

Employer Administration Site Overview



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Welcome

Manage your Health Savings Account (HSA) program with the Employer Administration Site.

The site is convenient and easy to use. You can access it any time to:

- See scores for key program metrics.
- Get resources to improve your program.
- View current and prior-year plan information.
- Access forms and documents.
- Retrieve your scheduled reports and notifications.
- Load data import files (Contributions).
- View real-time individual participant account summaries, contributions, claims and payments.
- Add and manage recurring contributions.

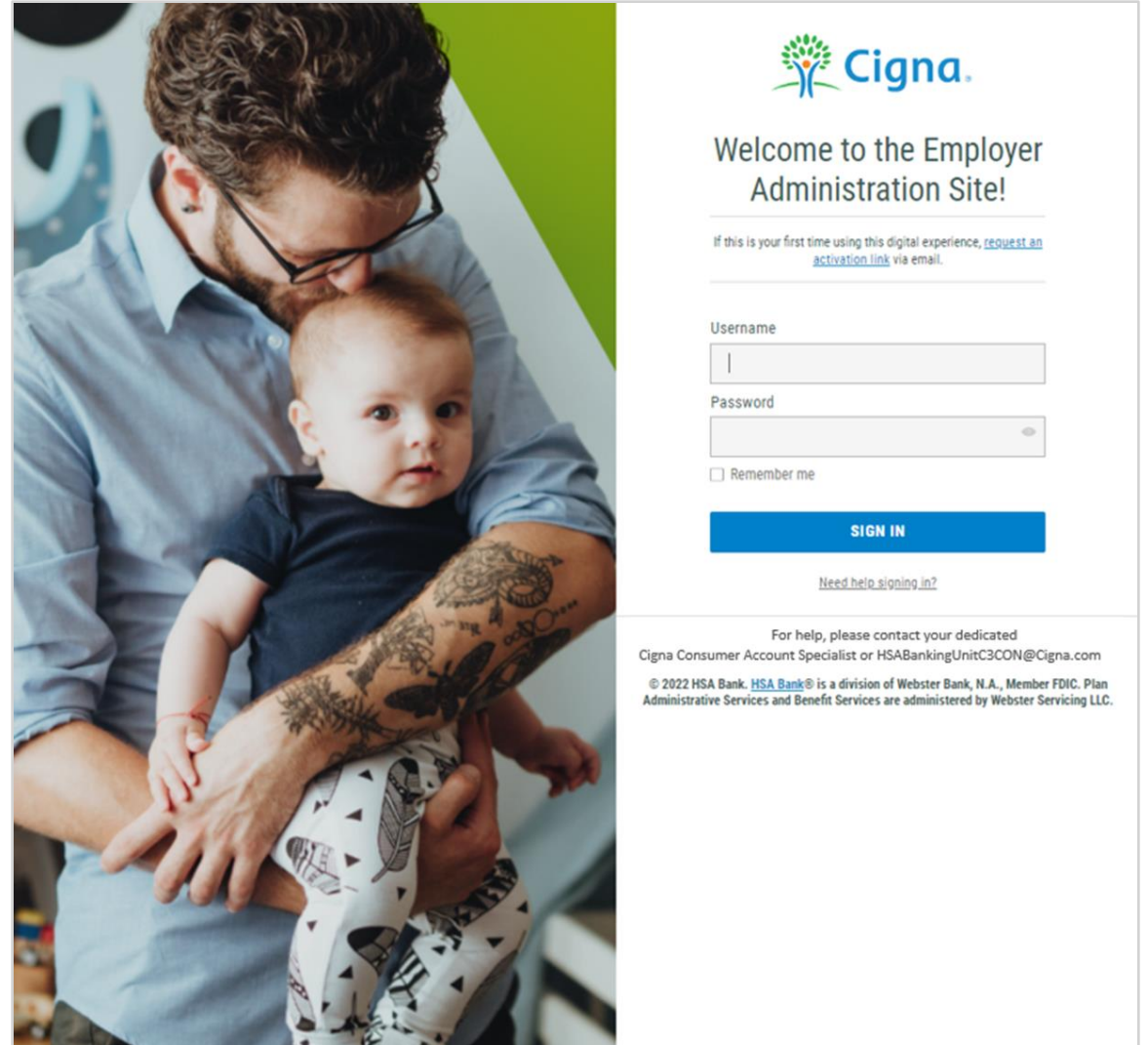
Site access

Request an activation email from the “Welcome to HSA Bank” or “HSA Bank Employer Admin Site Access Now Available” email. Your username is in this email.

