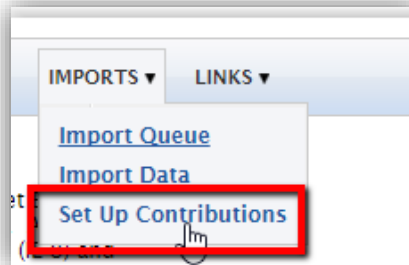


The one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as Health Savings Accounts (HSAs). You have the ability to set up contributions by following these steps:

Access the Employer Online Portal, Home page or hover over the Imports tab and choose “Set Up Contributions”.



OR



Select “Set Up New Schedule” to create a new schedule or update/delete any current schedules.



Schedules Set Up New Schedule		
Account	Schedule	Actions
Health Savings Account	14th day of every month Next Posting Date: 9/14/2016	Update Delete
Health Savings Account	30th day of every month Next Posting Date: 9/30/2016	Update Delete

One Time Contributions:

Select the Plan Year, Effective Date, and method of entry (Manual or Import).

Set Up Contributions

Would you like to set up a one-time contribution or recurring contribution?

One-Time Recurring

Select the plan year for which you would like to set up contributions:

HSA ▼

Effective Date:

7/1/2020



Funds available one business day after Start Day

Do you want to enter contributions manually or import a file?

Enter Manually Import a File

[Enter Contributions](#) | [Cancel](#)

If you choose manually, then you will then enter the employee and employer amounts.

Contribution Amounts			
Name	Identifier	Payroll Deduction	Employer Contribution
BAUER, JASON	xxx-xx-6356	\$ 50.00	\$
JARRAD, PAUL	xxx-xx-2228	\$ 192.00	\$

Recurring Contributions:

Select the Plan Year, Start Date, Frequency, End Date, and method of entry (Manual or Import).

Set Up Contributions

Would you like to set up a one-time contribution or recurring contribution?

One-Time Recurring

Select the plan year for which you would like to set up contributions:

HSA

Start On: 07/01/2020

Funds available one business day after Start Day

Frequency: Monthly Weekly

Day: 1 of every 1 month(s)

The: first day of every 1 month(s)

End On: No End Date End By

Do you want to enter contributions manually or import a file?

Enter Manually Import a File

[Enter Contributions](#) | [Cancel](#)

If you choose manually, then you will then enter the employee and employer amounts.

Contribution Amounts			
Name	Identifier	Payroll Deduction	Employer Contribution
BAUER, JASON	xxx-xx-6356	\$ 50.00	\$
JARRAD, PAUL	xxx-xx-2228	\$ 192.00	\$

Set Scheduled Contributions:

Update/Delete any current schedule listed or review what has been created.

Schedules Set Up New Schedule		
Account	Schedule	Actions
Health Savings Account	14th day of every month Next Posting Date: 9/14/2016	Update Delete
Health Savings Account	30th day of every month Next Posting Date: 9/30/2016	Update Delete

Employer Reports:

HSA Funding Collection Notification report details the funds that have pulled for HSA funding. This report is made available once it's been generated via the Home page where Recently Created Reports are listed, as well as via the Reports tab.

Recently Created Reports

[HSA Funding Collection Notification \(9/1/2016\)](#)
Created: 9/1/2016 | Detail Report | CSV

OR

HOME **REPORTS** REQ

Reports

The **HSA Account Detail Report** is similar to the Account Balance Detail Report and includes HSA Balance information.

[HSA Account Detail Report](#) (0 Reports | Last Created: -)

[Run New Report](#)

View an overview of each consumer's HSA along with individual payroll deduction and employer contribution detail at a tax year or year to date level.