

# HealthHub.com Health Savings Account (HSA) Quick Reference Guide

## Log in to HealthHub® & activate your HSA

- Go to HealthHub.com. Select **Employee Account Login**.
- Enter your **Username & Password**. Click **Login**.

### First-time users:

- If you are new to HealthHub, click on **Register Now**. Enter your Member ID. (Make sure to enter your number without dashes or spaces.) Enter your zip code.
- Click **Register**.
- Create a username and password. Re-enter your password to confirm.
- Select a security question and answer.
- Enter your e-mail address.
- Click **Confirm**.

### Activating your HSA:

- As an HSA accountholder you will have to agree to the online account terms and conditions. You will also have to provide the following information.
  - > E-mail address
  - > Health plan information – start date, coverage type, deductible amount
  - > Beneficiary information – names, addresses and Social Security numbers
  - > Personal account information – to link your HSA to a personal bank account for free deposits and withdrawals

**\*Note:** To sign up for e-mail and online updates, follow the directions below.

## Sign up for account notifications

- Log in to HealthHub.com. At the top of the screen, click on **My Settings**.
- Click on **Notifications / Email Address**.
  - > If you want to receive e-mails, enter your e-mail address.
- Check off the notifications you wish to receive. From the drop down menus, click on how often you want to receive them.
- Click **Submit**.

## View account balances & alerts

- Log in to HealthHub.com.
- On **My Dashboard** you will see any alerts on your account.
- Under **My Accounts** you can see your account balance.
- Click on **View Account Details** to see your most recent transactions.

## View account details

- Log in to HealthHub.com.
- You can get to your account details in three ways.
  1. On **My Dashboard** scroll down to **Financial Center- My Accounts**.
  2. On the left side of the screen click on **My Accounts and Services**.
  3. At the top of the screen click on the **Financial Center** tab.
- When you click on **View My Account**, you can see the following information on your account.
  - > Spending Summary – This displays as a pie chart. It breaks down your expenses in categories.
  - > Recent Transactions – View the recent transactions on your HSA. This includes deposits, withdrawals and payments.
  - > Recurring Transactions – You can see at a glance what you have set up for automatic contributions or payments.

## Take action on your account

- Log in to HealthHub.com.
- On the left side of the screen, click on **My Accounts and Services**.
- In the **Select Account** drop down list, select Health Savings Account.
- On the left side of the screen, under **My Account** you can link to a number of actions.
  - > **My Profile** – View and edit personal, insurance, beneficiary or dependent information.
  - > **Transactions** – View by date, type or status.
  - > **Link My Bank Accounts** – You link other bank accounts to your HSA. This will make it easy for you to make deposits into or withdrawals from your HSA.
  - > **Recurring Transactions** – View what you have set up for automatic contributions or payments.
  - > **Make a Deposit** – Contribute to your HSA from a linked bank account.
  - > **Make a Withdrawal** – Withdraw funds from your HSA and direct them to a linked bank account.
  - > **Make a Payment** – Pay a provider or merchant from your HSA.
  - > **My HSA Receipts** – Upload receipts and link them to specific transactions.
  - > **Expense Manager** – View, add and remove expense categories to track and manage your HSA expenses.
  - > **Investments** – View and select from a variety of mutual funds for investing your HSA dollars. Once you have at least \$1,000 in your HSA, you can open an investment account.
  - > **Fee Schedule** – View any fees that apply to your HSA
- You can order another debit card for your spouse or dependent. From the left side of the screen, click on **Manage My Debit Cards**. Click on **Order a Dependent Debit Card**. Enter the spouse or dependent's name and relationship.
- Click **Submit**. We will mail your card to your home address. You should receive it within 15 business days.