You can also request an activation email at <https://employer.hsabank.com/login?partner=mycigna> (or <https://employer.hsabank.com/login?partner=ChoiceFund> for ChoiceFund members).

Follow the steps in the activation email to select a password and set security information.

Call your Cigna Consumer Account Specialist for help accessing the site.



Evaluate your program

Program snapshot

Take a quick glance at your program progress.

Program health

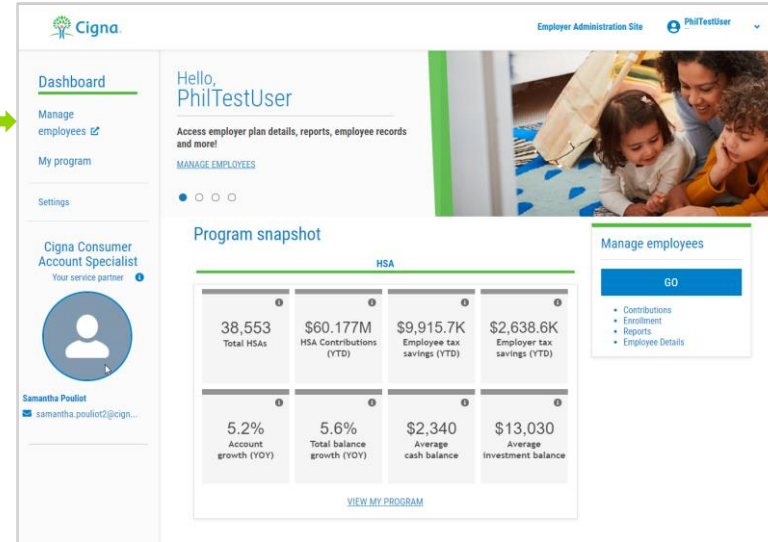
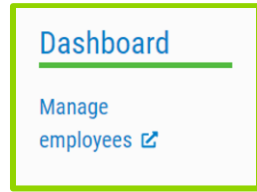
Find key program metrics to help you evaluate your program and make strategic decisions about your benefit plan. And get recommendations for content to share with employees to help them save.



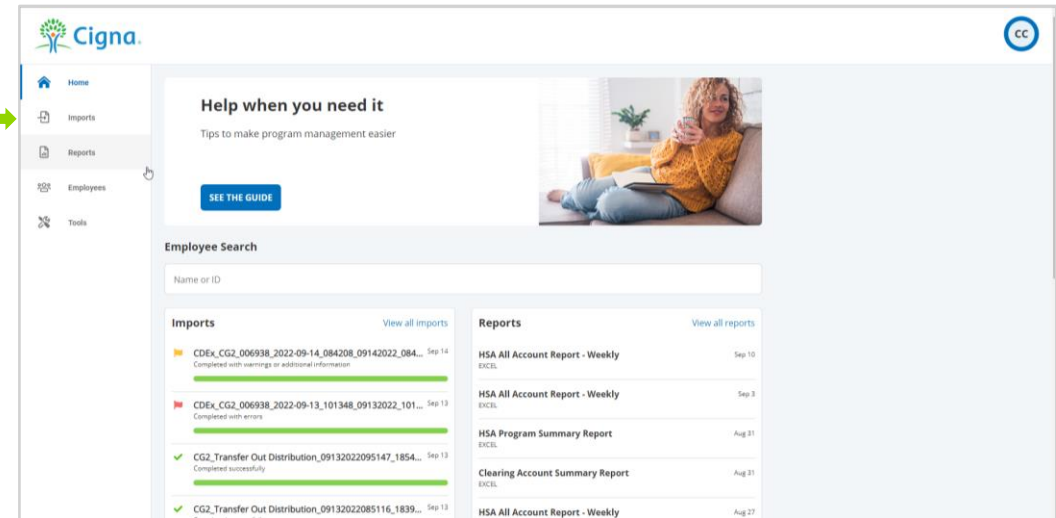
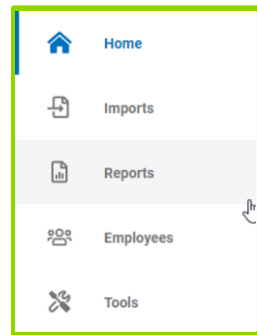
Manage employees

