2px 5px;"><a href="#">Add Beneficiary</a></span> </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <p><b>YACHT CLUB</b>                      Type: Contingent                      Share: 50%  <a href="#">View / Update</a>  <a href="#">Remove</a></p> </td> <td style="width: 50%; padding: 5px;"> <p><b>GARDEN CLUB</b>                      Type: Contingent                      Share: 50%  <a href="#">View / Update</a>  <a href="#">Remove</a></p> </td> </tr> <tr> <td colspan="2" style="padding: 5px;"> <p><b>BOOK CLUB</b>                      Type: Primary                      Share: 100%  <a href="#">View / Update</a>  <a href="#">Remove</a></p> </td> </tr> </table>	<p><b>YACHT CLUB</b>                      Type: Contingent                      Share: 50%  <a href="#">View / Update</a>  <a href="#">Remove</a></p>	<p><b>GARDEN CLUB</b>                      Type: Contingent                      Share: 50%  <a href="#">View / Update</a>  <a href="#">Remove</a></p>	<p><b>BOOK CLUB</b>                      Type: Primary                      Share: 100%  <a href="#">View / Update</a>  <a href="#">Remove</a></p>		<div style="display: flex; justify-content: space-between; align-items: center;"> <span><b>Authorized Signers</b></span> <span style="border: 1px solid red; padding: 2px 5px;"><a href="#">Add Authorized Signer</a></span> </div> <p><b>BOOK CLUB</b>                  Birth Date: 8/24/1978  <a href="#">View / Update</a></p>
<p><b>YACHT CLUB</b>                      Type: Contingent                      Share: 50%  <a href="#">View / Update</a>  <a href="#">Remove</a></p>	<p><b>GARDEN CLUB</b>                      Type: Contingent                      Share: 50%  <a href="#">View / Update</a>  <a href="#">Remove</a></p>				
<p><b>BOOK CLUB</b>                      Type: Primary                      Share: 100%  <a href="#">View / Update</a>  <a href="#">Remove</a></p>					

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### Add Dependents

Use the Add Dependent link to add a new dependent, or click View/Update under existing dependents to make changes. Dependents added appear in myHealth Portfolio<sup>SM</sup> and the Pay Bill / Contribute pages.

### Add Beneficiary

You can designate a beneficiary to receive your HSA assets in the event of your death by clicking Add Beneficiary. If you are married and domiciled in a community property state, you can designate your spouse as the primary beneficiary through the website. However, if you are married and wish to designate a non-spouse primary beneficiary, you must submit a beneficiary form with the notarized consent of your spouse.

### Add Authorized Signer

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

- Navigate to the Profile Summary page and click Add Authorized Signer.
- Complete the information and click Submit.

### Banking/Cards

On the Banking/Cards page, you can view HSA Bank Health Benefits Debit Card information, report lost and stolen cards, request a replacement card, add an external bank account, and order checks.

### Report a Lost or Stolen Card

- Click Report Lost/Stolen and submit the form to request a replacement card and cancel the lost or stolen card.

### Order a Replacement Card

- Click Order Replacement. Confirm that 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 more information.

**Cards / Order Replacement Card**

**Card Information**

Selected Card: Captain James Hook x6376  
 Current Status: ReadyToActivate

**Replacement Card**

Issuance Fee: \$6.00  
 Your Mailing Address: Captain James Hook, Captains Quarters, Main Quarter, Black Pearl, WI 54216, United States  
[Update Your Mailing Address](#)

\* A new card with the same card number will be issued and mailed to the primary cardholder's address to replace the card within 5-7 business days.  
 \* The cardholder must have a United States mailing address to receive a new card. If a card is requested and the cardholder has an international mailing address, a card will not be generated.

