

Employer Administration Site Overview



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Plan Administrative Services and Benefit Services are administered by Webster Servicing LLC.



Welcome

Manage benefit accounts like Health Savings Accounts (HSAs), Flexible Spending Accounts (FSAs), Health Reimbursement Arrangements (HRAs) and more 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.
- View real-time individual participant account summaries, enrollments, contributions, claims and payments.
- Update an employee's status.
- Add and manage recurring contributions.
- Learn about more benefit accounts.

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 employer.hsabank.com.

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

Call Business Relations at 855-731-5226 for help accessing the site.

A screenshot of the HSA Bank Employer Administration Site login page. The page features the HSA Bank logo at the top, followed by the heading "Welcome to the Employer Administration Site!". Below the heading, there is a message: "If this is your first time using this digital experience, [request an activation link](#) via email." The login form includes fields for "Username" and "Password", a "Remember me" checkbox, and a "SIGN IN" button. At the bottom of the form, there is a link: "[Need help signing in?](#)". Below the form, there is a footer with contact information: "For help, HSA Bank Business Relations can be reached at: [\(855\) 731-5226](tel:855-731-5226)" and a copyright notice: "© 2021 HSA Bank. [HSA Bank](#) is a division of Webster Bank, N.A., Member FDIC."

Evaluate and optimize 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.

Product showcase

Learn about account-based benefits that can help employees save.

Featured resources

Get administrative support and educational content for employees.

Program health



Optimize your average total balance

Check out the resources below to learn how to optimize average total balance over time.

Linking a personal bank account to your HSA
Learn how to link your personal bank account with your HSA Account.

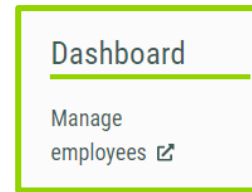
Medical cost reduction services
Make your HSA dollars go farther!

HSA savings calculator
Discover how much money you can save with an HSA!

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.



hsabank Employer Administration Site Billie Jo Fecington

Dashboard
Manage employees ↗
My program
Resources ↗
Settings

HSA Bank Business Relations
Your service partners

Business Relations Team
855-731-5226
businessrelations@hsabank.com
M-F, 7AM-7PM CT

Need help?
Talk with a live representative.
CHAT NOW

HEALTH & WEALTH INDEX CALCULATOR
Help employees understand how health and wealth management add up.
LEARN MORE

APR 12 | Deadline: correction requests before taxes | APR 14 | Deadline: Group Online Contributions submitted by 2:30pm CT | APR 15 | Deadline: enrollments in by 11am CT

Program snapshot

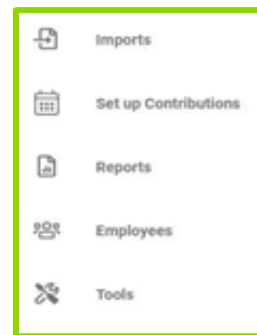
HSA	FSA	Commuter	HRA	Products
6,898 Total HSAs	\$5.710M HSA Contributions (YTD)	\$626.7K Employee tax savings (YTD)	\$109.6K Employer tax savings (YTD)	
0.6% Account growth (YOY)	169.6% Total balance growth (YOY)	\$3,943 Average cash balance	\$11,008 Average investment balance	

VIEW MY PROGRAM

Manage employees
GO
• Contributions
• Enrollment
• Reports
• Employee Details



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



hsabank A Division of Webster Bank, N.A. Member FDIC

Home
Imports
Set up Contributions
Reports
Employees
Tools

Your open enrollment resource
Help employees navigate their health plan options.
LEARN MORE

Employee Search
Name or ID

Imports View all imports

✓ Scheduled Contribution Completed successfully	Feb 1
✓ Scheduled Contribution Completed successfully	Jan 29
✓ Scheduled Contribution Completed successfully	Jan 15
✓ Scheduled Contribution Completed successfully	Jan 1

Reports View all reports

HSA Funding Collection Notification PDF	Feb 3
HSA Funding Collection Notification PDF	Jan 30
Employer Funding Notification EXCEL	Jan 25
Enrollment Report PDF	Jan 24
Employer Funding Notification	Jan 19

LIVE CHAT
8:30 am - 5 pm CT

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:

