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

HSA Bank Support

Alteryx, Inc.

Contents

Member Support

HSA Bank's Client Assistance Center is a dedicated and experienced team of individuals staffed to respond to individual client inquiries and all day-to-day account questions.

HSA Bank Client Assistance Center Available 24 hours a day, 7 days a week.	
PHONE	800-357-6246
EMAIL	askus@hsabank.com Allow 24-48 hours for response time. If immediate assistance is needed, call the client assistance center.
ONLINE	Members can chat with the Client Assistance Center by visiting the Member Portal and clicking on **Live Chat** to begin. (8:30 am through 5:00 pm CT)

HSA Bank Member Portal HSA Bank Member Website provides 24/7 online access to account management.	
URL	https://myaccounts.hsabank.com/Login
FEATURES	• Check balance and account activity • Make an HSA transaction (online contribution and distribution setup) • Manage investments (if applicable) • Add an authorized signer, beneficiary, or dependent to an account • Set up a Healthcare Savings Goal

Mobile App HSA Bank Mobile App provides 24/7 online access to account management.	
APP	The HSA Bank Mobile is available on the Google Play (Android-powered devices) and the App Store (iPhone, iPod Touch, iPad).
FEATURES	• Check account balance and account activity • Schedule HSA contributions • Make a payment from the account • Scan Item for IRS-qualified medical expenses

HSA Bank Tools and Resources

HSA Bank's website provides calculators and FAQs, as well as IRS guidelines.

HSA Bank Learning Center:

http://www.hsabank.com/hsabank/learning-center

HSA Bank - What is a Health Savings Account? (HSA) - YouTube

How to Use My Account:

[Get acquainted with your new account at HSA Bank (brainshark.com)]

https://www.hsabank.com/hsabank/Learning-Center/Health-Account-Videos

https://www.hsabank.com/hsabank/Learning-Center/Tools-And-Calculators-Overview

Member FAQ:

http://www.hsabank.com/hsabank/members/members-frequently-asked-questions

Frequently Asked Employee Questions

How can I login to the Member Website?	https://myaccounts.hsabank.com/Login Follow the login prompts.
How do I check my balance?	Log into the Member Website where there is secure 24/7 real-time account balances and transaction history. If further assistance is needed contact the Client Assistance Center.
How can I change my name?	Within the Member Website one can download the Name Change Request form or contact the Client Assistance Center.
How can I add an Authorized Signer, Beneficiary?	Within the Member Website one can add an authorized signer and beneficiary or contact the Client Assistance Center.
Where is my debit card?	The debit card should have arrived 10-14 business days after enrollments are processed. If it has not yet arrived and need to order a new one, log into the Member Website or contact the Client Assistance Center
My debit card was lost/stolen.	Immediately call the Contact the Client Assistance Center 800-357-6246 HBK On holidays, call (800) 523-4175.
How can I look up my transaction history and view my account?	For questions regarding debit cards, transaction histories, and balance, please visit the Member Website or contact the Client Assistance Center at 800-357-6246 HBK
How can I close my account?	Contact the Client Assistance Center at 800-357-6246 HBK There may be a closure fee.

Employer Support

HSA Bank Employer Support Teams

HSA Bank Business Relations Team Monday-Friday: 7 am - 7 pm, CT	
PHONE	866-357-5232 HBK

EMAIL	businessrelations@hsabank.com
	• Dedicated and experienced team prepared to assist with health benefit plan administration questions. • **Please be prepared to provide the company Federal Tax ID, company name, and full name when calling.** • If multiple people from the company will contact HSA Bank for support, we will need to have them all listed as a designated contact. We ask an already assigned contact to call Business Relations to request the form to add all these individuals on the system.

Employer Plan Details

Enrollments

- For questions on enrollment/eligibility or enrollment errors contact Business Relations at 866-357-5232 or email businessrelations@hsabank.com

	SFTP/File Feed
METHOD	The electronic file transfer (SFTP) process allows an electronic data file to be submitted to HSA Bank's SFTP server to open employees' HSAs.

