Employer Administration Site Overview

Welcome

Welcome to HSA Bank's Employer Administration Site! Here you can find tools to support your employees in managing their benefit plans including Health Savings Accounts (HSAs), Flexible Spending Accounts (FSAs) and Health Reimbursement Arrangements (HRAs).

The site is convenient and easy to use. You can access it any time to:

- View current and prior-year plan information.
- Access forms and documents.
- Retrieve your scheduled reports and notifications.
- Access your history of reports and notifications.
- Load data import files.
- View real-time individual participant account summaries, enrollments, contributions, claims and payments.
- Update an employee's status.
- Add and manage recurring contributions.

Some functionality may vary based on permissions and integration customizations.

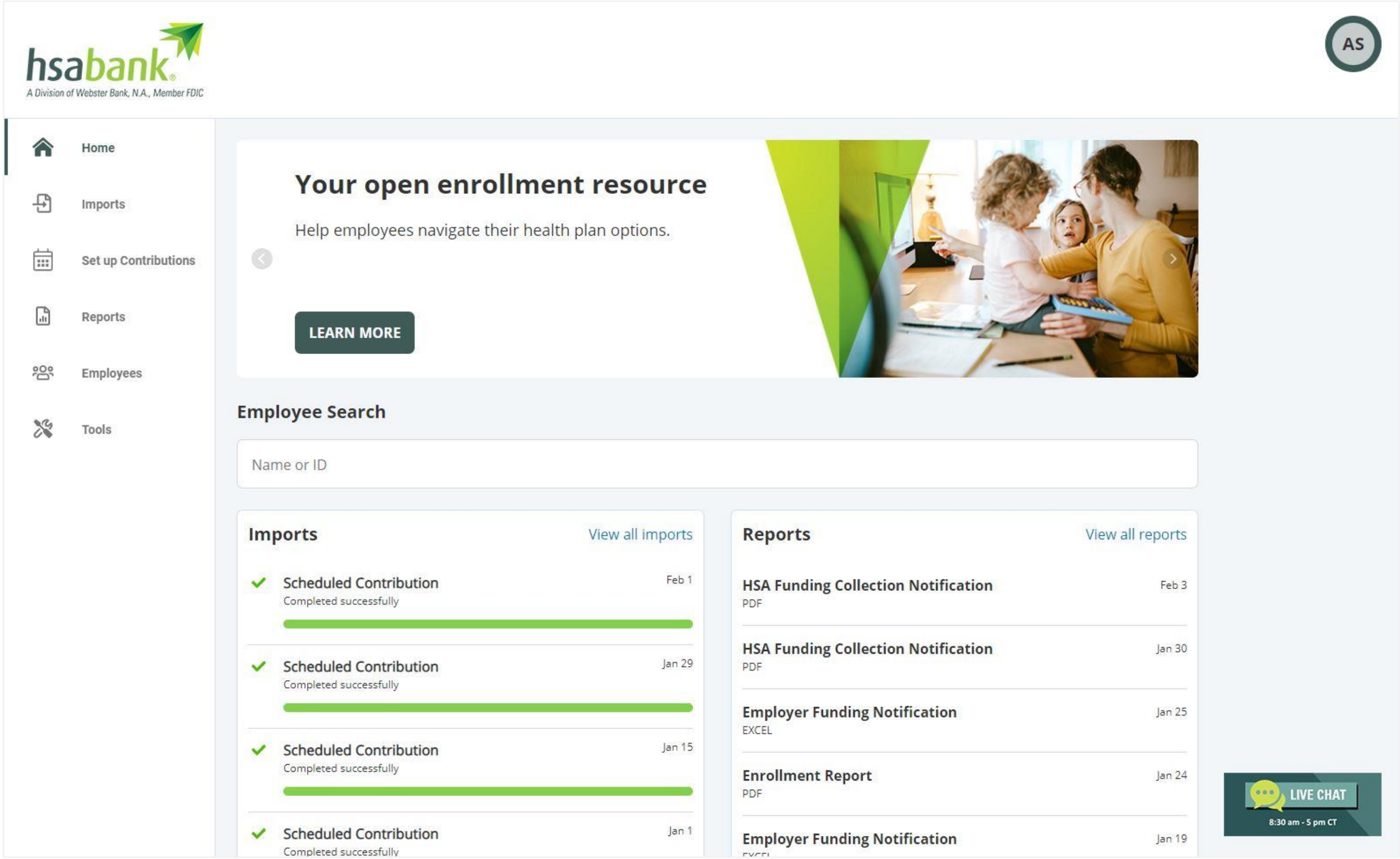
Site access

You can keep using your current username and password to access the Employer Administration Site. If you don't have a username and password yet, you and your assigned contacts will receive them.

