



HSA Distribution & Contribution Request Guide

To request an **HSA Distribution** from your account to reimburse eligible **Medical Expenses** that you have paid for out of pocket (not using your HSA card) or for eligible **Medical Expenses** that you will pay using the HSA Distribution requested (not using your HSA card), follow the below steps.

To request an **HSA Distribution** from your account for **Non-Medical Expenses**, please call Admin America for the appropriate form. Please note, any HSA distributions for non-medical expenses for individuals under the retirement age are subject to taxation and an additional 20% penalty tax. This will be reflected in the HSA form received for tax filing purposes.

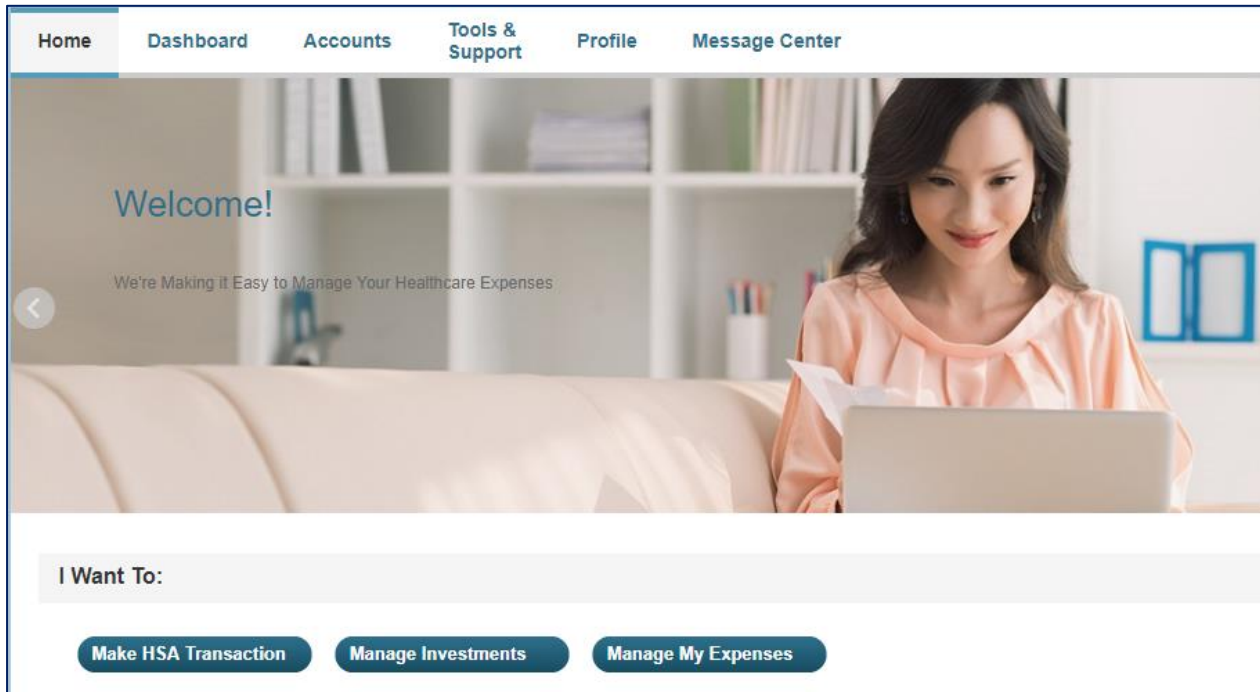
To enter an **HSA Contribution** from a bank account to your HSA account on a **Post-Tax** basis, follow the below steps. For more information on **Post-Tax Contributions** visit: <https://bit.ly/2MDvP2F>

1. Go to: <https://adminamerica.com> and click the  tab or the  button. Enter your username and password to login to the consumer portal.



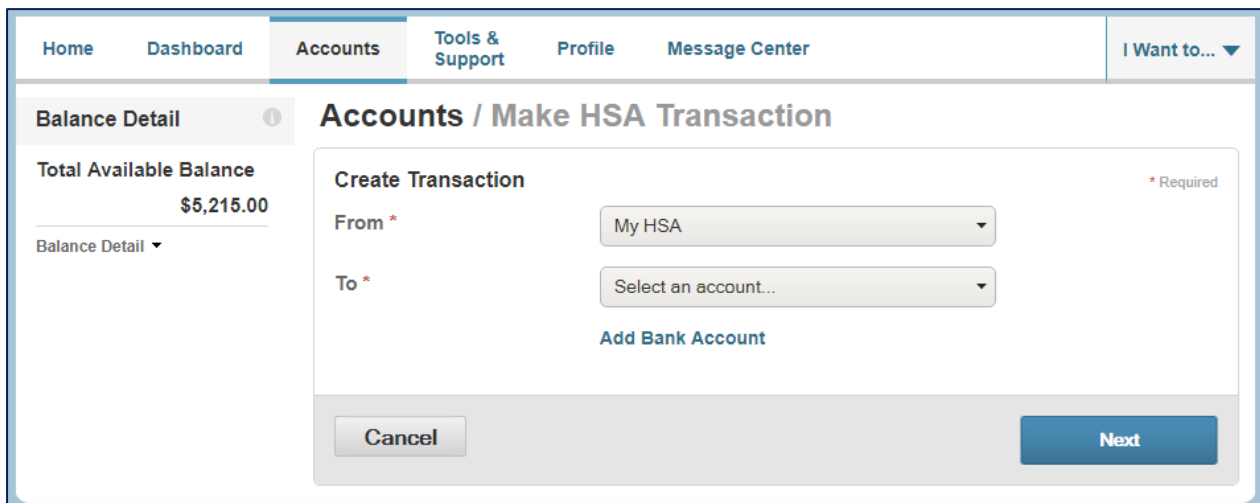
If you have never logged in before please refer to the **First Time Login Instructions Guide**. If you do not have access to this guide, please call Admin America at (770) 992-5959 or (800) 366-2961 and we will email the guide to you.

