CIGNA SELECT HSA

HSA Bank Employer Portal Guide

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You may link to a specific section by clicking on the underlined text.

HSA Administration Site

1 Logging In

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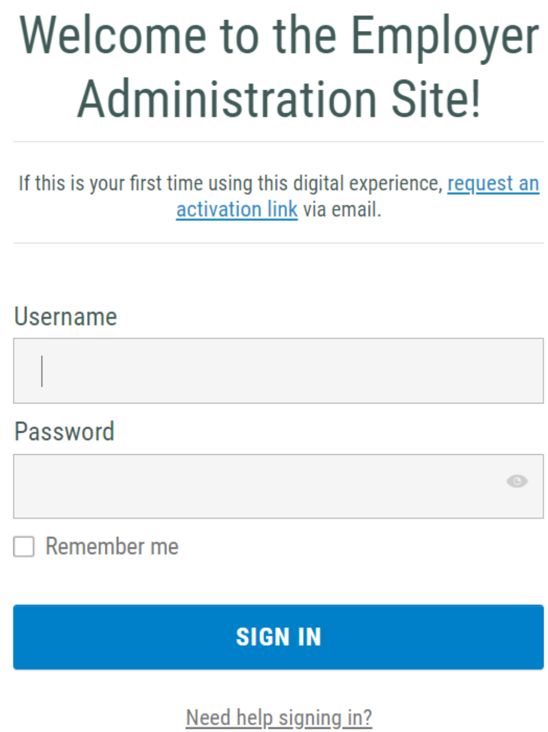
HSA Administration Site – Logging in

Logging into the Employer Administration Site

- Click here to: CREATE ACCOUNT
- *You will need your Username, if you have not received your username, please contact your Cigna Consumerism Account Specialist.*
- Access the site using the following **URL** https://employer.hsabank.com/login?partner=mycigna
- Enter your **Username** and **Password**
- Select **SIGN IN**



HSA Administration Site

2 Home

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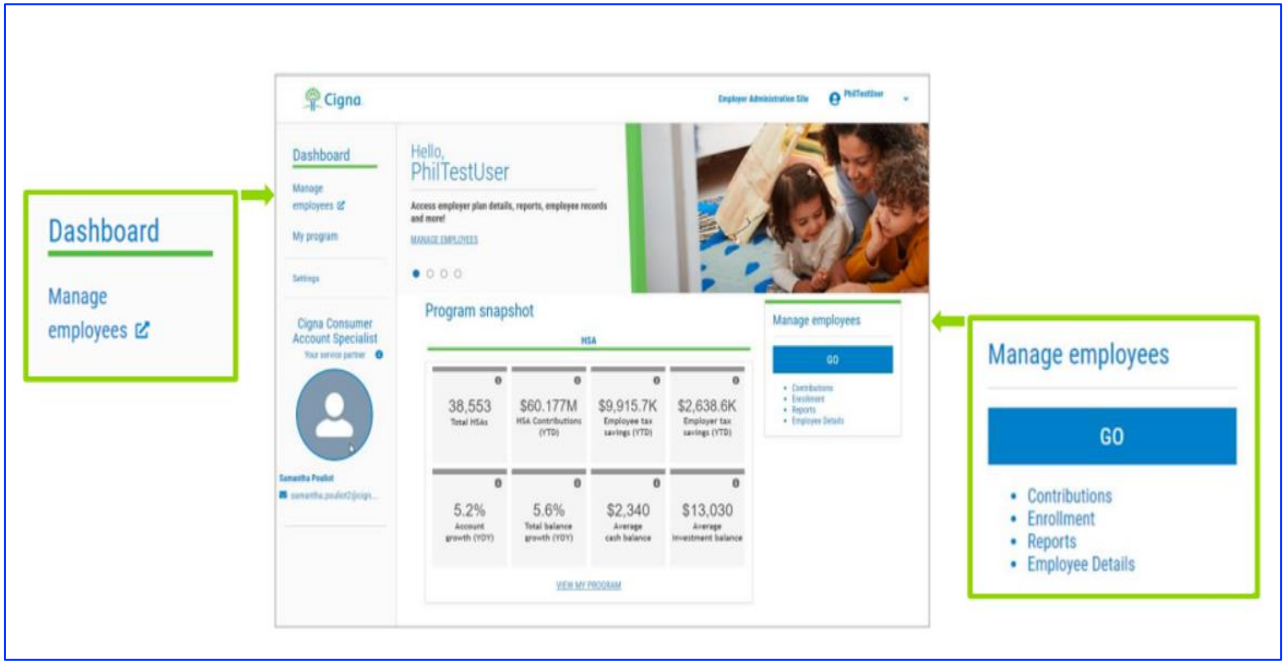
Home Page - HSA Administration Site

Once you have successfully logged in, you will be taken to the Employer Administration Site homepage. From here, you can 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.

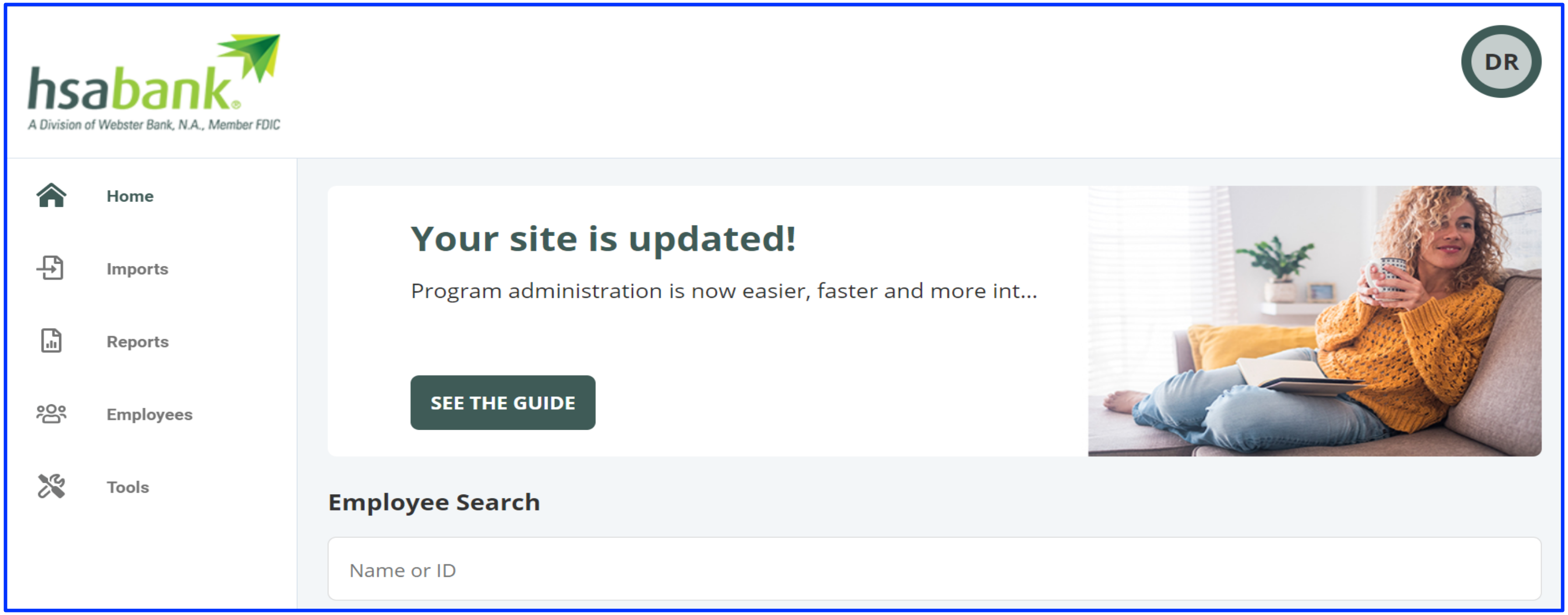
Go to **Manage employees** to:

- Import and check the status of contribution import files and set up recurring contributions
- View employee- level data
- Access reporting, tools and additional resources



Home Page - HSA Administration Site

From the **Manage employee** section the tabs you have availability to access are based on your access level. *If you have a question/concern regarding your access level, please reach out to your Cigna Consumerism Account Specialist (CAS).*



Note: The tabs you have availability to access are based on your access level.

If you have a question/concern regarding your access level, please reach out to your Cigna CAS.

HSA Administration Site

3 Imports

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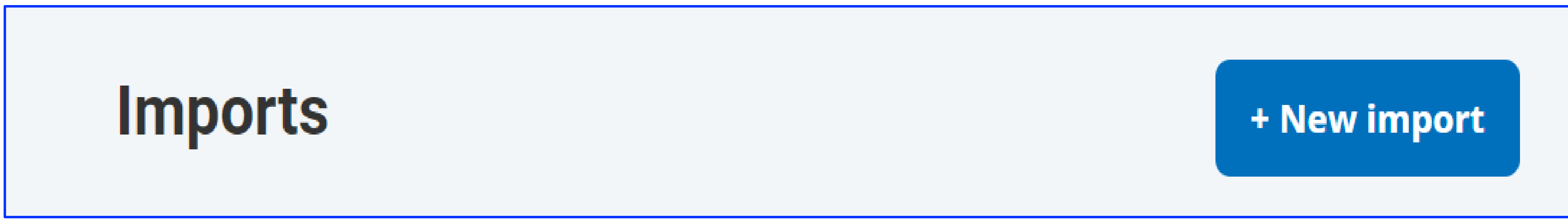
Imports Tab - HSA Administration Site

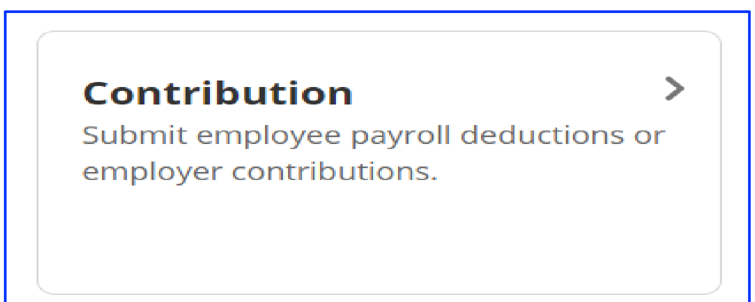
Group Online Contributions (GOC)

Contributions to the employee's HSA accounts can be made via an excel contribution file with an automated ACH pull of funds from your external business account you designate. *Prior to importing a contribution file, you will need to complete an agreement/form for setup.*

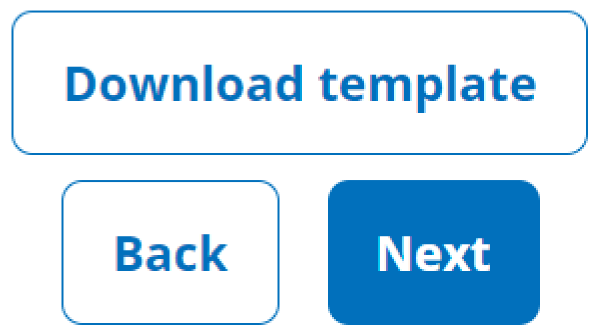
From the **Manage Employees** section select the **Imports** tab, then select **New Import**.



Select the import type **Contribution.**



Click **Download Template**, then click **Next**.



