

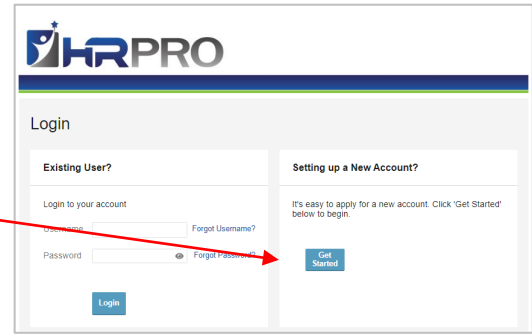


New HSA Account Online Enrollment Instructions

Welcome to HRPro's HSA Account

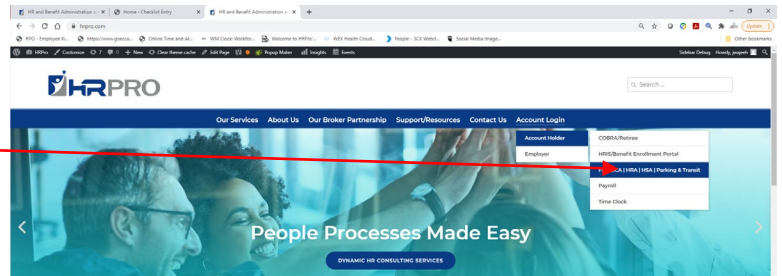
How to set up your account online:

Use the direct link provided by your employer and click on "Get Started" under "Setting up a New Account"



Or go to www.hrpro.com

Click "Account Login" (Right side of menu)
Click "Account Holder Login/FSA/HRA/HSA"



Under "Setting up a New Account" enter code (provided by your employer) then click "Get Started"

Create Account

Personal Information *Required

Please enter the following personal information to create your account. Create a username and password to login to your account in the future.

Name*
First Name MI
Last Name

Birth Date*

Home Address*
United States
Address Line 1
Address Line 2
City
Select a state...
Zip Code

Mailing Address*
 Same as Home Address

Mobile Number*
 -

Mobile Carrier*
Select a Carrier...

Your mobile number will be used only for the purpose of servicing your benefit plan account. This information will not be used for any solicitations.

Time Zone*
Select a Time Zone...

Email Address*

Confirm Email Address*

You are now at the first page of account creation. Complete the required information about yourself and set up your username and password.



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The next screen asks you to answer security questions. These questions are used to reset passwords and also in other areas of the portal.

Now you will be directed to complete your HSA Enrollment. The first screen takes you to a summary description of the HSA. This will provide a brief outline of how an HSA works with a high deductible health plan (HDHP). Click "Next" after you've read it.

Agreements

Next you will receive and need to read and agree to the following agreements:

- The Custodial Agreement and Disclosure Statement
- Electronic Disclosure
- Important Information on Patriot Act Requirements



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Profile:

Add or update the information on the Profile page. Please enter any additional information necessary and check it for accuracy. The fields indicated with a red * are required. This information will be used to verify your identity so make sure it is accurate. You will not be able to proceed without verification. Click "Next" when complete.

The screenshot shows the 'HSA Enrollment: Profile' page. The user is logged in as Jennifer Test. The page has a navigation bar with links for Agreements, Profile, Dependents, Eligibility, Payments, Beneficiaries, Summary, and Confirmation. The 'Demographic Information' section contains the following fields: First Name* (Jennifer), Middle Initial (), Last Name* (Test), Social Security Number* (), Birth Date* (8/25/1968), Gender (Select a gender), and Marital Status (Married, Single). The 'Contact Information' section contains: Country* (United States), Address Line 1* (1025 N. Campbell Road), Address Line 2 (), City* (Royal Oak), State* (Michigan), Zip Code* (48067), Mailing Address (Same as Home Address checked), Home Phone* (), Email Address* (jwajeet@hrpro.com), and Confirm Email Address* (jwajeet@hrpro.com). A red arrow points to the 'First Name' field. Buttons for 'Cancel', '< Previous', and 'Next >' are at the bottom.

Dependents:

Add your dependents, if applicable. Enter your dependent's information and click "Add Dependent". Repeat for to add additional dependents. When finished adding dependents, click "Next".

The screenshot shows the 'HSA Enrollment: Dependents' page. The user is logged in as Jennifer Test. The page has a navigation bar with links for Agreements, Profile, Dependents, Eligibility, Payments, Beneficiaries, Summary, and Confirmation. The page contains the following fields: First Name* (), Middle Initial (), Last Name* (), Social Security Number (), Birth Date* (), Gender (Male), Full Time Student* (Yes, No), and Relationship* (Spouse). There is an 'Add Dependent' button. A red arrow points to the 'Add Dependent' button. Buttons for 'Cancel', '< Previous', and 'Next >' are at the bottom.



