hsabank. A Division of Webster Bank, N.A., Member FDIC for cigna healthcare

Customer Website Guide

Table of Contents

970718 | Customer_Website_Guide_CG2_ALG_CIGNA_11062023

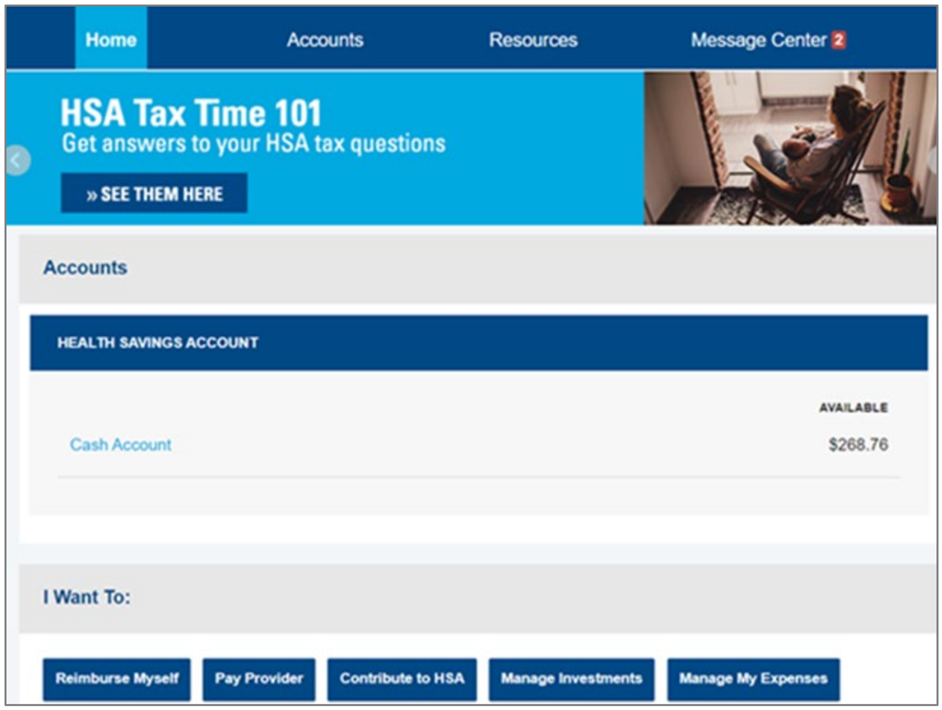
970718 | Customer_Website_Guide_CG2_ALG_CIGNA_11062023

Customer Website Overview

Welcome to HSA Bank! This guide will provide you with details about how to use the HSA Bank Customer Website. The HSA Bank Customer Website gives you 24/7 online access to your account.

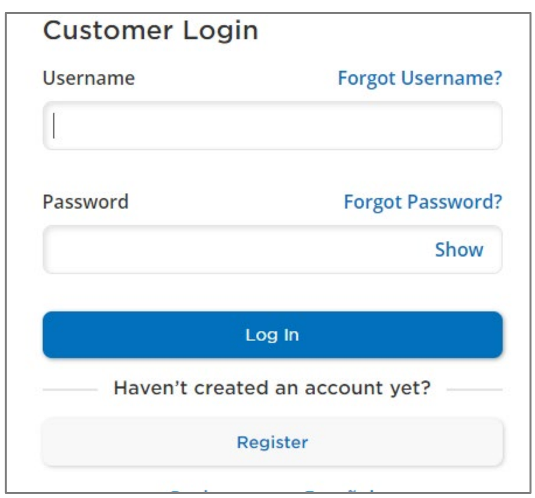
Some key account management features include:

- Reimburse Myself
- Pay Provider
- Contribute to HSA
- Manage Investments
- Manage My Expenses



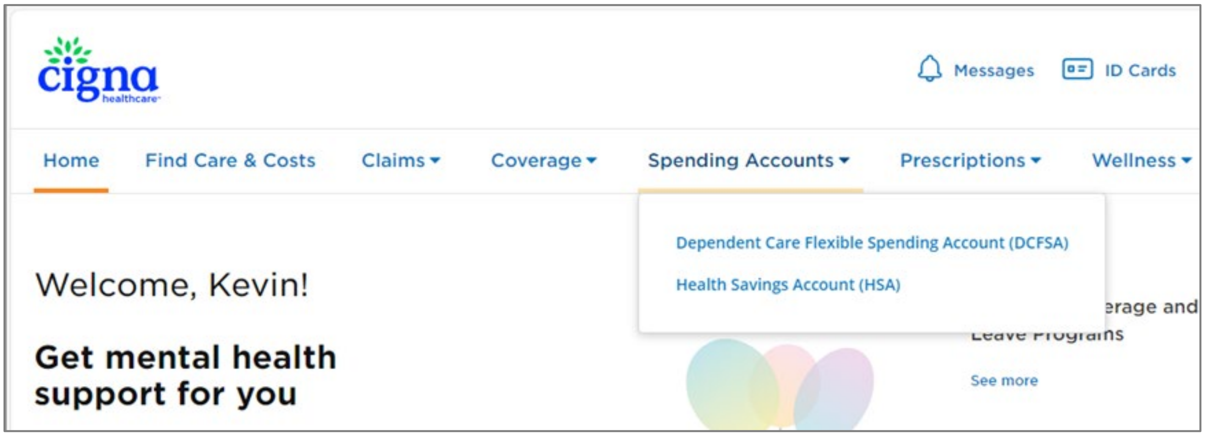
Initial Login Process

Step 1: Log in to myCigna®.

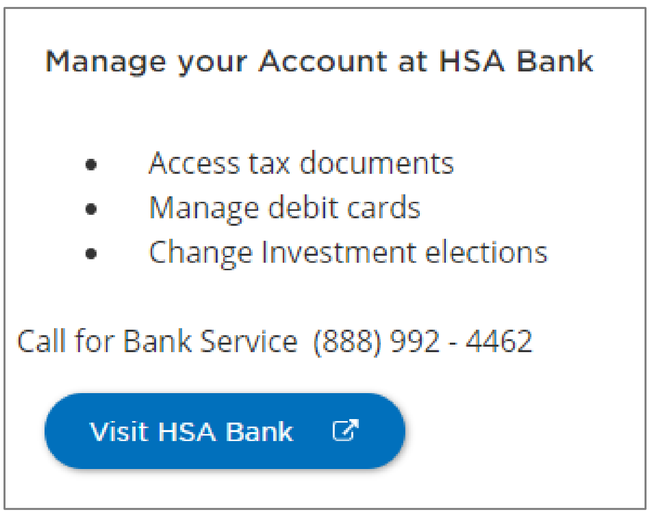


Step 2:

Once you log in, you will be brought to the myCigna Welcome page below. To single sign-on over to the HSA Bank Customer Website, simply click the Health Savings Account link in the Spending Accounts menu.

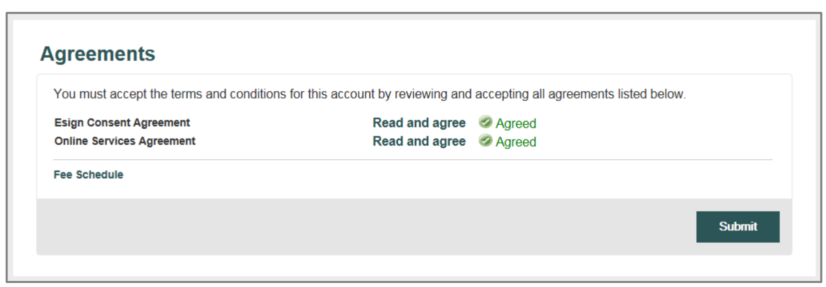


Then, click Visit HSA Bank on the right hand side of the screen. No additional ID/password is needed.



Step 3:

Please read and accept the Esign Consent Agreement and Online Services Agreement. You must open the agreements and **scroll to the bottom** in order to select the checkboxes.



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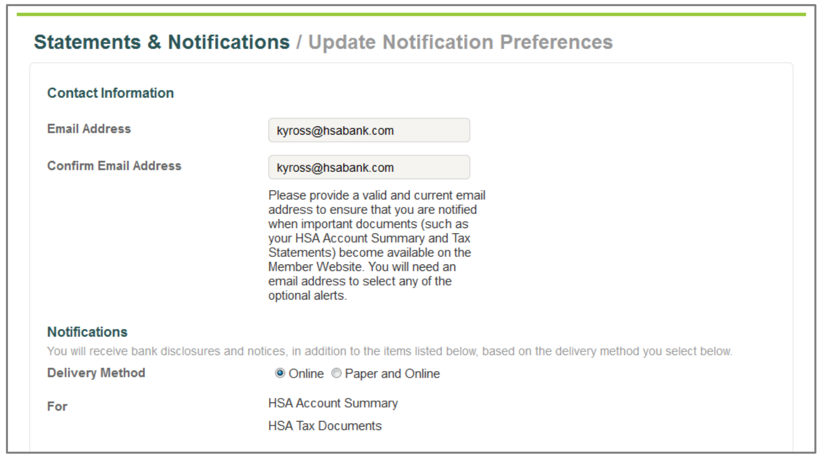
Step 4:

Please enter and confirm your email address to ensure you receive notifications based on your elected preferences. You can enter your mobile number if you would like to opt in to any text alerts.

You will also confirm your preferred delivery method for certain bank disclosures and notices.

Note: You may update this information later by clicking the Message Center tab, then clicking Update Notification Preferences in the top right corner of the page.



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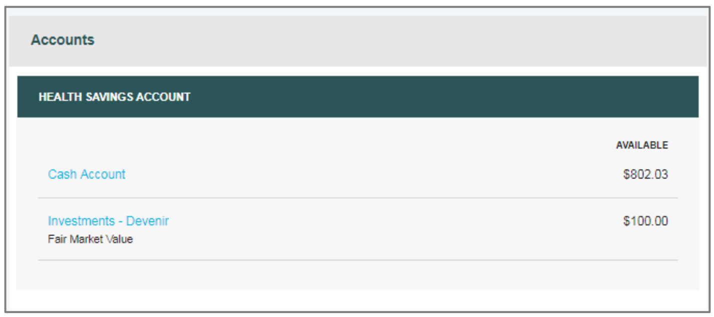
Navigate From the Home Page

The HSA Bank home page will be displayed on your screen each time you log in to the site. Each tab from your home page offers an easy-to-use navigation system for viewing information on your account.

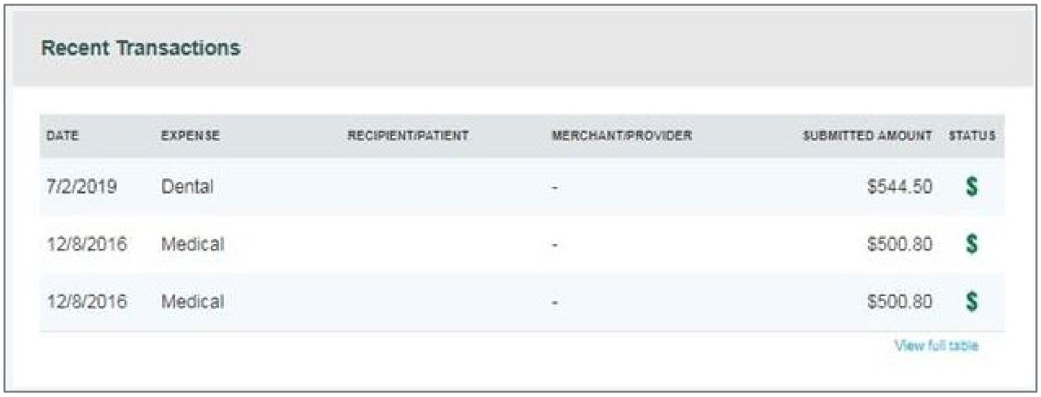
- Starting with the top navigation, you can access information using the menu tabs at the top of the screen.
    - Home
    - Accounts
    - Resources
    - Message Center

- Your account(s) and balance(s) will conveniently show at the top of the page so that you can easily keep track of your HSA and investment accounts (if applicable).



- Below your account information, the “I Want To…” buttons help you easily take actions related to your account:
    - Reimburse Myself
    - Pay Provider
    - Contribute to HSA
    - Manage Investments (if applicable)
    - Manage My Expenses

- After the "I Want To…" buttons, you will see a snapshot of your three most recent expenses. You can click the View full table link on the bottom right to review all expenses on the myHealth Portfolio tab.

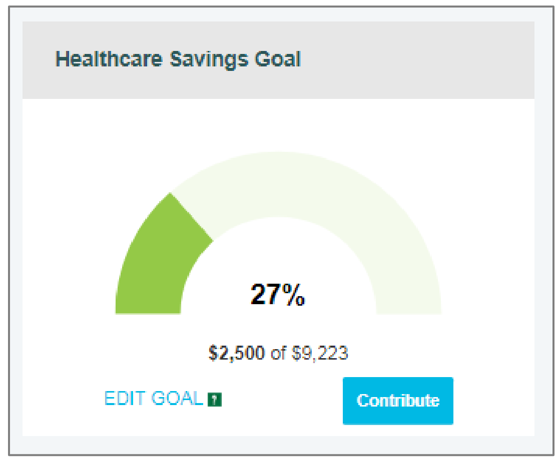


Recent Transactions

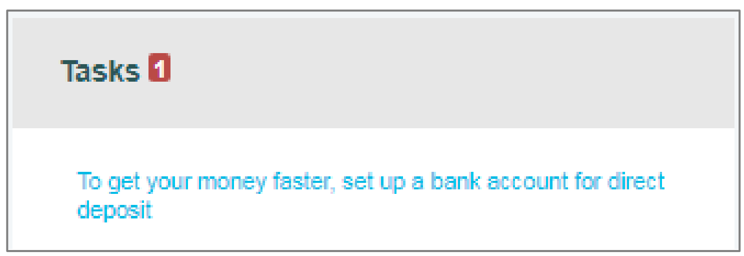
DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
7/2/2019	Dental		-	$544.50	$
12/8/2016	Medical		-	$500.80	$
12/8/2016	Medical		-	$500.80	$

View full table

- Below the Recent Transactions section, you will see the Healthcare Savings Goal tool. This interactive tool enables you to set a savings goal for future out-of-pocket medical costs.

