

Group Online Enrollment Instructions

It takes just four easy steps to enroll in a Health Savings Account using HSA Bank's Group Online Enrollment system. Simply use any computer, any time, and follow these instructions.

Step 1: Type or copy and paste this customized enrollment link into your Internet browser/address bar:

https://secure.hsabank.com/group_enrollment/enrollment.aspx?id=203849523

You will be taken to an enrollment page created specifically for your group. Enter your Social Security or Tax Payer Identification Number and click Submit.

Step 2: Complete and submit the online enrollment application. If your employer submitted a census file, some information may be pre-filled. You will need to supply the following information:

- ✓ Effective Date of your Health Plan
- ✓ First and Last Name
- ✓ Home and/or Business Phone
- ✓ Date of Birth
- ✓ Employer Information
- ✓ The Deductible for your Health Plan
- ✓ Street Address (P.O. boxes not accepted)
- ✓ Email Address
- ✓ Citizenship Status

You will also be able to order checks and one complimentary Visa® debit card, sign up for Internet Banking and designate an Authorized Signer. With Internet Banking, you have 24 hour a day access to view account details, access statements and tax documents, change your address, sign up for email notifications, and opt to receive electronic statements. If you would like to add an Authorized Signer, you will need to provide their:

- ✓ First and Last Name
- ✓ Phone Number
- ✓ Social Security Number
- ✓ Street Address
- ✓ Date of Birth

Identity Verification

Note: In order to comply with the Customer Identification Program (CIP), regulation 31 CFR 103.121, and section 326 of the USA PATRIOT Act, we must gather information for identity verification. This means that when you open an account, we will need you to provide the information as noted above for you and your Authorized Signer (should you choose to designate one). If your identity or the identity of your Authorized Signer is not verified by our automated process, you will receive a letter from us requesting additional information.

Step 3: Your account will typically open in 1-2 business days. Your employer can check your enrollment status by logging in to HSA Bank's Employer Site.

Step 4: A welcome kit will be mailed to you in approximately 7-10 business days after your account is open. This will contain important account information. To optimize your HSA benefits, please review it carefully.

One Choice Stands Out...