

# 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.

A photograph of a man with glasses and tattoos holding a baby. The man is wearing a light blue button-down shirt and the baby is wearing a dark blue shirt and patterned pants. They are in a room with a white crib and a green wall in the background.The image shows the login page for the Cigna Healthcare Employer Administration Site. At the top is the Cigna Healthcare logo, which consists of a green leaf icon above the word "cigna" in blue, with "healthcare" in a smaller font below it. Below the logo, the text "Welcome to the Employer Administration Site!" is displayed. A message states: "If this is your first time using this digital experience, [request an activation link](#) via email." Below this are input fields for "Username" and "Password". There is a "Remember me" checkbox. A blue "SIGN IN" button is located below the password field. A link "Need help signing in?" is at the bottom. At the very bottom, there is a footer with contact information: "For help, please contact your dedicated Cigna Consumer Account Specialist or email [HSABankingUnitC3CON@cigna.com](mailto:HSABankingUnitC3CON@cigna.com)" and a copyright notice: "© 2024 HSA Bank. HSA Bank® is a division of Webster Bank, N.A., Member FDIC. Plan Administrative Services and Benefit Services are administered by Webster Servicing LLC."

# 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.

### Program health

HSA

\$5,721

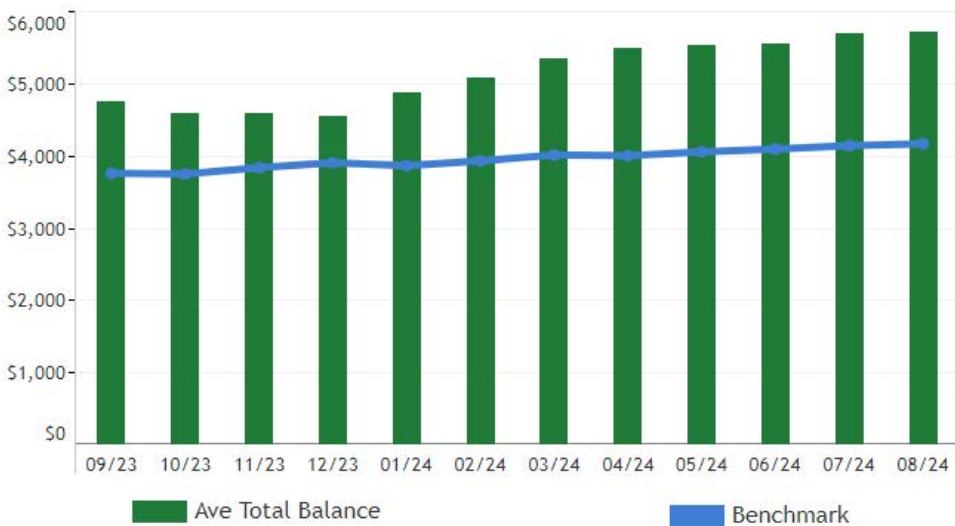
Average total balance

✓ GOOD

[Show Less](#)

#### Average Total Balance

Your program has an average total balance of \$5,721. The average is \$4,165.



# 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.

The screenshot shows the Cigna Employer Administration Site Dashboard. A callout box on the left highlights the 'Dashboard' menu item, which includes 'Manage employees'. Another callout box on the right highlights the 'Manage employees' button, which includes a 'GO' button and a list of links: 'Contributions', 'Enrollment', 'Reports', and 'Employee Details'.

**Dashboard**

- Manage employees

**Manage employees**

- GO
- Contributions
- Enrollment
- Reports
- Employee Details

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

The screenshot shows the Cigna Employer Administration Site 'Manage employees' page. A callout box on the left highlights the 'Employees' menu item in the sidebar. The main content area includes a 'Help when you need it' section, an 'Employee Search' bar, and a list of 'Reports' (Employer Fee Funding Notification PDFs).