Imports Tab - HSA Administration Site

Group Online Contributions (GOC)

Tips to assist you with completing the excel template:

Employee Identifier: Employee SSN (no dashes/format to withhold any leading zeros)
Contribution Date: MMDDCCYY (no dashes) ex. *04102021 = April 10, 2021*
Contribution Description: Employer or Payroll
Plan Name: This can be left blank.
Prior Tax Year: Current or Prior (Note: *You can allocate contributions to the prior year up until April 15 or the tax filing deadline of the previous year.)*

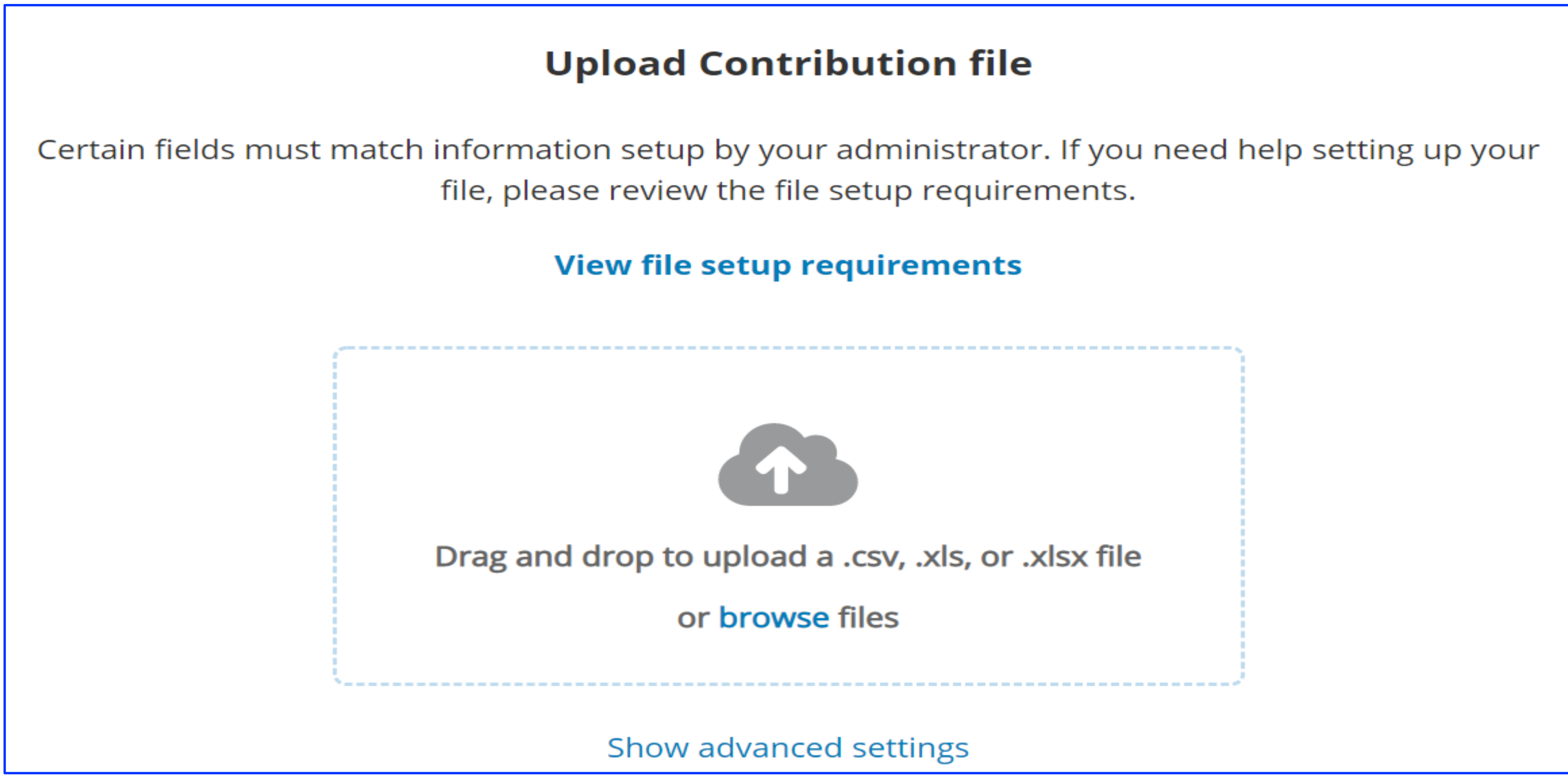
	A	B	C	D	E	F
1	EmployeeIdentifier	ContributionDate	ContributionDescription	ContributionAmount	PlanName	PriorTaxYear
2						
3						
4						
5						

Save the template as an Excel or CSV file to a location you can remember.

Imports Tab - HSA Administration Site

Group Online Contributions (GOC)

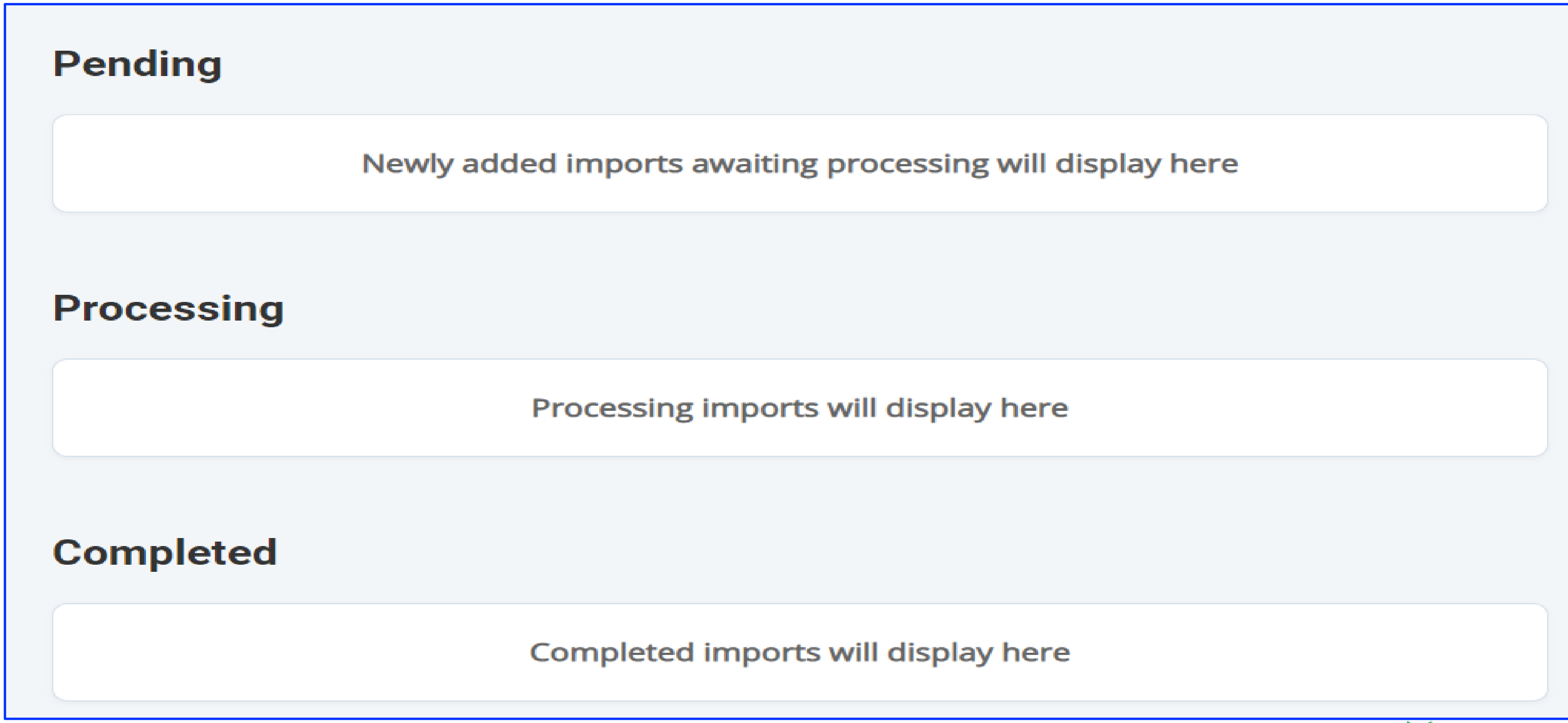
Click **Browse** to upload the file, then click **Import**.



Imports Tab - HSA Administration Site

Group Online Contributions (GOC)

Click back on the **Import** tab to view the status of the contribution file.



Imports Tab - HSA Administration Site

Group Online Contributions (GOC)

If there are errors, you will need to click on the file to review and/or correct:

Click the **Review** button.

03.15.2021 Payroll Contributions for Upload.xls

3/11/2021 12:50 PM

Completed with errors

Date received

3/11/2021 12:50 PM

Date processed

3/11/2021 12:51 PM

Record type	Added	Errored	Pending	Unchanged	Updated	Total Records
Contribution	0	8	0	0	1136	1144

Review

Imports Tab - HSA Administration Site

Group Online Contributions (GOC)

From here you can download the **Exception Report**, an excel document will display on **sheet 3** and you can view **errors** and/or **informational warning** messages.

You can also use the Action buttons to **Resubmit File** or **Review & Fix** errors.

Note: As the employer you are responsible for tracking errors and initiating the contribution(s) once the error condition(s) have been rectified.

HSA Administration Site

4 Set up Contributions

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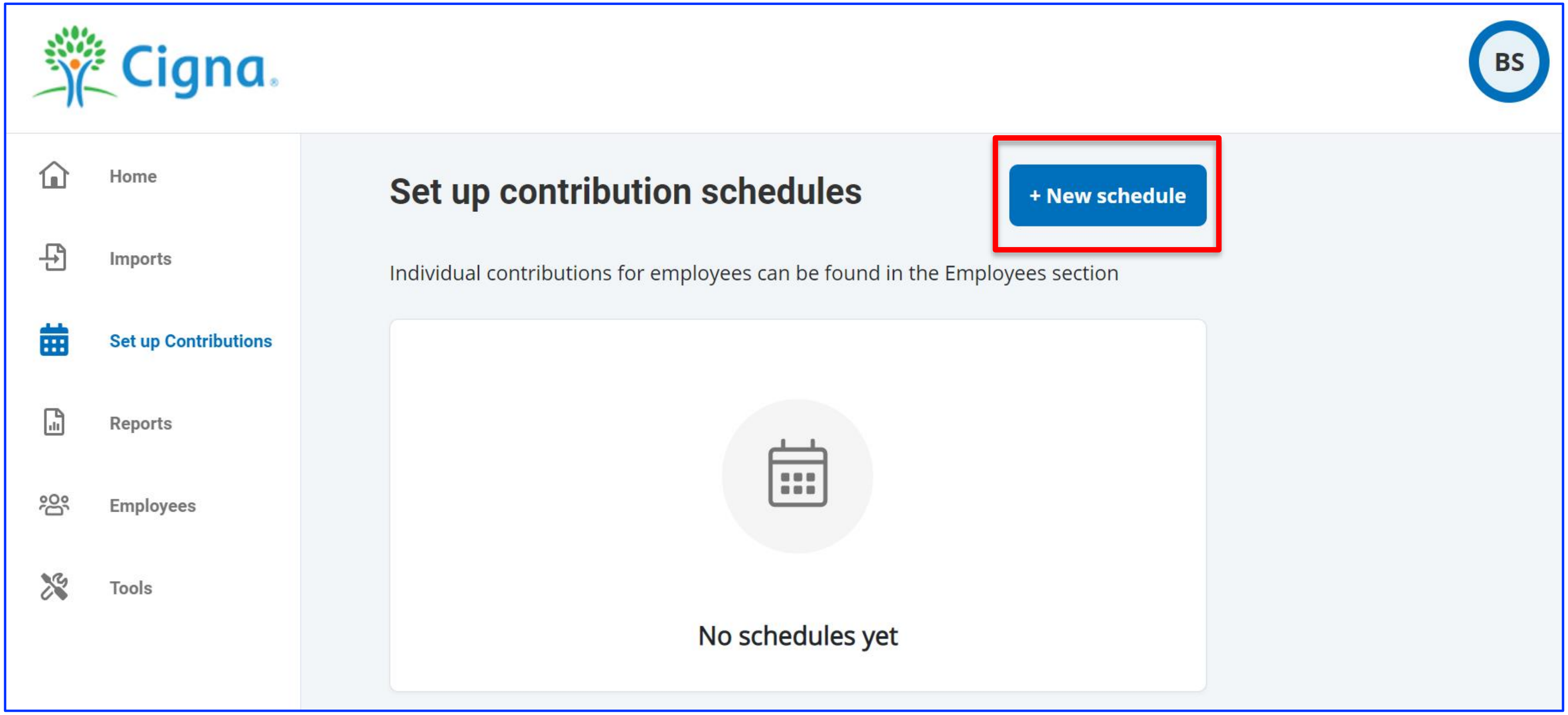
Set up Contributions - HSA Administration Site

