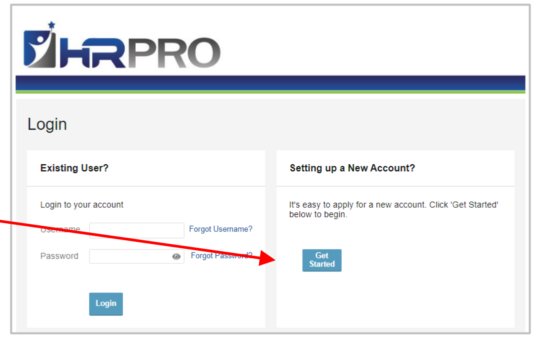
New HSA Account
Online Enrollment Instructions

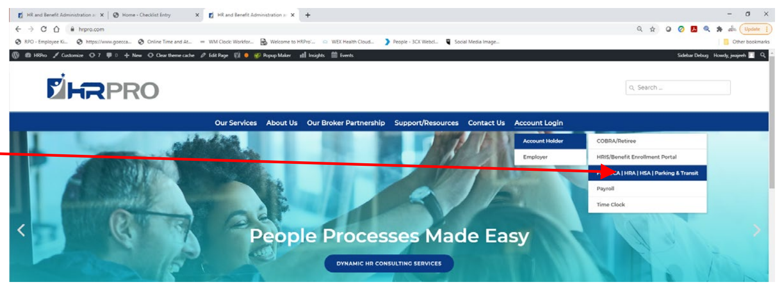
Welcome to HRPro’s HSA Account

How to set up your account online:

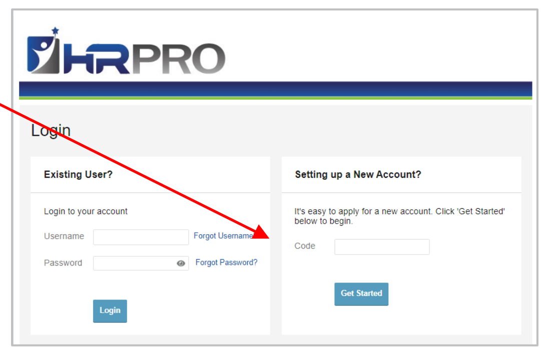
Use the direct link provided by your employer and click on “Get Started” under “Setting up a New Account”

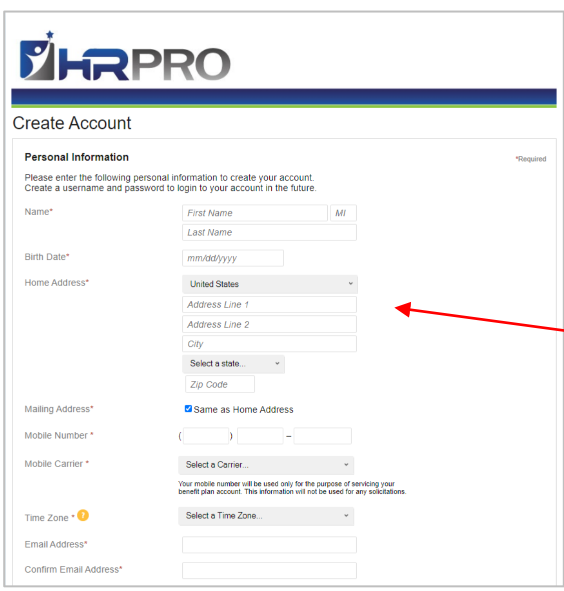


Or go to www.hrpro.com
Click “Account Login” (Right side of menu)
Click “Account Holder Login/FSA/HRA/HSA”