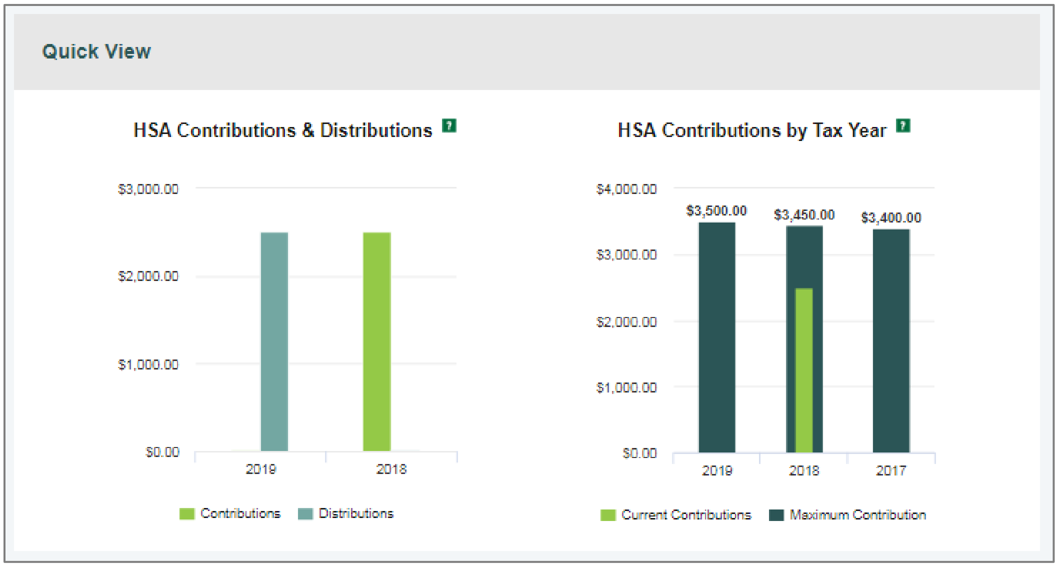


- Your Tasks section on the home page helps you stay on top of your account with a variety of notifications or requests for action, such as a notice of an external bank account that needs to be validated.



- Click the bold text in the Tasks section to navigate to the page needed to execute the requested action.

- At the bottom of the home page is the Quick View section, which graphically displays key metrics that make it easy to track your contributions each year You can also assess your year-over-year saving and spending habits with the HSA Contribution & Distribution Activity graph.

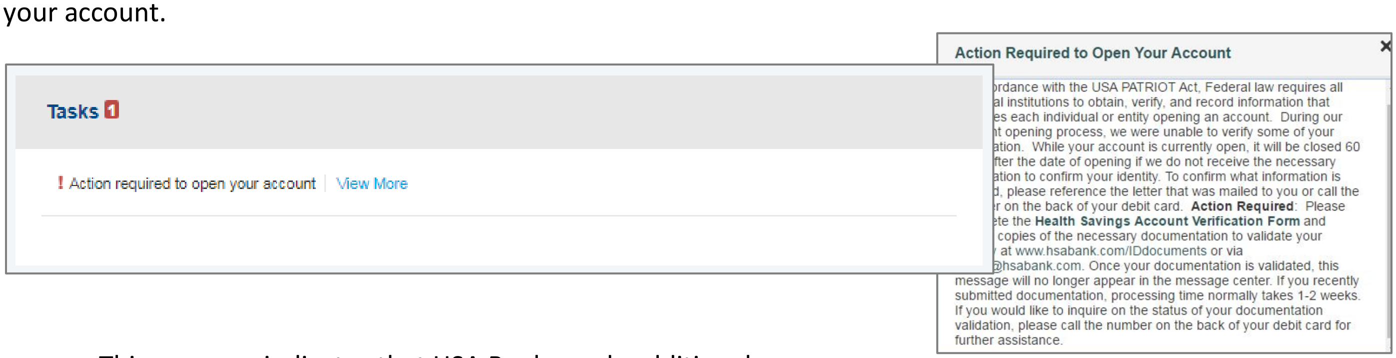


The HSA Contribution & Distribution Activity graph reflects the maximum contribution limit based on a member's high-deductible health plan (HDHP) coverage level (individual or family). Please contact HSA Bank if your contribution limit needs to be updated to reflect your current HDHP coverage level.

Tasks

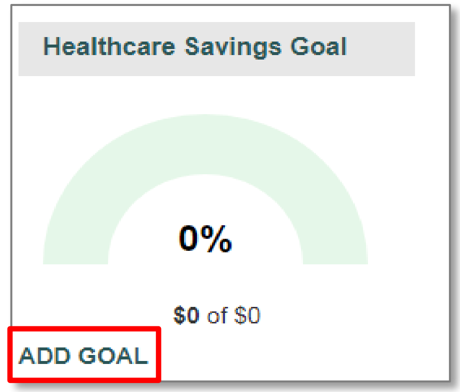
The Tasks section helps you make the most of your account by highlighting action items, such as downloading the mobile app to stay connected to your account on the go or confirming a linked external bank account. Clicking each item brings you to the relevant page or popup with more information.

When first opening your account, you may see a message indicating that action is required to finalize the opening of your account.



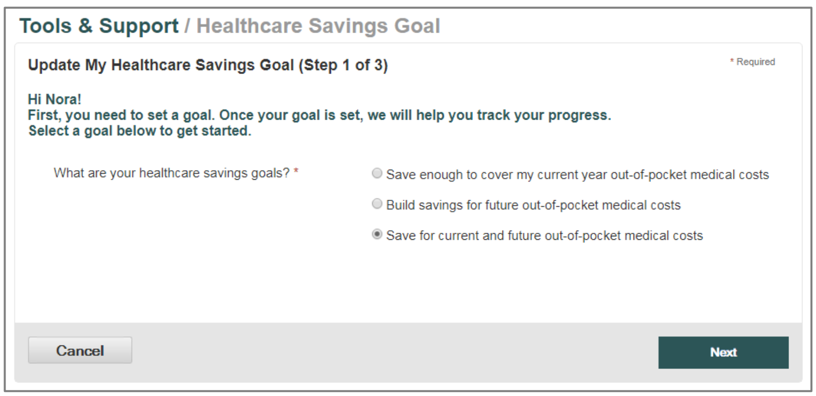
- This message indicates that HSA Bank needs additional documentation to maintain your open account. Clicking View More provides additional information on why we require this and how to submit your documentation.
- You will also receive a letter in the mail with specific information on what is needed from you and how to send us the required documents.

Healthcare Savings Goal

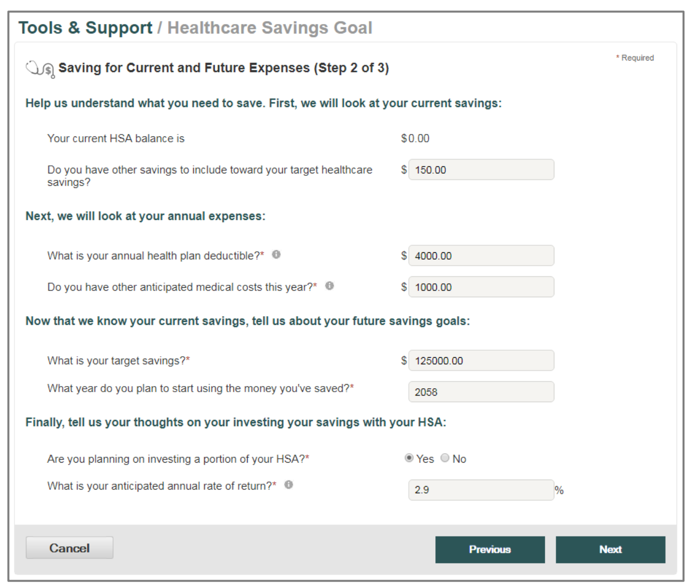


Looking to save money for current or future healthcare expenses but not sure where to start? The Healthcare Savings Goal tool can help you stay on track to meet your goals and give you an easy visual reminder of your progress.

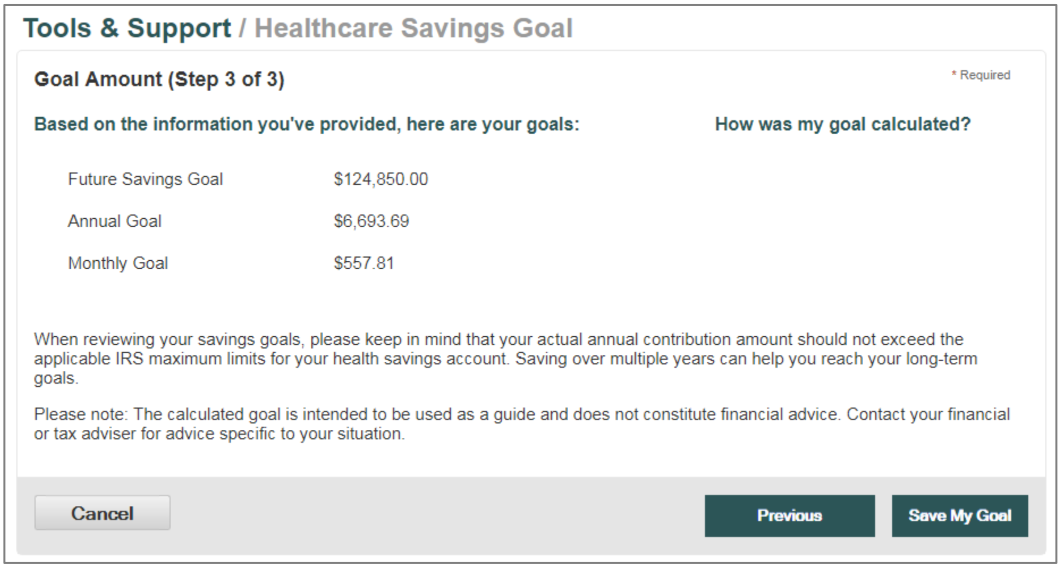
- To get started, click Add Goal.
- The first step shows three goal options:
    - Save enough to cover my current year out-of-pocket medical costs
    - Build savings for future out-of-pocket medical costs
    - Save for current and future out-of-pocket medical costs
- Select the goal that best meets your needs and click Next.



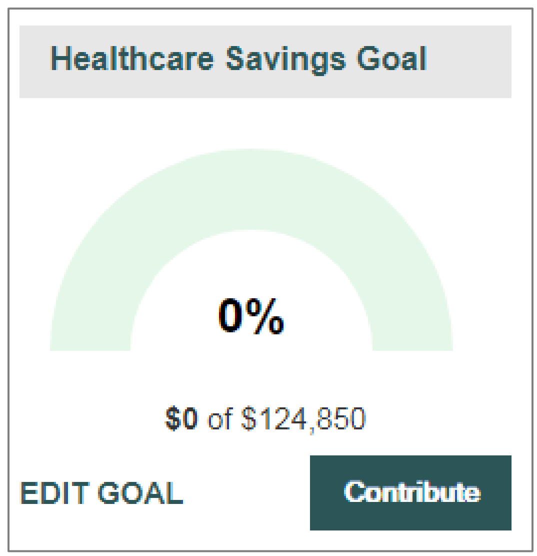
- Based on the goal you select, fill in the required fields on the next page. Some of the data shows automatically (such as your current HSA balance), and other fields prepopulate with suggested information.
- When you have entered the information that best reflects your savings goal, click Next.



- In the final step, review your goals. You can click the "How was my goal calculated?" link for more information or Previous if you would like to go back and change any information.
- When you are ready to finalize your goal, click Save My Goal.