Group Online Contributions (GOC)

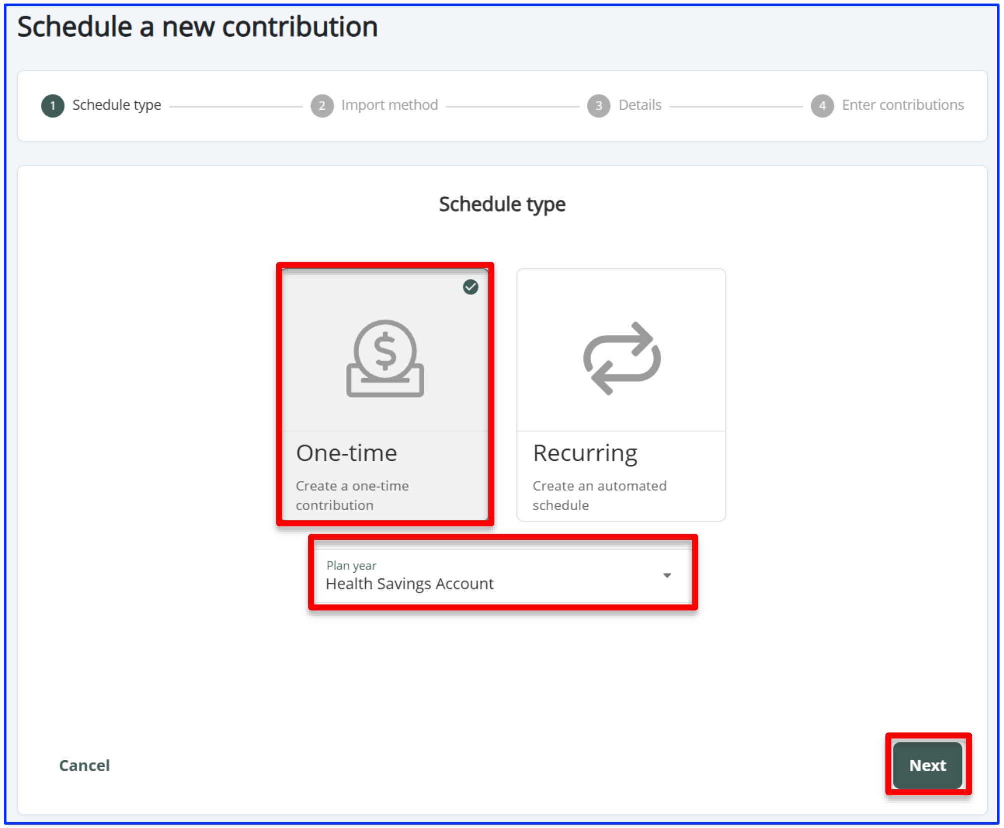
To perform a one-time manual entry or setup a schedule that will allow recurring contribution to be automatically initiated on a specific date, from the **Set-up Contributions** tab select **New Schedule.**



Set up Contributions - HSA Administration Site

Group Online Contributions (GOC) One-time Manual Entry

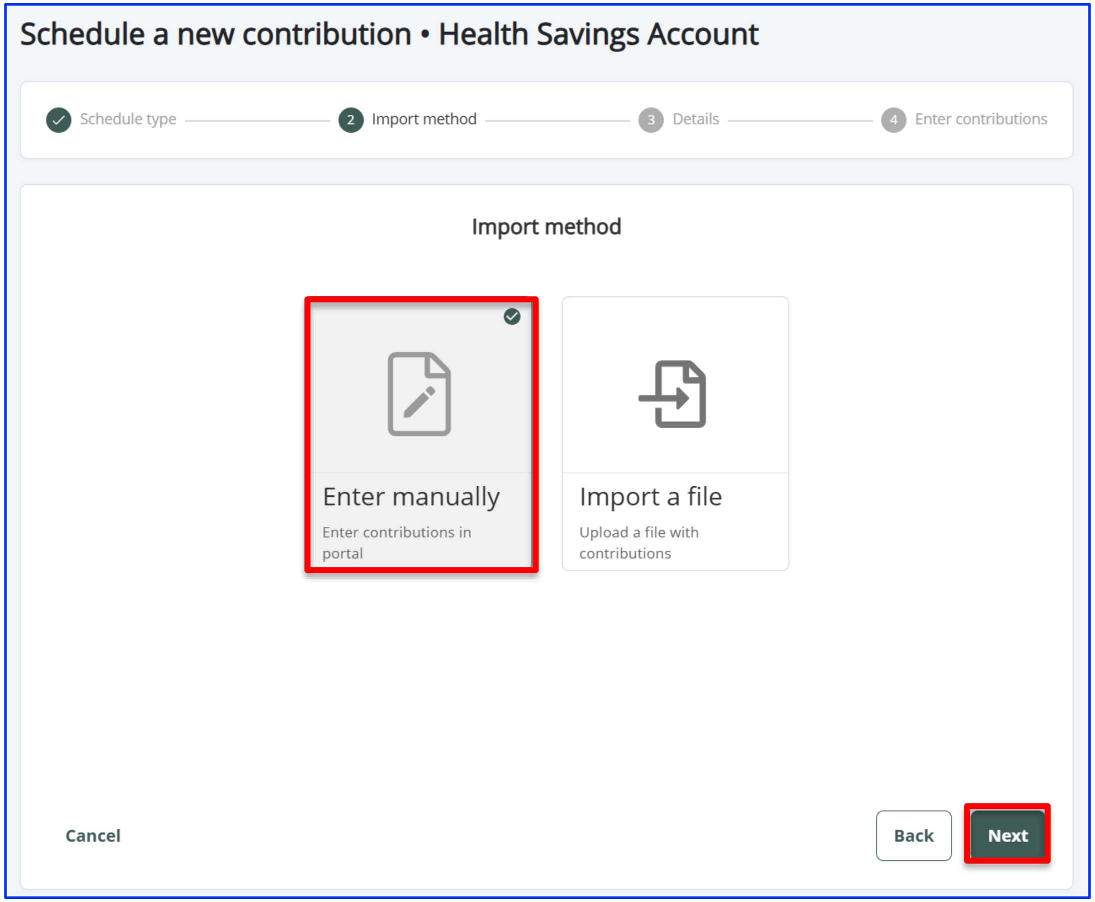
Step 1 – Select the schedule type: **One-time.**
Select **Health Savings Account** for the plan year.
Select **Next**



Set up Contributions - HSA Administration Site

Group Online Contributions (GOC) One-time Manual Entry

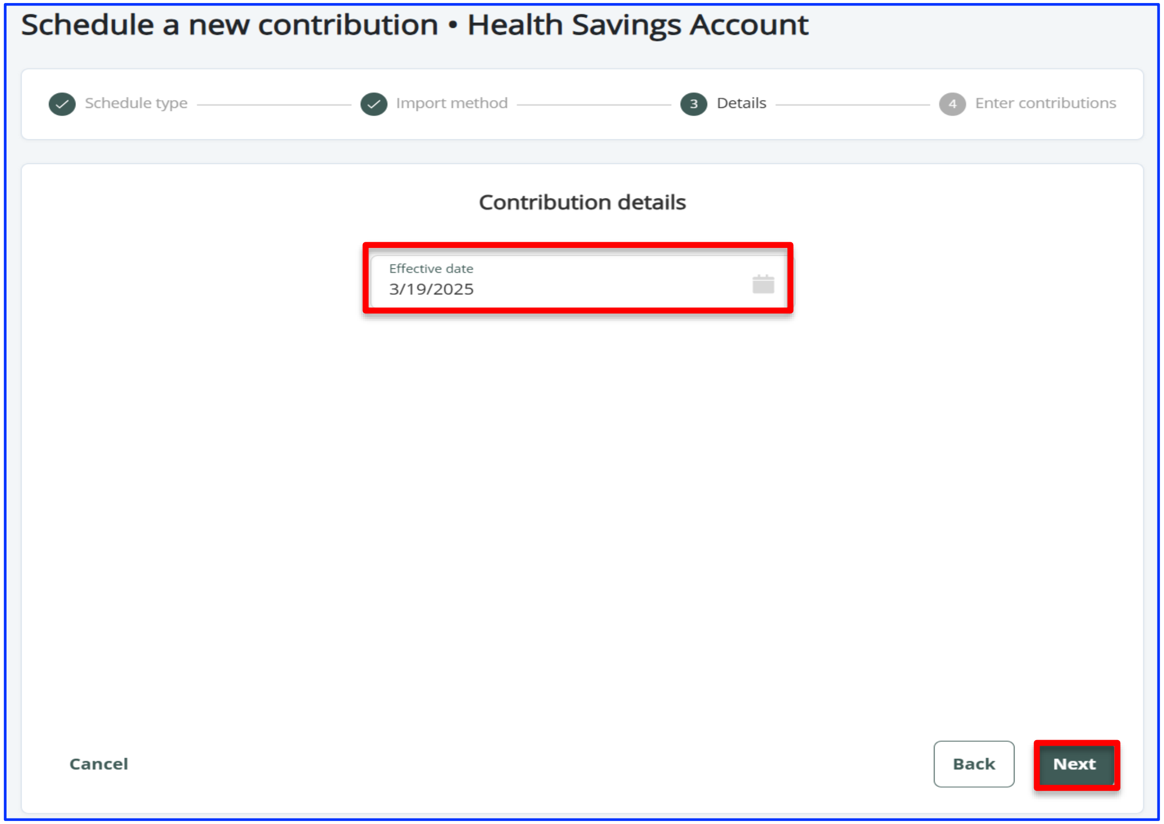
Step 2 – Select **Enter manually**
Select **Next**