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





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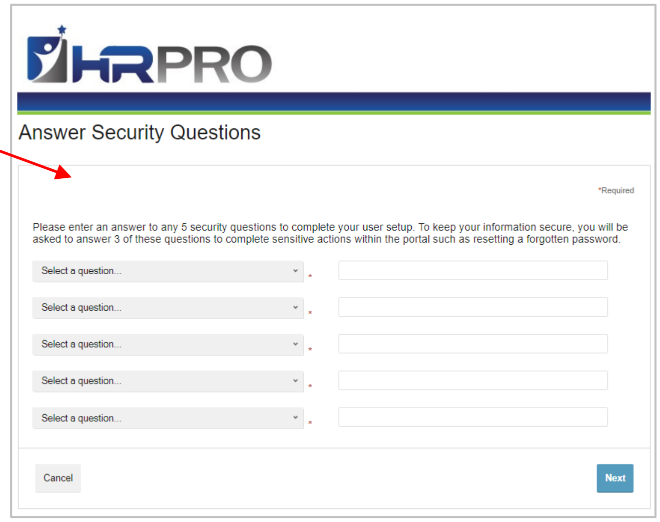
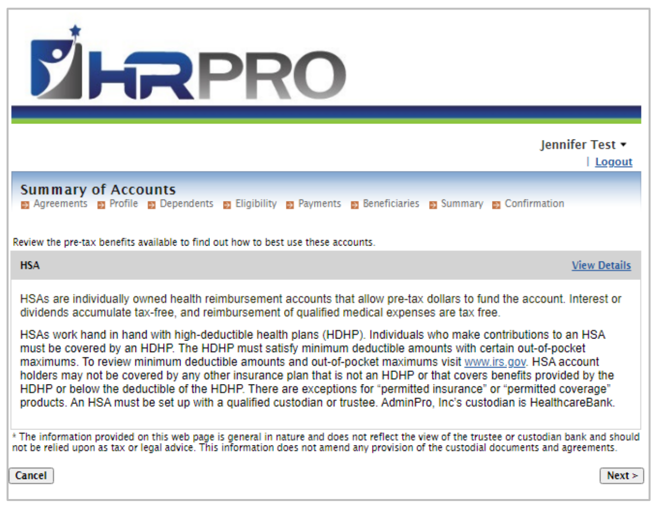
The next screen asks you to answer security questions. These questions are used to reset passwords and also in other areas of the portal.



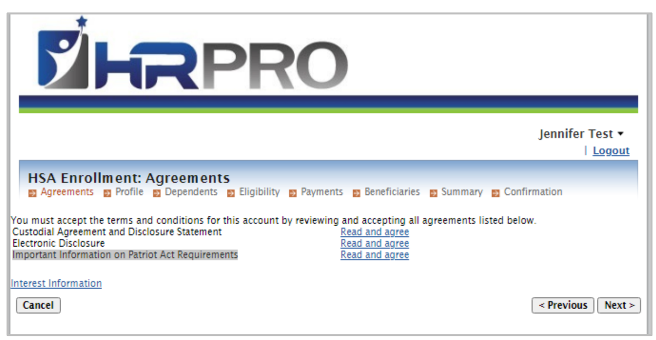
Now you will be directed to complete your HSA Enrollment. The first screen takes you to a summary description of the HSA. This will provide a brief outline of how an HSA works with a high deductible health plan (HDHP). Click "Next" after you've read it.



