

HSA Participant Online Post-Enrollment Terms Agreement Guide

1. Go to: www.adminamerica.com and click on the **Participants** **LOGIN** button on the Admin America website home page . . .

Admin★America
FSA HRA COBRA ERISA Compliance & Administration

(800) 366-2961
Corporate Headquarters
11800 Amberpark Drive, Suite 230
Alpharetta, GA 30009
(770) 992-5959
info@adminamerica.com

Home About Login Services Resources Contact Payment Center

Participants
Our secure web portal provides you with everything you need to know about your plan, including account activity and the status of claims.
Please login to access your confidential account. **LOGIN**

Employers
We relieve you of the burden of ever-changing employee benefits and administration so you have the freedom to focus on important day-to-day business.
Please login to access your confidential account. **LOGIN**

Agents & Consultants
We are dedicated to providing up-to-date, relevant and helpful information to agents, including round-the-clock online reporting options.
Please login to access your confidential account. **LOGIN**

If you have never logged in before please refer to the **First Time Login Instructions Guide**. If you do not have access to this guide, please call Admin America at (770) 992-5959 or (800) 366-2961 and we will email the guide to you.

2. Once you have logged in you will be asked to read and agree to the four agreements listed below. Click on the first [Read and agree](#) link.

Admin★America
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Agreements

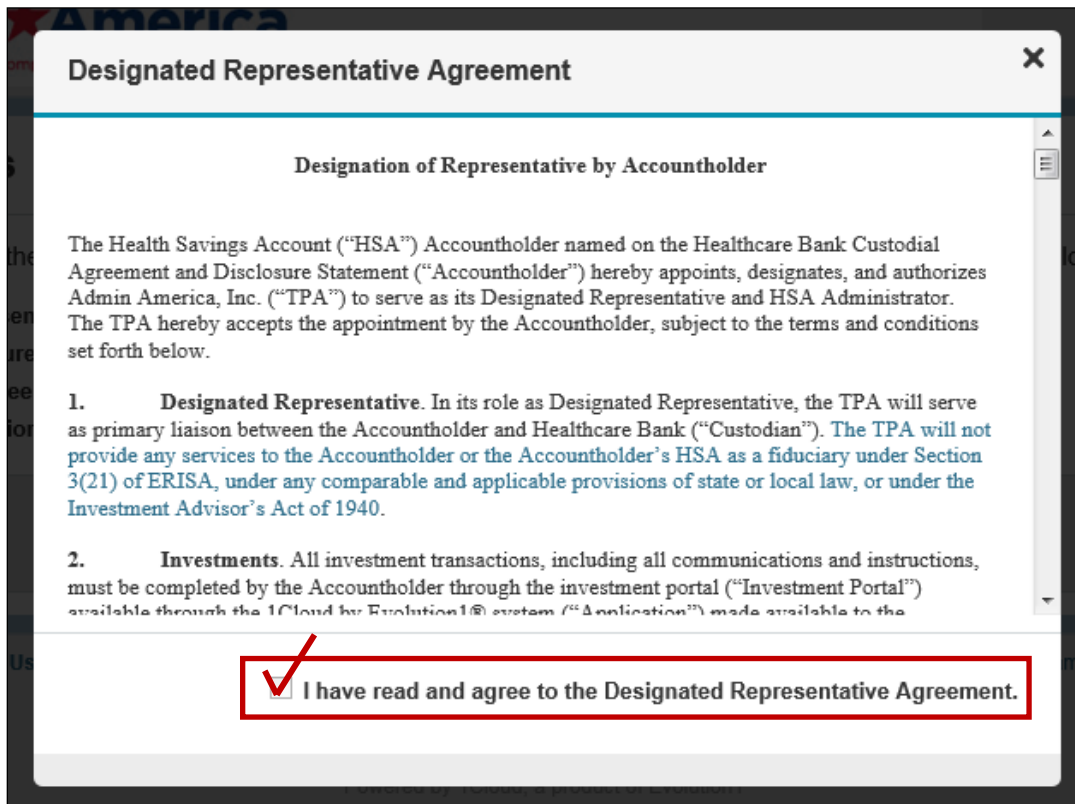
You must accept the terms and conditions for this account by reviewing and accepting all agreements listed below.

Designated Representative Agreement	Read and agree
Electronic Disclosure	Read and agree
HSA Custodial Agreement and Disclosure Statement	Read and agree
Important Information on Patriot Act Requirements	Read and agree