Once logged on, everything you need to efficiently manage your consumer-driven healthcare (CDH) accounts is found on the Home page. From here, you can:

- Check the status of data import files.
- Set up recurring contributions.
- View employee-level data.
- Review recent reports.

You can also access the tabs on the left side of the page for easy navigation.



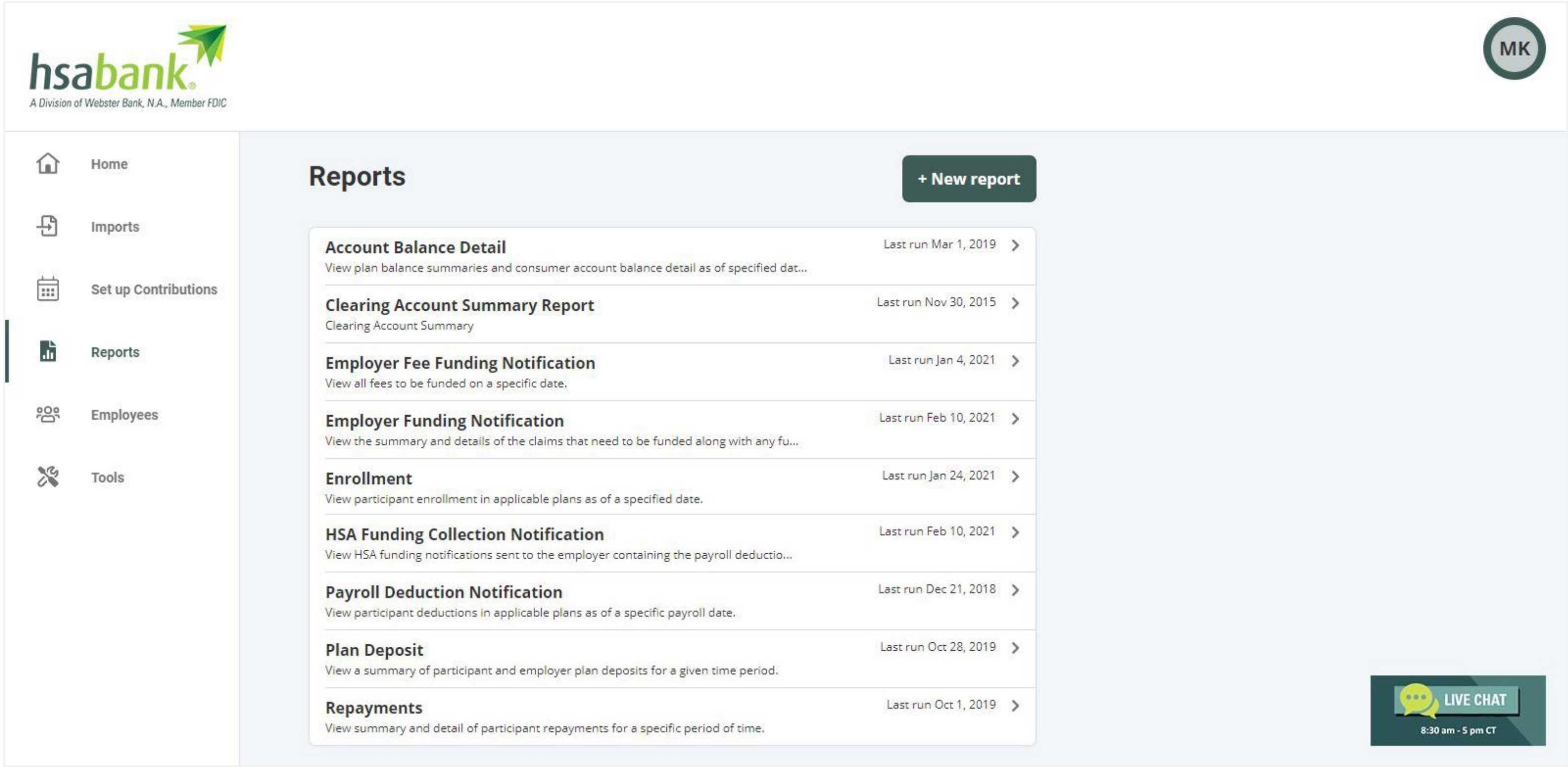
Reports and notifications

To view reports and notifications:

1. Select the Reports tab.
2. Select the desired enrollment, financial, contribution or plan information report. It will automatically display.
3. If you don't see a report that you need, please contact HSA Bank to request it.