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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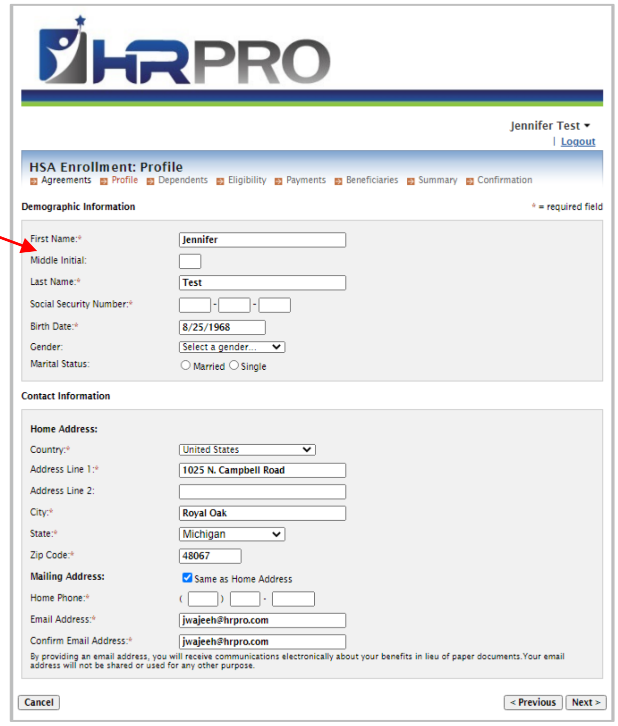
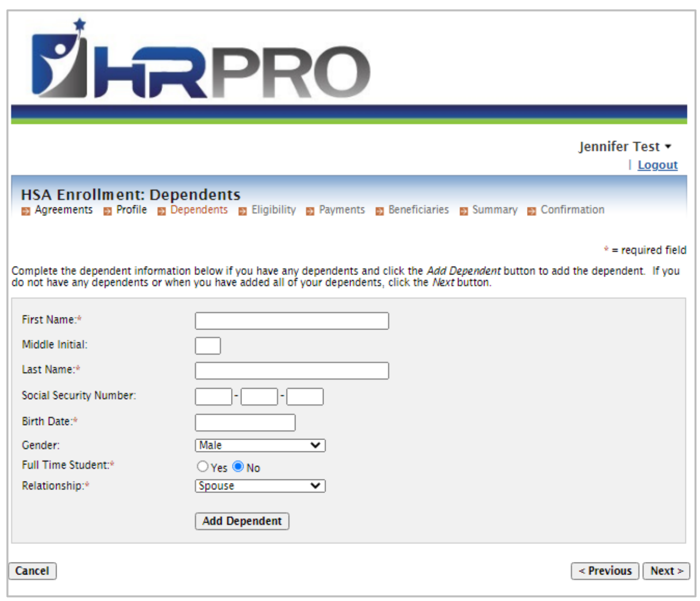
Profile:

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.



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".



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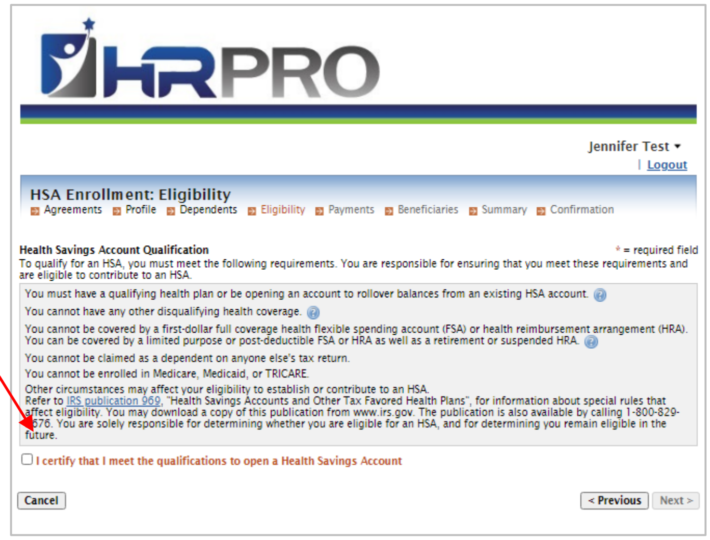
Eligibility:

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.