Set up Contributions - HSA Administration Site

Group Online Contributions (GOC) One-time Manual Entry

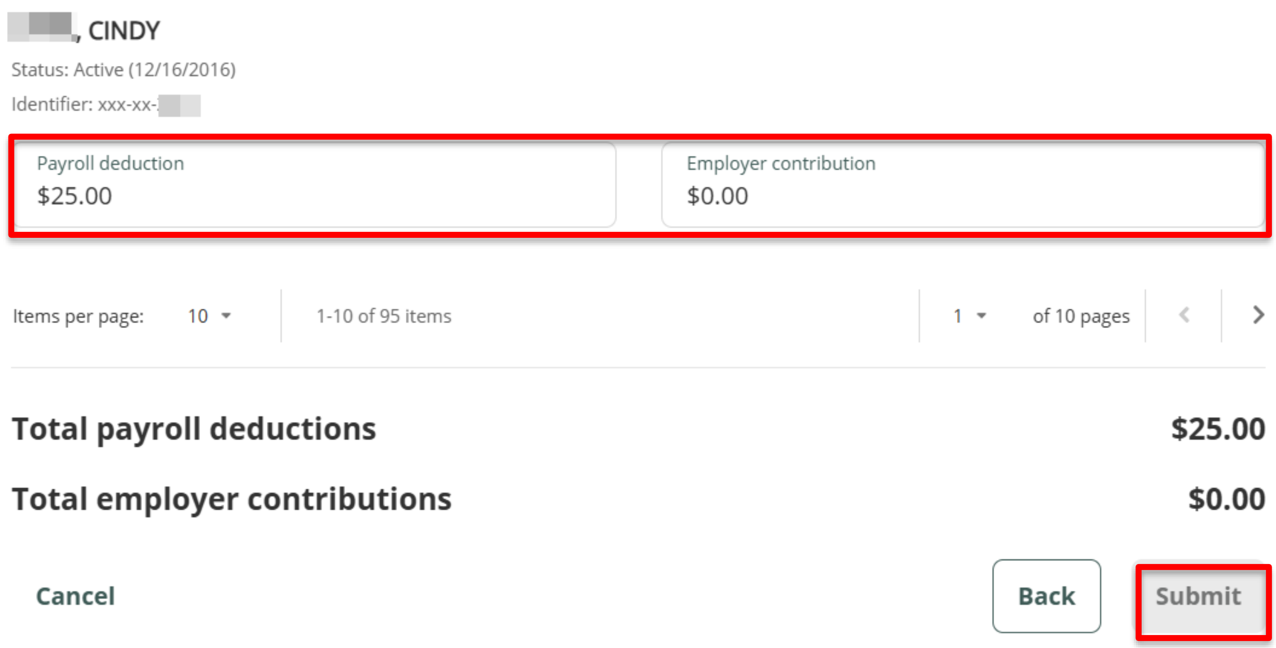
Step 3 – Enter the **Effective Date**
Select **Next**



Set up Contributions - HSA Administration Site

Group Online Contributions (GOC) One-time Manual Entry

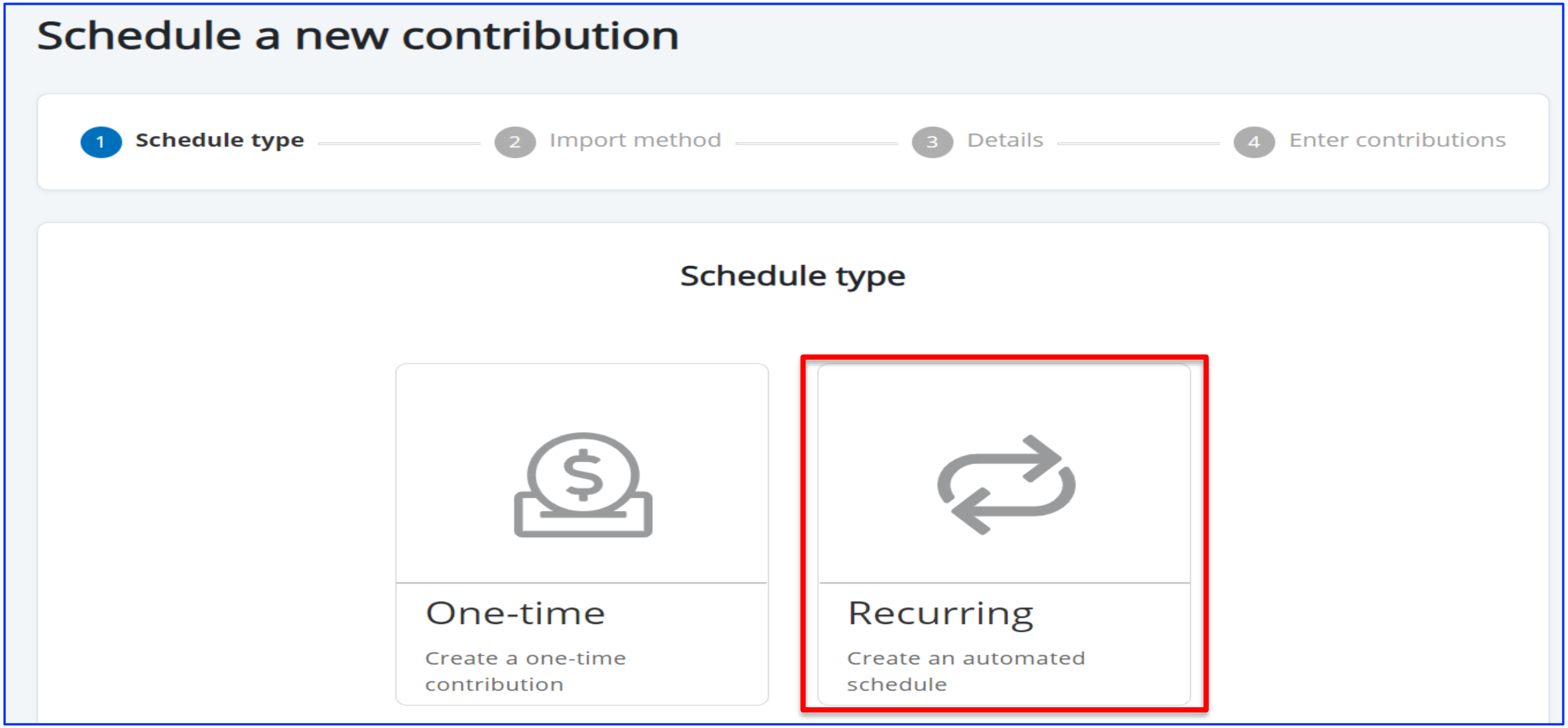
Step 4 – Locate the employee(s) you'd like to manually enter contributions for and enter the applicable payroll deduction and/or employer contribution.
Review your entries for accuracy, scroll to the bottom of the page and select **Submit**



Set up Contributions - HSA Administration Site

Group Online Contributions (GOC) Recurring Schedule

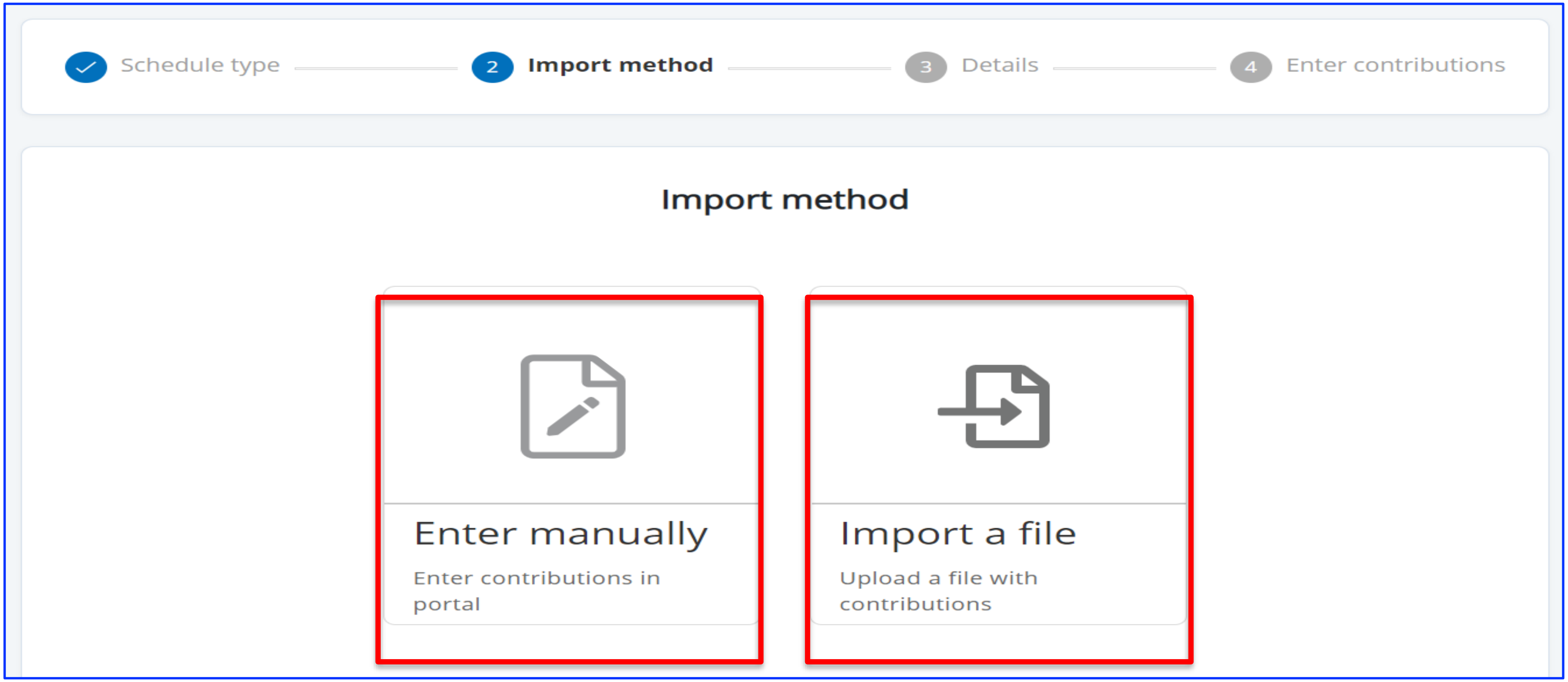
Step 1 – Select the schedule type: **Recurring.**
Select **Health Savings Account** for the plan year.
Select **Next**