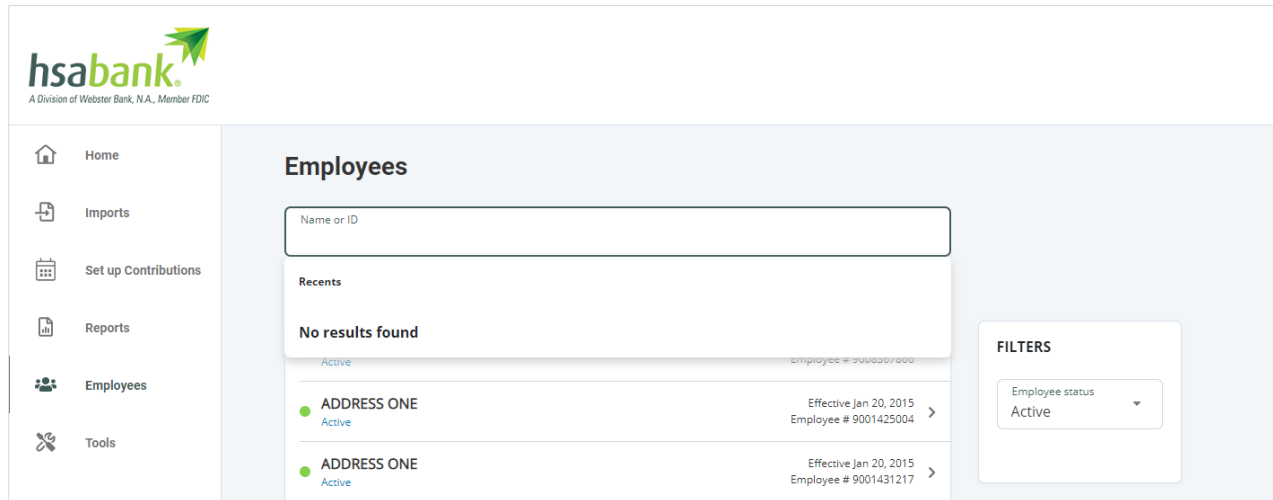
1. Select the Reports tab.
2. Click the New Report button.
3. Select the appropriate report type.
4. Complete the report detail fields.
5. Click Request.
6. The report generates. An email is sent to you when the report is available if you selected this option.

The screenshot displays the HSA Bank web interface. At the top left is the HSA Bank logo with the tagline 'A Division of Webster Bank, N.A., Member FDIC'. In the top right corner, there is a user profile icon with the initials 'JD'. A left-hand navigation menu includes links for Home, Imports, Set up Contributions, Reports (which is highlighted), Employees, and Tools. The main content area is titled 'Reports' and features a '+ New report' button. Below this, a list of reports is shown, each with a title, a brief description, and the date it was last run. The reports listed are: Account Balance Detail (Last run Mar 1, 2022), ACH Based Employer Funding (Last run Mar 14, 2022), Claims Reimbursement Notification (Last run Mar 16, 2022), Employer Fee Funding Notification (Last run Mar 2, 2022), Employer Funding Notification (Last run Mar 16, 2022), Enrollment (Last run Mar 1, 2022), HSA Account Detail (Last run Mar 1, 2022), HSA All Account Report - Weekly Sun (Last run Mar 13, 2022), HSA All Account Report with Account Number - Weekly Sun (Last run Feb 13, 2022), HSA Program Summary Report (Last run Feb 28, 2022), and Payroll Deduction Notification (Last run Mar 11, 2022). In the bottom right corner of the interface, there is a 'LIVE CHAT' button with a speech bubble icon and the text '8:30 am - 5 pm CT'.

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.