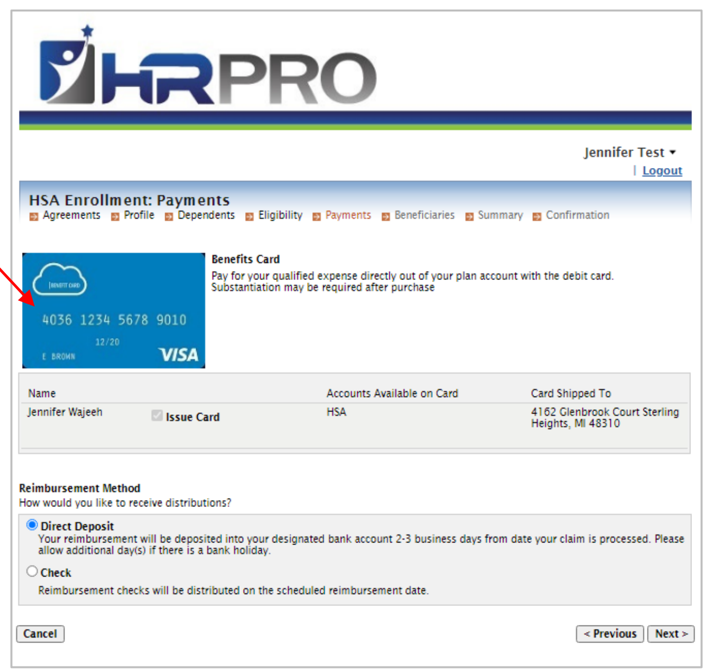
Under "Qualifying Health Plan Coverage", you must indicate if you are as an "individual" or "family" and click "Next".



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.



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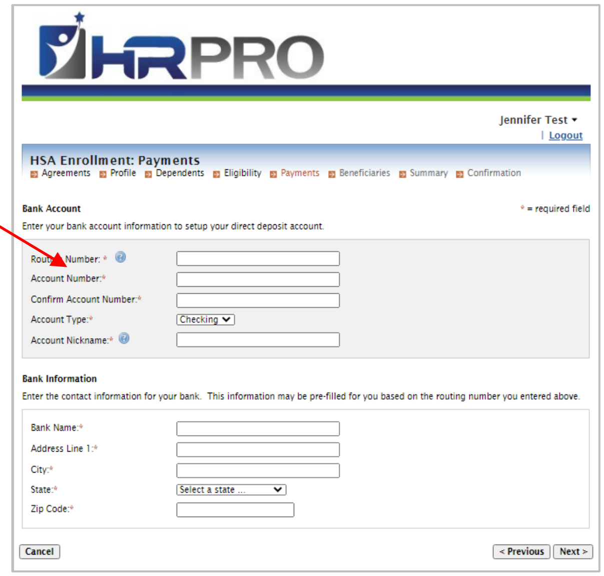
Direct Deposit:
When choosing direct Deposit option, you will be required to enter your banking information on this next screen. Check for accuracy.

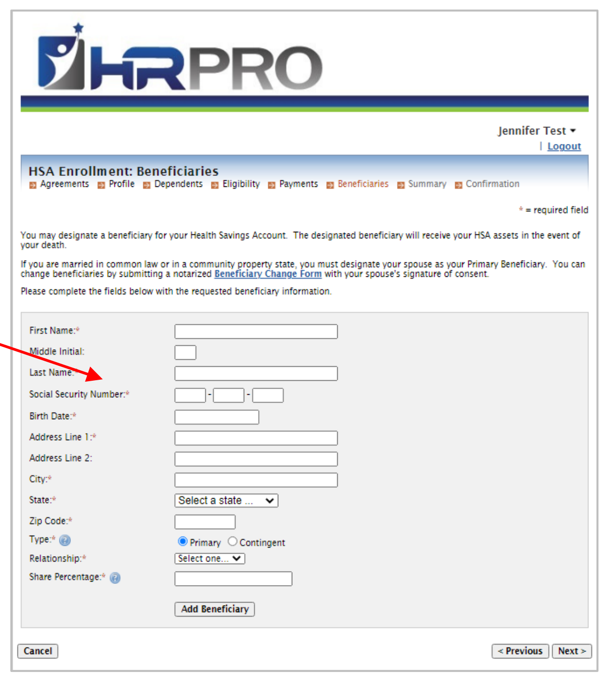


Beneficiaries:

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.