Set up Contributions - HSA Administration Site

Group Online Contributions (GOC) Recurring Schedule

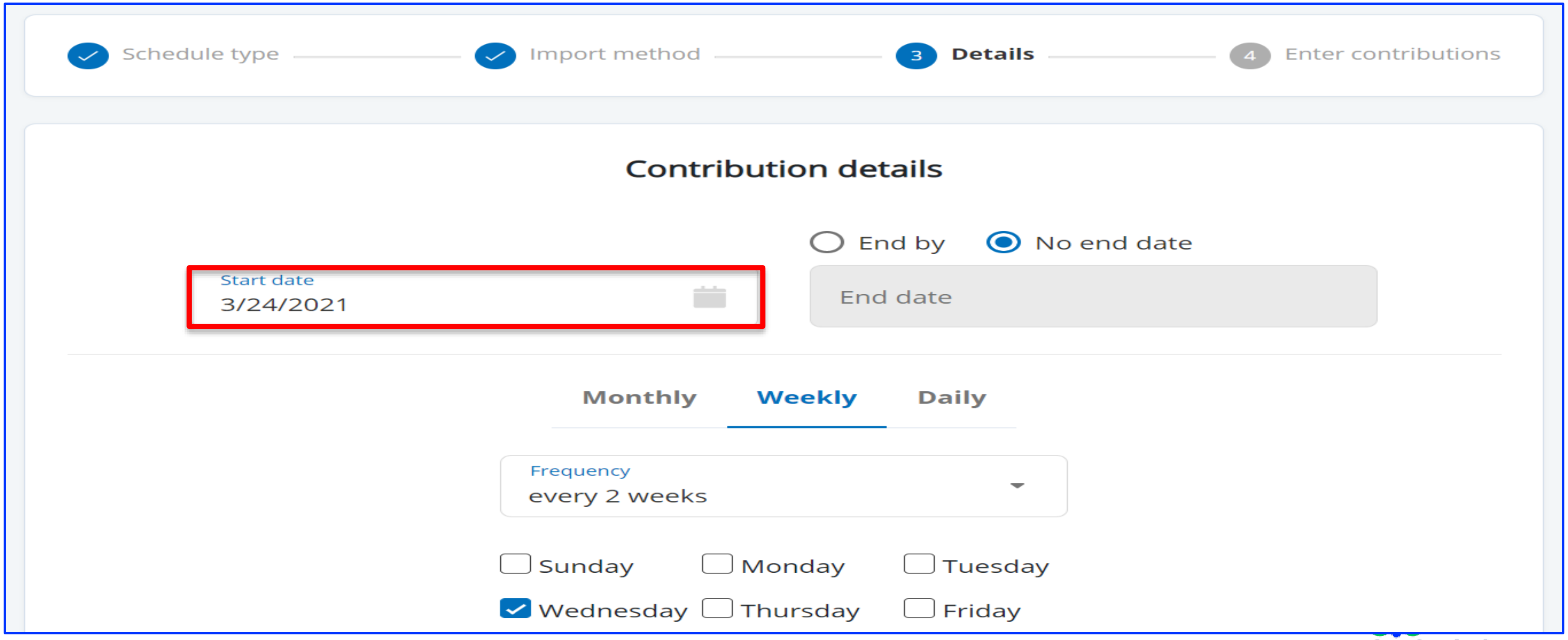
Step 2 – Select the how you would like to import the contribution data.
Enter Manually – Provides the option to manually enter contributions for employees.
Import a File – You have completed an excel file that you plan to upload.
Select **Next**



Set up Contributions - HSA Administration Site

Group Online Contributions (GOC) Recurring Schedule

Step 3 – Select the schedule for the recurring contributions.
Important: The funding process takes 3 business days. For example, if you would like the employees' funds to be deposited on Friday, **Start Date** should reflect Wednesday.

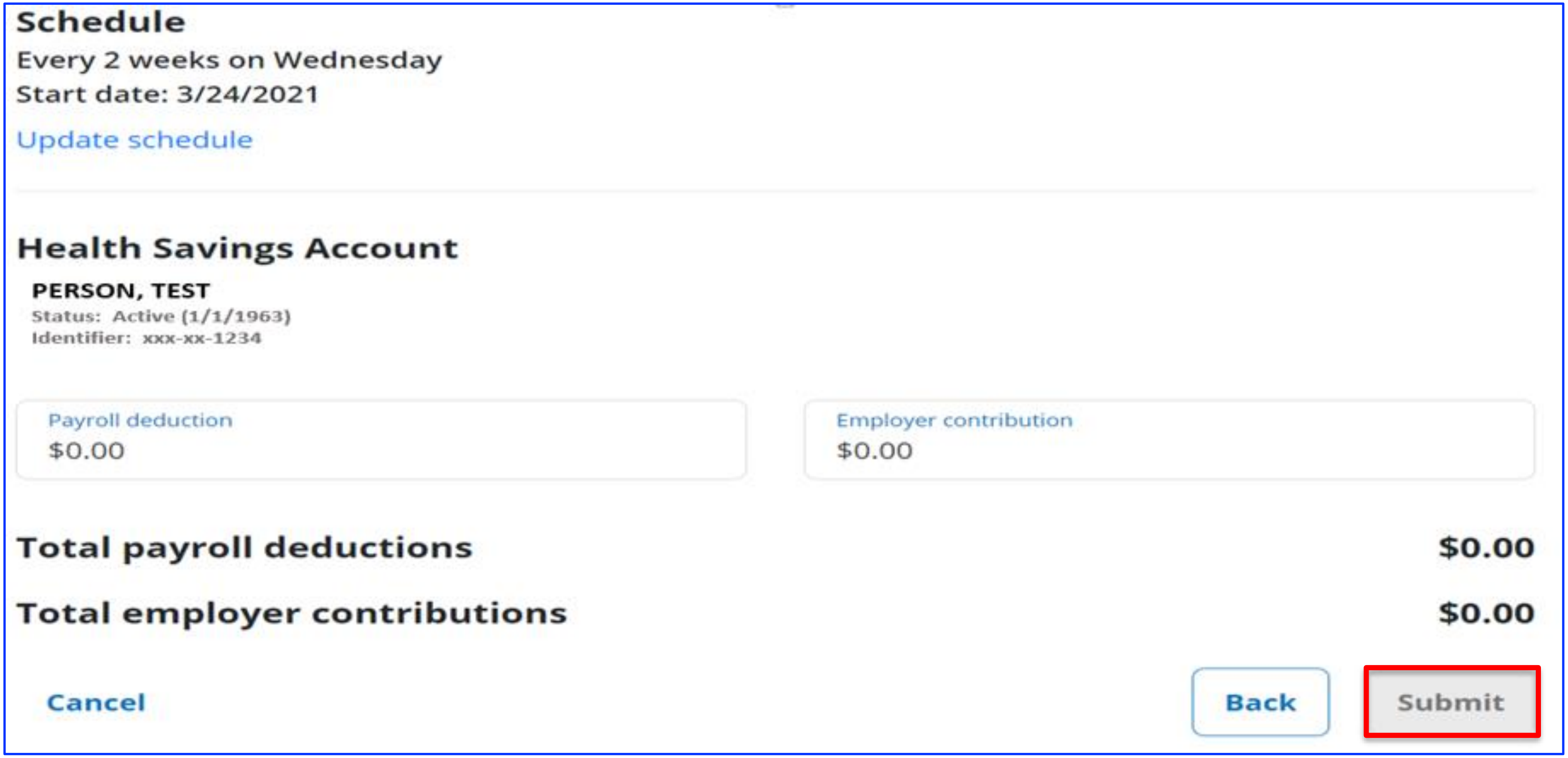


If you previously selected to **Import a File** – browse to upload the file now.
If you previously selected to **Enter Manually** – select **Next** to move on to step 4.

Set up Contributions - HSA Administration Site

Group Online Contributions (GOC) Recurring Schedule

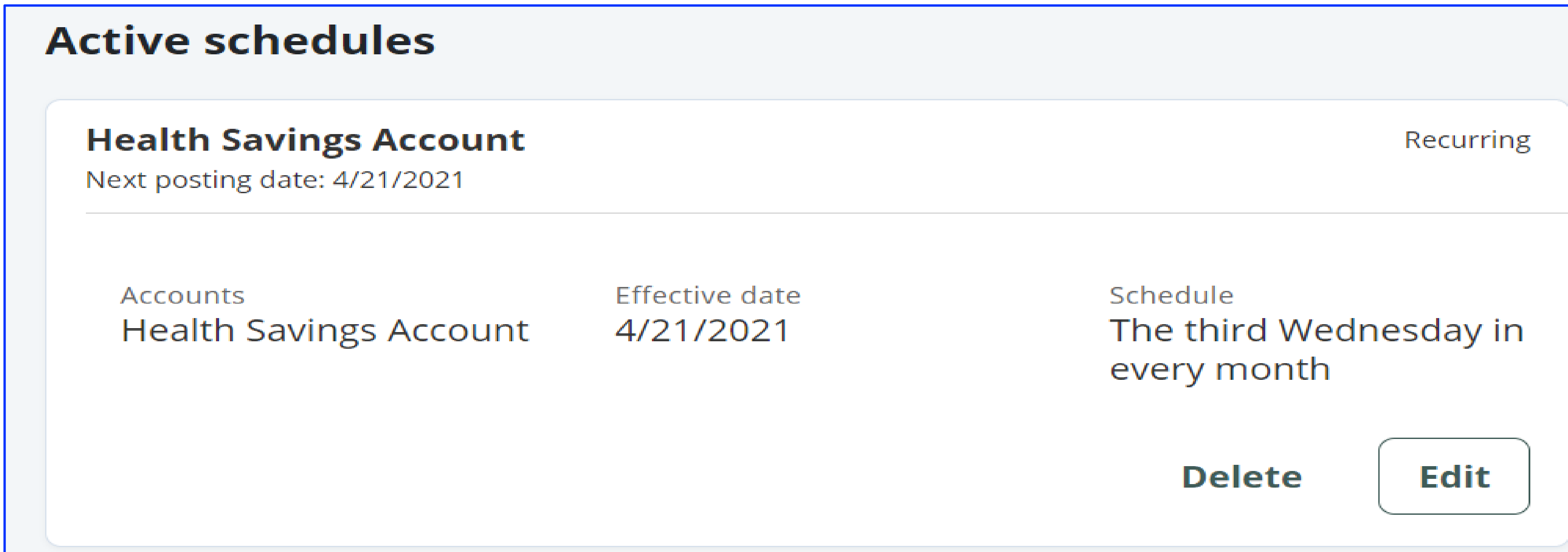
Step 4 – Enter contributions manually for employees as Payroll deduction, Employer Contribution or Both and **Submit**.

