

## WELCOME TO YOUR NEW HSA!

The purpose of this letter is to welcome you, and to provide you with an overview of the benefits you'll receive as a Paylocity Health Savings Account accountholder. HealthCareBank is the custodian of the Paylocity HSA and investment accounts. Our experience and focus on excellent administration and customer services processes, along with our trusted partners and great technology, help to bring you these benefits:

- Convenient access to your HSA via a user-friendly portal to manage online election change and expense tracking
- Integrated investment portal, meaning only one username and password to remember
- Choice of multiple recognized mutual funds in several investment categories
- Automatic transfers between cash and investment accounts so your funds are always available and you don't need to remember to move funds between accounts
- Easy access to your funds with debit card and direct deposit online distributions
- Paperless administration and online Account Summary Reports

## HOW TO USE YOUR ACCOUNT FUNDS

**Debit Card:** You may use your Paylocity Benefit Card to access HSA funds to pay for eligible medical expenses. This debit card can be used at any healthcare eligible merchant that complies with IIAS for healthcare related items. Using your Card helps you keep cash in your wallet and makes paying for qualified healthcare expenses with your HSA funds easy.



**Mobile:** Conveniently manage your healthcare information anywhere, anytime with the Paylocity Benefit Account Mobile App. The mobile app makes it easy for you to check account balances, submit claims, and more, on-the-go. Rest easy knowing no sensitive account information is ever stored on the device and secure encryption is used to protect all transmissions.

For additional questions, please contact the Paylocity Customer Service Team at (800) 631-FLEX or [batinfo@paylocity.com](mailto:batinfo@paylocity.com).

Wishing you good health and well-being!

## REQUIRED NEXT STEPS

Please reference the following instructions to setup your HSA Account:

1. Your **Paylocity Benefit Card** will arrive (in a separate mailing) in about 7-10 business days. *If you already have a TPA service with Paylocity, you will not receive a new card.*
2. To finish setting up your HSA, you **must** log into the Self Service Portal. **Steps below can be completed starting on your effective date in the plan.**

Once logged into the Self Service Portal:

1. Click on **Spending Accounts**.
2. Read and Accept the **Custodial Agreement, Electronic Disclosure, and Patriot Act Requirements**.
3. Click on the **Account Settings Tab** at the top of the screen.
  - a. Enter **Beneficiary** information.
  - b. Review/add **Dependent(s)**.
  - c. Enter personal bank account information for Online Account Transfers.
    - i. Primary method of payment is **Debit Card**.
    - ii. Alternate Method of Payment will be the bank account identified as your Main Account.
3. Access **HSA Forms** in the Self Service Portal
  - a. Click **Spending Accounts**.
  - b. Select **Knowledge Base from the Help** drop down menu.
  - c. Search HSA Resources for **Paylocity Flex Services**.