

PARTICIPANT LETTER

HSA

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 BATHSAoperations@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. Instructions to access the Employee Portal will be included with your Debit Card.
3. **To finish setting up your HSA, you must log into the Employee Portal.**

Once logged into the Employee Portal:

1. Sign the electronic **Privacy Policy and Custodial Agreement**.
2. Review your **Message Center** for important account notifications.
3. Click on the **Profile Tab** at the top of the screen.
 - a. Enter **Beneficiary** information.
 - b. Review/add **Dependent(s)**.
4. Click on **Banking/Cards** in the **Profile Section**.
 - a. Enter personal bank account information for Online Account Transfers.
 - b. Click on **Payment Method** to add Direct Deposit to your HSA Account.
 - i. Primary method of payment is **Debit Card**.
 - ii. **Alternative Method of Payment Section**, click on **Direct Deposit** and then hit Submit.
5. Click on the **Tools and Support Tab**
 - a. **Documents and Forms Section** download and complete an **HSA Information Authorization Form** to designate a spouse or third-party to access your account, if applicable.
 - b. Return this form to **BATHSAoperations@paylocity.com** via a secure email.