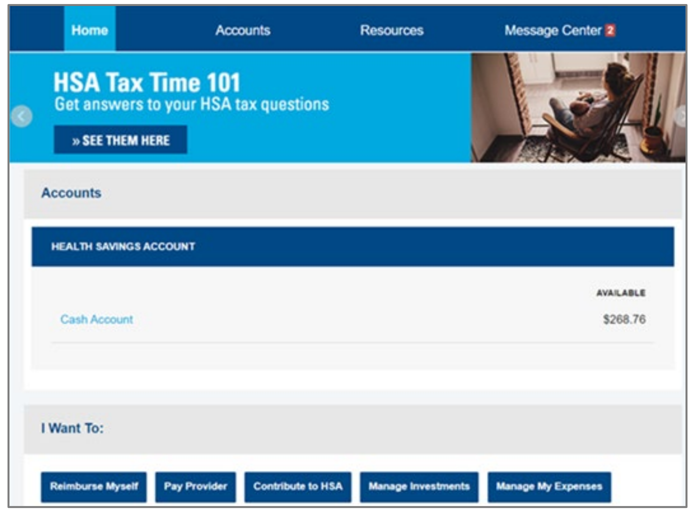


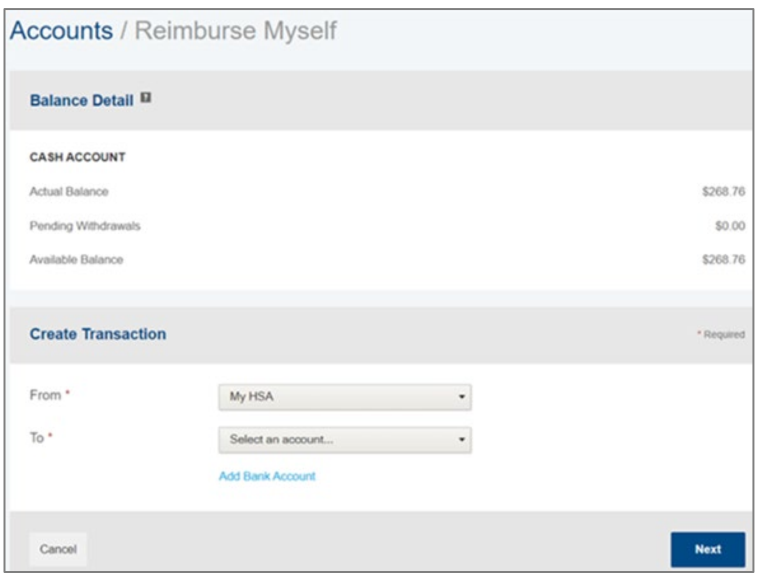
- Once your goal is saved, you can edit it at any time by clicking Edit Goal.
- Clicking the Contribute button makes it easy to contribute money from your external bank account to your HSA.
    - **In order to avoid being taxed on excess HSA contributions, please calculate your annual HSA contribution amount to ensure that it does not exceed the IRS' annual contribution limits. If you are 55 years or older, and not enrolled in Medicare, you are eligible to contribute an additional $1,000 above the IRS limit.**



I want to…Pay Bill/Contribute (Distribution/Contribution)

From the buttons under your account balance(s), select Reimburse Myself, Pay Provider or Contribute to HSA. These feature can be used to transfer funds to or from your HSA.





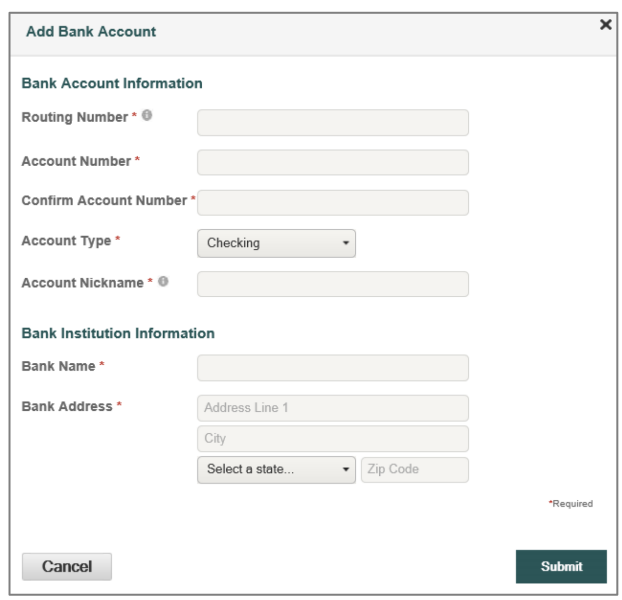
Reimburse Myself

The best way to reimburse yourself is to establish an electronic fund transfer (EFT) with your external checking or savings bank account and initiate a transaction from your HSA to your external account.

If you need to add an external bank account, click Add Bank Account and follow the instructions below.

Add External Bank Account

To add a new account, complete your banking information on the "Add Bank Account" popup and click Submit. (See the [Profile section](#) for additional details.)

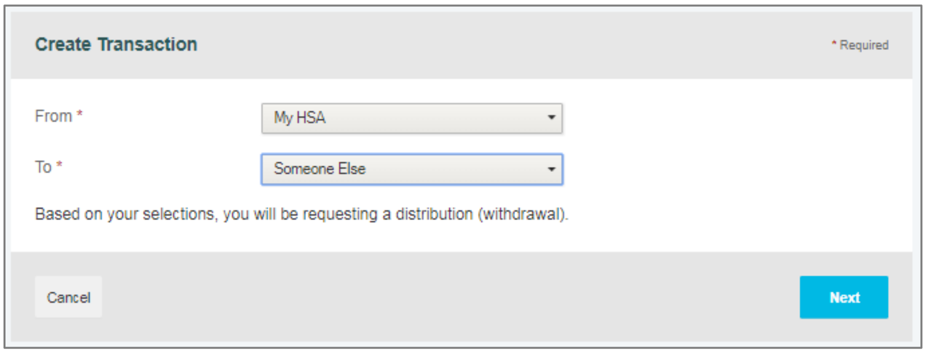


Pay Provider

- To provide additional payment flexibility when using your HSA, you have the option to request a distribution check from your account. The check will be sent directly to the payee listed. Please follow the instructions below to submit an online distribution request.

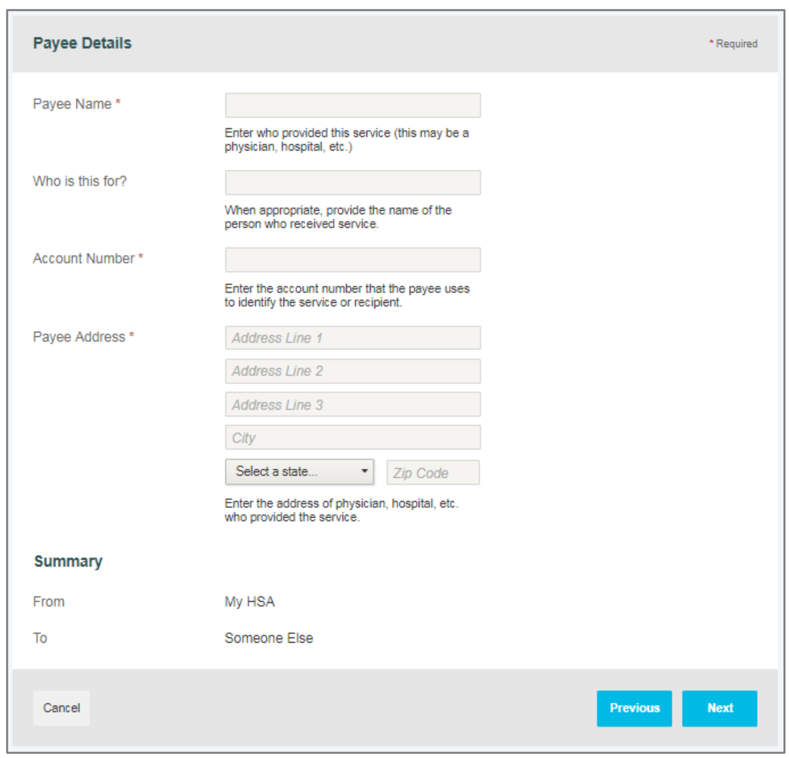
  Note: Checks are mailed within 72 hours of the request and take 5 to 6 days for delivery.

- From the Pay Provider page, select "My HSA" from the "From" dropdown and "Someone Else" from the "To" dropdown, and then click Next.



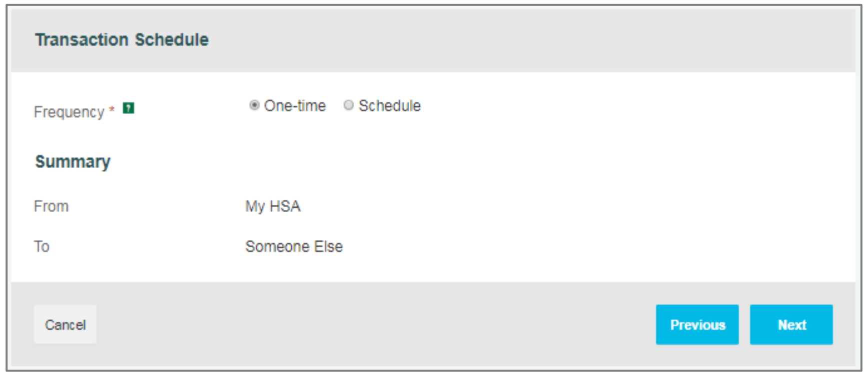
Add a Payee

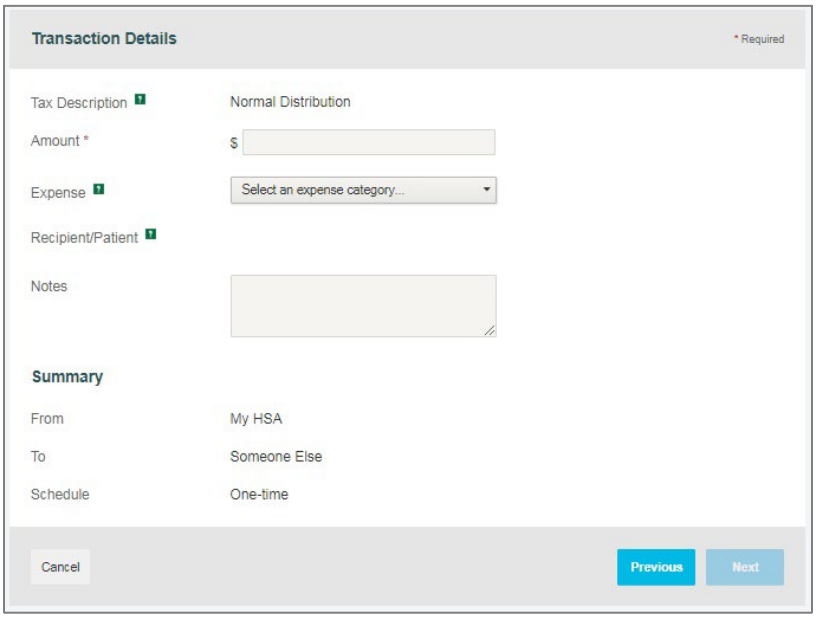
- You can add a new payee or select a previously added payee to send payment to.
- Enter the name of the person to be paid in the "Payee Name" field (this will be to whom the check is made payable).
- Optionally, you can include the name of the person who received the service in the "Who is this for?" field.
- Enter the account number of the payee; this will also appear on the printed check.
- Complete the payee address for where the check should be mailed.
- If this payee may be used again, leave the "Save new payee information" box checked. Otherwise, uncheck it if you do not want this payee's information saved.
- Once you have completed the payee information, click Next.



Payment Transaction

Enter the frequency as either one-time or schedule (for a recurring payment), and click Next.



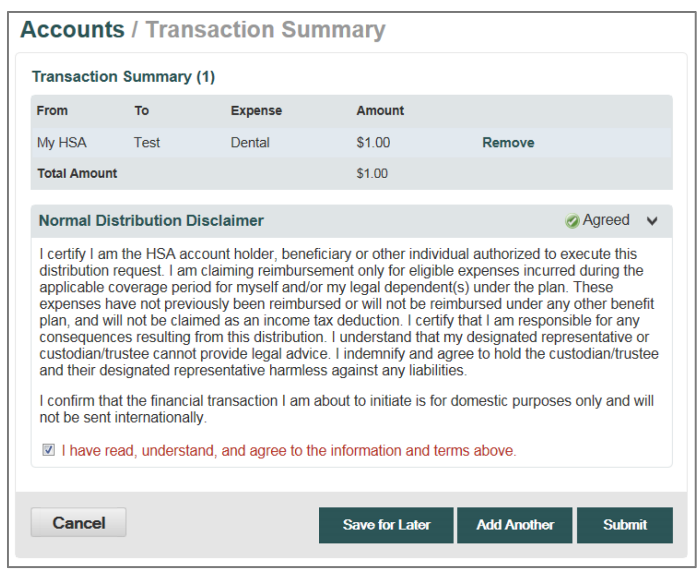


Payment Transaction Details

Enter the amount of the expense, the expense category, the recipient/patient, as well as any notes you have, and click Next.

Transaction Summary and Confirmation

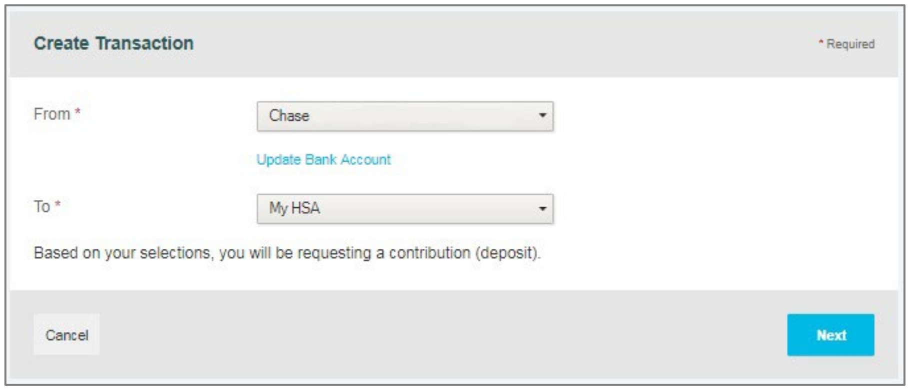
- View the transaction summary and confirm the "Normal Distribution Disclaimer" by checking the box near the bottom of the page.
- Confirm the transaction and click Submit, or enter another transaction by clicking Add Another.