2. From the Home Tab, Click Make HSA Transaction



If you would like your HSA distribution sent to your bank account as a direct deposit or if you would like your HSA contribution sent from your bank account to your HSA as a direct deposit and you have not setup a bank account for direct deposit use, follow steps 3-6 below, otherwise skip to step 7.

3. To setup direct deposit (required to make an HSA Contribution), Click Add Bank Account



4. Enter your Bank Account Information

Click Submit

Add Bank Account ✕

Bank Account Information *Required

Routing Number * ⓘ

Account Number *

Confirm Account Number *

Account Type *

Account Nickname * ⓘ

Bank Institution Information

Bank Name *

Bank Address *

5. Answer your Security Question

Click Submit

Authentication ✕

AUTHENTICATION

Security Question What is your mother's maiden name?

Answer*

6. Review your Payment Method information in the window displayed. To change your payment method for your benefit Click the check box next to the benefit

Click Submit

Update Payment Method to Direct Deposit

Select the plan year/s below that you would like to update your payment method to Direct Deposit.

Plan Year	Current Payment Method	Update Payment Method To
<input checked="" type="checkbox"/> HSA	Benny Card Check	Benny Card Direct Deposit

7. There are two options when creating an HSA Transaction:

Option 1: HSA Distribution

Request money from your HSA account made payable to you or to someone else

Option 2: HSA Contribution

Enter money into your HSA account from another bank account for use at a later date

Accounts / Make HSA Transaction

Create Transaction

From *

To *

[Add Bank Account](#)

* Required

Accounts / Make HSA Transaction

Create Transaction

From *

To *

[Add Bank Account](#)

* Required

To make an HSA Distribution

- Select HSA in the **From *** section
- Select **Me (Check)**, **Checking / Checking xxxx1234**, or **Someone Else** in the **To *** section. See Distribution Option table below for further details.

Distribution Option	Type	Sent To
Me (Check)	Check	Your mailing address
Checking / Checking (xxxx5879)	Direct Deposit	Bank account selected
Someone Else	Check	Another address

To make an HSA Contribution

- Select the bank account to debit in the **From *** section
- Select HSA in the **To *** section

Click Next

If you selected Someone Else as your distribution option, proceed to the next step. If you did not select Someone Else as your distribution option, skip to step 9.

If you selected Someone Else as your distribution option, follow the step below. If you did not select Someone Else as your distribution option, skip to step 9.

8. If you selected Someone Else as your distribution option, your distribution will be sent as a check to the address you enter into the Payee Details section. Complete the Payee Details section. You will have an option to save Payee Detail for use in the future.

Click Next

Payee Details

Payee Name *
Enter who provided this service (this may be a physician, hospital, etc.)

Who is this for?
When appropriate, provide the name of the person who received service.

Account Number *
Enter the account number that the payee uses to identify the service or recipient.

Payee Address *

Enter the address of physician, hospital, etc. who provided the service.
 Save new payee information

Summary

From My HSA
To Someone Else

9. Select if the expense will be One-time or if it will be recurring on a set Schedule.

If you select One-time, Click Next and proceed to step 11.

Transaction Schedule

Frequency * ⓘ One-time Schedule

Summary

From My HSA

To Someone Else

If you selected Schedule to setup a recurring distribution, follow the step below. If you did not select Schedule to setup a recurring distribution, skip to step 11.

10. If you selected Schedule to setup a recurring distribution, select the recurring distribution frequency: Monthly or Weekly.

Additional options will open depending on your selection.

Monthly

Transaction Schedule

Frequency * ⓘ One-time Schedule

Schedule *

Monthly Weekly

Day: 1 of every 1 month(s)

On the: First Monday of every 1 month(s)

Start Date * ⓘ

End Date

None

End by

Weekly

Transaction Schedule

Frequency * ? One-time Schedule

Schedule * Monthly Weekly

Every week(s) on:

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday

Start Date * ?

End Date None End by

Complete your Transaction Schedule

Click Next

11. Complete the Transaction Details section

Click Next

Transaction Details

* Required

Tax Description ? Normal Distribution

Amount * \$

Expense ?

Recipient/Patient ? Brian Curtis

Notes

Summary

From My HSA

To Someone Else

Schedule One-time

12. Review the Normal Distribution Disclaimer and Check the box to Agree to the terms.

Click **Add Another** to add an additional HSA distribution

Click **Save for Later** to save the HSA distribution for processing at a later date

Click **Submit** to process your HSA distribution

You distribution may take 2-3 business days to process. Once a distribution is submitted it cannot be cancelled.

Questions? Email HSA@adminamerica.com or Call 770-992-5959