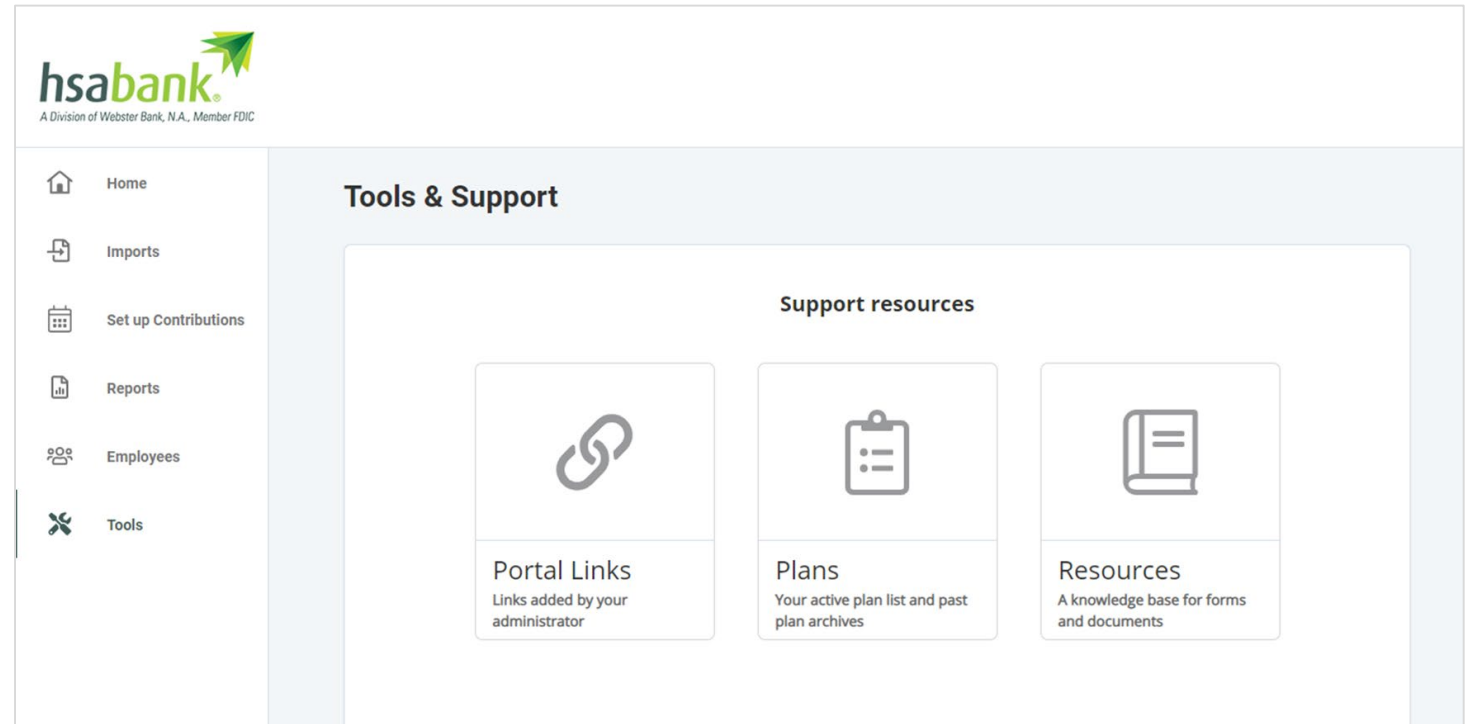
The screenshot displays the 'Employees' page in the hsabank system. The page features a navigation sidebar on the left with icons for Home, Imports, Set up Contributions, Reports, Employees, and Tools. The main content area is titled 'Employees' and includes a search bar labeled 'Name or ID'. Below the search bar, there is a 'Recents' section with the message 'No results found'. A table of employees is shown below, with two entries: 'ADDRESS ONE' (Active) with Employee # 9001425004 and 'ADDRESS ONE' (Active) with Employee # 9001431217. Both entries are effective as of Jan 20, 2015. A 'FILTERS' panel on the right shows 'Employee status' set to 'Active'.

Name	Status	Effective Date	Employee #
ADDRESS ONE	Active	Effective Jan 20, 2015	Employee # 9001425004
ADDRESS ONE	Active	Effective Jan 20, 2015	Employee # 9001431217

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.