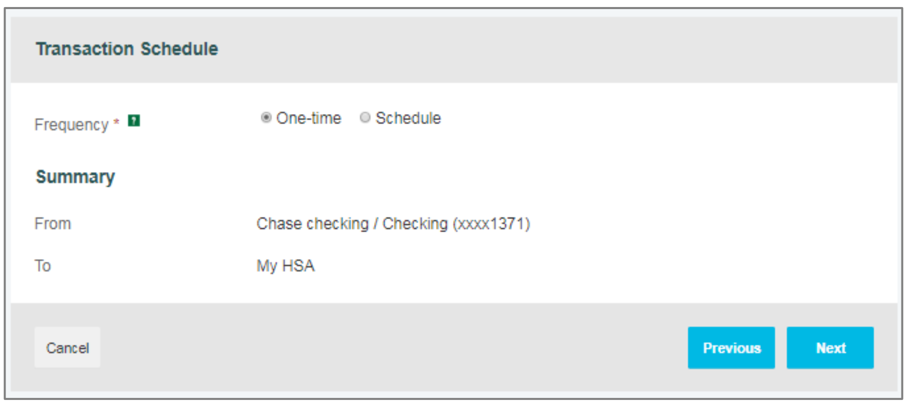


Make a Contribution

To make a post-tax contribution, from the Pay Bill / Contribute page, select a bank account on file from the “From” dropdown and select “My HSA” from the “To” dropdown.

Note: If you do not have a bank account on file, you can click Add Bank Account and follow the steps in the, Add External Bank Account section of this guide.





Select your contribution schedule:

- One-time
- Schedule (recurring)

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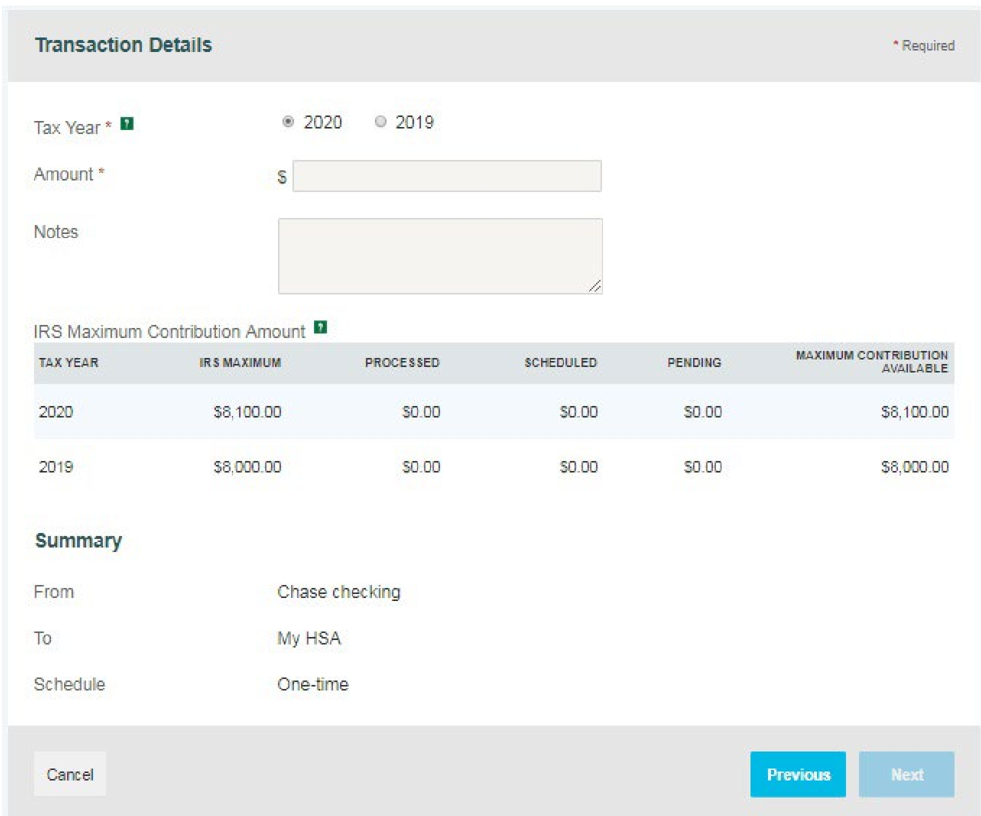
If you are making a contribution between January 1 and April 15, you have the option to contribute to the prior tax year. Use the IRS Maximum Contribution Amount detail presented to determine how much you can contribute for the applicable tax year.

Select the tax year and enter the contribution amount in the Amount field, as well as any relevant notes in the Notes field. Click Next.

On the next page, you will confirm the transaction summary, agree to the contribution disclaimer, and click Submit.

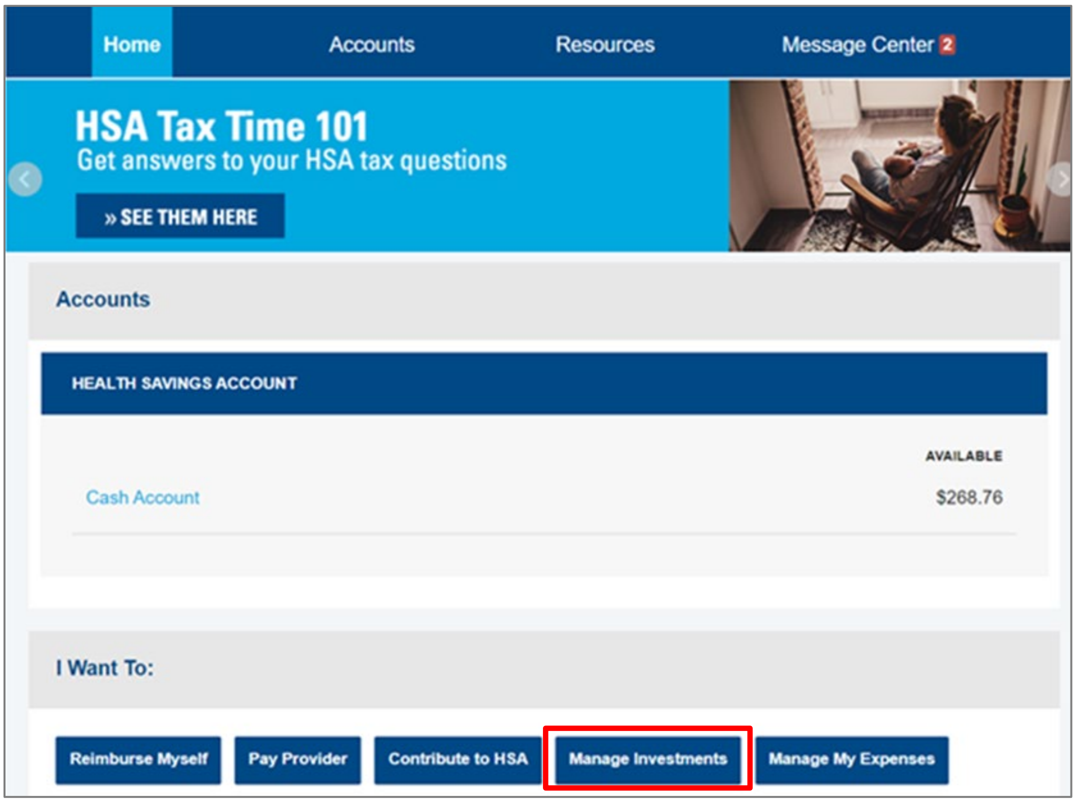
Contributions from your personal external bank account will generally be complete within 2 to 3 business days of your request.



I want to…Manage Investments

HSA Bank provides unique opportunities to invest Health Savings Account (HSA) funds in self-directed investment options. It's a great way to potentially grow HSA funds for healthcare expenses or save funds as a nest egg for retirement.

From the Manage Investment page, you can click the "See an Overview" link to learn more about our Schwab and Devenir self-directed investment options. You may begin investing once you have a minimum of $1,000 in your HSA Bank cash account. Only HSA funds above $1,000 in your HSA Bank cash account can be transferred to your investment account. For assistance, please use the phone number and/or website found on your ID card.



HSA Bank also offers an online overview and video demo if you are interested in learning more about Devenir or Schwab. The links below will direct you to HSA Bank's online overview and video demo.

Devenir Online Overview - http://www.hsabank.com/hsabank/members/devenir-guided-portfolio-investment-program

Devenir Video Demo - https://hsainvestments.com/p/hsabank/hsagp/video/marketing.html

Schwab Online Overview - https://www.hsabank.com/hsabank/members/schwab-health-savings-brokerage-account

Schwab HSBA Video Demo - https://www.schwab.com/content/hsba-how-to

Devenir Guided Portfolio Investment Program:

This is a user-friendly program that combines professional guidance with an easy-to-use platform. Perfect for new investors, this helps you create a customized investment allocation that fits your lifestyle and HSA investment goals.

- Competitive fund lineup with professionally selected, low-cost, no-load mutual funds covering a range of asset classes and families.
- Easy-to-use online planning tool to help you start investing and manage your investment account.
- Options to automatically adjust your investments following your preferred schedule and auto-rebalance to align with goals.
- Quarterly performance review of mutual fund selections by FINRA-registered investment advisors.
- Online access to account history, balance information, future elections, trades, and more through the Member Website.
- Access to Morningstar® pages, fund fact sheets, and prospectuses.
- Low-cost with no minimum investment and no commission on investment trades. Devenir's quarterly asset-based fees may be applied on the amount invested and deducted pro rata from the investment account.

Schwab Health Savings Brokerage Account:

This is intended for those who are knowledgeable, experienced investors who are seeking a wider range of investments or those who may be engaging with their own personal investment advisor.

- Wide range of investment options include stocks, bonds, mutual funds and Exchange Traded Funds (ETFs).
- Fractional share trading available in S&P 500 companies which is a 'slice' of stock that represents a partial share, for as little as $5.*
- Access a variety of investment tools and services to help you choose the investments that are right for you, including the Schwab Portfolio Checkup, customizable screens and lists of prescreened funds.
- Automatic investing is available in qualified mutual funds.
- Manage your account and place trades on Schwab.com, Schwab Mobile app or over the phone through a Schwab Registered Representative.
- Find the right investments for you with access to powerful proprietary research tools on Schwab.com as well as independent, third-party research from leading providers.
- Transaction fees and commissions may be applied by Charles Schwab.

SECURITIES AND INVESTMENTS

Not Insured by FDIC or Any Other Government Agency	Not Bank Guaranteed	Not Bank Deposits or Obligations	May Lose Value

Schwab Health Savings Brokerage Account (HSBA) is offered through Charles Schwab & Co., Inc. (Member SIPC), a registered broker/dealer, which also provides other brokerage and custody services to its customers. Devenir Mutual Fund Selection Option is provided by Devenir Group LLC, a Registered Investment Advisor that selects and monitors the performance of the mutual fund lineup.

HSA Bank, Charles Schwab & Co., Inc., and Devenir Group, LLC are not affiliated and not responsible for the products and services provided by the other. Self-directed investing is the responsibility of the account owner. Neither HSA Bank, Schwab nor Devenir can provide investment advice to you. We recommend you speak with a licensed investment advisor or consult the prospectus should you have questions about any investment. Your ability to replace losses in the investment account may be limited by the annual contribution limits of your HSA.

*Schwab Stock Slices is not intended to be investment advice or a recommendation of any stock. Investing in stocks can be volatile and involves risk including loss of principal. Investors should consider their individual circumstances prior to investing. The "S&P 500® Index" is a product of S&P Dow Jones Indices LLC or its affiliates ("SPDJI"), and has been licensed for use by Charles Schwab & Co., Inc. ("CS&Co").

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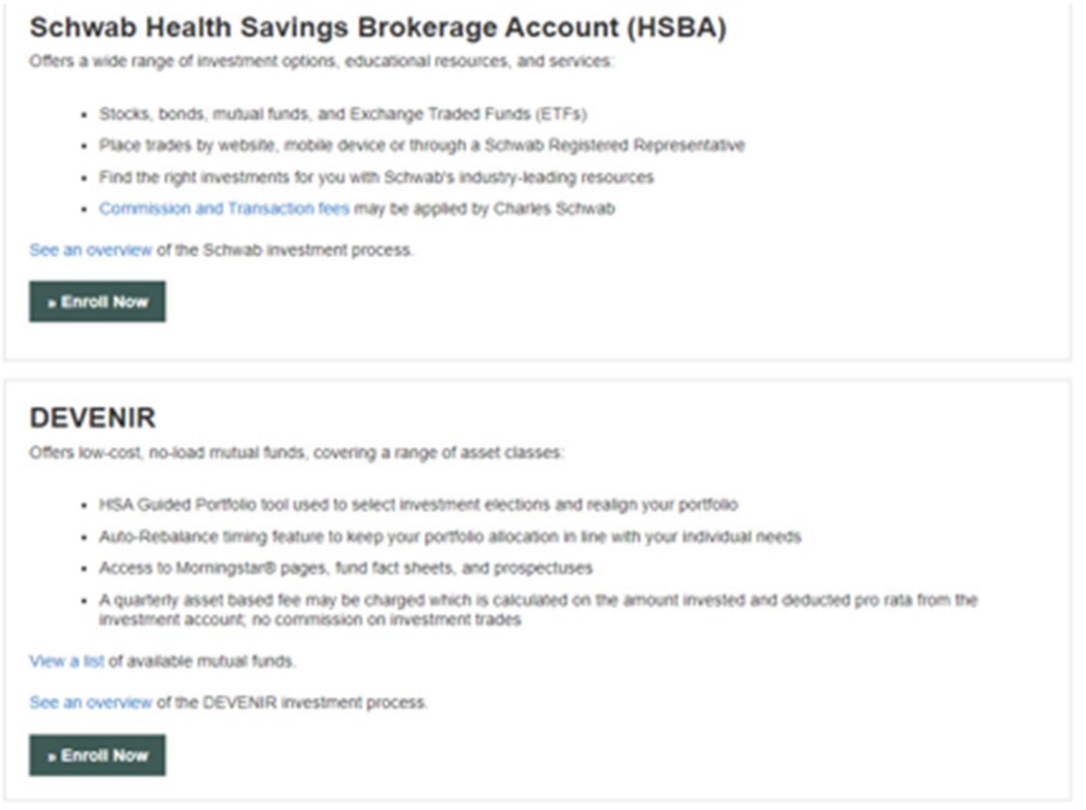
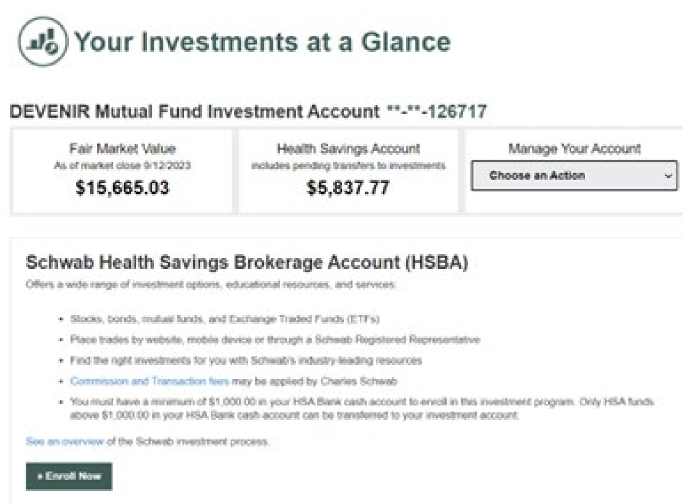
Click the Enroll Now button when you are ready to open a Schwab or Devenir self-directed investment account.