**Employees**

**Help when you need it**

Tips to make program management easier

**SEE THE GUIDE**

**Employee Search**

Name or ID

**Imports**

Go to imports

**Reports**

View all reports

- Employer Fee Funding Notification PDF Oct 4
- Employer Fee Funding Notification PDF Sep 2
- Employer Fee Funding Notification PDF Sep 1
- Employer Fee Funding Notification PDF Aug 2
- Employer Fee Funding Notification PDF Jul 1

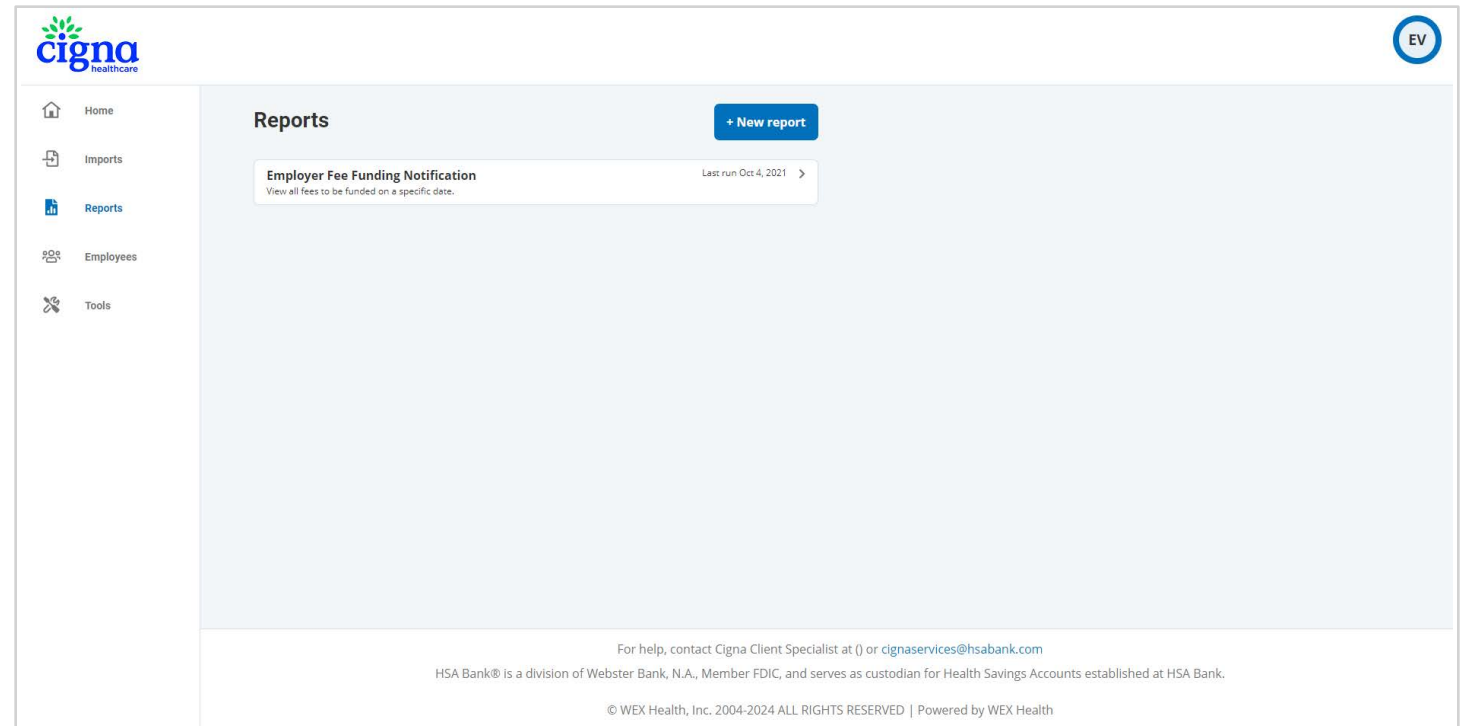
# Reports and notifications

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:

