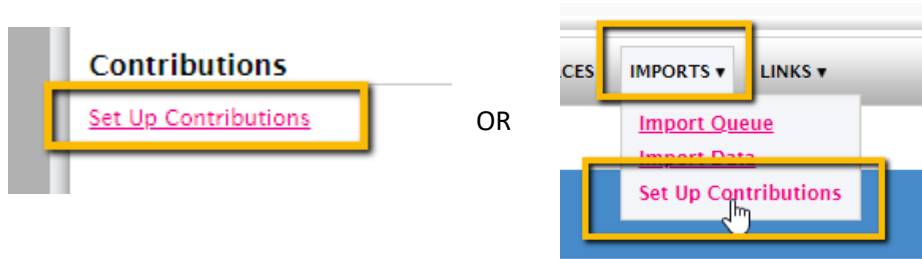


The one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as Health Savings Accounts (HSAs). You have the ability to set up contributions by following these steps:

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



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



Schedules [Set Up New Schedule](#)

Plan Year	Account	Schedule	Actions
01/01/2020 - 12/31/2020	Health Care Account	One-Time Contribution Effective Date: 1/10/2020 Next Posting Date: 1/10/2020	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:

01/01/2020 - 12/31/2020

Select the contribution schedule for which you would like to set up contributions:

Bi-Weekly payroll and employer contribution

Effective Date: 12/25/2020

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

Enter Manually Import a File

- Dependent Care
- Health Care Account
- Transit

[Cancel](#)

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

Contribution Amounts		Calculate Totals		Total Payroll Deductions: \$105.75
Name	Status	Identifier	Payroll Deduction	
Chan, Jackie	Active (1/17/2014)	xxx-xx-1234	\$ 25	
Doe, Joe	Active (5/27/2018)	xxx-xx-5555	\$ 105.75	

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:

01/01/2020 - 12/31/2020

Select the contribution schedule for which you would like to set up contributions:

Bi-Weekly payroll and employer contribution

Enter the number of business days before the contribution date that you would like your contributions to process:

7

This allows you to review your file results prior to your contribution date and make changes (if applicable). Funds will not be available to your employees until the contribution date included in your file.

Start On: 12/25/2020 Contribution Date

Select the contribution date that you would like the schedule to begin.

End On: 12/25/2020 Contribution Date

Select the contribution date that you would like the schedule to end.

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

Enter Manually Import a File

- Dependent Care
- Health Care Account
- Transit

[Cancel](#)

Recurring Contributions:

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

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

Contribution Amounts		Calculate Totals		Total Payroll Deductions: \$187.29
Name	Status	Identifier	Payroll Deduction	
Chan, Jackie	Active (1/17/2014)	xxx-xx-1234	\$ 81.54	
Doe, Joe	Active (5/27/2018)	xxx-xx-5555	\$ 105.75	
Doe, John	Active	xxx-xx-0000	\$	

Set Scheduled Contributions:

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

Schedules Set Up New Schedule			
Plan Year	Account	Schedule	Actions
01/01/2020 - 12/31/2020	Health Care Account	One-Time Contribution Effective Date: 1/10/2020 Next Posting Date: 1/10/2020	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 \(12/11/2020\)](#)
Created: 12/11/2020 | [Detail Report](#) | [PDF](#)

[Payroll Deduction Notification \(12/10/2020\)](#)
Created: 12/10/2020 | [Detail Report](#) | [PDF](#)

OR



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

<p>Enrollment Report (0 Reports Last Created: -) View participant enrollment in applicable plans as of a specified date.</p> <p>HSA Account Detail Report (0 Reports Last Created: -) 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.</p> <p>Payment History Report (0 Reports Last Created: -) View all reimbursements/payments during a specified time period.</p>	<p>Run New Report</p> <p>Run New Report</p> <p>Run New Report</p>
--	---