HealthHub.com HSA Quick Reference Guide

Log into HealthHub™

- At HealthHub.com, select **Employee Account Login**.
- Enter your **Username & Password** and click **Login**.
- If you are a new participant, click on **Register** and enter your member number (which could be your Social Security Number or Employer assigned number). Make sure to enter your number without dashes or spaces. Then enter your 5-digit zip code and click **Register**.
- Select a security question and answer.
- Then create your own username and password and click **Confirm**.

*Make sure to sign up to receive electronic account updates by following the directions below.

Sign up for account notifications

- At HealthHub.com, select **Employee Account Login**.
- Enter your username and password and click **Login**.
- From My Dashboard, select **My Settings**.
- Select Manage Notifications and identify the types of notifications you wish to receive, and how you want to receive them.
- Then click **Submit**.

Access account balances & alerts

- At HealthHub.com, select **Employee Account Login**.
- Enter **Username & Password**.
- **My Dashboard** shows your alerts and your *Accounts Snapshot* displaying your balance and the amount and date of your last deposit.
- To view your most recent account activity, click on the account you wish to view.

View account details

- At HealthHub.com, select **Employee Account Login**.
- Enter your username and password and click **Login**.
- You can access your account through **My Dashboard** in **Accounts Snapshot**, from **My Accounts and Services** link or the **Financial Center** tab.
- From **My Account**, you can:
  - View your spending summary
  - See most recent or all transactions
  - Access and manage the HSA
  - Make a deposit or a withdrawal
  - Link external bank accounts

Take account-specific actions

- At HealthHub.com, select **Employee Account Login**.
- Enter your username and password and click **Login**.
- Select **My Account** from left hand navigation.
- From here, you can link to:
  - My Profile – view and edit personal, insurance or beneficiary information
  - Transactions – view by date, type or status
  - Link My Bank Accounts – allows you to link other bank accounts for ease in making deposits or withdrawals
  - Make a Deposit – allows you to make a deposit into your HSA from a designated, linked account
  - Make a Payment – make a payment your HSA to a designated provider or merchant
  - Make a Withdrawal - withdraw funds from your HSA and direct them to a linked bank account
  - My HSA Receipts – allows you to upload receipts and link to specific transactions
  - Expense Manager – enables you to view, add and remove Expense Categories to track and manage your HSA expenses
  - My Investments – allows you to view and select from a variety of mutual funds for investing your HSA dollars

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To Make a Payment

- At HealthHub.com, select **Employee Account Login**.
- Enter your username and password and click **Login**.
- On **My Dashboard**, select **My Account** on the left hand navigation bar.
- Then select **Make a Payment**.
- **Step 1:** Select who you want to pay (payee) from the drop down box or add a new payee with the + sign.
- **Step 2:** Enter the date the payment should be made (origination date), amount to be paid, expense category and date of service.
- **Step 3:** Review your payment and click "Submit" to complete the payment or "Previous" to make changes.
- **Step 4:** Print a copy of your confirmation.

To withdraw funds

- At HealthHub.com, select **Employee Account Login**.
- Enter your username and password and click **Login**.
- On **My Dashboard**, select **My Account** on the left hand navigation bar.
- Then select **Make a Withdrawal** to withdraw funds from your HSA and deposit into a linked bank account.
- **Step 1:** Enter the amount you want to withdraw, select the linked account to which the funds should be directed, if expense is IRS-eligible, a description of the transaction, and the date the transaction should be executed (origination date).
- **Step 2:** Confirm your entry and click "Submit" to complete the withdrawal, or "Back" to make changes.
- **Step 3:** Print a copy of your confirmation.

Choose Your Investments

- At HealthHub.com, select **Employee Account Login**.
- Enter your username and password and click **Login**.
- From **My Account**, select **My Investments**.
- To open an investment account which allows you to invest your HSA dollars with a variety of investments funds, click **Submit**.
- Read and electronically sign the agreement to complete the investment account process which may take up to 24 hours
- Once your investment account is set up, you are then able to transfer funds into and out of your HSA interest-bearing account

Link to useful tools

- At HealthHub.com, select **Employee Account Login**.
- Enter your username and password and click **Login**.
- In **My Dashboard**, from left hand panel, you will find the information and tools you need the most.
  - My Accounts and Services – accesses the Financial Center
  - My Calendar – displays pending and historical
  - My Documents – accesses an archive of documents either sent or received as well as account-related forms
  - Plan My Benefits – directs you to the Benefits Center allowing you to view and/or enter your plan information
  - My Health and Wellness – brings you to the Wellness Center enabling you to track your health and wellness
  - Shop Online – places you at the Consumer Center so you can shop online for your healthcare needs
  - My Settings – allows you can 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, calculators, FAQs and more

Access account-related forms

- At HealthHub.com, select **Employee Account Login**.
- Enter your username and password and click **Login**.
- On **My Dashboard**, select **My Documents** on the left hand navigation bar.
- To download and/or print the following documents, click on the **Document Title**.
  - Enrollment Verification Form
  - Contribution Coupon
  - Beneficiary Designation Form
  - Trustee Transfer Form
  - Address/Change Form
  - Account Closure Form

Questions?

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

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