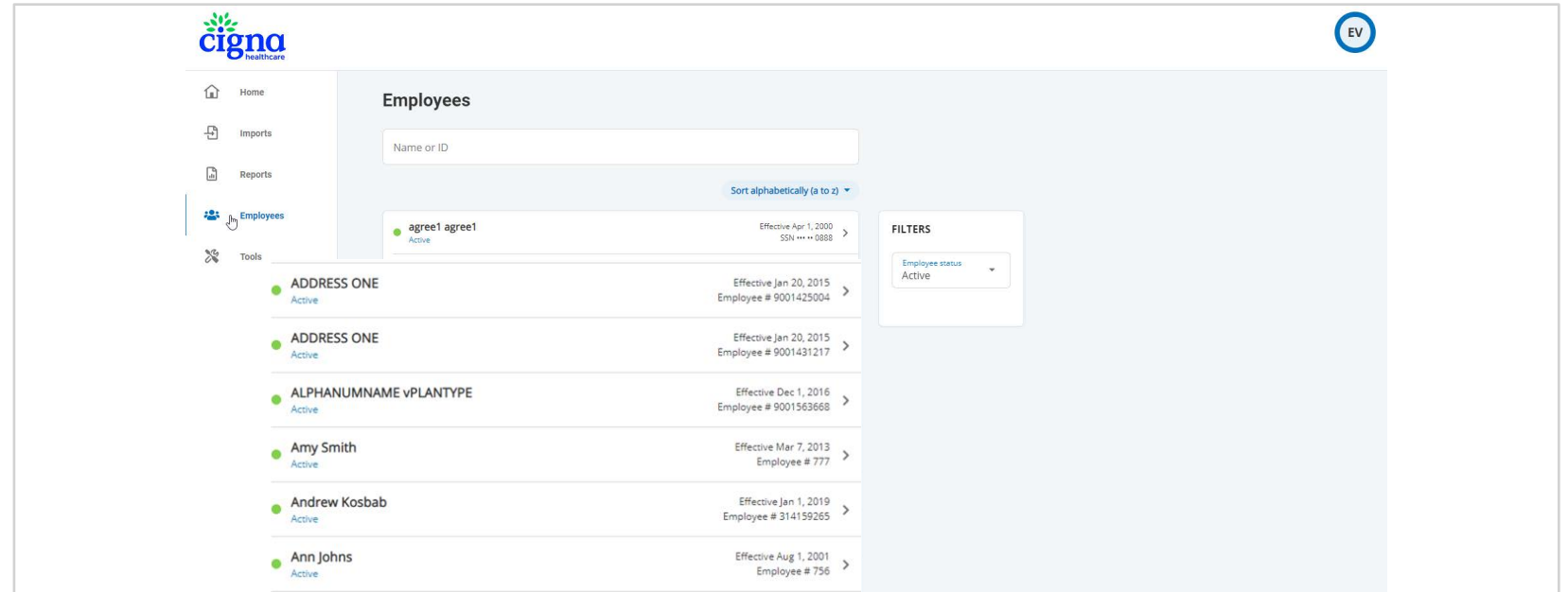
1. Select the Reports tab.
2. Click the New Report button.
3. Select the appropriate report type.
4. Complete the report detail fields.
5. Click Request.
6. The report generates. An email is sent to you when the report is available if you selected this option.