Cancel Submit

### Order Checks (optional – fees may apply)

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

- Complete the check order and click the Order Checks link at the bottom of the page. The fee for the checkbook will be withdrawn from your HSA. Please refer to your *HSA Bank Fee and Interest Rate Schedule* for more 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 the Banking/Cards link in the main menu.
- Click the Add Bank Account link and enter the information regarding your checking or savings account and financial institution name and address. Click the Submit button at the bottom of the screen. **Please confirm your account number and ACH routing number with your external bank.**

**Banking / Add Bank Account**

**Bank Account Information** \*Required

Routing Number \*

Account Number \*

Confirm Account Number \*

Account Type \*

Account Nickname \*

**Bank Institution Information**

Bank Name \*

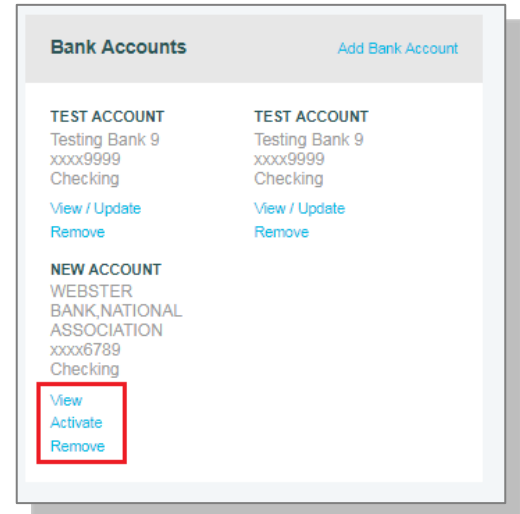
Bank Address \*

Cancel Submit

- After you have submitted the account information, HSA Bank will send a small deposit to your account within three 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.

## Validate External Bank Account

- Navigate to the Banking/Cards page via the Profile section of the Accounts tab.
- Click Activate under your bank account information.
- 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 Submit.
- This account will now be available for contributions and paying bills and reimbursements.



### Banking / Activate Bank Account

**Activation Details** \*Required

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

Bank Name	WEBSTER BANK, NATIONAL ASSOCIATION
Routing Number	xxxx7947
Account Number	xxxx6789
Amount *	\$ <input type="text"/>

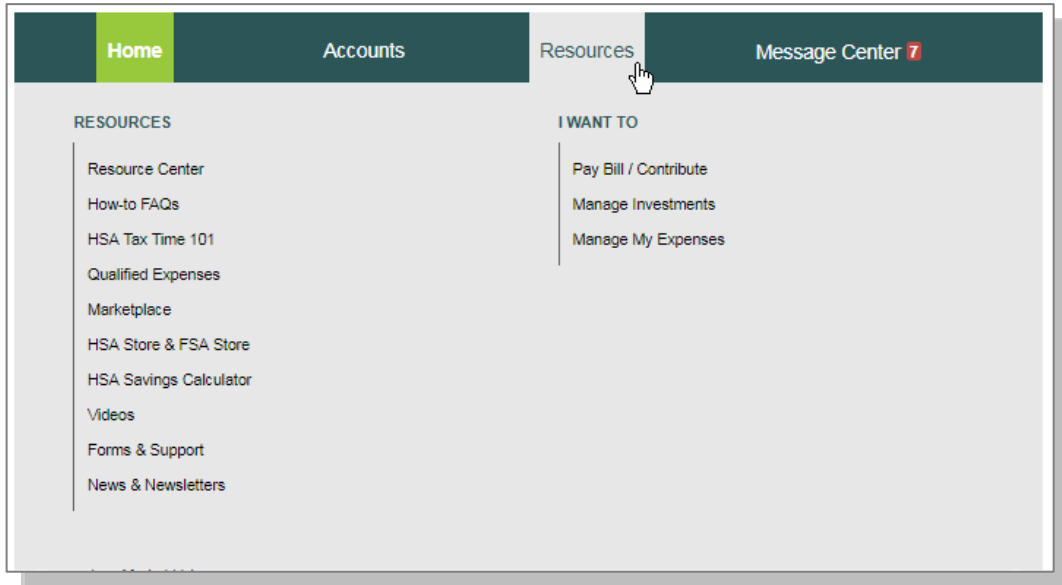
Enter the amount deposited into your account.