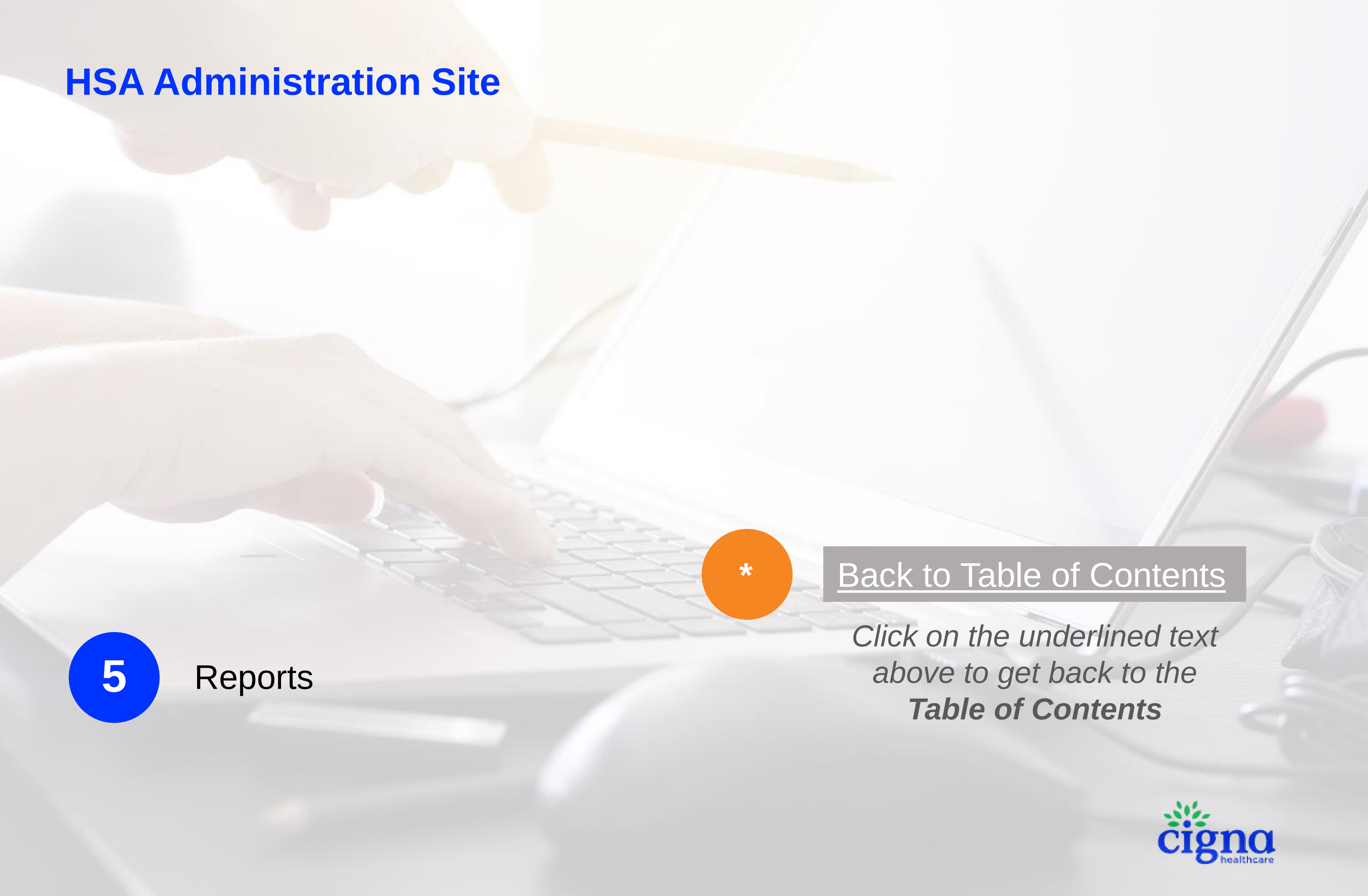


Set up Contributions - HSA Administration Site

Group Online Contributions (GOC) Recurring Schedule

You can Delete or Edit a scheduled at any time.
From the **Set-up Contribution** tab, click on the scheduled contribution.
This will expand the view and allow you to **Delete** or **Edit** the schedule as needed.





HSA Administration Site

5 Reports

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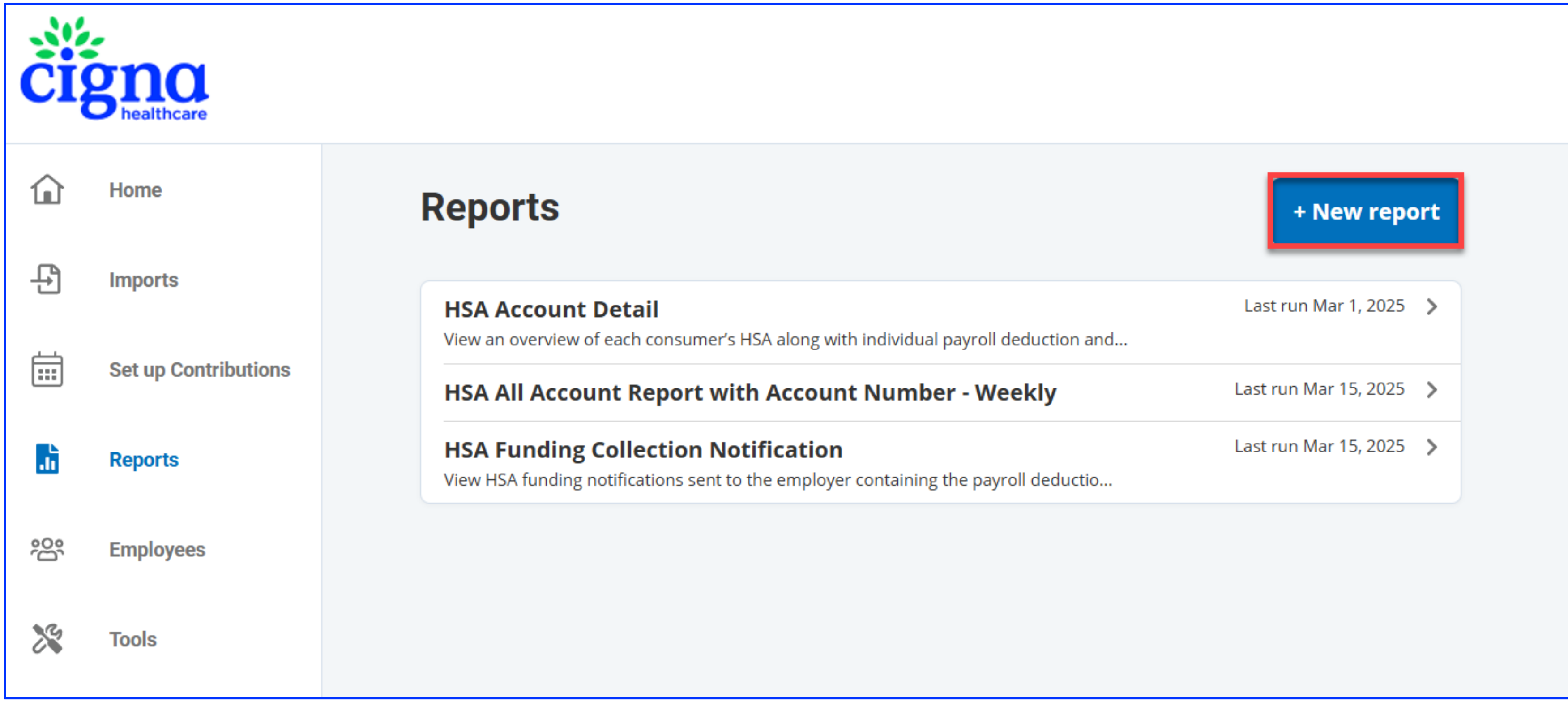
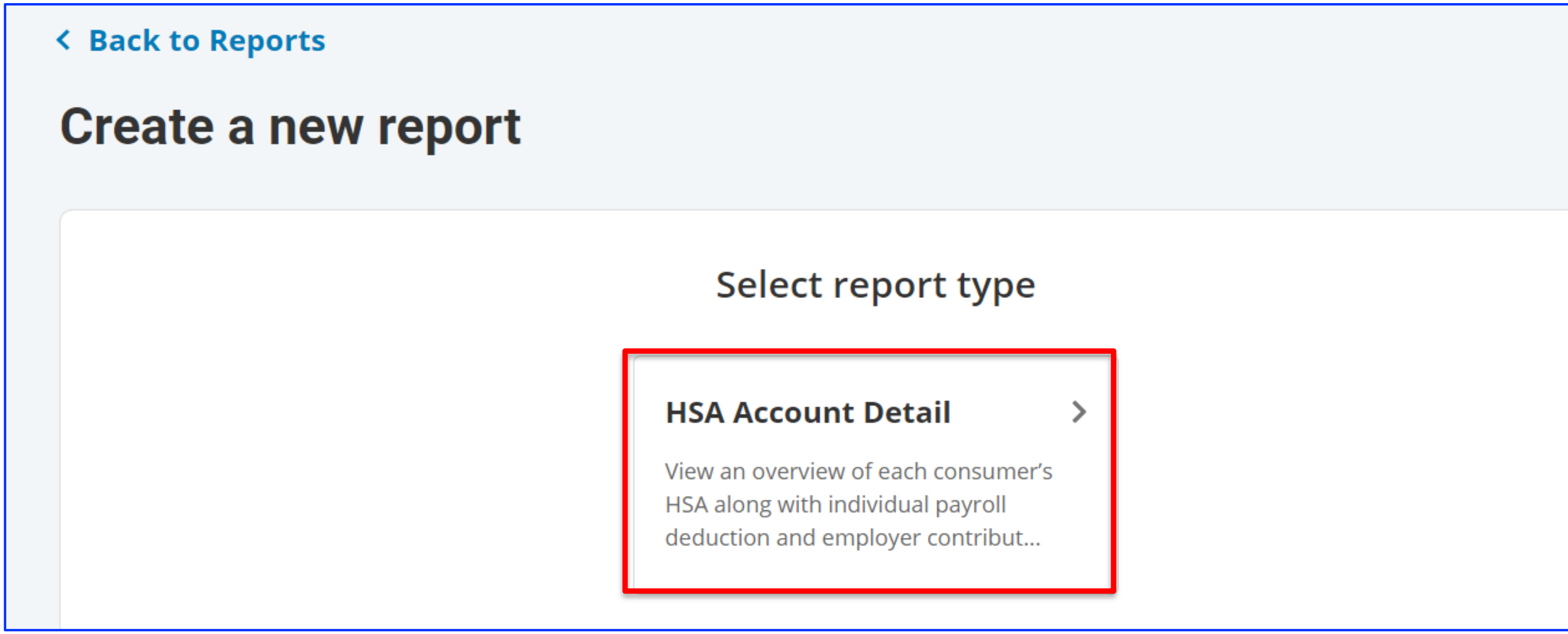
Reports Tab - HSA Administration Site

From the **Manage Employees** section, view or request reports.
To request the HSA Details Report on demand, from the Reports tab select +**New report.**



Reports Tab - HSA Administration Site

Step 1 – Select **HSA Account Detail** as the report type.



Reports Tab - HSA Administration Site

Step 2 – Complete the following fields:

Start Date and End Date - Only needed if **Reporting Period Data** is selected.

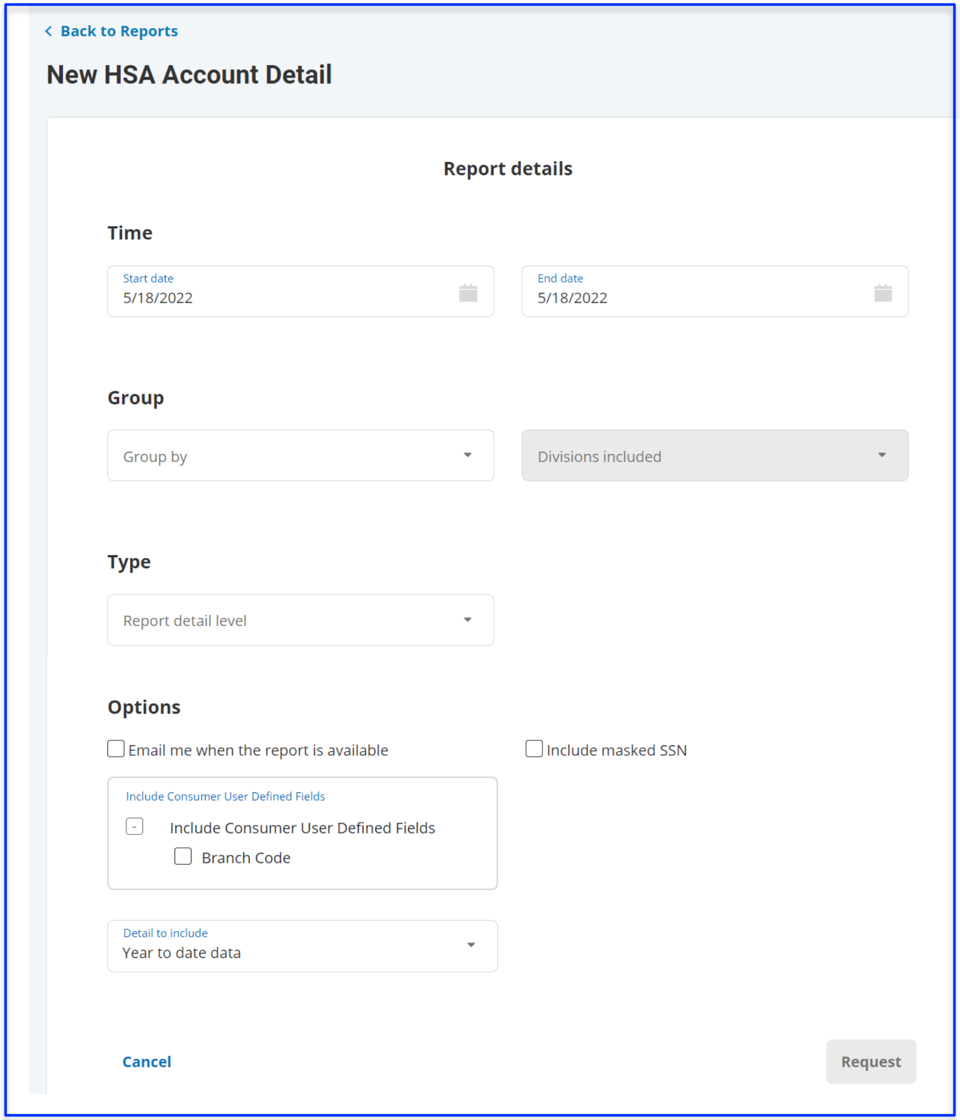
Group
- Do Not Group

Type - Select Detail

Options
- ✓ Email me when the report is available
- ✓ Include masked SSN

Detail to Include
Year to date data
Reporting Period Data – Ability to set a date range for specific period.