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Eligibility:

This page contains the eligibility requirements that are necessary to open a Health Savings Account. If you qualify, click the checkbox certifying that you meet the qualifications to open a Health Savings Account.

Under “Qualifying Health Plan Coverage”, you must indicate if you are as an “individual” or “family” and click “Next”.

The screenshot shows the 'HSA Enrollment: Eligibility' page. At the top, the HRPRO logo is visible. Below it, the user's name 'Jennifer Test' and a 'Logout' link are shown. A navigation bar includes links for 'Agreements', 'Profile', 'Dependents', 'Eligibility', 'Payments', 'Beneficiaries', 'Summary', and 'Confirmation'. The main content area is titled 'Health Savings Account Qualification' and contains a list of requirements. A red arrow points from the text 'click the checkbox certifying that you meet the qualifications to open a Health Savings Account' to a checkbox labeled 'I certify that I meet the qualifications to open a Health Savings Account' at the bottom of the page. Navigation buttons for '< Previous' and 'Next >' are also present.

Payments:

Employees will be ordered a debit card to be used for HSA expenses automatically upon enrolling in the HSA. To have an additional card issued to a spouse or an adult child, please click the “issue card” box next to the appropriate individual in this section. (Only if you have added dependents or spouse to plan).

Reimbursement Method. There may be times when you are not able to utilize your debit card to make HSA eligible purchases or payments. If you would like to request a distribution from your plan, you will need to select a reimbursement method.

If you select “Direct Deposit” and click “Next”, you will be directed to the section to enter your bank account information. Otherwise a check will be issued to your home for each distribution requested.

The screenshot shows the 'HSA Enrollment: Payments' page. At the top, the HRPRO logo is visible. Below it, the user's name 'Jennifer Test' and a 'Logout' link are shown. A navigation bar includes links for 'Agreements', 'Profile', 'Dependents', 'Eligibility', 'Payments', 'Beneficiaries', 'Summary', and 'Confirmation'. The main content area is titled 'Benefits Card' and contains a section for 'Pay for your qualified expense directly out of your plan account with the debit card. Substantiation may be required after purchase.' Below this, there is a table with columns for 'Name', 'Accounts Available on Card', and 'Card Shipped To'. A red arrow points from the text 'click the “issue card” box next to the appropriate individual in this section' to a checkbox labeled 'Issue Card' in the table. Below the table, there is a section for 'Reimbursement Method' with options for 'Direct Deposit' and 'Check'. Navigation buttons for '< Previous' and 'Next >' are also present.



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New HSA Account Online Enrollment Instructions

Direct Deposit:

When choosing direct Deposit option, you will be required to enter your banking information on this next screen. Check for accuracy.

HRPRO

Jennifer Test | Logout

HSA Enrollment: Payments
Agreements Profile Dependents Eligibility Payments Beneficiaries Summary Confirmation

Bank Account * = required field
Enter your bank account information to setup your direct deposit account.

Routing Number: *

Account Number: *

Confirm Account Number: *

Account Type: *

Account Nickname: *

Bank Information
Enter the contact information for your bank. This information may be pre-filled for you based on the routing number you entered above.

Bank Name: *

Address Line 1: *

City: *

State: *

Zip Code: *

Cancel << Previous Next >>

Beneficiaries:

You may designate a beneficiary for your Health Savings Account (HSA). The designated beneficiary will receive your HSA assets in the event of your death.

If you are married in common law or in a community property state, you must designate your spouse as your Primary Beneficiary.

You can pre-fill this section by clicking one of the dependents listed in the box at the right.

HRPRO

Jennifer Test | Logout

HSA Enrollment: Beneficiaries
Agreements Profile Dependents Eligibility Payments Beneficiaries Summary Confirmation

* = required field

You may designate a beneficiary for your Health Savings Account. The designated beneficiary will receive your HSA assets in the event of your death.

If you are married in common law or in a community property state, you must designate your spouse as your Primary Beneficiary. You can change beneficiaries by submitting a notarized [Beneficiary Change Form](#) with your spouse's signature of consent. Please complete the fields below with the requested beneficiary information.

First Name: *

Middle Initial:

Last Name: *

Social Security Number: *

Birth Date: *

Address Line 1: *

Address Line 2:

City: *

State: *

Zip Code: *

Type: * Primary Contingent

Relationship: *

Share Percentage: *

Add Beneficiary

Cancel << Previous Next >>





New HSA Account Online Enrollment Instructions

Summary Screen

This screen summarizes all of the enrollment information entered and gives you an opportunity to change or update it if necessary.