[Cancel](#) [Submit](#)

## Resources

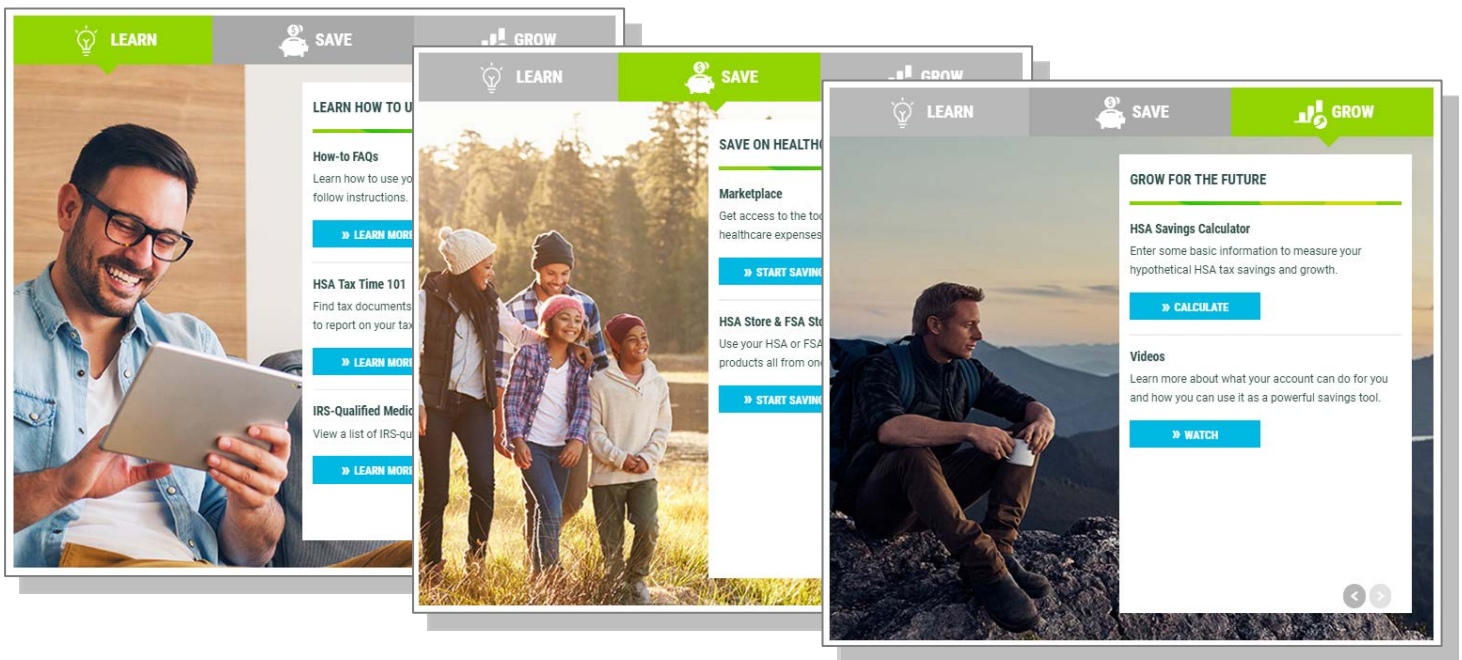
### Resource Tab

On the main menu at the top of the page, hovering over the Resources tab will show a full listing of resources available to you. You can either select the page you would like to see or click on Resource Center for an overview of the resources available. The I Want To options are also accessible from this menu on the far right.



### Resource Center

The Resource Center provides an overview of the resources available, conveniently listed under three categories: Learn, Save, and Grow. Each of these tabs will lead you to information about each page and a link to access it:



## Message Center

### Current Messages

The Message Center page provides access to notifications about statements, tax documents, and other messages, as well as the ability to update notification preferences and access past statements. Click the View link next to any notification to view the message. If there is an attachment, indicated by the paperclip icon, you can see attachments (such as account statements or tax documents) via the View link as well. You can also print the document.

