



HSA Today® Online Enrollment Guide

Log in to your HSA Today® web portal:

The screenshot shows the HSA Today Enrollment landing page. At the top, it says "HSA Today Enrollment" and "Open An Account and Start Saving Today!". Below this, it lists several benefits: "Save" (Maximize Tax Savings, Tax-deferred contributions become tax-free when used for qualified health expenses), "Invest" (Grow Your Savings, Portfolio models tailored to your specific investment needs), and "Pay" (Simplify Health Payments, Convenient debit card speeds payments and reduce paperwork). On the right side, there are two call-to-action boxes: "Are You Ready?" with "Enroll Now!" and "Login Now!" buttons, and "Forgot Your Login ID or Password?" with a "Click Here" button.

- Click on **Enroll Now!**

The screenshot shows the HSA Today Enrollment eligibility questions page. At the top, it says "HSA Today Enrollment" and "Are you eligible?". Below this, it lists several eligibility questions with checkboxes: "I am covered by a HSA-qualified high deductible health plan.", "I have no other health coverage except what is permitted as 'other health coverage' under IRC Section 223.", "I am not enrolled in Medicare.", and "I am not a dependent on someone else's tax return." At the bottom right, there are "Continue" and "Cancel" buttons.

- Answer the eligibility questions. Check all that are true.
- Click **Continue**
- Enter Information to **Create Your User Account**
 - Employer Code is the enrollment code given by your ER/TPA
 - SSN
 - First Name
 - Last Name
 - Email
 - Create Login ID and password – be sure to write this down
 - Answer Security Questions – be sure to write these down
 - Click **Continue**

The screenshot shows the HSA Today Enrollment "Create Your User Account" page. It contains several input fields: "Employer Code:", "SSN:", "Login ID:", "Password:", "Re-type Password:", "Security Question 1: Select One", "Security Question 2: Select One", and "Security Question 3: Select One". Below each question is an "Answer:" field. A note below the password field says "Use 8 to 32 characters, upper and lower case, numbers, special characters, no spaces."

HSA Today Enrollment

Step 1. Eligibility |
 Step 2. User Set-up |
 Step 3. Account Information |
 Step 4. Optional Services |
 Step 5. Review

Required Information

Create Your User Account

Employer Code: First Name:
 SSN: Last Name: Email:

Login ID:
 Password:

Use 8 to 32 characters, upper and lower case, numbers, special characters, no spaces.

Re-type Password:

Security Question 1: Select One
 Answer:

Security Question 2: Select One
 Answer:

Security Question 3: Select One
 Answer:

or

- Complete required information
- Click on High **Deductible Health Plan (HDHP)**
- Complete the Insurance Carrier Name, Effective Date of Coverage, and choose Single or Family
- The Statement Delivery option will default to online statement only.
 - Choose the other option if you want a paper statement (\$3.00 monthly fee)
- Click **Continue**

Add Your Account Information

Social Security Number:

Date of Birth:

First Name:
 Middle Initial:
 Last Name:
 Home Phone:
 Work Phone:
 Email:

Address 1:
 Address 2:
 City:
 State: Zip:
 Country:
 Mother's Maiden Name:
 City of Birth:

Health Plan Selection:
 Date of Hire:
 Effective Date of Coverage:

How do you want to receive your Monthly Account Statements?

Via Online Account Portal Only
 Via Snail Mail and Online (A \$3.00 Fee will be charged to your account)

or

Add Beneficiaries

- Add Primary Beneficiary
- Enter SSN, Name, Address, choose Relationship, and enter Percentage
- If only one primary beneficiary, enter 100% as percentage and click Save
- If you have more than one primary, enter percentage less than 100% and click Save
- Click **+Add New Beneficiary** to add another primary beneficiary
- Once completed, click **Continue**

Step 1. Eligibility | Step 2. User Set-up | Step 3. Account Information | **Step 4. Primary Beneficiary** | Step 5. Contingent Beneficiary | Step 6. Optional Services | Step 7. Review

Primary Beneficiaries

SSN	Name	Address	Relationship	Percentage	Action
<input type="text" value="SSN"/>	<input type="text" value="First Name"/> <input type="text" value="Middle Initial"/> <input type="text" value="Last Name"/>	<input type="text" value="Street Line 1"/> <input type="text" value="Street Line 2"/> <input type="text" value="City"/> <input type="text" value="State"/> <input type="text" value="Zip"/> <input type="text" value="United States of America"/>	<input type="text" value="Relationship"/>	<input type="text" value="Percentage"/>	Save Cancel

