

HSA BANK INSIDER

TIPS TO NAVIGATE YOUR JOURNEY

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A Division of Webster Bank, N.A.,
Member FDIC

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Managing your Health Savings Account (HSA) is important. So, we've put together some easy-to-follow instructions for ordering a debit card, funding your account, and more.



First-Time Online User?

Whether you're a brand new HSA Bank member or you've been with us a while, it's easy to register for online account access. Follow these simple steps and you'll be set up in no time.

- 1** To register your online account, go to myhsabankaccount.com.
- 2** Select the "Create your new username and password" link from the bottom of the page.
- 3** Enter the identifying information requested on the page and click on the Next button.
- 4** Select and answer your three security questions.
- 5** After completing the Username, New Password, and Confirm Password fields, click Submit.
- 6** Please read and accept the Esign Consent Agreement and Online Services Agreement. You must open and review the agreements, scroll to the bottom, and check the appropriate boxes.
- 7** Please enter and confirm your email address to ensure you receive notifications based on your elected preferences.
- 8** Confirm your delivery method preference for certain bank disclosures and notices*.

***Please note:** You may update your notification preferences later by clicking on the Statements and Notifications tab and then on the Update Notification Preferences button.



How Do I Order a Replacement Debit Card?

If your card has been lost or stolen, please immediately call 800-357-6246 or promptly follow these simple instructions to cancel your existing card and request a new card. To order a replacement card for any other reason, please also follow the applicable steps.

- 1 After logging into your account, click on the Profile Tab.
- 2 Click on Banking/Cards.
- 3 Click on Order Replacement.
- 4 To replace your existing card, complete the simple form, check for accuracy, and click Submit. This will both cancel your current card and will initiate the card replacement process.
- 5 Your replacement card should arrive roughly within 10-14 days.

Please note: A card issuance fee may apply. Refer to your HSA Bank Fee and Interest Rate schedule for further information.



How Can I View & Print My Statements?

If you need to view or print your statements, it's easy to do so on the [Member Website](#).

- 1 After logging into your account, click on the Statements & Notifications tab.
- 2 Choose the document or summary you wish to view from the list of available statements and notifications.
- 3 When the document or summary appears on screen, you will have the option to print.

Please note: You can also view or change your notification delivery method preference for account summaries, tax forms, and certain bank disclosures and notices by clicking on Update Notification Preferences under the Statements & Notifications tab.



How Can I Add an Authorized Signer?

Sometimes it makes sense to allow another individual (i.e., spouse, relative, partner) access to your account. To add an authorized signer, follow these easy steps.

- 1 After logging into your account, click on the Profile tab.
- 2 Next, click on Add Authorized Signer.
- 3 You will then be asked to provide information about your chosen authorized signer, including his/her Social Security Number and his/her birthdate. Upon completion of this form, click Submit.

Please note: Authorized signer must be 18 years or older.



How Can I Link a Bank Account?

If you want to make contributions to your HSA or withdraw funds to reimburse yourself for IRS-qualified expenses from an external bank account, just follow these quick and easy steps.

- 1** After logging into your account, click on the Profile tab.
- 2** Click on Banking/Cards.
- 3** Click on the Add Bank Account link.
- 4** Fill out the form with your account and institution information and select your account type (i.e., Savings, Checking). Once completed, click on the Submit button.
- 5** After you have submitted the account information, HSA Bank will send a small deposit to your external account within three (3) business days to verify your banking information.
- 6** Once the deposit is received in your external account, you need to validate your banking information using the steps below.
- 7** Navigate to the Banking/Cards section of the Profile tab.
- 8** Click on Activate under your bank account information.
- 9** To activate your account, enter the amount (between \$.01 - \$1.99) we deposited into your checking/savings account and click Submit. Upon completion, your account will be available for contributions and withdrawals.



How Do I Add a Beneficiary?

If you wish to designate a beneficiary or update your current beneficiary, simply follow these easy steps. In the absence of a designation, your beneficiary is your estate.

- 1** After logging into your account, click on the Profile tab.
- 2** Click on Add Beneficiary.
- 3** You will then be asked to provide information about your chosen beneficiary, including his/her Social Security Number and his/her birthdate. Upon completion of this form, click Submit.

Note: If you designate a non-spouse primary beneficiary, you may be required to submit a beneficiary form with the notarized consent of your spouse.

Additional Resources

Member Website Videos

These two video tutorials are designed to help you navigate your way through the HSA Bank Member Website and perform account functions such as making contributions and distributions.



Member Website Guide

Our Member Website Guide helps you navigate your way on the HSA Bank Member Website – providing helpful how-to tips on all of the site's functionality, including the ones found here and much more.



HSA Bank Insider, the official newsletter of HSA Bank, is a member-exclusive resource designed to optimize the health savings experience by helping the user get the most out of their account.