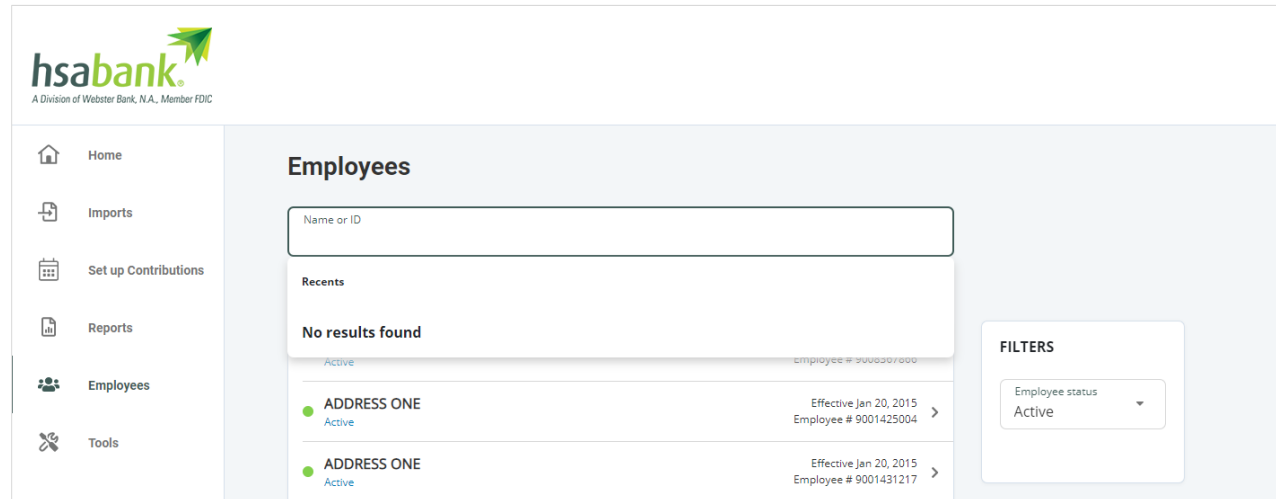
The screenshot displays the hsabank portal interface. At the top left is the hsabank logo with the tagline "A Division of Webster Bank, N.A., Member FDIC". Below the logo is a vertical navigation menu with icons and labels: Home, Imports, Set up Contributions, Reports, Employees, and Tools. The main content area is titled "Tools & Support" and features a "Support resources" section with three tiles:

- Portal Links**: Links added by your administrator
- Plans**: Your active plan list and past plan archives
- Resources**: A knowledge base for forms and documents

Update an employee's status

To update an employee's status:

1. Select the Employees tab.
2. Search and select the employee using first name, last name or employee identifier (employee ID or SSN).
3. Make a selection from the Status dropdown menu.
4. Enter the status effective date.
5. Click Show status history, then click Add.



The screenshot displays the 'Employees' management page in the hsabank system. The page features a left-hand navigation menu with options: Home, Imports, Set up Contributions, Reports, Employees (selected), and Tools. The main content area is titled 'Employees' and includes a search box labeled 'Name or ID'. Below the search box is a 'Recents' section showing 'No results found'. A table lists two employees, both with the name 'ADDRESS ONE' and status 'Active'. The first entry has an effective date of 'Jan 20, 2015' and employee number '9001425004'. The second entry has an effective date of 'Jan 20, 2015' and employee number '9001431217'. A 'FILTERS' sidebar on the right shows 'Employee status' set to 'Active'.

Name	Status	Effective Date	Employee #
ADDRESS ONE	Active	Jan 20, 2015	9001425004
ADDRESS ONE	Active	Jan 20, 2015	9001431217

Import data

You may have the capability to import data (such as demographic, enrollment or 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 'Imports' section of the hsabank Employer Administration Site. The page features a navigation sidebar on the left with options: Home, Imports, Set up Contributions, Reports, Employees, and Tools. The main content area is titled 'Imports' and includes a '+ New import' button. A warning message 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.' Below this, there are three sections: 'Pending' (with a placeholder 'Newly added imports awaiting processing will display here'), 'Processing' (with a placeholder 'Processing imports will display here'), and 'Completed'. The 'Completed' section shows a list of three 'Scheduled Contribution' records, each with a green status indicator and a timestamp (3/9/2022 12:04 AM, 3/7/2022 12:03 AM, and 3/4/2022 12:07 AM). A 'FILTERS' panel on the right allows filtering by 'Received from' (11/10/2021) and 'Received to' (3/9/2022), with a 'Search by file name' field and a 'Filter' button.

For assistance, contact
Business Relations:

businessrelations@hsabank.com



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