Some reports can be run on demand. (Please note these may vary.) To run a report on demand:

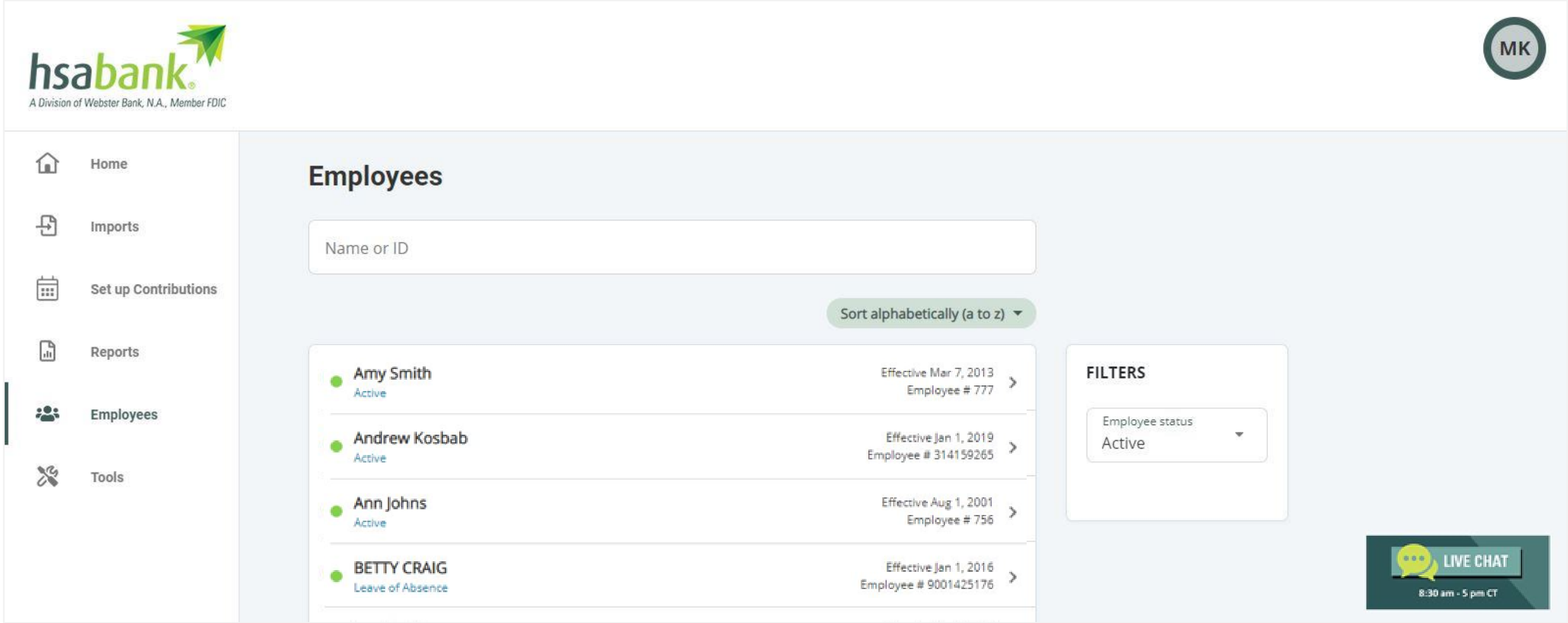
1. Select the Reports tab.
2. Click the New Report button.
3. Select the appropriate report type.
4. Complete the report detail fields.
5. Click Request.
6. The report generates. An email is sent to you when the report is available if you selected this option.