Terminations

- For questions on enrollment/eligibility or enrollment errors call Business Relations at 866-357-5232 or email businessrelations@hsabank.com

	SFTP/File Feed
METHOD	Terminations are processed via file through SFTP. If Alteryx were paying the participant's monthly fee, they will receive a letter advising they will be responsible for the fee going forward.

HSA Contributions

- For questions on contributions call Business Relations at 866-357-5232 at or email businessrelations@hsabank.com

	GOC
METHOD	GOC enables employers to make contributions through our online portal. HSA Bank debits the funds from Alteryx's external bank account and contributes the funds to employees' HSAs on a one-time or recurring basis. Employer contributions and employee pre-tax contributions can be submitted at the same time. A detailed transaction descriptions will be listed on the Member Website.

Customer Identification Program

Customer Identification Program (CIP)
**HSA Enrollments Only*

- Due to the USA Patriot Act, all banks are required by federal regulation to implement Customer Identification Programs (CIPs) to prevent financing of terrorist operations and money laundering.
- CIP for the accountholder will be performed at time of enrollment.
- If an individual fails the CIP process, it may result in account closure if not resolved within 90 days.
- Accountholders must submit two unique forms of identification to HSA Bank within 90 days of notification via postal mail, fax, or upload through secure website.
- Accounts will remain open and fully functional while we attempt identity verification.
- If identity verification is not completed and the account is closed, all remaining funds will be returned to the accountholder. Tax reporting will be conducted for the period the account was open. If the accountholder wishes to establish another account, they will be required to resubmit a new application through the appropriate enrollment method and provide identification at that time.

HSA Bank will reach out to all accountholders that are required to submit additional forms of identification. The HSA Bank CIP communication plan is listed below:

Timeframe after Enrollment	Method of Communication
4 DAYS	POSTAL LETTER
3 WEEKS	POSTAL LETTER

Frequently Asked Employer Questions

Who do I call if I have a general question?	Call Business Relations for assistance 866-357-5232.
If an employee requests to have their mail sent to a PO Box, how is that information provided to HSA Bank?	HSA Bank requires a physical address to open the HSA account but can mail information to the employee's PO Box. Please make sure to include both addresses at the time of enrollment.
Are Employees issued different debit cards for different product enrollments?	Employees are issued one debit card for all product combinations. The HSA Bank Smart Card allows all elected plans to process through one debit card. When the transaction occurs, the type of transaction will be recognized and the appropriate account will be debited.
How often can an Employee change their HSA contribution amount?	Unlike other health benefit accounts, employees can change or stop their HSA payroll deduction amount at any time. Payroll deduction changes do not require a qualifying life event or status change.
An Employee was provided a contribution amount greater than intended – how can this be reversed?	Generally, the IRS specifies that once funds are processed into the HSA they cannot be reversed for any reason without employee consent. If the account is not over the annual contribution limit, the employee can complete the Contribution Correction Form. HSA Bank will reverse the transaction and refund the contribution to the employer. The employer can then refund the contribution to the employee via payroll once the appropriate taxes are applied. If the mistaken contribution has put the account over the maximum contribution, the employee must remove the funds as excess. The Contribution Correction form and the Excess Contribution form can both be provided by the HSAB Support Teams.
Can Employees make contributions to their HSA outside of payroll deductions	Yes, Health Savings Accounts are personal accounts that are managed by the account owner. Employees can contribute additional funds to their HSA at any time.
Where do I return forms?	Email them to HSAFORMS@hsabank.com
CIP Questions	A weekly All Account Report is located in the Employer Portal. The report will list anyone who has failed CIP.
How do I terminate an Employee or an Employee's benefit plan?	Terminations are processed via file through the Employer Portal or via SFTP. Multi Product: If an Employee is only terminating a plan, but is staying employed, a termination will be submitted only for the Enrollment. If an Employee is leaving the Employer Group, a termination will be submitted for the Participant.