## Make a payment

- Log in to HealthHub.com.
- From the left side of the screen, click on **My Accounts and Services**.
- In the **Select Account** drop down list, select Health Savings Account.
- From the left side of the screen, click on **Make a Payment**.  
**Step 1:** Select your payee from the drop down list. This is who you want to pay. You can add a new payee with the [+] sign. Click **Continue**.  
**Step 2:** Enter the date the payment should be made (check date), date of service, amount to be paid and expense category. Mark if the expense is eligible. **Note:** The other fields are optional. Click **Continue**.  
**Step 3:** Review your payment. Click **Submit**. To make a change, click **Previous**.  
**Step 4:** Print a copy of your confirmation for your records.

## Withdraw funds

- Log in to HealthHub.com.
- From the left side of the screen, click on **My Accounts and Services**.
- In the **Select Account** drop down list, select Health Savings Account.
- From the left side of the screen, click on **Make a Withdrawal**. **Note:** You will need to have a linked bank account to do this.  
**Step 1:** Enter the amount you want to withdraw and the linked account to which the funds should be directed. Mark if the expense is eligible. Select the expense category. Provide a brief description and the date the withdrawal should occur (origination date).  
**Step 2:** Review your withdrawal. Click **Submit**. To make a change, click **Back**.  
**Step 3:** Print a copy of your confirmation for your records.

## Make after-tax contributions

- Log in to HealthHub.com.
- From the left side of the screen, click on **My Accounts and Services**.
- In the **Select Account** drop down list, select Health Savings Account.
- From the left side of the screen, click **Make a Deposit**. **Note:** You will need to have a linked bank account to do this.  
**Step 1:** Enter the amount you want to deposit into your HSA from your linked bank account. Enter the contribution year. Select the bank account. Provide a brief description and the date the deposit should occur (origination date). Mark if you want to repeat the transaction. Click **Continue**.  
**Step 2:** Review your deposit. Click **Submit**. To make a change, click **Back**.  
**Step 3:** Print a copy of your confirmation for your records.

## Start investing

- Log in to HealthHub.com.
- From the left side of the screen, click on **My Accounts and Services**.
- In the **Select Account** drop down list, select Health Savings Account.
- From the left side of the screen, click on **Investments**. **Note:** The Investments screen will let you know if you are eligible to invest your HSA funds. You must have a balance of at least \$1,000 to open an investment account.
- To open an investment account, click **Enroll Now**.
- Click that you have read the fees and agreement. Enter your initials as your electronic signature. Click **Submit**. **Note:** It may take up 48 hours to open the investment account.
- Once your investment account is set up, you are then able to transfer funds between your HSA and investment accounts.

## Link to useful tools

- Log in to HealthHub.com.
- On the left side of the screen, on **My Dashboard**, you will find the information and tools you need the most.
  - > **My Accounts and Services** – the Financial Center and your account details
  - > **My Calendar** – pending and historical transactions
  - > **My Documents** – an archive of documents we sent you as well as account-related forms
  - > **Plan My Benefits** – view and enter your plan information in the Benefits Center
  - > **My Health and Wellness** – the Wellness Center where you can track your health and wellness
  - > **Shop Online** – the Consumer Center allows you the convenience to shop online from a number of online vendors for your health care needs
  - > **My Settings** – update your username, password, e-mail address and security question, as well as manage your notifications
  - > **My HealthHub Resources** – points you to the Resource Center with educational materials, FAQs and more

## Access account-related forms

- Log in to HealthHub.com.
- From the left side of the screen, click on **My Documents**.
- In the **Filter Document Type** drop down list, select **HSA Forms**.
- You can download and print the following documents.
  - > Contribution Coupon
  - > Account Closure Form
  - > Beneficiary Designation Form
  - > Enrollment Verification Form
  - > Trustee Transfer Form

## Questions?

Contact Customer Service at 800.284.4885, 7am - 7pm, Monday - Friday and Saturday 9am - 2pm CT.

This material is for informational purposes only. Information is believed to be accurate as of the production date; however, it is subject to change. For more information about PayFlex, refer to HealthHub.com.