Employee data

To access real-time employee data:

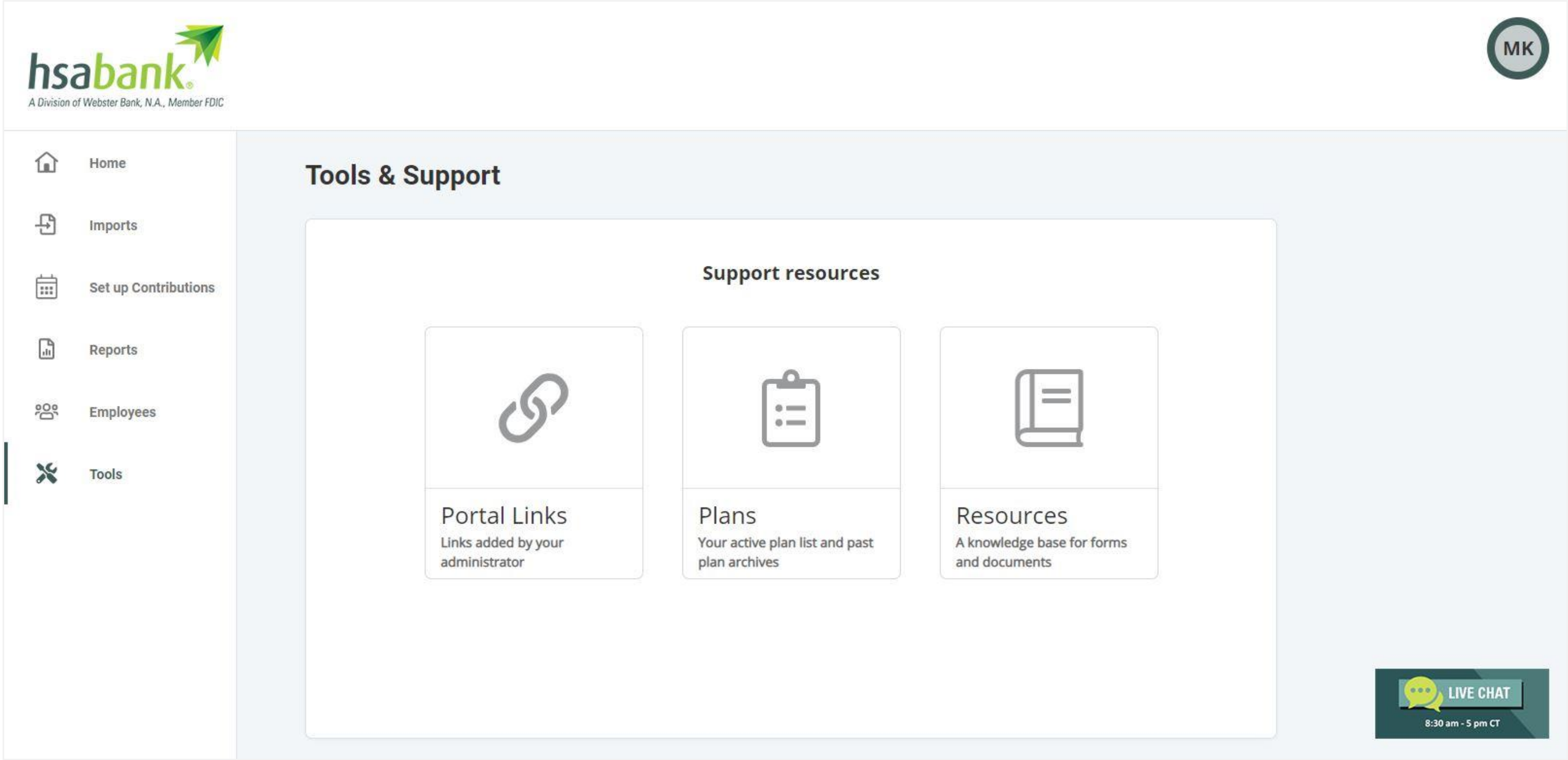
1. Select the Employees tab.
2. Search for employees using first name, last name or employee identifier (defined ID or SSN).
3. Once in the employee view, you can access summaries, enrollments, activity, claims, payments and contributions.