Once all information is verified and complete, click "Next"

HSA Enrollment: Summary
Agreements Profile Dependents Eligibility Payments Beneficiaries Summary Confirmation

Please verify the following information is correct and click Next to continue your enrollment.

Profile Update

Name: Home Address:
Social Security Number:
Birth Date: Mailing Address:
Gender: Home Phone:
Marital Status: Email Address:

Dependents Update

No Dependents

Eligibility Update

Qualifying Health Plan Coverage
Coverage Level: Individual

Payment Method Update

Benefits Debit Card
Cards issued to:

Direct Deposit
Account Usage: IbiAccountUsage
Bank Name: IbiBankName
Account Type: IbiAccountType
Routing Number: IbiRoutingNumber
Account Number: IbiAccountNumber

You have selected Direct Deposit as your reimbursement method. You must complete and submit the Direct Deposit Form¹ in order to setup your direct deposit account.

Beneficiaries Update

Cancel < Previous Next >

Confirmation Page

Please read and agree that you are requesting that a Health Savings Account be opened in your name by checking each of the appropriate boxes and then click "Submit Enrollment"

HSA Enrollment: Creation Authorization
Agreements Profile Dependents Eligibility Payments Beneficiaries Summary Confirmation

By submitting the enrollment, you are requesting that a Health Savings Account be opened in your name.

I affirm that all information I have provided is true and correct and may be relied upon by the Designated Representative and the HSA Custodian.

I understand the eligibility requirements for this HSA and I state that I am responsible for determining whether I qualify to make deposits to this HSA. I am responsible for:

A. Determining that I am eligible to make contributions to an HSA for each year I make a contribution;
B. Ensuring that all contributions are within the maximum limitations set forth by the tax laws, taking into account my coverage and the applicable deductible under a high deductible health plan;
C. The tax consequences of any contributions (including rollover contributions) or distributions;
D. Seeking the assistance of a qualified tax or legal professional to address any questions or concerns I may have about eligibility, contribution limitations, or the taxation of contributions or distributions from my HSA.

I certify that I have received a copy of the enrollment form, the Designation of Representative, the Custodial Agreement and Disclosure Statement, and the Privacy Policy. I understand that I may revoke the HSA on or before seven (7) days after the date of establishment. I have not received any tax or legal advice from the Designated Representative or the Custodian, and I will seek the advice of my own tax or legal professional to ensure my compliance with related laws. I release and agree to hold the Custodian and Designated Representative harmless against any and all claims or losses arising from my actions.

Submit Enrollment < Previous



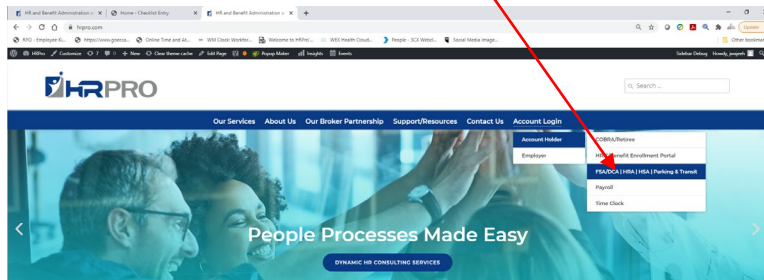


New HSA Account Online Enrollment Instructions

Enrollment Complete!

Once you “submit enrollment” that’s all you need to do – your account is now set up!

To access your portal: go to www.hrpro.com
Click “Account Login” (Right side of menu)
Click “Account Holder Login/FSA/HRA/HSA”



This time choose “Existing User”

HRPRO

Login

Existing User? Setting up a New Account?

Login to your account

Username [Forgot Username?](#)

Password [Forgot Password?](#)

It's easy to apply for a new account. Click 'Get Started' below to begin.

How do I choose my contribution amount?

Your employer will need to obtain your enrollment contribution amounts during your open enrollment. Your employer will upload all contribution amounts into the Employer Portal.

How do I change my contribution amount?

You will need to alert your HR Department for any HSA contribution changes. They will have their own internal process in place for making changes, perhaps by form, benefit enrollment system, etc. Verify with your HR Department how your changes are to be submitted.

What Does My Online Account Do For Me?

With your HSA online account, you will be able to manage and view your investments, make HSA transactions (such as transfer of funds), view balances and recent transactions, view contributions and distributions, set up text alerts, report a lost/stolen card, view messages, download forms and more!

How Do I Access the Mobile App?

Once your account is set up, login to your mobile app with the same login and password. The HRPro app is available through the Apple Store and Google Play.

Visit <https://www.hrpro.com/benefit-administration/benefits-on-the-go/> to download.



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