Go to Manage employees to:

- Check the status of data import files.
- Set up recurring contributions.
- View employee-level data.
- Review recent reports.



A new browser window will open where you can manage employees.



Reports and notifications

To view reports and notifications:

1. Select the Reports tab.
2. Select the desired enrollment, financial, contribution or plan information report. It will automatically display.
3. If you don't see a report that you need, please contact HSA Bank to request it.

Some reports can be run on demand. (Please note these may vary.) To run a report on demand:

1. Select the Reports tab.
2. Click the New Report button.
3. Select the appropriate report type.
4. Complete the report detail fields.
5. Click Request.
6. The report generates. An email is sent to you when the report is available if you selected this option.

Cigna

Home Imports **Reports** Employees Tools

Reports + New report

Clearing Account Summary Report Clearing Account Summary	Last run Aug 31, 2022 >
HSA All Account Report - Weekly	Last run Sep 10, 2022 >
HSA Consumer Identification Process Reporting	Last run Dec 28, 2019 >
HSA Program Summary Report The HSA Program Summary Report will provide each Employer with a snap shot of their...	Last run Aug 31, 2022 >

For help, contact Samantha Pouliot at (804) 904-3301 or Samantha.Pouliot2@Cigna.com
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Employee data

To access real-time employee data:

1. Select the Employees tab.
2. Search for employees using first name, last name or employee identifier (defined ID or SSN).
3. Once in the employee view, you can access summaries, enrollments, activity, claims, payments and contributions.

The screenshot shows the Cigna Employees management interface. On the left is a navigation sidebar with icons for Home, Imports, Reports, Employees (highlighted), and Tools. The main content area is titled 'Employees' and features a search box labeled 'Name or ID'. Below the search box is a table of employee records, sorted alphabetically (a to z). Each record includes a green status indicator, the employee name, their status (Active), and their effective date and employee ID. A 'FILTERS' panel on the right shows 'Employee status' set to 'Active'. The Cigna logo is in the top left, and a 'CC' icon is in the top right.

Name	Status	Effective Date	Employee ID
ADDRESS ONE	Active	Effective Jan 20, 2015	Employee # 9001425004
ADDRESS ONE	Active	Effective Jan 20, 2015	Employee # 9001431217
ALPHANUMNAME vPLANTYPE	Active	Effective Dec 1, 2016	Employee # 9001563668
Amy Smith	Active	Effective Mar 7, 2013	Employee # 777
Andrew Kosbab	Active	Effective Jan 1, 2019	Employee # 314159265
Ann Johns	Active	Effective Aug 1, 2001	Employee # 756

Import data

You may have the capability to import data (such as contribution files) directly onto the Employer Administration Site. To import data:

1. Select the Imports tab, then select New Import.
2. Select the import type.
3. Click Download Template, then click Next.
4. Check for field matches: Click the View file setup requirements link to review the fields.
5. Paste or enter your data into the template.
6. Save the template as an Excel or CSV file to a location you can remember.
7. Click Browse to upload the file, then click Import.

