



Group Online Enrollment Instructions

It takes just four easy steps to enroll in a Health Savings Account (HSA) using HSA Bank's Group Online Enrollment system. Simply use any computer, any time and follow these instructions.



Step 1: Type or copy and paste this customized link into your Internet browser/address bar:
<https://secure.hsabank.com/tvaenroll>

You will be taken to an enrollment page created specifically for your group. Click on "Begin Online Enrollment" to get started.

Step 2: Complete the online enrollment application. You will need to supply the following information:

- First and Last Name
- Street Address (P.O. boxes not accepted)
- Date of Birth
- Citizenship Status
- Type of Health Plan Coverage
- Deductible Amount
- Social Security Number
- Home and/or Business Phone
- Email address
- Employer Information
- Effective Date of your Health Plan

You will also be able to order checks and up to two complimentary Visa® debit cards, one for yourself and one for your Authorized Signer (a person you authorize to act in your place with respect to your account), if you choose to designate one. If you wish to designate more than one Authorized Signer, there will be a fee for each additional debit card beyond the two complimentary ones (see your Health Savings Account Fee and Interest Schedule for details). In order to add an Authorized Signer, you will need to provide his or her:

- First and Last Name
- Phone Number
- Social Security Number
- Street Address
- Date of Birth

You can also sign up for online banking via our Member Website. With the Member Website, you have 24/7 access to view account details, change your address, and sign up for email notifications; you can also opt to receive the following items electronically: statements, tax forms, and bank disclosures and notices.

Identity Verification

Note: In order to comply with the Customer Identification Program (CIP), regulation 31 CFR 103.121, and section 326 of the USA PATRIOT Act, we must gather information for identity verification. This means that when you open an account, we will need you to provide the information as noted above for you and your Authorized Signer (should you choose to designate one). If your identity or the identity of your Authorized Signer is not verified by our automated process, you will receive a letter from us requesting additional information.

Step 3: Your account will open in conjunction with the effective date supplied in the enrollment.

Step 4: Once you have completed your enrollment, your debit card(s) and welcome kit will be mailed to the address you provided and should arrive within 7-10 business days.

For assistance, please contact the Client Assistance Center:



844-650-8934

Monday – Friday, 7 a.m. – 9 p.m., and Saturday, 9 a.m. - 1:00 p.m., CT
www.hsabank.com | 605 N. 8th Street, Ste. 320, Sheboygan, WI 53081

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