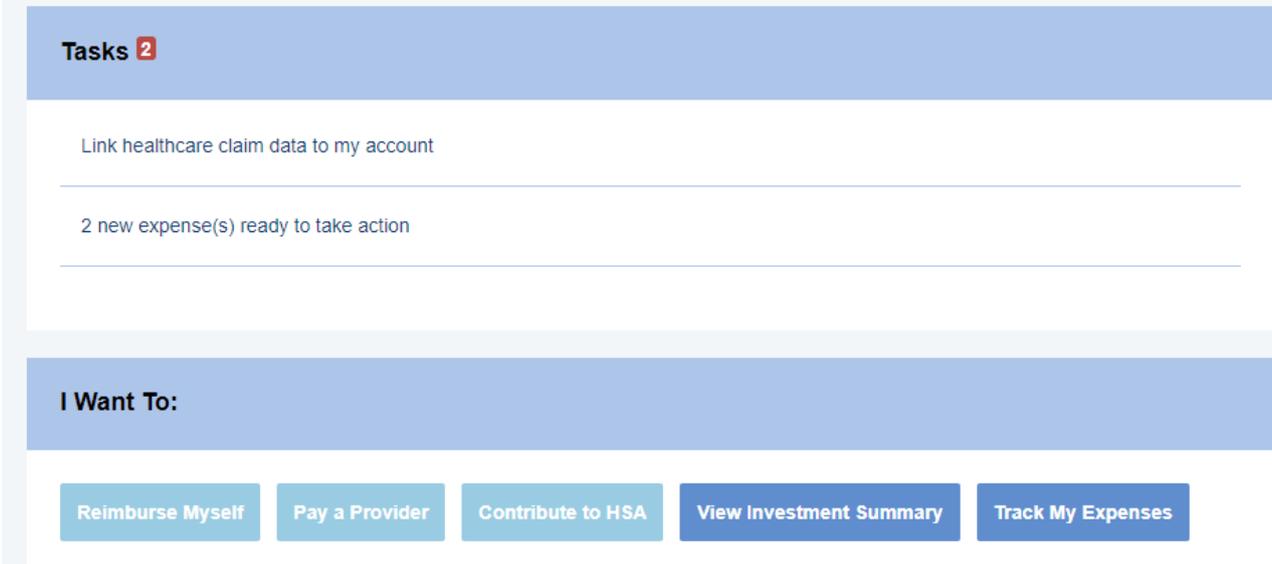


Submitting An HSA Claim

DIDN'T HAVE YOUR HSA DEBIT CARD? NOT A PROBLEM.

Submit your claim online. It is quick and easy!

1. Log In [Here](#) to access your online account and select Reimburse Myself or Pay a Provider from the I want To menu on your home page.



The screenshot shows a user interface for an HSA account. At the top, there is a blue header with the text "Tasks 2". Below this, there are two task items: "Link healthcare claim data to my account" and "2 new expense(s) ready to take action". Below the tasks, there is another blue header with the text "I Want To:". Underneath this header, there are five buttons: "Reimburse Myself", "Pay a Provider", "Contribute to HSA", "View Investment Summary", and "Track My Expenses".

2. Confirm where the funds will be coming from (My HSA for reimbursement) and how you want them dispersed. You may select to have the funds issued via direct deposit to your bank, to you by check or pay directly to your provider.

ACCOUNTS	INVESTMENTS	PROFILE	I WANT TO
Account Summary	Investment Summary	Profile Summary	Make an HSA Transaction
Account Activity	Education	Banking/Cards	View Investment Summary
Expense Tracker		Payment Method	Track My Expenses
Statements		Login Information	

Pending Withdrawals	\$0.00	Fair Market Value <small>*Current as of 8/23/2021</small>	\$0.00
Available Balance	\$4,869.75		

Create Transaction * Required

From *

To *

[Add Bank Account](#)

3. Select if the payment is a one-time payment or schedule a recurring payment if you have a regular expense due. You may schedule recurring payments to happen weekly or monthly.

4. Enter the payment amount. You may also select an expense type and add notes to the transaction. The expense type and notes are not required but can be used to help you track your expenses and payments. They are for your record only and details are not included with the actual payment.

Transaction Details * Required

Tax Description ⓘ	Normal Distribution
Amount *	\$ 100.00
Expense ⓘ	Dental
Recipient/Patient ⓘ	<input type="checkbox"/> HSA Test <input checked="" type="checkbox"/> HSA Dependent
Notes	Tooth extraction on 8/1/2021

Summary

From	My HSA
To	Me (Check) 100 Quannapowitt Pkwy Suite 300 Wakefield, MA 01880
Schedule	One-time

Cancel Previous Next

5. Click Next to submit your transaction. Payments generally are received in 5-7 business days (Direct Deposit) or 7-10 business days (Check). **Expedited delivery for checks is not currently available.