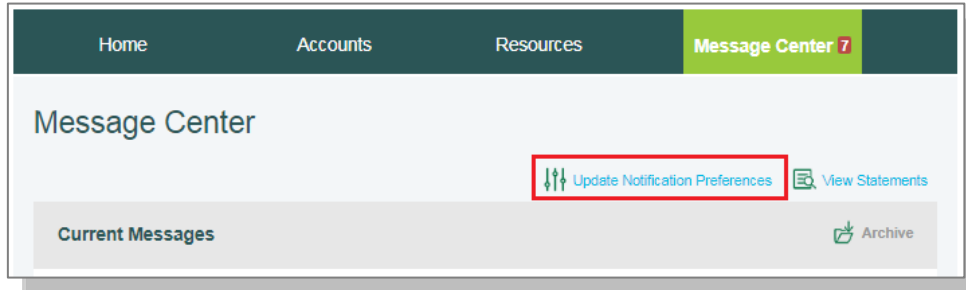
To remove messages from the Current Messages list, you can select the checkbox to the left of each message you would like to archive and click Archive. Any archived messages can be shown by clicking Show Archived Messages at the bottom of the page. You can also view your past statements and tax documents by clicking View Statements.

The screenshot displays the Message Center interface. At the top, there is a navigation bar with links for Home, Accounts, Resources, and Message Center (10). Below the navigation bar, the page title "Message Center" is shown. There are two utility links: "Update Notification Preferences" and "View Statements". A section titled "Current Messages" contains an "Archive" button. Below this is a table of messages with columns for DATE/TIME, FROM, SUBJECT, and a View link. A red box highlights the first message in the table, and another red box highlights the View link for that message.

<input type="checkbox"/>	DATE/TIME ▼	FROM	SUBJECT	
<input type="checkbox"/>	6/18/2019 12:30 PM	Auto-generated	Recent Updates to your Account	<a href="#">View</a>
<input type="checkbox"/>	6/1/2019 1:17 AM	Auto-generated	HSA Account Summary (5/1/2019 - 5/31/2019)	<a href="#">View</a>
<input type="checkbox"/>	5/1/2019 2:19 AM	Auto-generated	HSA Account Summary (4/1/2019 - 4/30/2019)	<a href="#">View</a>
<input type="checkbox"/>	4/27/2019 1:32 AM	Auto-generated	5498-SA (2018)	<a href="#">View</a>
<input type="checkbox"/>	4/1/2019 2:53 AM	Auto-generated	HSA Account Summary (3/1/2019 - 3/31/2019)	<a href="#">View</a>
<input type="checkbox"/>	3/1/2019 1:31 AM	Auto-generated	HSA Account Summary (2/1/2019 - 2/28/2019)	<a href="#">View</a>
<input type="checkbox"/>	2/1/2019 1:07 AM	Auto-generated	HSA Account Summary (1/1/2019 - 1/31/2019)	<a href="#">View</a>
<input type="checkbox"/>	1/1/2019 1:22 AM	Auto-generated	HSA Account Summary (12/1/2018 - 12/31/2018)	<a href="#">View</a>
<input type="checkbox"/>	12/1/2018 1:50 AM	Auto-generated	HSA Account Summary (11/1/2018 - 11/30/2018)	<a href="#">View</a>
<input type="checkbox"/>	11/1/2018 1:10 AM	Auto-generated	HSA Account Summary (10/1/2018 - 10/31/2018)	<a href="#">View</a>
<input type="checkbox"/>	10/1/2018 1:01 AM	Auto-generated	HSA Account Summary (9/1/2018 - 9/30/2018)	<a href="#">View</a>
<input type="checkbox"/>	9/1/2018 2:07 AM	Auto-generated	HSA Account Summary (08/01/2018 - 08/31/2018)	<a href="#">View</a>
<input type="checkbox"/>	8/1/2018 3:24 AM	Auto-generated	HSA Account Summary (07/01/2018 - 07/31/2018)	<a href="#">View</a>
<input type="checkbox"/>	7/1/2018 2:53 AM	Auto-generated	HSA Account Summary (06/01/2018 - 06/30/2018)	<a href="#">View</a>

## Notification Preferences

- To update your notification preferences, click Update Notification Preferences at the top of the Message Center.



