

## Enrolling Online

# Health Savings Account

This handout explains how to enroll in a health savings account (HSA) from your online account.

To enroll online, complete the following steps:

1. Under the **I Want To** section, click **Enroll in HSA**.

**I Want To:**

[Enroll Now](#) [Manage My Expenses](#) [Enroll in HSA](#)

2. Click the **Plan Description** link to review the plan information.
3. Click **Begin Your Enrollment Now**.

*If you're enrolling in an HSA, review the Summary of Accounts statement, and agree to the terms and conditions.*

4. Review your personal information under **Profile**, make any needed updates and then click **Continue**.



### Quick Tip:

Providing your email address and updating your notification preferences ensures you receive account statements, tax statement, debit card, and contribution/distribution alerts.

5. For each eligible dependent, complete the required fields and then click **Add to List**. After all dependents have been added or if you choose not to add any dependents, click **Continue**.
6. Review the plan rules and check the box indicating you have read and understood the plan rules, and then click **Continue**.
7. Based on how much you would like to set aside for the year into your spending or reimbursement account, enter that amount in the election section, and click **Continue**.



### Quick Tip:

Click **Calculate** if you want to see the estimated tax savings.

Total election for the year: \$5,750.00

Total tax savings for the year \*: \$1,725.00

Estimated per pay period deduction: \$442.31

**Calculate**

8. Select your preferred reimbursement method and then click **Continue**. If you select **Debit Card**, you will also be asked to select a secondary form of payment.
9. We recommend adding a beneficiary. Click **Add Beneficiary** and then click **Next**.
10. Review your enrollment information, make any necessary updates, and then click **Submit**.
11. Read the HSA Enrollment: Creation Authorization, check the required boxes to indicate you want to open an HSA in your name and then click **Submit Enrollment**.

### HSA Enrollment: Creation Authorization

[➔ Agreements](#)
[➔ Profile](#)
[➔ Dependents](#)
[➔ Eligibility](#)
[➔ Payments](#)
[➔ Beneficiaries](#)
[➔ Summary](#)
[➔ Confirmation](#)

By submitting the enrollment, you are requesting that a Health Savings Account be opened in your name.

- I affirm that all information I have provided is true and correct and may be relied upon by the Designated Representative and the HSA Custodian. This text is customizable by you!
- I understand the eligibility requirements for this HSA and I state that I am responsible for determining whether I qualify to make deposits to this HSA. I am responsible for: A. Determining that I am eligible to make contributions to an HSA for each year I make a contribution; B. Ensuring that all contributions are within the maximum limitations set forth by the tax laws, taking into account my coverage and the applicable deductible under a high deductible health plan; C. The tax consequences of any contributions (including rollover contributions) or distributions; D. Seeking the assistance of a qualified tax or legal professional to address any questions or concerns I may have about eligibility, contribution limitations, or the taxation of contributions or distributions from my HSA. This text is customizable by you!
- I certify that I have received a copy of the enrollment form, the Designation of Representative, the Custodial Agreement and Disclosure Statement, and the Privacy Policy. I understand that I may revoke the HSA on or before seven (7) days after the date of establishment. I have not received any tax or legal advice from the Designated Representative or the Custodian, and I will seek the advice of my own tax or legal professional to ensure my compliance with related laws. I release and agree to hold the Custodian and Designated Representative harmless against any and all claims or losses arising from my actions. This text is customizable by you!

**Submit Enrollment**
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### Quick Tip:

Print the Enrollment Confirmation page for your records. This page verifies that your enrollment is complete.



**Congratulations!** You have now successfully enrolled in a health savings account.