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
- 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
- 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
- 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
- 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
- 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
- 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.