Manage Existing Self-Directed Investment Account

Once you have opened a self-directed investment account, you will be able to see "Your Investments at a Glance." To manage your self-directed investment account, click "Choose an Action" from the dropdown under "Manage Your Account."

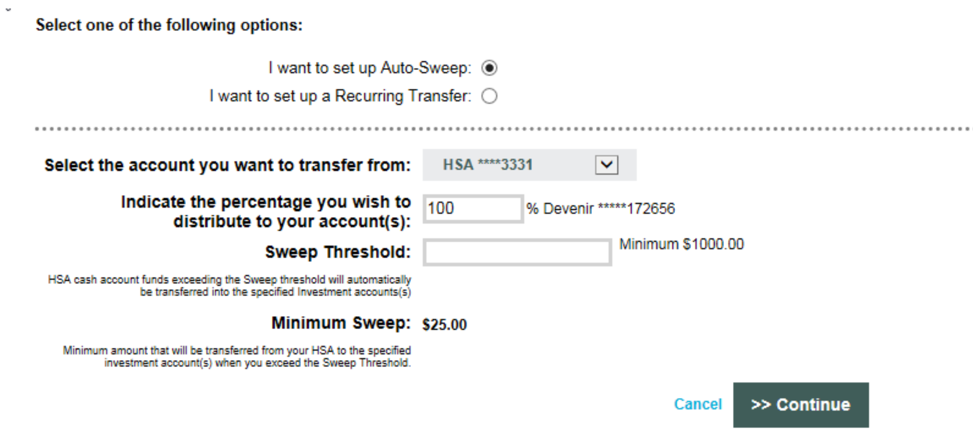
The "Manage Your Account" dropdown enables you to transfer funds to and from your self-directed investment account and view your account and transactions. You can make a one-time transfer, create a schedule of transfers, or select the option for cash balances above a designated amount to automatically be swept over to the self-directed investment account.



Auto-Sweep Setup

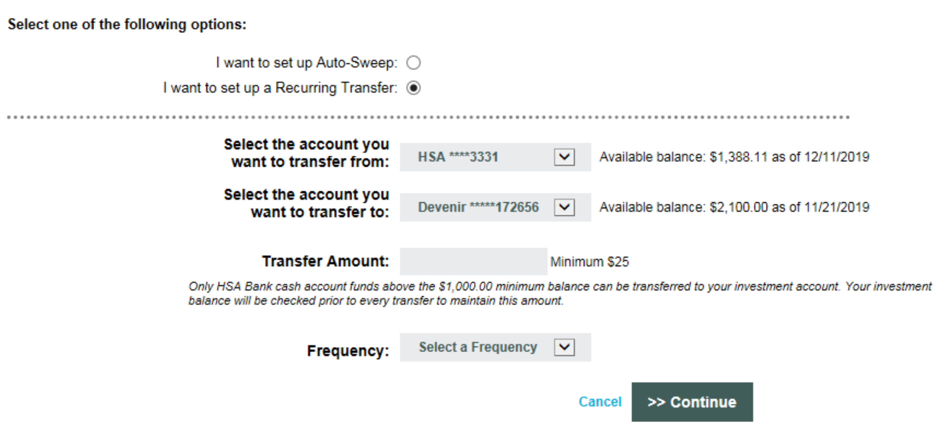
- Under the Auto-Sweep & Recurring Transfers tab, select the “I want to set up Auto-Sweep” radio button.
- Enter the sweep threshold. Any HSA cash account funds that exceed this sweep threshold will automatically be transferred into the specified investment accounts (the percentage must equal 100%).
- The minimum sweep amount is $25. Click Continue.
- On the next page, you will be prompted to enter the last four digits of your Social Security number to confirm the transfer details and set up the automatic sweep.

Note: If you need to transfer funds back to your cash account to pay for IRS-qualified medical expenses, you must temporarily suspend your sweep or the funds will be swept back into the investment account.



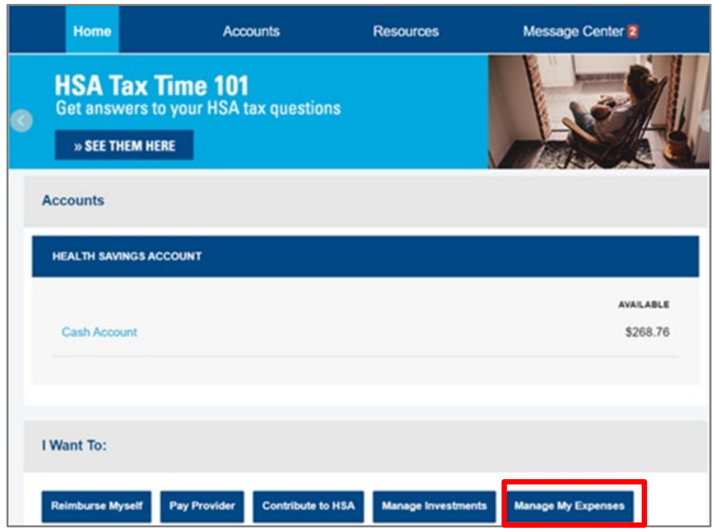
Recurring Transfer Setup

- Under the Auto-Sweep & Recurring Transfers tab, select the “I want to set up a Recurring Transfer” radio button.
- Select the desired accounts to set up the recurring transfer and specify the transfer amount.
- Select the desired transfer frequency and click Continue.
- On the next page, you will be prompted to enter the last four digits of your Social Security number to confirm the transfer details and set up the recurring transfer.



I want to…Manage My Expenses

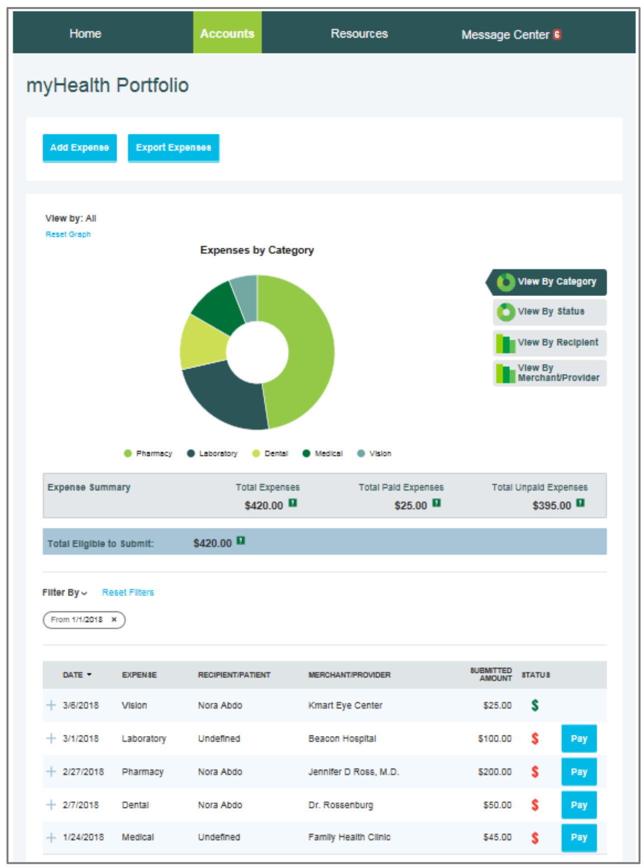
From the buttons under your account balance(s), click Manage My Expenses to add expenses, export expenses, or link medical claims.

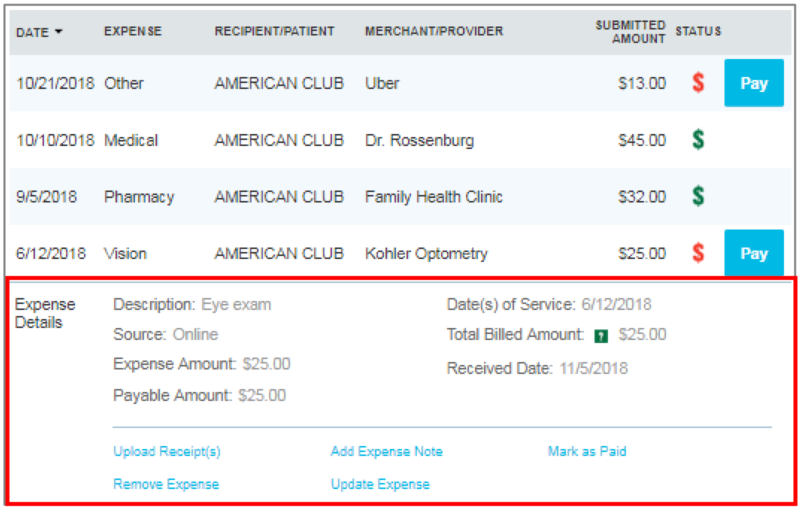


myHealth Portfolio℠ Dashboard

The Manage My Expenses button takes you to the myHealth Portfolio page, which can also be found under the Accounts tab in the top menu. This page provides a complete picture of your healthcare expenses. It is a self-service dashboard that enables you to:

- Store health expense data and receipts
- File claims or distribution requests
- Initiate a provider payment
- View an easy-to-read snapshot of your healthcare finances with charts and graphs
- Consolidate health expenses and claims from multiple insurance providers (this functionality may not be available to all Customers)





DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS	
10/21/2018	Other	AMERICAN CLUB	Uber	$13.00	$	Pay
10/10/2018	Medical	AMERICAN CLUB	Dr. Rossenburg	$45.00	$	
9/5/2018	Pharmacy	AMERICAN CLUB	Family Health Clinic	$32.00	$	
6/12/2018	Vision	AMERICAN CLUB	Kohler Optometry	$25.00	$	Pay

Expense Details
Description: Eye exam
Source: Online
Expense Amount: $25.00
Payable Amount: $25.00
Date(s) of Service: 6/12/2018
Total Billed Amount: $25.00
Received Date: 11/5/2018
Upload Receipt(s)
Add Expense Note
Mark as Paid
Remove Expense
Update Expense

Further,

- The graph shows expenses by category, status, recipient, and merchant provider. To change the view, click Reset Graph and select the view you would like to see.
- Details of your expense transactions can be viewed by clicking any expense.
- You can edit an expense, such as the category, by clicking Update Expense.
- You can also pay an expense by clicking the Pay button or clicking "Mark as Paid" if you paid the expense out of pocket.

Add Qualified Medical Expenses

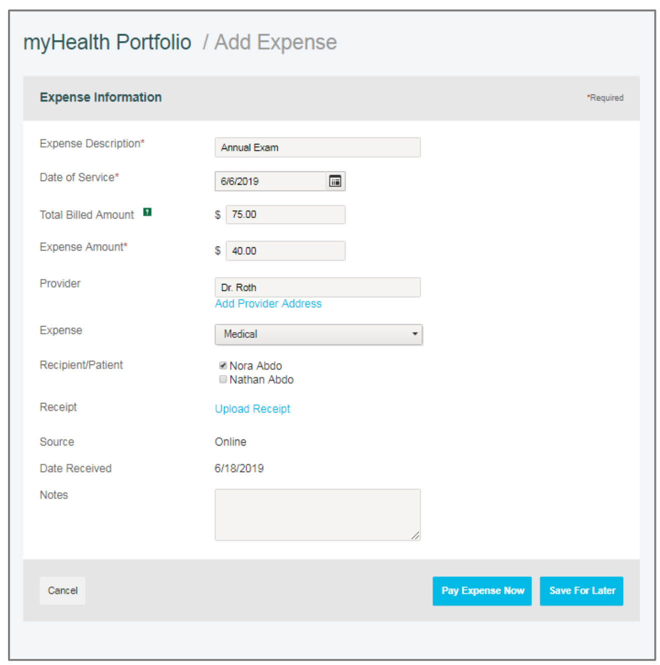
- You may want to keep track of expenses paid with funds other than your HSA Bank Health Benefits Debit Card. To add an expense to your portfolio, click the Add Expense button at the top of the myHealth Portfolio^{SM} page. Keep in mind that you can pay for a wide range of IRS-qualified healthcare expenses with your HSA, including many that are not typically covered by health insurance plans. This includes deductibles, co-insurance, prescriptions, dental and vision care, and more.