# 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.



# 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.

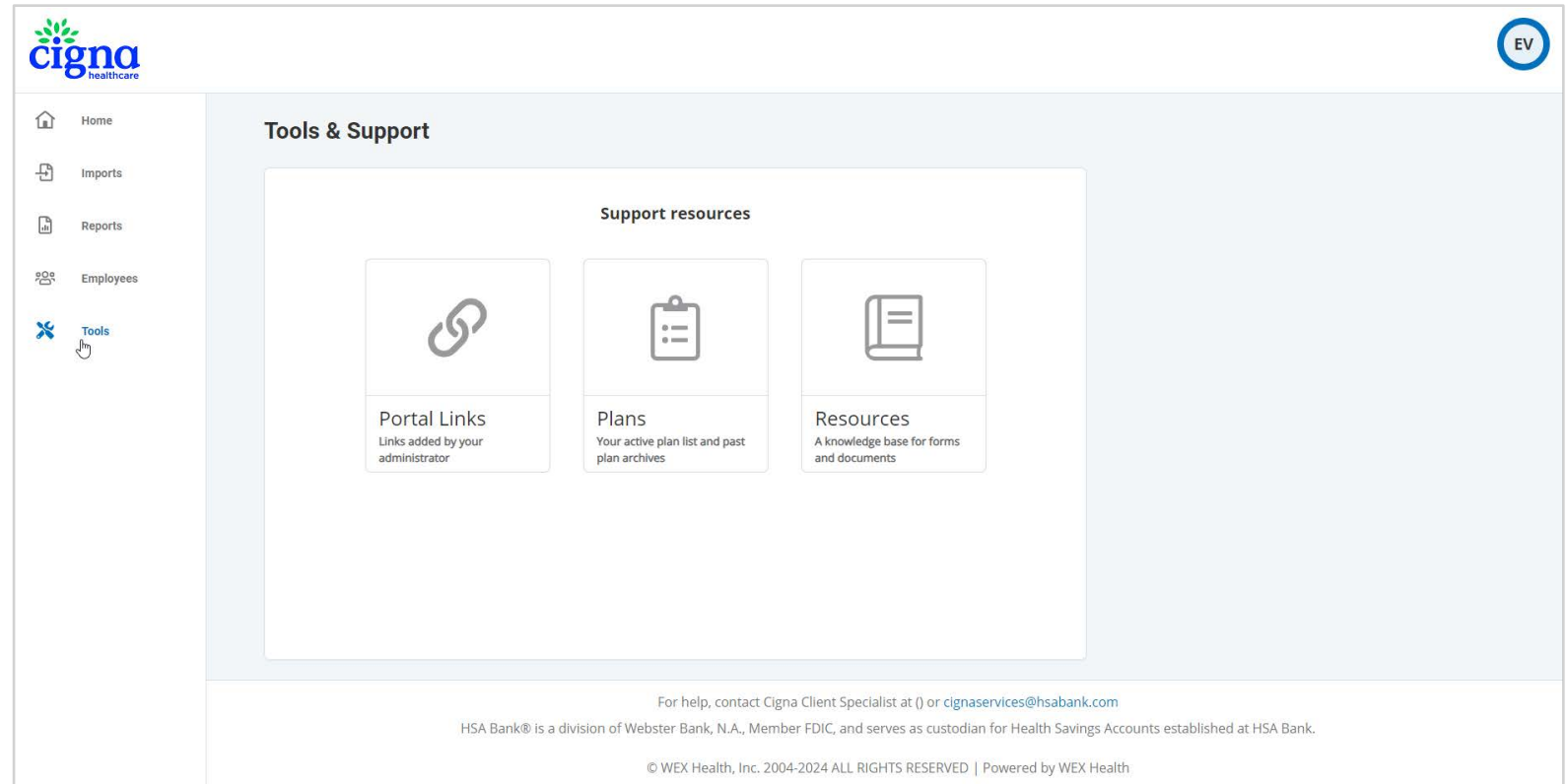
Once the data is imported, any errors are displayed and can be easily updated by clicking the Review & Fix button. Click the Fix All button for the record line and you can correct the errors. Click Queue Record once corrections are made. Click the Resubmit File button to import the corrected records.

The screenshot displays the Cigna Healthcare Employer Administration Site interface. On the left is a navigation sidebar with icons and labels for Home, Imports (highlighted with a mouse cursor), Reports, Employees, and Tools. The main content area features a top banner with the Cigna logo and a blue 'EV' icon. Below the banner is a yellow warning box stating: '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 main area is divided into three sections: 'Pending' with a box 'Newly added imports awaiting processing will display here', 'Processing' with a box 'Processing imports will display here', and 'Completed' with a box 'Completed imports will display here'. To the right of these sections is a 'FILTERS' panel containing date pickers for 'Received from' (5/24/2024) and 'Received to' (9/20/2024), a search box for 'Search by file name', and a blue 'Filter' button. At the bottom of the page, there is a footer with contact information for Cigna Client Specialist, HSA Bank information, and a copyright notice for WEX Health, Inc. (2004-2024).

# 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.



# 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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