

HSA Online Enrollment Process

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1. Open an HSA
2. Click on Click Here to Enroll today
3. Enter enrollment(employer) code given to Employee by Employer or PSP. The code is listed on the employer screen in the HSA System on right hand side.
4. Custodial Account Agreement...must click I agree and understand
5. HSAToday Disclaimer: Employee must click I understand and agree before continuing
6. Creating personalized login ID and password
7. Employee inputs their information
8. Entering Primary Beneficiary(ies) This part is optional
9. Entering contingent beneficiary(ies)
Optional page
10. Enter personal banking information for direct deposit for disbursements or account used for scheduled post tax drafts
11. This is optional
12. Adoption Agreement.
13. Must be selected before completing online process
14. HSA Debit Card Addendum
15. This is if the employee wishes to have a debit card
16. Employee may complete debit card application
17. Completion of online hsa application process
18. The employee can go back and review their account information or investment enrollment selection.