- For a complete list of IRS-qualified healthcare expenses, visit irs.gov or hsabank.com/IRSQualifiedExpenses.

- Provide the information for the expense and click "Pay Expense Now" or "Save For Later".

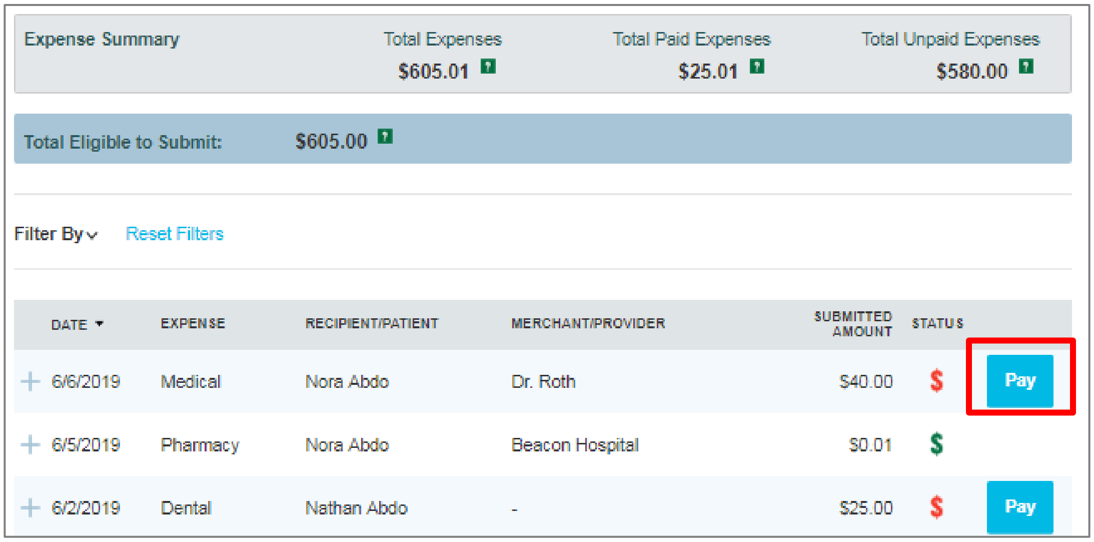
- You also have the ability to upload a healthcare receipt for easy future reference by clicking Upload Receipt.

- The expense will be reflected in the graph on the myHealth Portfolio^{SM} dashboard.



Pay Expense

Click Pay if you paid for an expense out-of-pocket and need to be reimbursed, or if you would like to pay a claim manually.



Export Expenses

To export your expenses to use for other purposes, click the Export Expenses button at the top of the page.

Sample Excel Expense Export

Expense I	Expense D	Expense	Recipient,	Merchant,	Submitted	Expense S	Descriptic	Expense D	EOB Numl	Source	Date Rece	Date(s) of	Total Bille	Expense A	Payable A	Notes	Payee	Provider A	Provider
8454	7/7/2015	Other			20	Paid		doctor		Online	7/7/2015	7/7/2015	20	20	0				

Accounts

Accounts Tab

On the main menu at the top of the page, hovering over the Accounts tab will show a full listing of pages you can access to manage your account, organized under three different headers. The “I Want To” options are also accessible from this menu on the far right.

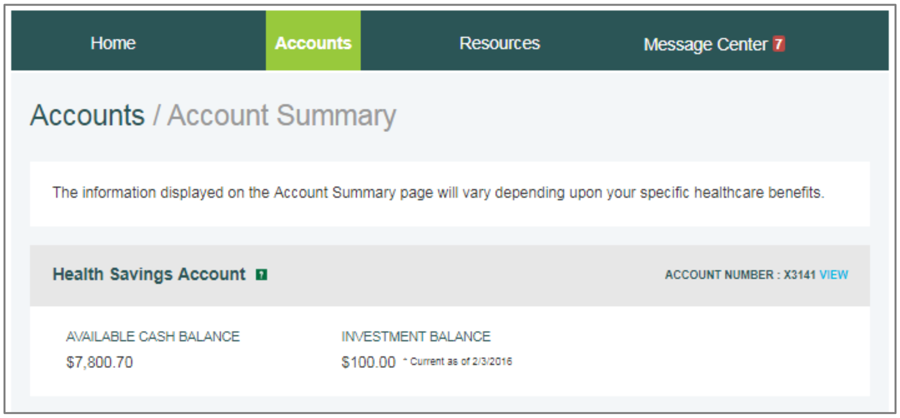
The Accounts pages include:

- Accounts
  - Account Summary
  - Account Activity
  - myHealth Portfolio
  - Statements
- Investments
  - Investments
- Profile
  - Profile Summary
  - Banking
  - Payment Method
  - Login Information

Profile information and links to these pages can also be accessed by hovering over your name at the top right corner of any page.

Account Summary (Balances)

The Account Summary page on the Accounts tab shows the available HSA cash balance and the self-directed investment balance (if applicable).



Account Activity

The Account Activity page provides transaction details for your account. You can export transactions using the Export button. You can also see details of a specific transaction by clicking the individual transaction.

Home | Accounts | Resources | Message Center 7

Accounts / Account Activity

My HSA

Balance Detail

CASH ACCOUNT

Actual Balance	$7,800.70
Pending Withdrawals	$0.00
Available Balance	$7,800.70

INVESTMENT ACCOUNT

Investments - Devenir	
Fair Market Value *Current as of 2/3/2018	$100.00

Transactions

Export

PENDING TRANSACTIONS

REQUESTED DATE	DESCRIPTION	METHOD	CONTRIBUTION (DEPOSIT)	DISTRIBUTION (WITHDRAWAL)	AVAILABLE CASH BALANCE
There are no records to display.					

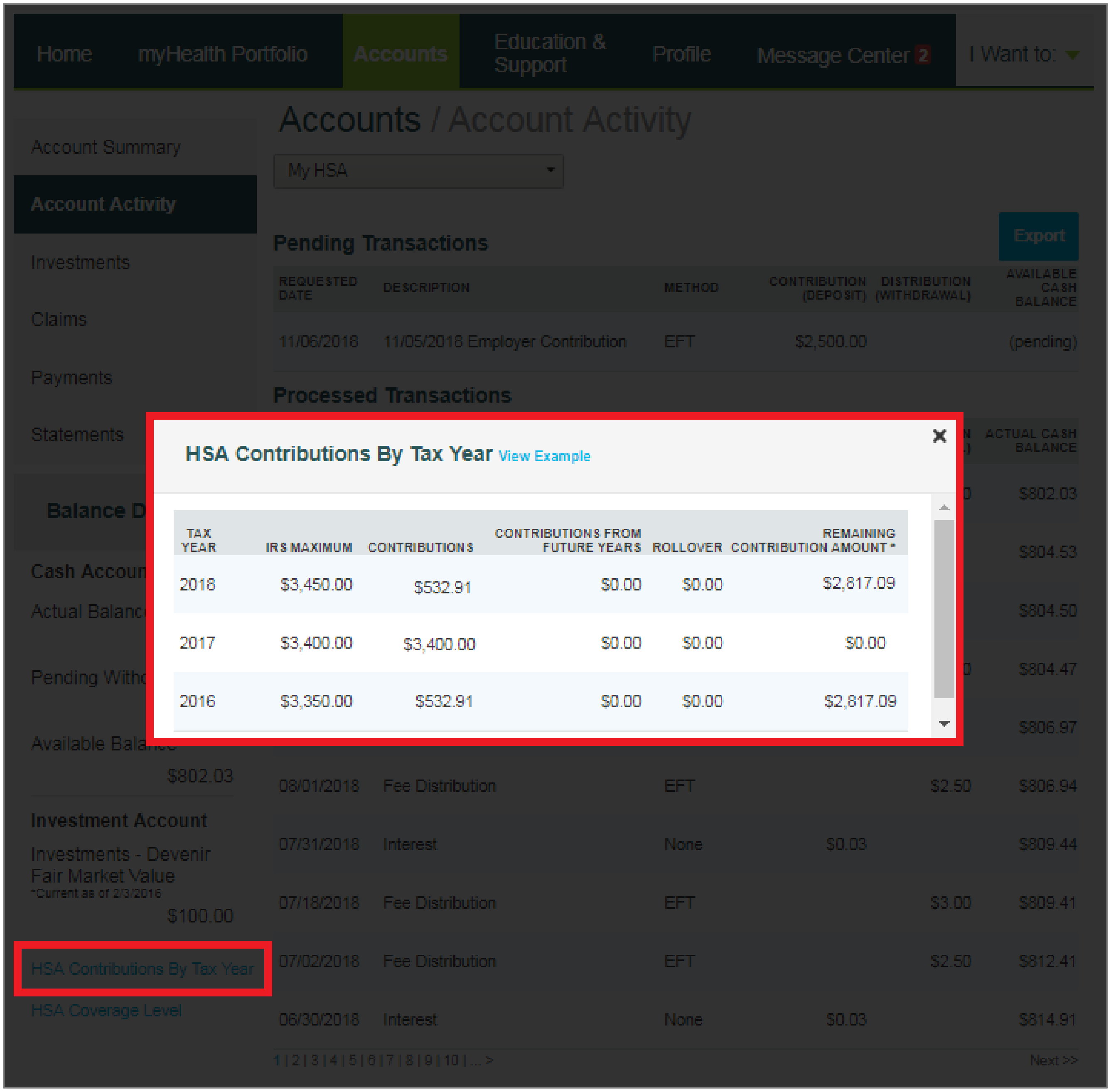
PROCESSED TRANSACTIONS

PROCESSED DATE	DESCRIPTION	METHOD	CONTRIBUTION (DEPOSIT)	DISTRIBUTION (WITHDRAWAL)	ACTUAL CASH BALANCE
+ 02/28/2019	Interest	None	$0.90		$7,800.70
+ 01/31/2019	Interest	None	$1.31		$7,799.80
+ 01/22/2019	Distribution	EFT		$2,499.00	$7,798.49
+ 01/09/2019	Transfer Participant Contribution	Check	$7,000.00		$10,297.49
+ 01/03/2019	Fee Distribution	EFT		$2.50	$3,297.49
+ 12/31/2018	Interest	None	$0.28		$3,299.99
+ 12/04/2018	Fee Distribution	EFT		$2.50	$3,299.71
+ 11/30/2018	Interest	None	$0.18		$3,302.21
+ 11/13/2018	11/05/2018 Employer Contribution	EFT	$2,500.00		$3,302.03
+ 11/02/2018	Fee Distribution	EFT		$2.50	$802.03

1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | ... > Next >>

HSA Contributions by Tax Year

You can view HSA contributions by tax year by clicking the link near the bottom left of the Account Activity page.



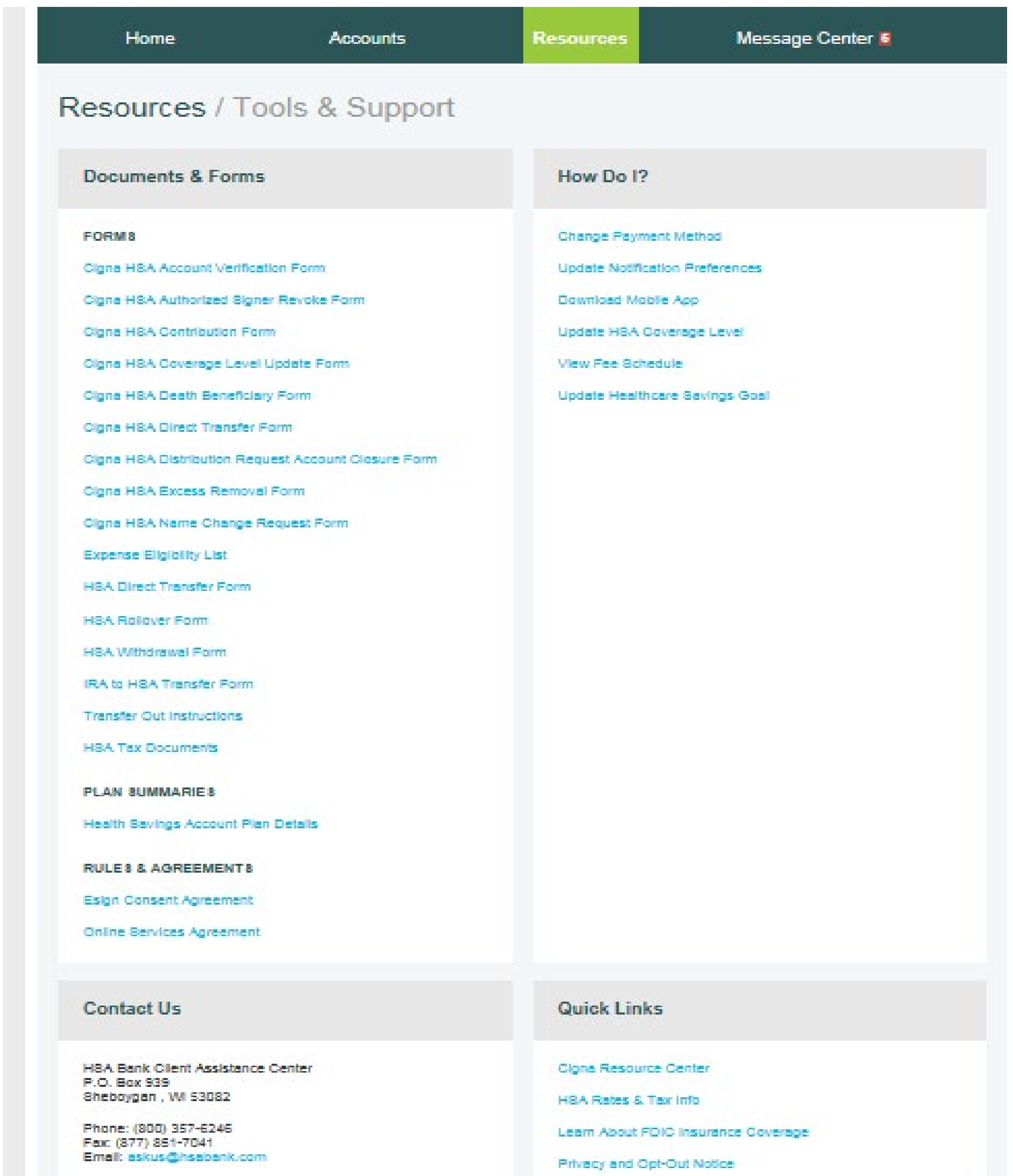
Resources

Tools & Support

The Tools & Support page will provide you with forms, quick links, and a handy "How Do I?" section that helps you quickly navigate to the information you need to manage your account.

