

Employer Administration Site Overview



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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.

The screenshot displays the hsabank Employer Administration Site. At the top left is the hsabank logo with the tagline "A Division of Webster Bank, N.A., Member FDIC". In the top right corner, there is a circular "AS" icon. A left-hand navigation menu contains icons and labels for Home, Imports, Set up Contributions, Reports, Employees, and Tools. The main content area features a banner titled "Your open enrollment resource" with the subtext "Help employees navigate their health plan options." and a "LEARN MORE" button. Below the banner is an "Employee Search" section with a text input field labeled "Name or ID". The interface is divided into two columns: "Imports" and "Reports". The "Imports" column shows four entries, each with a green checkmark, the text "Scheduled Contribution Completed successfully", a green progress bar, and a date (Feb 1, Jan 29, Jan 15, Jan 1). The "Reports" column shows four entries with titles like "HSA Funding Collection Notification" and "Employer Funding Notification", file formats (PDF, EXCEL), and dates (Feb 3, Jan 30, Jan 25, Jan 24, Jan 19). A "LIVE CHAT" button is located in the bottom right corner, indicating availability from 8:30 am to 5 pm CT.

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.

The screenshot shows the HSA Bank web interface. At the top left is the HSA Bank logo with the tagline 'A Division of Webster Bank, N.A., Member FDIC'. In the top right corner, there is a circular profile icon with the initials 'MK'. The left sidebar contains a navigation menu with the following items: Home, Imports, Set up Contributions, Reports (which is highlighted with a vertical bar), Employees, and Tools. The main content area is titled 'Reports' and features a '+ New report' button in the top right. Below this, there is a list of reports, each with a title, a brief description, and a 'Last run' date with a right-pointing arrow. The reports listed are: Account Balance Detail (Last run Mar 1, 2019), Clearing Account Summary Report (Last run Nov 30, 2015), Employer Fee Funding Notification (Last run Jan 4, 2021), Employer Funding Notification (Last run Feb 10, 2021), Enrollment (Last run Jan 24, 2021), HSA Funding Collection Notification (Last run Feb 10, 2021), Payroll Deduction Notification (Last run Dec 21, 2018), Plan Deposit (Last run Oct 28, 2019), and Repayments (Last run Oct 1, 2019). In the bottom right corner of the page, there is a 'LIVE CHAT' button with a speech bubble icon and the text '8:30 am - 5 pm CT'.

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.

The screenshot displays the 'Employees' page in the hsabank system. The page features a navigation sidebar on the left with options: Home, Imports, Set up Contributions, Reports, Employees (selected), and Tools. The main content area is titled 'Employees' and includes a search bar labeled 'Name or ID'. Below the search bar is a dropdown menu set to 'Sort alphabetically (a to z)'. A list of employees is shown, each with a green status indicator, name, status, effective date, and employee ID. A 'FILTERS' panel on the right shows 'Employee status' set to 'Active'. A 'LIVE CHAT' button is visible in the bottom right corner, indicating availability from 8:30 am to 5 pm CT. The hsabank logo and 'A Division of Webster Bank, N.A., Member FDIC' are in the top left, and a user profile icon 'MK' is in the top right.

Name	Status	Effective Date	Employee ID
Amy Smith	Active	Effective Mar 7, 2013	Employee # 777
Andrew Kosbab	Active	Effective Jan 1, 2019	Employee # 314159265
Ann Johns	Active	Effective Aug 1, 2001	Employee # 756
BETTY CRAIG	Leave of Absence	Effective Jan 1, 2016	Employee # 9001425176

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.

The screenshot displays the hsabank portal interface. At the top left is the hsabank logo with the tagline "A Division of Webster Bank, N.A., Member FDIC". In the top right corner, there is a circular icon with the letters "MK". A vertical navigation menu on the left side includes icons and labels for Home, Imports, Set up Contributions, Reports, Employees, and Tools. The main content area is titled "Tools & Support" and features a "Support resources" section with three tiles: "Portal Links" (described as "Links added by your administrator"), "Plans" (described as "Your active plan list and past plan archives"), and "Resources" (described as "A knowledge base for forms and documents"). In the bottom right corner, there is a "LIVE CHAT" button with a speech bubble icon and the text "8:30 am - 5 pm CT".

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.

The screenshot shows the 'Employees' management page in the hsabank system. The page includes a search bar for 'Name or ID', a 'Recents' list, and a main list of employees with their status and effective dates. A 'FILTERS' sidebar is visible on the right, showing 'Employee status' set to 'Active'. A 'LIVE CHAT' button is located in the bottom right corner.

hsabank
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Employees

Name or ID

Recents

JOHNNY APPLE	9001425125	🔗
Amy Smith	777	🔗
JOHNNY ABREWER	9002149331	🔗

Employee List:

Amy Smith Active	Effective Mar 7, 2013 Employee # 777	>
Andrew Kosbab Active	Effective Jan 1, 2019 Employee # 314159265	>
Ann Johns Active	Effective Aug 1, 2001 Employee # 756	>
BETTY CRAIG Leave of Absence	Effective Jan 1, 2016 Employee # 9001425176	>

FILTERS

Employee status
Active

LIVE CHAT
8:30 am - 5 pm CT

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.

The screenshot displays the 'Imports' page in the hsabank system. The left sidebar contains navigation options: Home, Imports, Set up Contributions, Reports, Employees, and Tools. The main content area is titled 'Imports' and features a '+ New import' button. A warning message states: 'During high volume periods, files may take several hours to complete. Files are processed on a first in - first out basis and will complete processing in full within 24 hours from the date received.' Below this, there are three sections: 'Pending' (with a placeholder 'Newly added imports awaiting processing will display here'), 'Processing' (with a placeholder 'Processing imports will display here'), and 'Completed'. The 'Completed' section shows a list of successful imports:

Import Type	Status	Completion Date
Scheduled Contribution	Completed successfully	2/1/2021 12:04 AM
Scheduled Contribution	Completed successfully	1/29/2021 12:04 AM
Scheduled Contribution	Completed successfully	1/15/2021 12:02 AM
Scheduled Contribution	Completed successfully	1/1/2021 12:00 AM

The right sidebar contains 'FILTERS' with input fields for 'Received from' (10/14/2020) and 'Received to' (2/10/2021), a 'Search by file name' field, and a 'Filter' button. A 'LIVE CHAT' button is located in the bottom right corner, showing the time '8:30 am - 5 pm CT'.

For assistance, contact Business Relations:

Email
businessrelations@hsabank.com

Visit
hsabank.com/employers