Required forms

To access required forms:

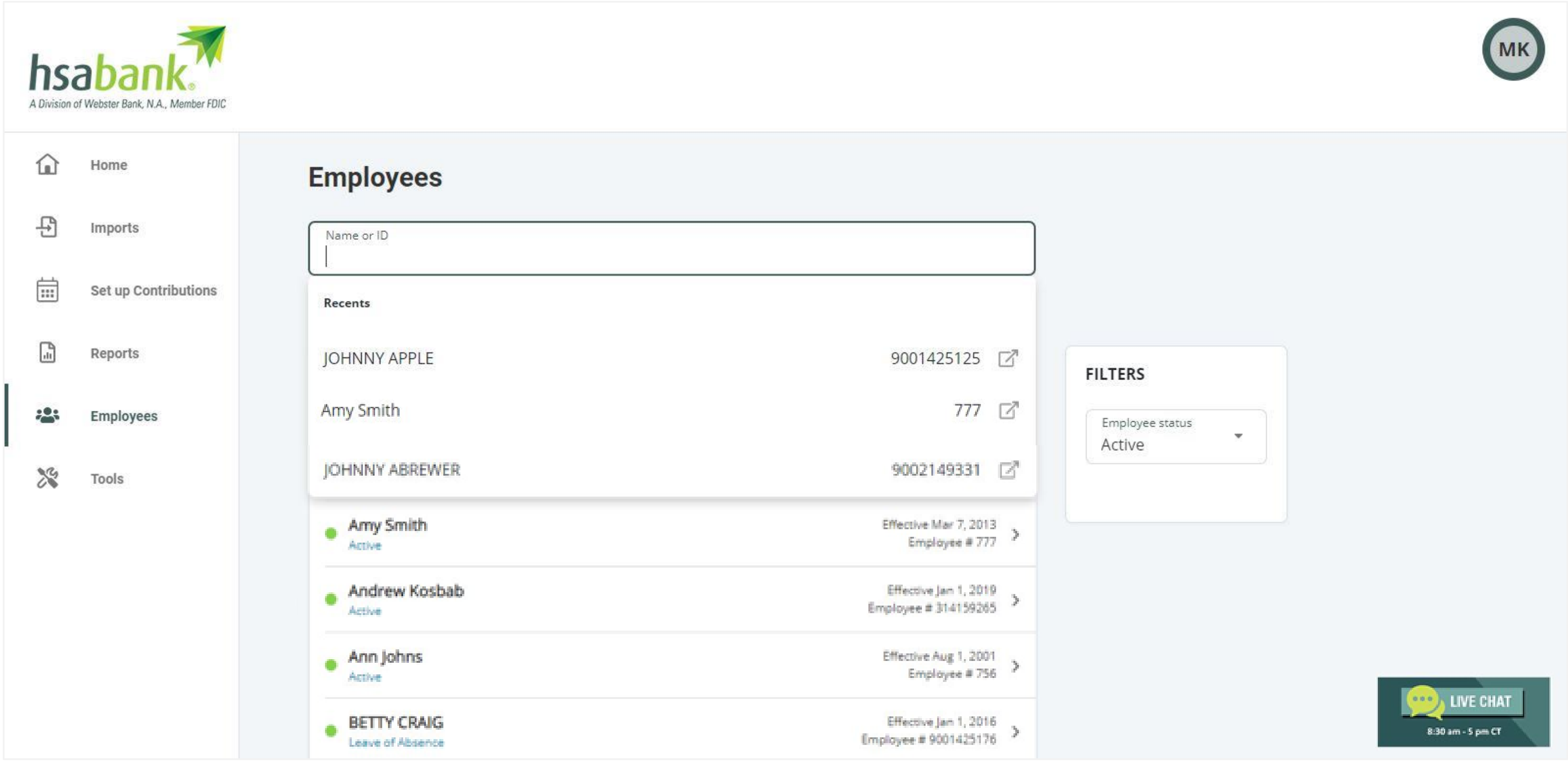
1. Visit the Tools tab and then the Resources tile.
2. In this section you can download and print any forms needed.
3. Here you can also access any other documents or custom materials related to your plans.



Updating an employee's status

To update an employee's status:

1. Select the Employees tab.
2. Search and select the employee using first name, last name or employee identifier (employee ID or SSN).
3. Make a selection from the Status dropdown menu.
4. Enter the status effective date.
5. Click Show status history, then click Add.