[+ Add New Beneficiary](#)

Save and Exit [Continue](#) or [Cancel](#)

Add Contingent Beneficiary

- Add Contingent Beneficiary
- Enter SSN, Name, Address, choose Relationship, and enter Percentage
- If only one Contingent beneficiary, enter 100% as percentage and click Save
- If you have more than one contingent, enter percentage less than 100% and click Save
- Click **+Add New Beneficiary** to add another contingent beneficiary
- Once completed, click **Continue**

Step 1. Eligibility | Step 2. User Set-up | Step 3. Account Information | Step 4. Primary Beneficiary | **Step 5. Contingent Beneficiary** | Step 6. Optional Services | Step 7. Review

Contingent Beneficiaries

SSN	Name	Address	Relationship	Percentage	Action
<input type="text" value="SSN"/>	<input type="text" value="First Name"/> <input type="text" value="Middle Initial"/> <input type="text" value="Last Name"/>	<input type="text" value="Street Line 1"/> <input type="text" value="Street Line 2"/> <input type="text" value="City"/> <input type="text" value="State"/> <input type="text" value="Zip"/> <input type="text" value="United States of America"/>	<input type="text" value="Relationship"/>	<input type="text" value="Percentage"/>	Save Cancel

[+ Add New Beneficiary](#)

Save and Exit [Continue](#) or [Cancel](#)

- This page is optional; it's used for setting up a bank account for direct deposits, payroll deductions, and debit cards.
- Click **Continue**

Step 1. Eligibility | Step 2. User Set-up | Step 3. Account Information | Step 4. Primary Beneficiary | Step 5. Contingent Beneficiary | Step 6. Optional Services | Step 7. Review

Add Optional Services

You can choose to add the following options or skip this step. If you choose to skip, you can add them later through your account control panel.

Direct Distribution and Contribution
 Contribute to your HSA from your personal checking or savings account.
 I want to add this

Payroll Deduction
 Contribute to your HSA from your paycheck

I want to contribute: \$ Weekly - 52
 My Employer is Contributing: \$ Weekly - 52
 Your total payroll contribution will be: \$0.00

Our Recommendation
 Based on the IRS limit of \$6650.00, you can contribute an additional \$6650.00, saving you an additional \$1662.50 in income tax.
 Increase your annualized payroll deduction amount to \$6656.00

- **Direct Distribution and Contribution** – Enter bank account to use for direct deposit for reimbursements or use for post tax deposits

Step 1. Eligibility | Step 2. User Set-up | Step 3. Account Information | Step 4. Primary Beneficiary | Step 5. Contingent Beneficiary | Step 6. Optional Services | Step 7. Review

Add Optional Services

You can choose to add the following options or skip this step. If you choose to skip, you can add them later through your account control panel.

Direct Distribution and Contribution
 Contribute to your HSA from your personal checking or savings account.
 I want to add this

Account Type: Checking Savings
 Account Number:
 Routing Number:
 Bank Name:
 City:
 State: AK

I hereby authorize my Plan Service Provider (PSP) to facilitate Electronic Funds Transfer (EFT) between my Health Savings Account (HSA) and my Personal Bank Account as indicated below. These EFT transactions will be facilitated by the PSP but will be initiated by the Custodian. EFT transactions will be either a withdrawal from my Personal Bank Account for subsequent deposit into my HSA or will be a withdrawal from my HSA for subsequent deposit into my Personal Bank Account.

NOTE: Bank Routing and Account Numbers are found on your check and not on the deposit slips.

- **Payroll Deduction** – Use as a calculator to see how much you can do each pay period to meet the IRS Max. This information will not feed to the payroll department at your place of employment

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Payroll Deduction
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I want to contribute: \$ Weekly - 52
 My Employer is Contributing: \$ Weekly - 52
 Your total payroll contribution will be: \$0.00

Our Recommendation
 Based on the IRS limit of \$6650.00, you can contribute an additional \$6650.00, saving you an additional \$1662.50 in income tax.
 Increase your annualized payroll deduction amount to \$6650.00

Debit Card(s) - Order a primary (Card 1) and secondary (Card 2).