Once the data is imported, any errors are displayed and can be easily updated by clicking the Review & Fix button. Click the Fix All button for the record line and you can correct the errors. Click Queue Record once corrections are made. Click the Resubmit File button to import the corrected records.

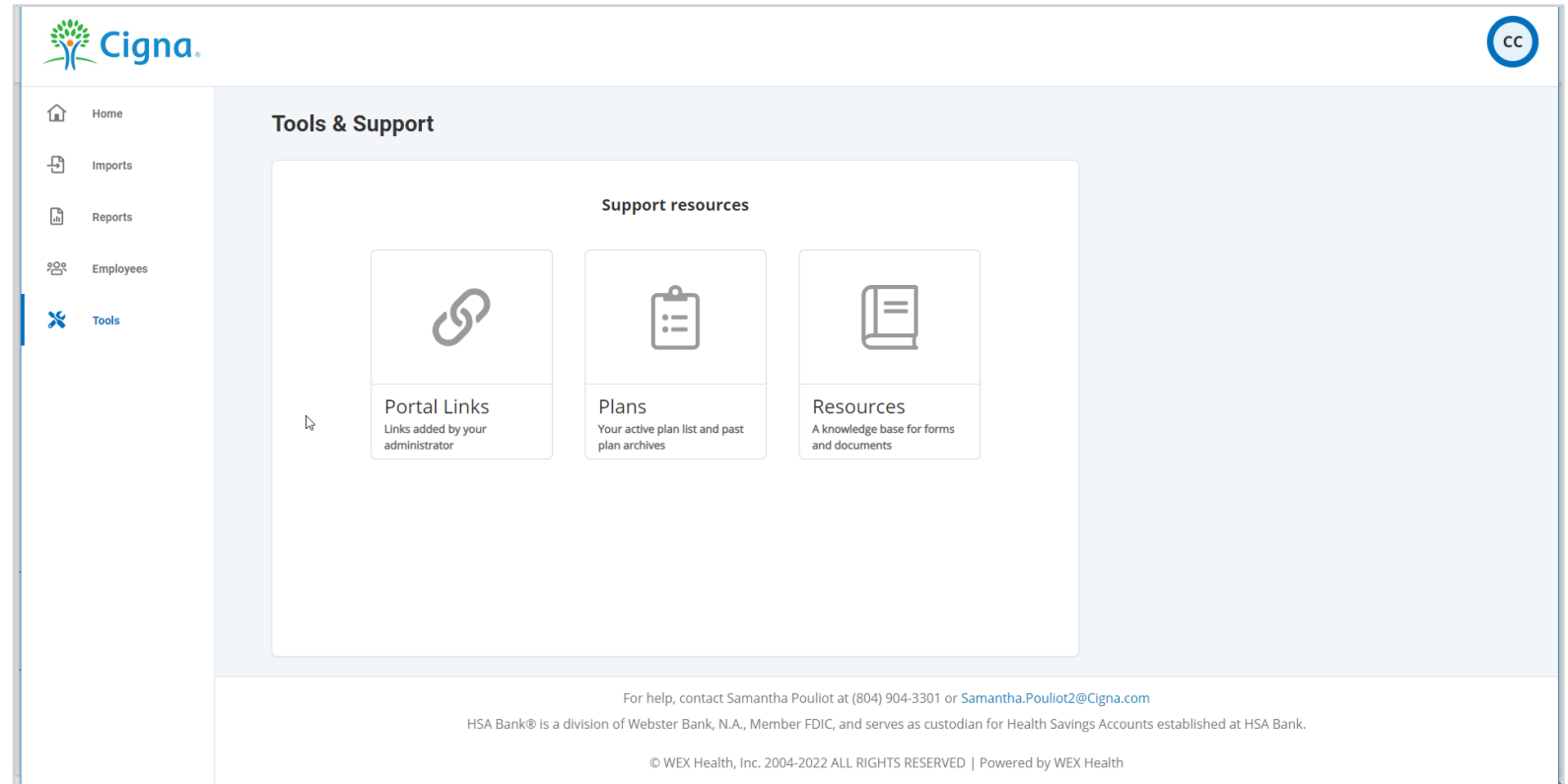
The screenshot displays the Cigna Employer Administration Site's Import Data interface. The page features a navigation sidebar on the left with options: Home, Imports (selected), Reports, Employees, and Tools. The main content area is divided into sections: Pending, Processing, and Completed. A warning banner at the top states: "During high volume periods, files may take several hours to complete. Files are processed on a first-in, first-out basis and will complete processing in full within 24 hours from the date received." The Pending section contains a message: "Newly added imports awaiting processing will display here." The Processing section contains a message: "Processing imports will display here." The Completed section lists several import records with their status and completion times. A FILTERS panel on the right allows users to filter by "Received from" (5/18/2022) and "Received to" (9/14/2022), with a search by file name field and a Filter button.