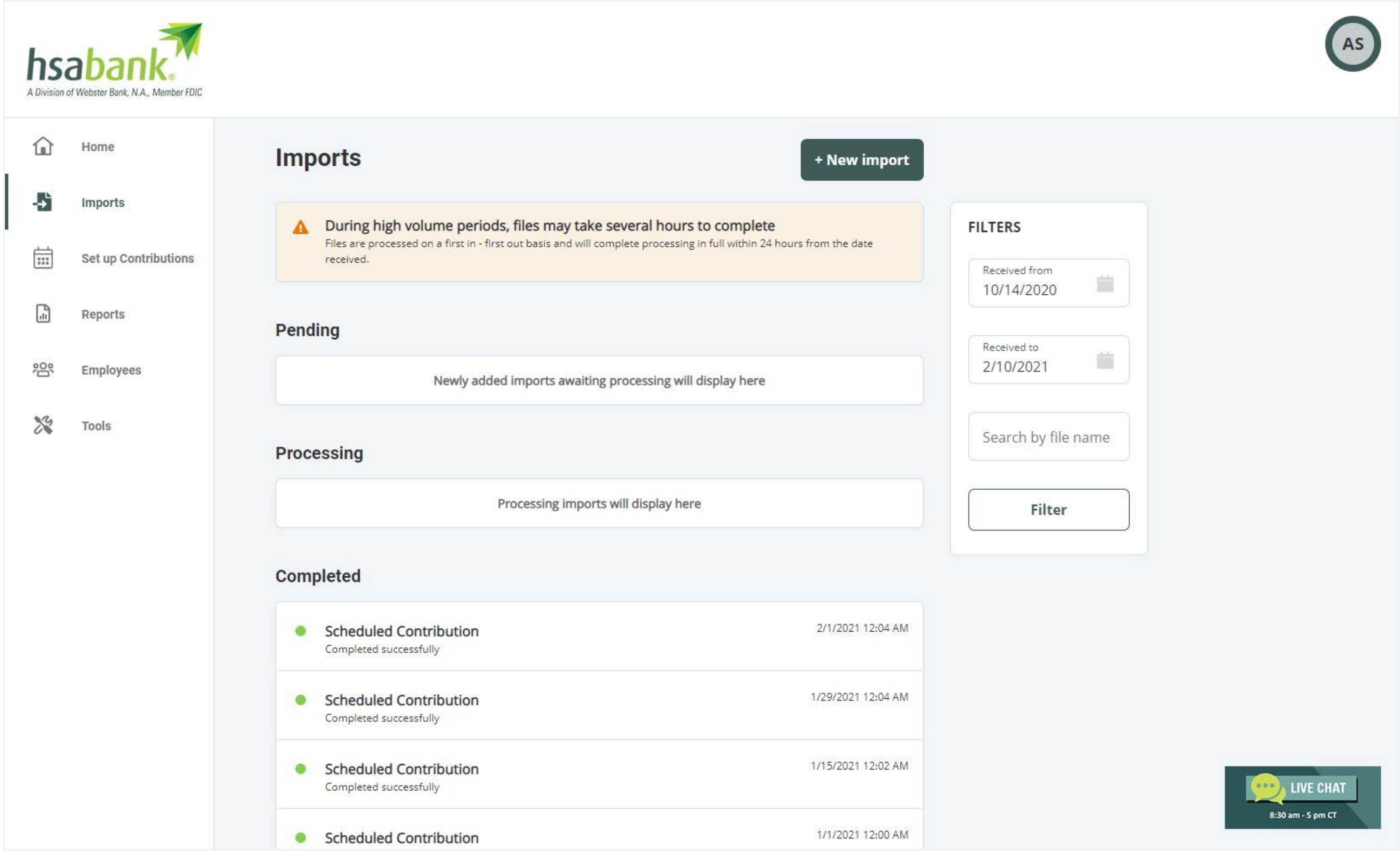


Importing data

You may have the capability to import data (such as demographic, enrollment or contribution files) directly onto the Employer Administration Site. To import data:

1. Select the Imports tab, then select New Import.
2. Select the import type.
3. Click Download Template, then click Next.
4. Check for field matches: Click the View file setup requirements link to review the fields.
5. Paste or enter your data into the template.
6. Save the template as an Excel or CSV file to a location you can remember.
7. Click Browse to upload the file, then click Import.

Once the data is imported, any errors are displayed and can be easily updated by clicking the Review & Fix button. Click the Fix All button for the record line and you can correct the errors. Click Queue Record once corrections are made. Click the Resubmit File button to import the corrected records.



For assistance, contact Business Relations:

Email
businessrelations@hsabank.com

Visit
hsabank.com/employers