- Primary card will default with Account holder's name
- Secondary card can be ordered; enter name for that card in Card 2 field

Payroll Deduction

Contribute to your HSA from your paycheck

I want to contribute: \$ Weekly - 52

My Employer is Contributing: \$ Weekly - 52

Your total payroll contribution will be: \$0.00

Our Recommendation


Based on the IRS Limit of \$6650.00, you can contribute an additional \$6650.00, saving you an additional \$1662.50 in income tax.

Increase your annualized payroll deduction amount to \$6650.00

Debit Card(s)

Make easy payments from your HSA with the mysourceCard™, a MasterCard® Debit Card

I accept the terms of the Card Program. [View Card Agreement](#)



Enter the Name(s) to appear on your Debit Card(s)
(If ordering only one card, please use the Card 1 field and leave the Card 2 field blank.)

There is a 21 character maximum, including spaces.

Card 1: _____

Card 2: _____

Back | Save and Edit **Continue** or Cancel

- Last Page is **Review The Application**
- Click on the arrows to expand the sections
- Edit any section that needs to be updated
- If all is correct, click **I Agree**
- Click to view **"Custodial Account Agreement"**

Review Your Application

Click an arrow to view your information. To make any changes, click the [Edit This Section](#) link | [Collapse All Sections](#)

User Set-up

Application

Primary Beneficiaries

Contingent Beneficiaries

Direct Distribution and Contribution

Payroll Deduction

Debit Card(s)

I have completed this application to establish my individually owned Health Savings Account. The information entered via this online application is true and accurate to the best of my knowledge, and I submit the information with full understanding and acceptance of the provisions contained within the Custodial Account Agreement, HSA Terms and Conditions Statement, and the HSA Disclosure Statement. I also acknowledge that the Plan Service Provider (PSP) is authorized to perform transactions for my account and all such transactions initiated by the PSP will be treated as if initiated directly by me, the Account Holder.

I Agree or Cancel

Enrollment Complete Confirmation

Step 1. Eligibility | Step 2. User Set-up | Step 3. Account Information | Step 4. Primary Beneficiary | Step 5. Contingent Beneficiary | ✓ Step 6. Optional Services | ✓ Step 7. Review

Enrollment Complete

Congratulations!

Jackson Bogart, you have completed enrollment for your HSA Today™ account.

Check your email for a Confirmation of enrollment containing an Account Activation link. Clicking this link confirms your registration for online access to your Account Portal.


For general questions about enrollment or health savings accounts please contact your plan service provider:

DataPath Administrative Services, Inc.
1601 WestPark Drive, Suite 9
Little Rock, AR 72204
T: 877-685-0655
F: 501-687-3282

[Continue](#)

Email received after enrolling

- Click on the link to activate the account and to receive the welcome kit

 myHSAToday.com | [Support](#) | [Login](#)

Enrollment Confirmation

Hello Holly Gollightly,


Congratulations! You are receiving this email because you have enrolled into an HSA Today™ account and you have been **Approved**. Only one more step to complete and you can begin using your HSA Today™ account Today!

Activate your Account by clicking the link below or cut and paste into your web browser:
<https://secure.myrrsc.com/hsaenroll/HSAEnrollment/ActivateMyHSA?tempid=CF02AAD5-4249-4C1A-8041-5398697BB9C1>

Support

Call your local Plan Service Provider for information regarding this email or your health savings account:

*Demo TPA
1601 WestPark Drive
Little Rock 72204
501-687-0000*




Account Number
***** 5284


Account Status
Approved, Not Activated

Statements are available online by default. To receive Statements by mail please call your PSP.

Welcome email received after account is activated



myHSAToday.com | Support | Login



Your HSA Welcome Kit

Hello Holly Golightly,

Congratulations! Your health savings account has been **Approved**, and is now ready to use. |

Start by making your first deposit and begin a life-long experience of reducing your tax bill, while preparing for future health expenses.

[Login Now and Start Saving!](#)

Helpful Information

IRS Contribution Limits:
<http://www.hsa223.com/limits.asp>

FAQs,
http://www.hsa223.com/treas_faqs.asp

Video Tutorial of Account Owners Portal
<https://www.youtube.com/watch?v=PgcsS3gFnUs>

Support

Call your local Plan Service Provider for information regarding this email or your health savings account:

Account Number
***** 5284

Account Status
Approved

Statements are available online by default. To receive Statements by mail please call your PSP.



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