Quick Links

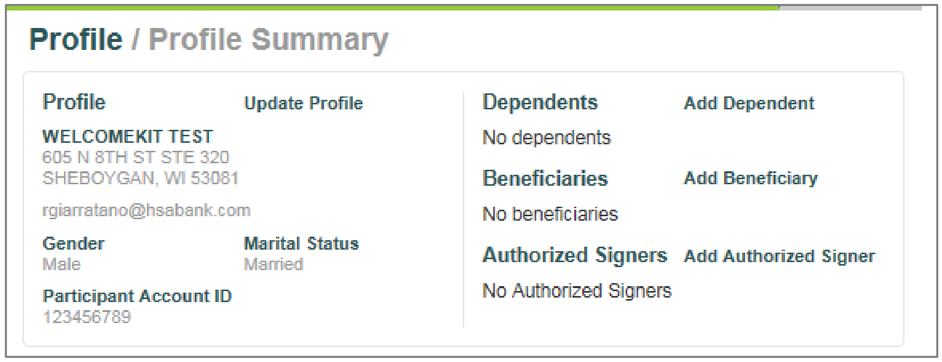
The Quick Links section provides easy access to common actions and fast navigation to frequently used pages, including the Customer Website Guide. Clicking any of the links will take you directly to the related page on the website to complete the action or see the information described.



Profile

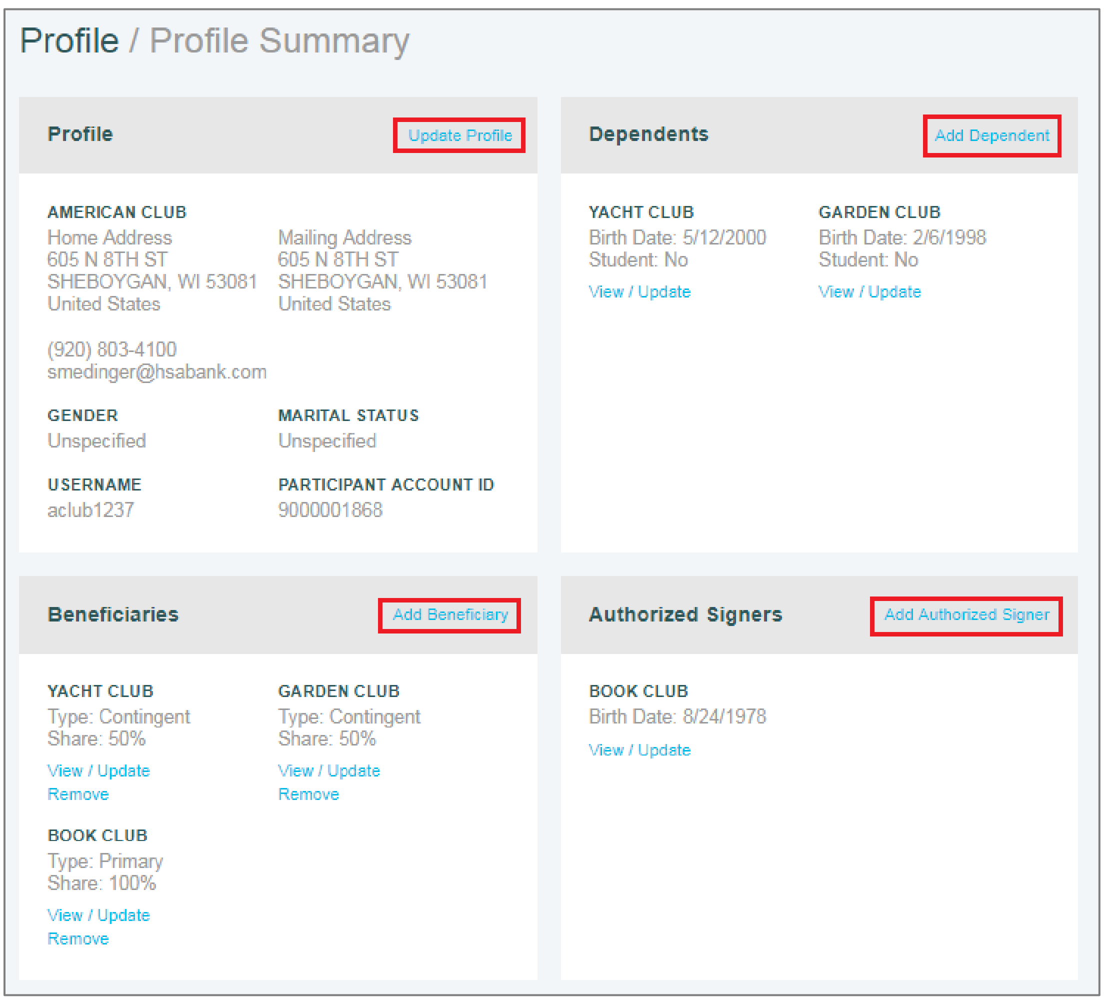
Profile Summary

The Profile page will assist with reviewing your personal demographic information, as well as adding an external bank account for online contributions and distributions from your HSA. Use the Profile tab to view your setup details.



Update Profile

Click the Update Profile link to update your email or enter your marital status or gender. If your name has changed, please complete the Name Change Request Form located under the Tools & Support tab of the Customer Website. If you would like to change your name or home mailing address, please notify your employer to make sure your employer, Cigna, and HSA Bank all have up-to-date information.



Add Dependents

Use the Add Dependent link to add, view, or update dependents. Dependents added will appear in the myHealth Portfolio[SM] and Pay Bill/Contribute pages.

Add Beneficiary

It is recommended that you designate a beneficiary to receive your HSA assets in the event of your death by clicking Add Beneficiary. If you are married and live in a community property state, you may designate your spouse as the primary beneficiary through the website. However, if you designate a primary beneficiary who is not your spouse, you must submit a beneficiary form with the notarized consent of your spouse.

Add Authorized Signer

An authorized signer may be added through the Profile tab. Authorized signers can access the HSA and submit updates on the account. To add an authorized signer:

- Navigate to the Profile page and click Add Authorized Signer.
- Complete the information and click Submit.

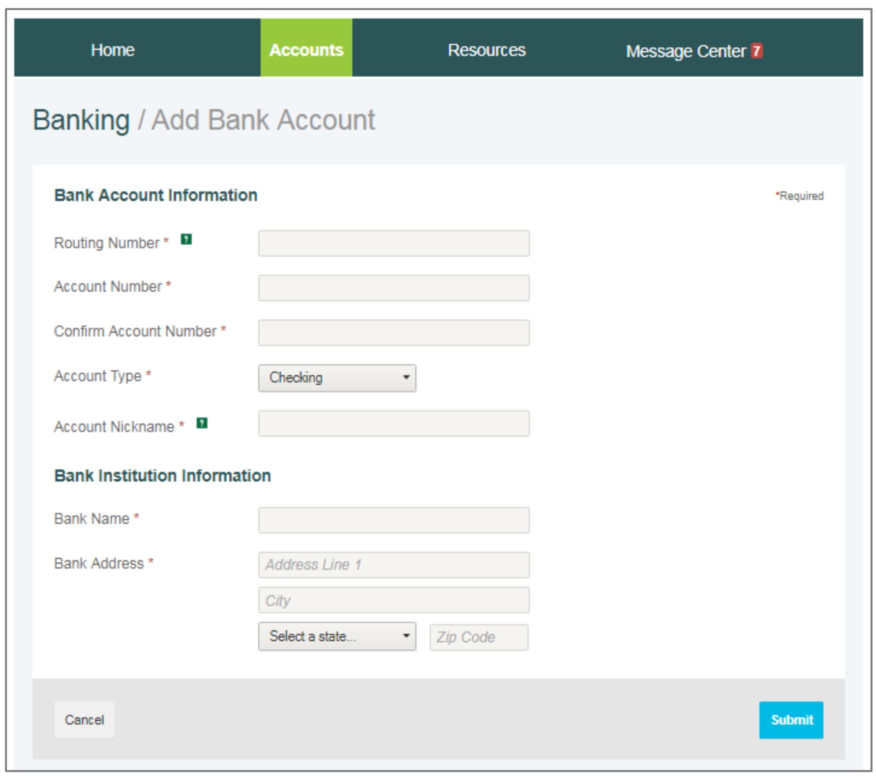
Order Checks (optional – fees may apply)

From the Profile page, find the Banking/Cards tab, and click Order Checks.
Complete the check order and click the Order Checks button at the bottom of the page. The fee for the checkbook will be taken from your HSA cash account. Please refer to your *HSA Bank Fee and Interest Rate Schedule* for more information.

Add External Bank Account

- You must have an active external bank account on file in order to make an online contribution to or reimburse yourself from your HSA. If you need to set up your external bank account, click the Banking link.

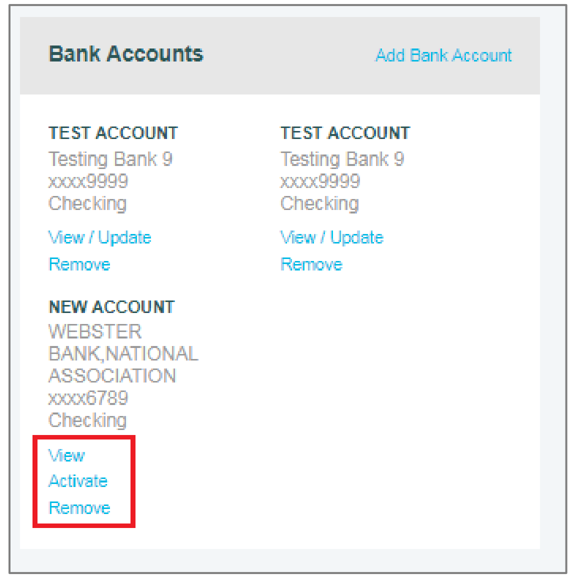
  Click the Add Bank Account link and enter the information for your checking or savings account and the financial institution name and address. Click Submit at the bottom of the screen. **Please confirm your account number and ACH routing number with your external bank.**

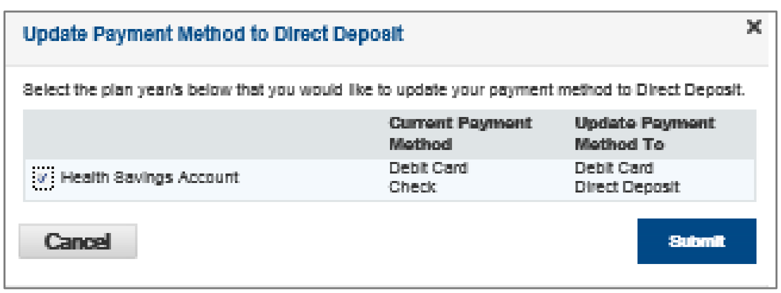


- After you have submitted the account information, HSA Bank will send a small deposit to your account within three business days to verify your banking information.
- Once the deposit is received in your external account, you will validate your banking information using the steps below.

Validate External Bank Account

- Navigate to the Banking page via the Profile section of the Accounts tab.
- Click Activate under your bank account information.
- Enter the amount of the small transaction ($0.01 to $1.99) that was deposited to your checking or savings account from HSA Bank in the Amount field and click Submit.
- This account will now be available for you to use for HSA contributions, paying bills and reimbursements.
- Select the HSA Direct Deposit button to update your payment method after you have entered and confirmed your bank account information.