Step 3 - Select **Request**



Reports Tab - HSA Administration Site

HSA Account Detail Report

Available Monthly or On Demand – Reports Tab

Both a summary and detail version are generated upon your request. These reports provide both detailed and summary contribution information, employee account status and other valuable data.

Summary Version

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
Identifier	Last Name	First Name		Employment Status	Employment Status Effective Date	Account Creation Date	Account Status	IDV	Agreements	Current Period Payroll Deductions	Current Period Employer Contributions	Current Period Total Contributions	YTD Payroll Deductions	YTD Employer Contributions	YTD Total Contributions	Pr YT De
9000000866	BUR	CHE		Active	02/01/2014	03/25/2014	Active	Y	N	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
9000000316	BURGER	CHEESE		Active	02/01/2014	03/25/2014	Active	Y	N	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
9000000367	BURRITO	BREAKFEST		Active	02/01/2014	03/25/2014	Active	Y	N	$0.00	$2,000.00	$2,000.00	$0.00	$2,000.00	$2,000.00	
9000000916	BURRITO	BREAKFEST		Active	02/01/2014	03/25/2014	Active	Y	N	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
9000000924	BURRITO	STEAK		Active	02/01/2014	03/25/2014	Active	Y	N	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	

Detail Version

	A	B	C	D	E	F	G	H
1	Identifier	Last Name	First Name	Amount	Contribution Type	Tax Year	Processed Date	Note
2	9000000367	BURRITO	BREAKFEST	$2,000.00	Employer Contribution	2014	03/27/2014	03/25/2014 Employer Contribution
3	9000000375	BURRITO	STEAK	$2,000.00	Employer Contribution	2014	03/27/2014	03/25/2014 Employer Contribution

Reports Tab - HSA Administration Site

All Account Report

Available Weekly – Reports Tab

This report provides you access to valuable data about your plan including:

1) Status of CIP (Federally Requires Customer Identification Program review) - i.e. whether employees passed vs. failed
   - Indicates anyone who has not yet passed CIP in the "Has Passed CIP" column with "No"
   - Includes the aging information of CIP status
   - Provides Date Employee passed CIP in "Date Passed CIP" column
2) Account Status
3) Date of last funding
4) Customer Account number (for clients funding via ACH Direct Deposit through payroll)

	A	B	C	D	E	F	G	H	I	J	K
1	First Name	MI	Last Name	Masked SSN	Identifier	Account Number	Division	Branch Code	Account Status	Employment Status	Employment Status Effective Date
2	ALDO		ADAMS	1234	1234	39707654	9990001	ACT	Open	Active	2/27/2019

L	M	N	O	P	Q	R	S	T
Current HDHP Coverage Level	Account Effective Date	CIP Start Date	Has Passed CIP	CIP Aged Days	Date CIP Passed	Account Closed Date		Last Payroll Funding Date
Family	3/1/2019	2/27/2019	Yes		2/27/2019			10/11/2019

Reports Tab - HSA Administration Site

HSA Plan Funding Collection Notification

Available Day 2 of GOC Funding Process – Reports Tab

Only available for clients using **Group Online Contribution (GOC)** as the elected funding method. Provides you funds for recently posted payroll and employer contributions and the date the funds will be posted.

Cigna Retail CG2
HSA Plan Funding Collection Notification
Create Date: 9/29/2017

SUMMARY
FUNDS TO BE COLLECTED

Funding will be pulled as described below.

Contribution Type	Amount	Funding Account	Funding Date
Employer Contribution	$70.00	xxxxx0000	10/2/2017
Employee Payroll Deduction	$40.00	xxxxx0000	10/2/2017
Totals	**$110.00**		

FUNDS ON HOLD

These employees have contributions posted but did not process because either the HSA integration status is not active or the acceptance of HSA Terms and Conditions (T&C) is not complete. Once these conditions have been met, the contributions will process and a new notification will be available.

Contribution Type	Amount
Employer Contribution	$0.00
Employee Payroll Deduction	$10.00
Totals	**$10.00**

Cigna Retail CG2
HSA Plan Funding Collection Notification
Create Date: 9/29/2017

FUNDS TO BE COLLECTED

Identifier	SSN	Last Name	First Name	MI	Contribution Date	Employer Contribution	Employee Payroll Deduction	Total Contribution
0005094143	XXX-XX-3434	Jones	Jon		9/28/2017	$20.00	$10.00	$30.00
0005094144	XXX-XX-2222	Rae	Rita		9/28/2017	$50.00	$10.00	$60.00
0005238904	XXX-XX-2488	RETAIL	CIGNA		9/28/2017	$0.00	$10.00	$10.00
0005327668	XXX-XX-5678	TESTER	TEST		9/28/2017	$0.00	$10.00	$10.00
					Totals:	**$70.00**	**$40.00**	**$110.00**

FUNDS ON HOLD

Identifier	SSN	Last Name	First Name	MI	Contribution Date	Employer Contribution	Employee Payroll Deduction	Total Contribution	Hold Reason
0005327720	XXX-XX-9927	TEST	DC		9/28/2017	$0.00	$10.00	$10.00	HSA not Active
					Totals:	**$0.00**	**$10.00**	**$10.00**	

Reports Tab - HSA Administration Site

Clearing Account Summary Report

Available Monthly – Reports Tab (report may also be produced and emailed daily)

Only available for clients using **Text Funding** as the elected funding method. The following information is provided to help you reconcile HSA funding.

Clearing Account Summary Report	
Tab 1	The **Month to Date** tab shows all debits, credits, and refunds to the account for the current month.
Tab 2	The **File Activity** tab shows the file status of all files received in the last 90 days, except for those auto rejected at time of being uploaded through the portal. An email is sent to the email address in the file stating the file was rejected. Those in a rejected status are those that were manually rejected by HSAS Bank.
Tab 3	The **Pending Transactions** tab provides all unprocessed contributions being held in the clearing account.
Tab 4	The **Pending Refunded** tab provides a list of funds being returned to the employer.

HSA Administration Site

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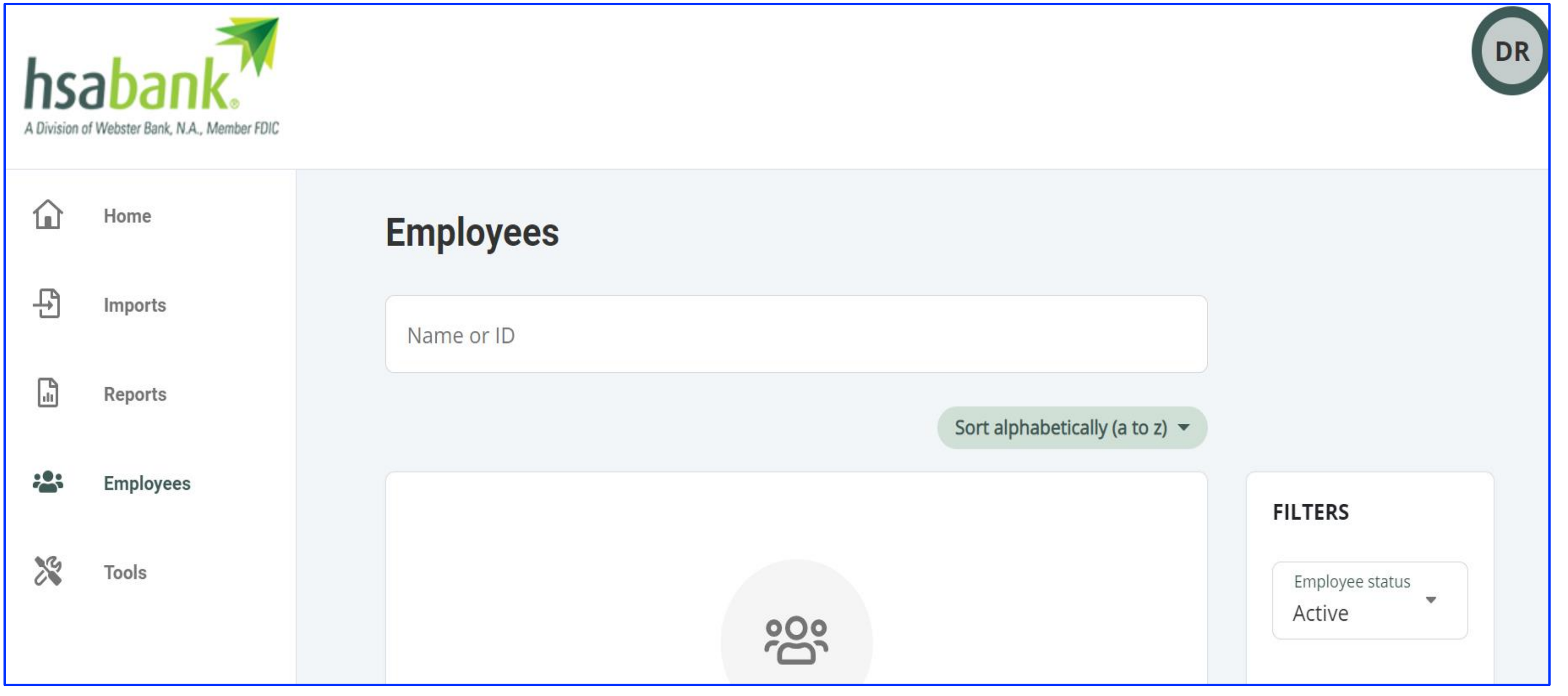
6 Employees