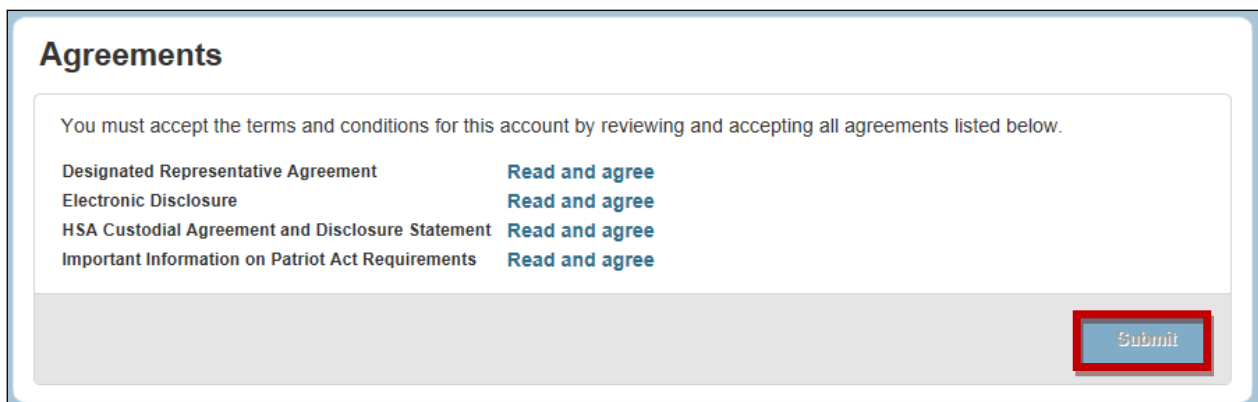
Submit

Contact Us - Call Customer Service at (770) 992-5959, Toll Free at (800) 366-2961 or Email us at customerservice@adminamerica.com

3. Each of the Read and agree links will open in a new window similar to the one shown below. After reading through the information you will agree to the terms and conditions by placing a check mark in the Box to continue through all agreements.



4. You will continue to click on each link and read the documents until all four agreements have been acknowledged by checking the boxes. Now click Submit located at the bottom of the main screen (*shown below*). The submit button will be grayed out until you have agreed to all four of the documents.

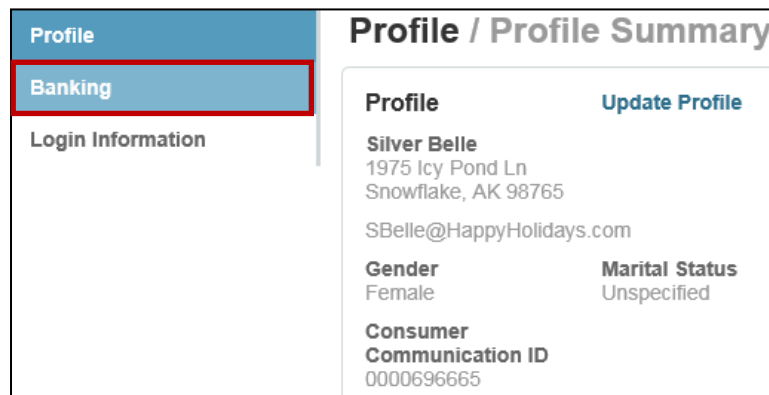


If you would like to setup Direct Deposit for HSA Disbursements, please follow the instructions below:

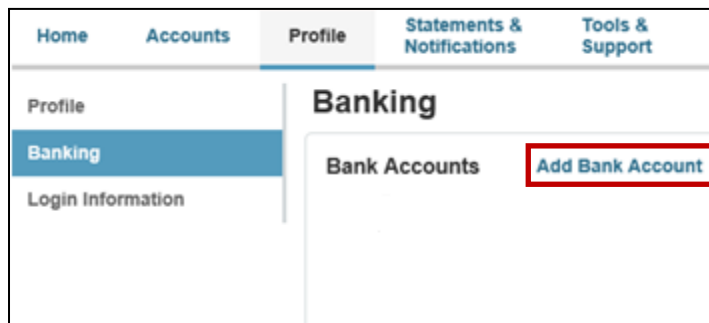
5. After agreeing to all terms and conditions you will arrive at the home screen of your portal. Click on the Profile tab.



6. From your Profile click on the Banking option on the left hand side of the screen



7. Select Add Bank Account



8. Enter the requested information in the fields below, then click **Submit**

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Accounts', 'Profile', 'Statements & Notifications', 'Tools & Support', and 'Dashboard'. A dropdown menu 'I Want to...' is on the right. On the left, a sidebar lists 'Profile', 'Banking', and 'Login Information'. The main content area is titled 'Banking / Update Bank Account' and contains two sections: 'Bank Account Information' and 'Bank Institution Information'. The 'Bank Account Information' section includes fields for 'Routing Number *' (filled with 123456789), 'Account Number *' (filled with 00000123456789), 'Confirm Account Number *' (filled with 00000123456789), 'Account Type *' (a dropdown menu set to 'Checking'), and 'Account Nickname *'. The 'Bank Institution Information' section includes 'Bank Name *' (filled with 'Snow Drift Bank'), 'Bank Address *' (filled with '1159 Frosty Rd', 'Snowflake', and 'Alaska'), and a ZIP code field (filled with '98765'). A '*Required' label is at the bottom right of the form. At the bottom, there are 'Cancel' and 'Submit' buttons, with the 'Submit' button highlighted by a red box.

9. **CONGRATULATIONS YOU ARE FINISHED AND YOUR NEW HSA CAN NOW BE SETUP!** Check your portal either online or via your smartphone mobile app regularly to make the most of your HSA account.