Status	File Name	Completion Time	Notes
Completed	CDEX_CG2_006938_2022-09-13_101348_09132022_101653_5012.original...	9/13/2022 10:18 AM	Completed with errors
Completed	CG2_Transfer Out Distribution_09132022095147_1854003_09132022_09...	9/13/2022 9:57 AM	Completed successfully
Completed	CG2_Transfer Out Distribution_09132022085116_1839481_09132022_09...	9/13/2022 9:01 AM	Completed successfully
Completed	CDEX_CG2_006938_2022-09-13_085213_09132022_085718_2606.original...	9/13/2022 8:58 AM	Completed with warnings or additional information
Completed	CDEX_CG2_006938_2022-09-13_084809_09132022_085141_8670.original...	9/13/2022 8:52 AM	

Required forms

To access required forms:

1. Visit the Tools tab and then the Resources tile.
2. In this section you can download and print any forms needed.
3. Here you can also access any other documents or custom materials related to your plans.



The screenshot shows the Cigna portal interface. At the top left is the Cigna logo. A navigation sidebar on the left includes links for Home, Imports, Reports, Employees, and Tools (which is highlighted). The main content area is titled 'Tools & Support' and contains a 'Support resources' section with three tiles: 'Portal Links' (with a chain link icon), 'Plans' (with a clipboard icon), and 'Resources' (with a book icon). Below the tiles, there is contact information for Samantha Pouliot and a copyright notice for WEX Health, Inc.

Cigna

Home
Imports
Reports
Employees
Tools

Tools & Support

Support resources

Portal Links
Links added by your administrator

Plans
Your active plan list and past plan archives

Resources
A knowledge base for forms and documents

For help, contact Samantha Pouliot at (804) 904-3301 or Samantha.Pouliot2@Cigna.com

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Contributions ACH Limit

The daily ACH limit is displayed in the following locations:

1. Imports - Error Review
2. Imports - Setup Requirements
3. Setup contributions - Enter Manually, including
 - a) One-time contributions
 - b) Recurring contributions
 - c) Creating new schedules
 - d) Editing existing schedules
4. Setup contributions - Import a File, including
 - a) One-time contributions
 - b) Recurring contributions
 - c) Creating new schedules
 - d) Editing existing schedules
5. Requests - Process a Contribution File

Schedule a new contribution • Health Savings Account

✓ Schedule type ———— ✓ Import method ———— ✓ Details ———— 4 Enter contributions

Schedule
One-time contribution
Effective date: 3/21/2022
[Update schedule](#)

ACH limit
The daily ACH limit is the amount of money that you can process on a given day.
Your ACH limit is \$3,000.00.

For assistance, please contact
your assigned Cigna Consumer
Account Specialist.



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