- In the Contact Information, you can update your mobile and email contact information.

The screenshot shows the 'Update Notification Preferences' form in the HSA Bank Message Center. The form is titled 'Message Center / Update Notification Preferences' and includes a red asterisk indicating required fields. The form contains the following fields:

- Contact Information** (Required):
  - Mobile Number\***: A field for entering a phone number in the format ( ) - .
  - Mobile Carrier \***: A dropdown menu labeled 'Select a Carrier'. Below it, a note states: 'Your mobile number will be used only for the purpose of servicing your benefit plan account. This information will not be used for any solicitations.'
  - Time Zone \***: A dropdown menu labeled 'Select a time zone'.
  - Email Address**: A text input field.
  - Confirm Email Address**: A text input field.

Below the email address fields, a note states: '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.'

## Notification Alerts

In the Statements & Notifications Options section, you will see electronic preferences and alert preferences. Review each of the notification categories to set, edit, or turn off text and email notifications as appropriate or switch between online and paper notices and statements. Please note, the available options may vary depending on your account type, options, and more.

### Statements & Notifications Options

You will receive statements, notifications, and bank disclosures based on the Electronic Preferences selected below, as well as email and text alerts based on your Alert Preferences. Go paperless today by opting for Online preferences only and choosing email and/or text alerts where applicable to help you stay in control of your account on the go!

	Electronic Preferences		Alert Preferences	
	ONLINE	PAPER	EMAIL	TEXT
<b>STATEMENTS</b>				
HSA Account Summary <small>\$1.50 fee per printed summary</small> <small>Automatically emailed based on whether or not you have an email address</small>	Available	<input type="checkbox"/>	Emailed	<input type="checkbox"/>
HSA Tax Documents <small>Automatically emailed based on whether or not you have an email address</small>	Available	<input checked="" type="checkbox"/>	Emailed	<input type="checkbox"/>
Banking Notices/ Disclosures	-	<input type="checkbox"/>	<input type="checkbox"/>	-
<b>CONTRIBUTIONS</b>				
Contribution posted to your HSA	-	-	<input type="checkbox"/>	<input type="checkbox"/>
HSA available cash balance is below \$ <input style="width: 100px;" type="text"/>	-	-	<input type="checkbox"/>	<input type="checkbox"/>
HSA contributions year-to-date are within \$ <input style="width: 100px;" type="text"/> of the IRS maximum	-	-	<input type="checkbox"/>	<input type="checkbox"/>
<b>PAYMENTS</b>				
Payment issued out of your HSA	-	-	<input type="checkbox"/>	<input type="checkbox"/>
Withdrawal from your HSA exceeds \$ <input style="width: 100px;" type="text"/>	-	-	<input type="checkbox"/>	<input type="checkbox"/>
<b>DEBIT CARD</b>				
Debit Card has been mailed	-	-	<input type="checkbox"/>	<input type="checkbox"/>
Debit Card purchase has been made <small>Automatically alert when a debit card purchase has been made on one of your accounts. Helps to quickly identify possible fraudulent activity</small>	-	-	<input type="checkbox"/>	<input type="checkbox"/>

Cancel
Submit

## Getting Help

If you need further assistance with the Member Website or with any day-to-day Health Savings Account questions, contact:

HSA Bank Client Assistance Center

Phone: 800-357-6246 (available 24/7, excluding major holidays)

Email: [askus@hsabank.com](mailto:askus@hsabank.com)

Fax: 877-851-7041

You can also chat with us live through the Member Website! Click Live Chat to begin.