Employees Tab - HSA Administration Site

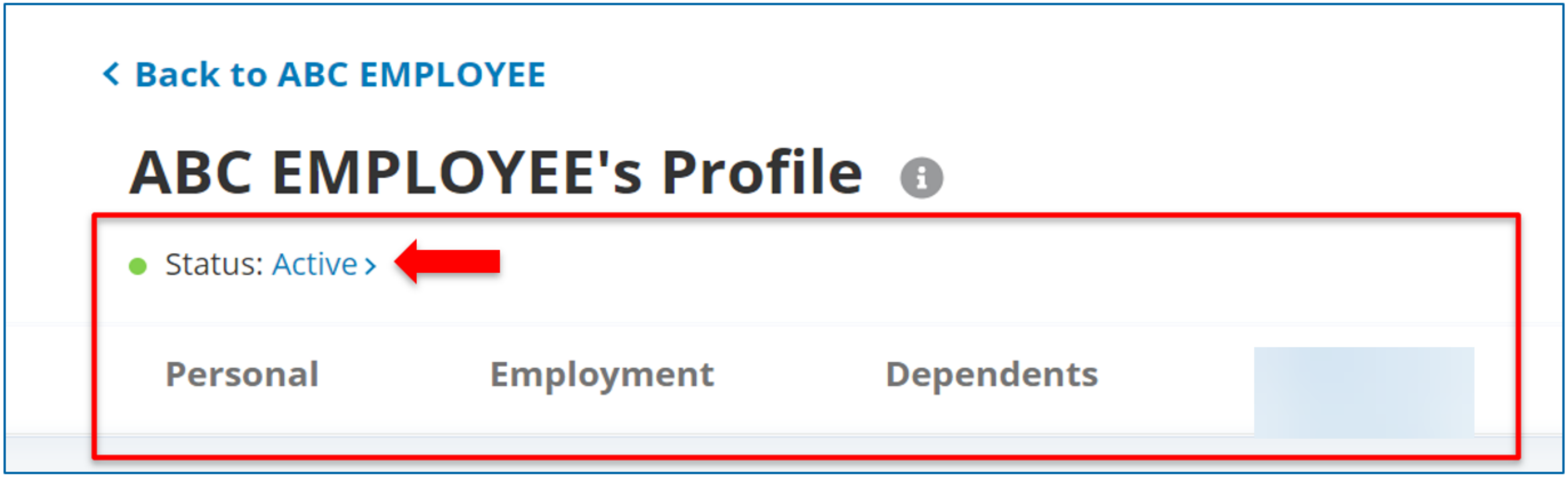
You have access to view real-time data at an employee level to facilitate your ability to support your employees' questions. From the **Manage Employees** section under the **Employees** tab, you can search for employees using Name or SSN or you may select an employee from a list of all employees.



Employees Tab - HSA Administration Site

View Profile – If you select 'View profile' you will be able to access the following information:

- Status – Active or Inactive
- Personal Information - Name, address and phone number
- Employment – Citizenship and Enrollment Status
- Dependents – Will only show if the employee has added dependents



HSA Administration Site

7 Tools

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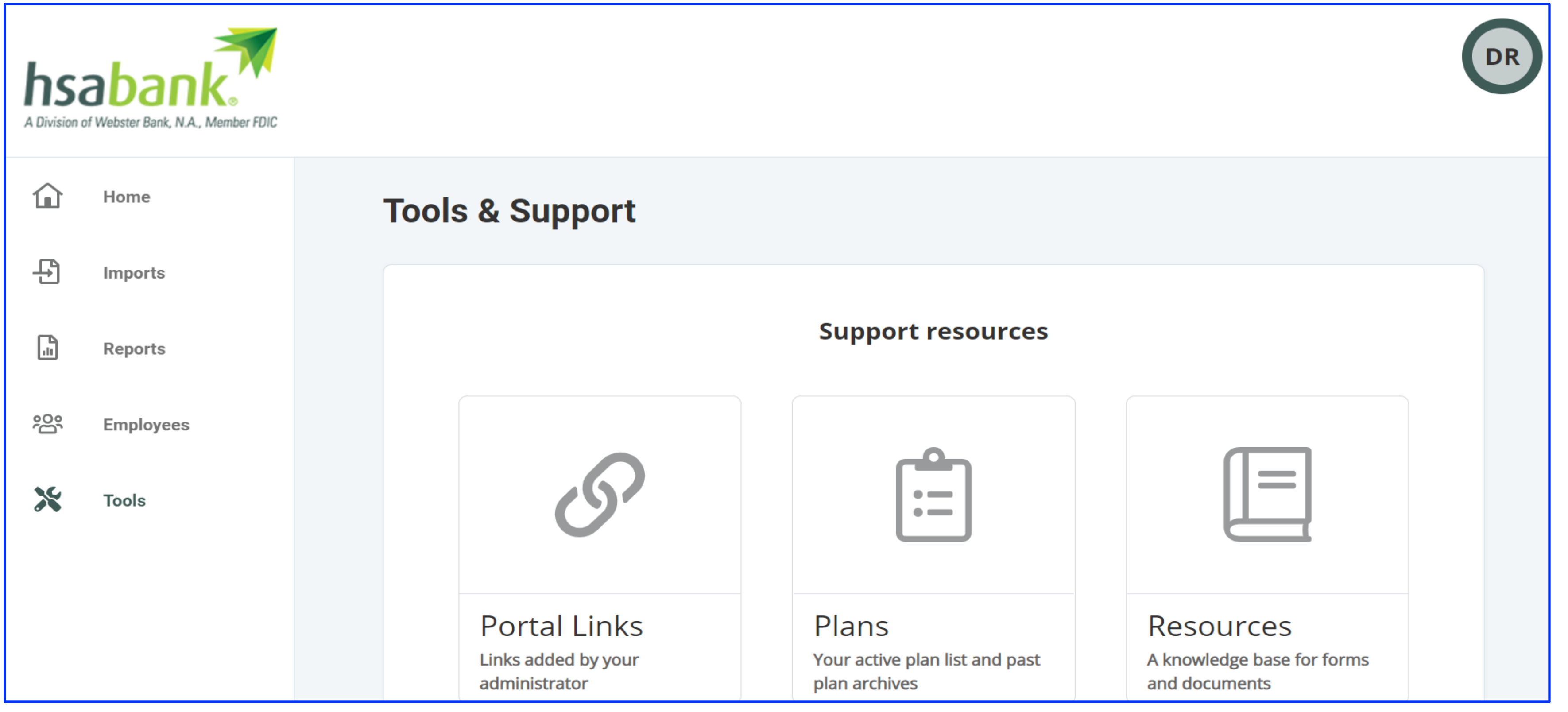
Tools Tab - HSA Administration Site

From the **Manage Employees** section you can locate **Portal Links, Plans** and **Resources** under the Tools tab.



Note: Cigna Summary Plan Descriptions are not available via the HSA Bank Employer Portal.

Tools Tab - HSA Administration Site

Portal Links - The **Links** tab provides additional information related to the HSA Plan. Click on the link to access the URL.

Links

Cigna Resource Center

Eligible Expense List

HSA Rates & Tax Info

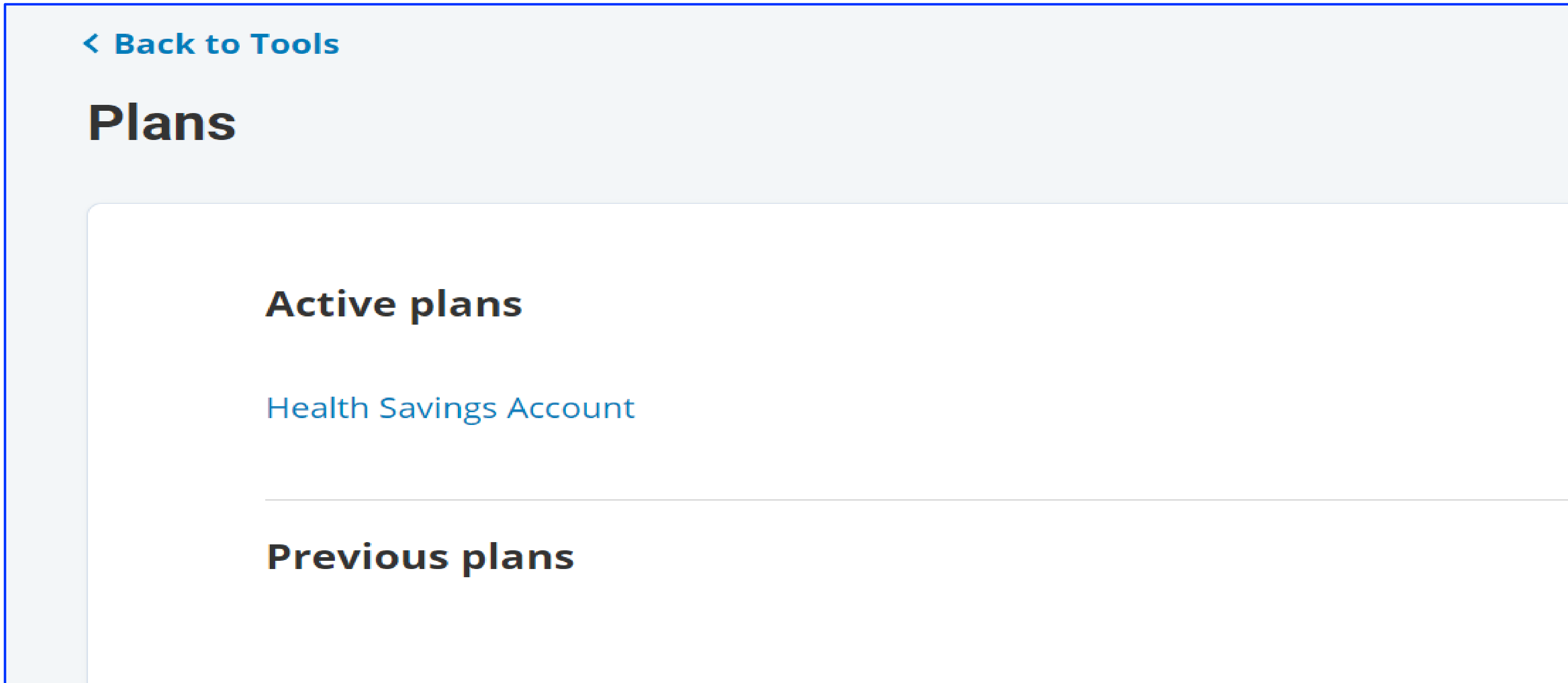
Learn About FDIC Insurance Coverage

Privacy and Opt-Out Notice

Security

Tools Tab - HSA Administration Site

Plans - Cigna Summary Plan Descriptions are not available via the Employer Portal.



Tools Tab - HSA Administration Site

Resources - The **Resources** tab provides documents related to the HSA Plan. Click on the link to view the PDF.

Resources

- Cigna Employer HSA Bulk Correction Form
- Cigna HSA Contribution Form
- Cigna HSA Coverage Level Update Form
- Cigna HSA Direct Transfer Form
- Cigna HSA Excess Contribution Removal Form
- Cigna HSA Rollover Form
- Cigna HSA Withdrawal Form
- HSA Direct Transfer Form
- HSA Withdrawal Form
- Transfer Out Instructions
- Cigna HSA Account Verification Form
- Cigna HSA Contribution Reversal Form
- Cigna HSA Death Beneficiary Form
- Cigna HSA Distribution Request Account Closure...
- Cigna HSA Name Change Request Form
- Cigna HSA Tax Correction Form
- Cigna IRA to HSA Transfer Form
- HSA Rollover Form
- IRA to HSA Transfer Form

Please contact your dedicated Cigna Consumerism Account Specialist if you have questions.