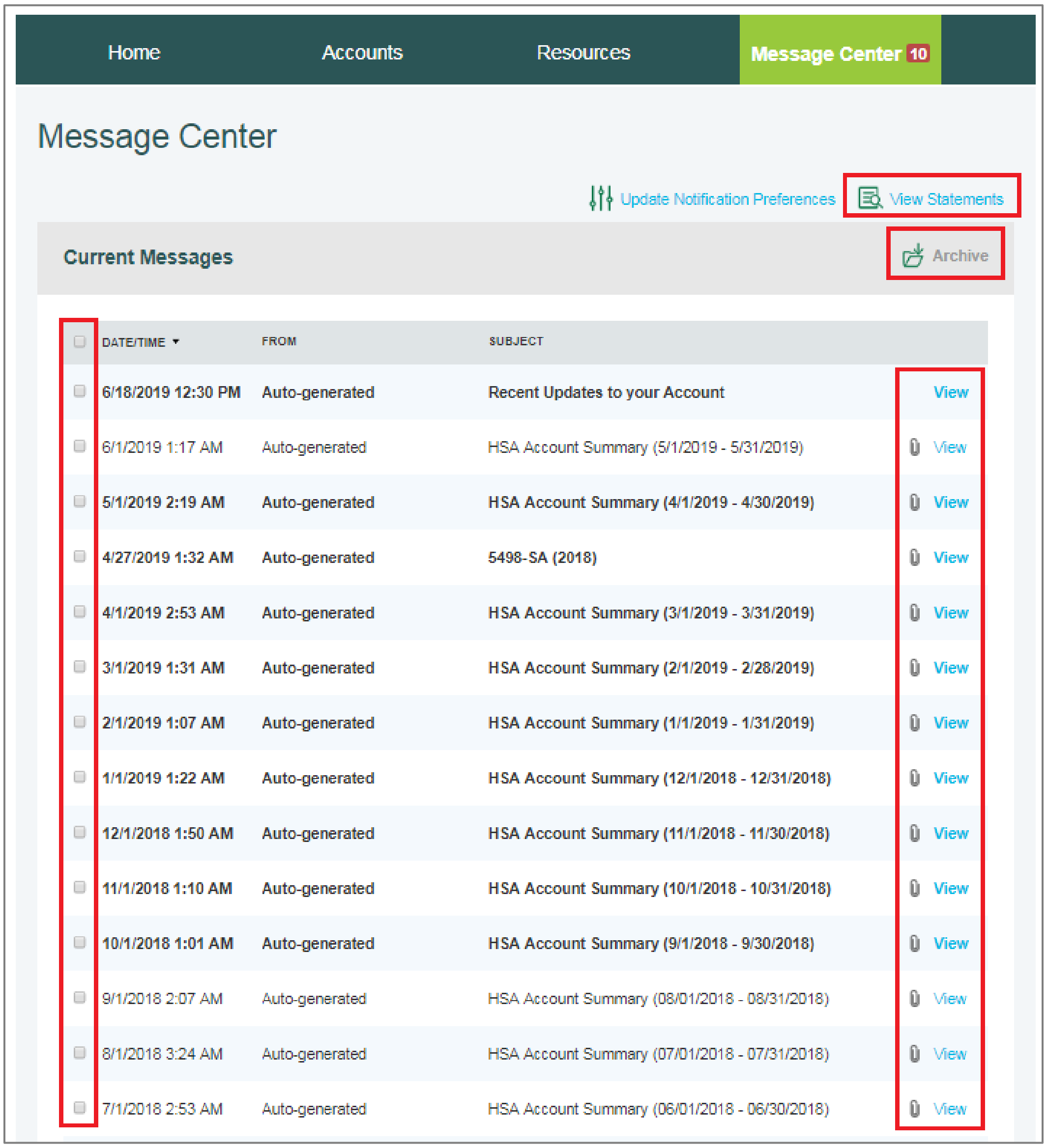


Message Center

Current Messages

The Message Center page provides access to notifications about statements, tax documents, and other messages, as well as the ability to update notification preferences and access past statements. Click the View link next to any notification to view the message and any associated attachments, such as account statements or tax documents. Attachments are indicated by the paperclip icon and are available to print..

To remove messages from the Current Messages list, select the checkbox to the left of each message you would like to archive, and click Archive. Archived messages can be shown by clicking Show Archived Messages at the bottom of the page. You can also view your past statements and tax documents by clicking View Statements.



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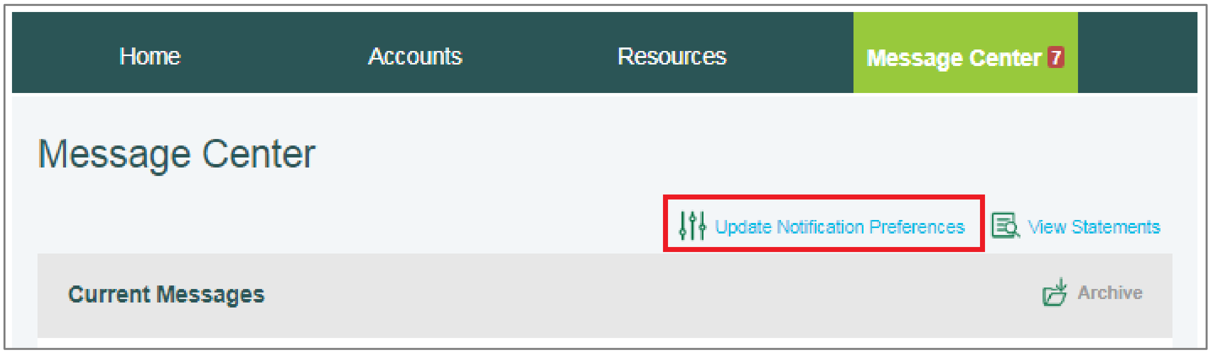
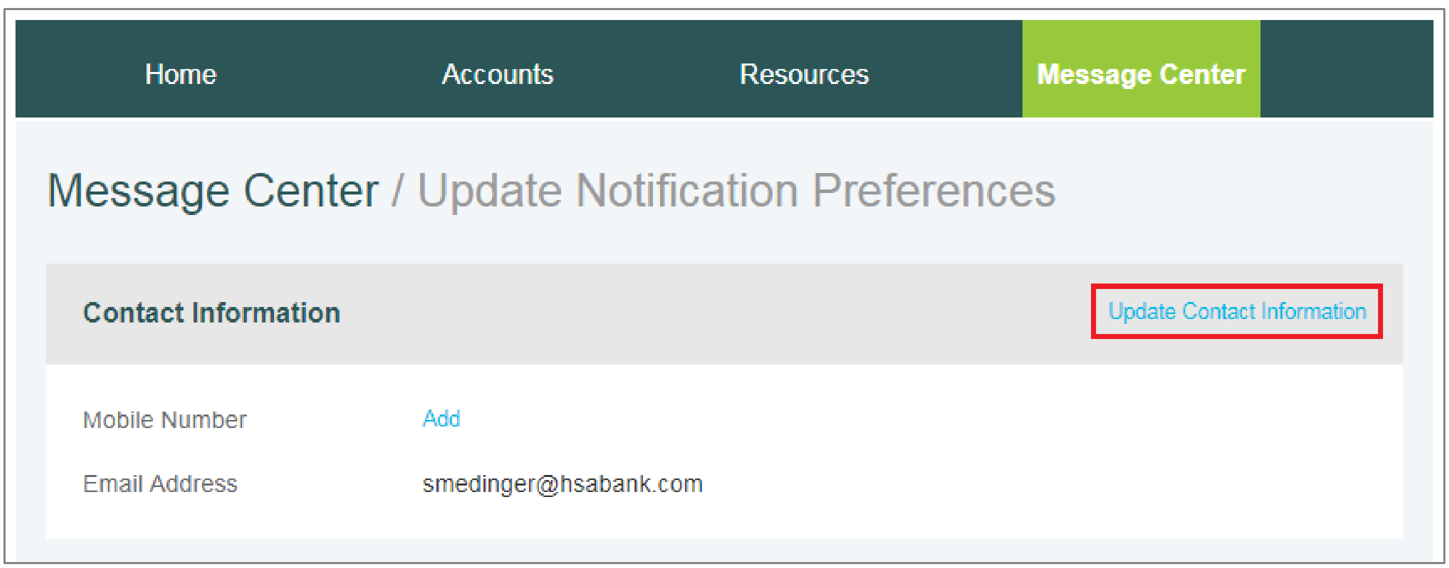
Notification Preferences

- To update your notification preferences, click Update Notification Preferences at the top of the Message Center.

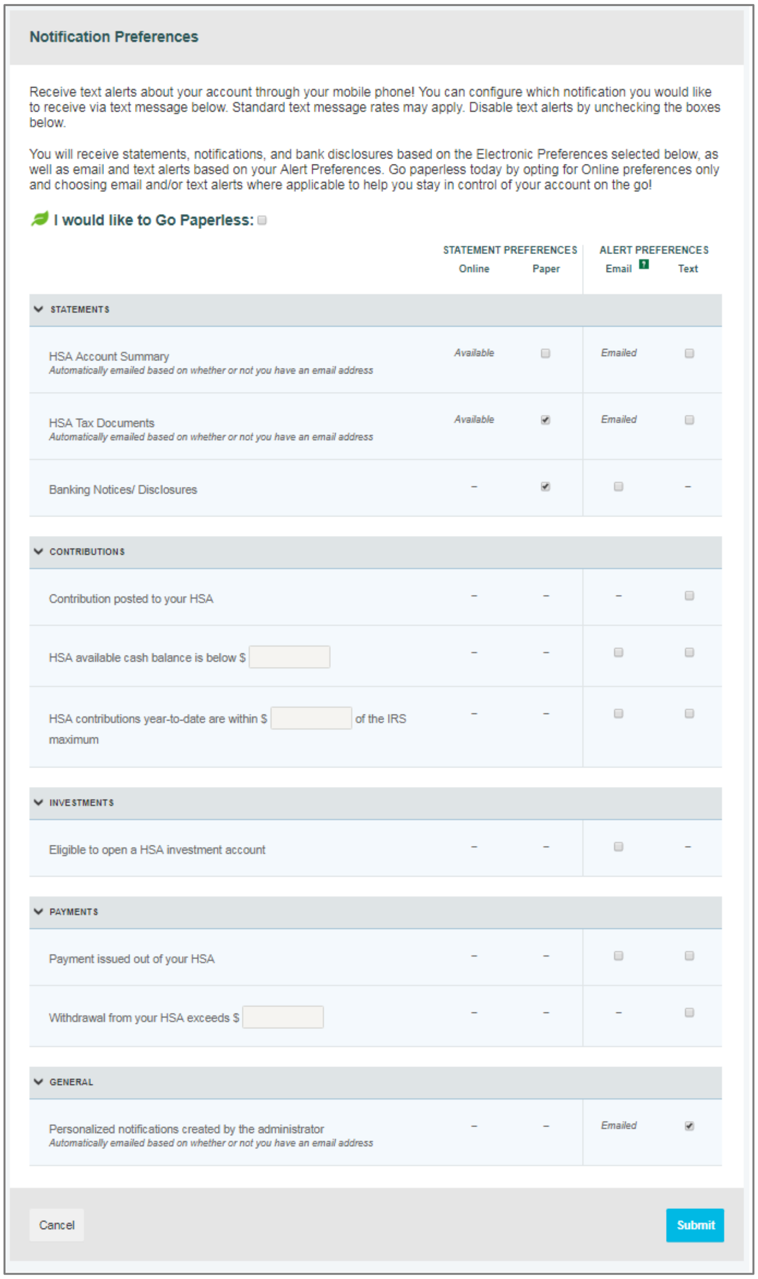


- In the Contact Information section, you can view your mobile and email contact information or click Update Contact Information to edit them.



Notification Alerts

In the Statements & Notifications Options section, you will see options for “Electronic Preferences” and “Alert Preferences.” Review each of the notification categories to set, edit, or turn off text and email notifications or to switch between receiving online and/or paper notices and statements. You can also select “I would like to Go Paperless” to set all of your “Statement Preferences” to “Online” only, where applicable. Please note that the available options may vary depending on your account type, options, and more.



Notification Preferences

Receive text alerts about your account through your mobile phone! You can configure which notification you would like to receive via text message below. Standard text message rates may apply. Disable text alerts by unchecking the boxes below.

You will receive statements, notifications, and bank disclosures based on the Electronic Preferences selected below, as well as email and text alerts based on your Alert Preferences. Go paperless today by opting for Online preferences only and choosing email and/or text alerts where applicable to help you stay in control of your account on the go!

I would like to Go Paperless: ☐

	STATEMENT PREFERENCES		ALERT PREFERENCES	
	Online	Paper	Email	Text
STATEMENTS				
HSA Account Summary *Automatically emailed based on whether or not you have an email address*	*Available*	☐	*Emailed*	☐
HSA Tax Documents *Automatically emailed based on whether or not you have an email address*	*Available*	☑	*Emailed*	☐
Banking Notices/ Disclosures	–	☑	☐	–
CONTRIBUTIONS				
Contribution posted to your HSA	–	–	–	☐
HSA available cash balance is below $	–	–	☐	☐
HSA contributions year-to-date are within $ of the IRS maximum	–	–	☐	☐
INVESTMENTS				
Eligible to open a HSA investment account	–	–	☐	–
PAYMENTS				
Payment issued out of your HSA	–	–	☐	☐
Withdrawal from your HSA exceeds $	–	–	–	☐
GENERAL				
Personalized notifications created by the administrator *Automatically emailed based on whether or not you have an email address*	–	–	*Emailed*	☑

Cancel | Submit

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Let’s chat – Virtual Assistant

Virtual Assistant can provide responses for the following intents when the ‘Need help?’ button is clicked:

- Balances
- Claims
- Debit Cards
- Receipts
- Tax Documents
- Profile
- Banking

Getting Help

If you need further assistance with the Customer Website or have questions regarding your HSA, please call the number on the back of your debit card.