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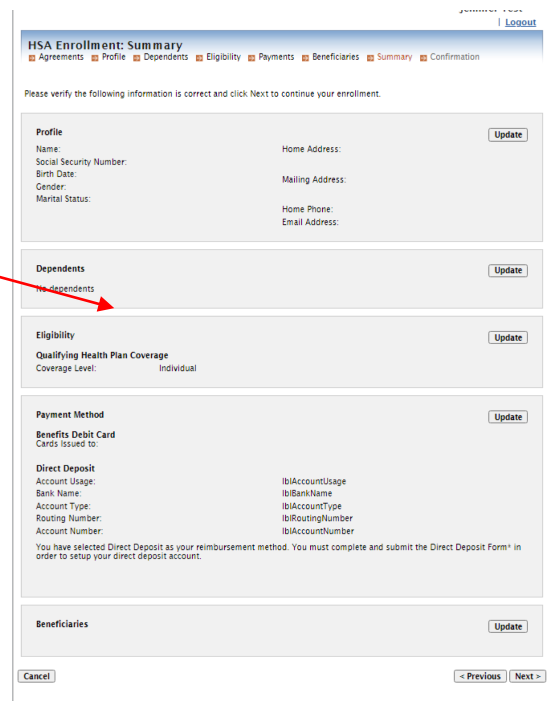
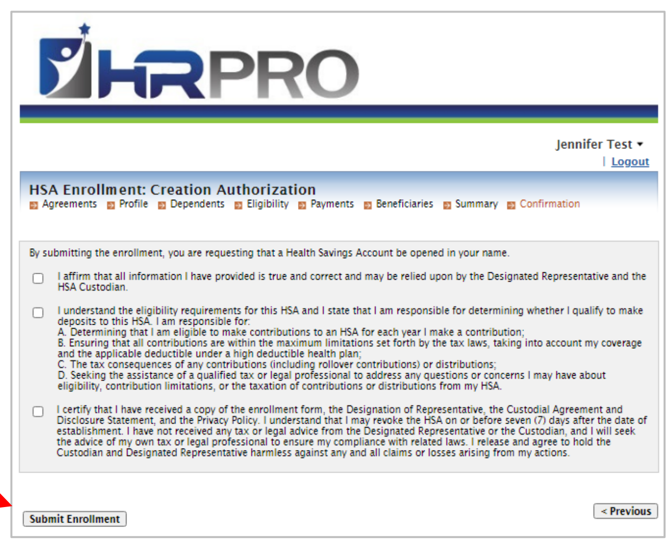
Summary Screen
This screen summarizes all of the enrollment information entered and gives you an opportunity to change or update it if necessary.

Once all information is verified and complete, click “Next”



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”



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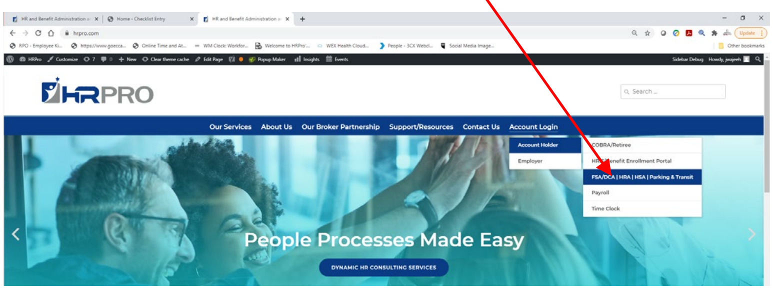
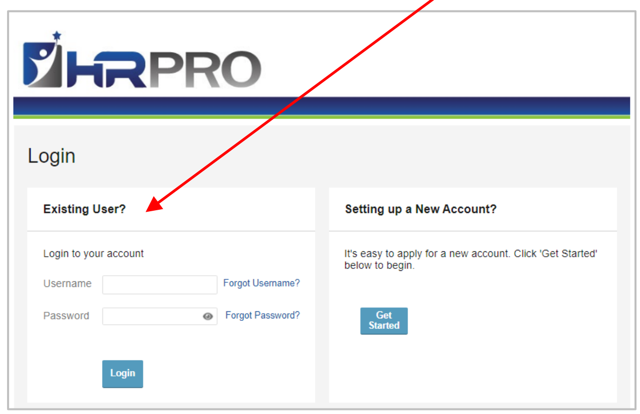
Enrollment Complete!

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"



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?

Your 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.