

WELCOME SCOTT!

Your new Health Savings Account (HSA) has been set up with PayFlex. If you have an account with JPMorgan Chase (“Chase”), it will be closing soon. At that time, your funds at Chase will be deposited into your PayFlex account.

### **Register your new HSA at PayFlex**

In order to get ready to use your new HSA, register your account online. By registering your account, you’ll be able to:

- **View your account information** – Once funds are in your account you can view your balance, contributions and payments.
- **Access your account on the PayFlex Mobile™ app** – You’ll log in with your PayFlex username and password.
- **Order additional PayFlex debit cards** – You can order more cards for your spouse and dependents.
- **Choose your account notifications** – You can set up alerts on your new HSA.
- **Link bank account(s)** – This will make for easy transfers into and out of your HSA.
- **View your investment options** – Learn how you can invest your HSA funds at PayFlex.

The back of this letter gives you step-by-step instructions to register your account, set up alerts and order more debit cards.

### **Customer Identification Process (CIP)**

You may receive a CIP letter from PayFlex. If you passed CIP at Chase, you can disregard that letter. Once we start the migration process with Chase, we’ll have your current CIP status from Chase on your new account at PayFlex.

If you didn’t pass the CIP at Chase, then you’ll have to go through CIP with PayFlex. If you receive a CIP letter from PayFlex, please provide the needed information to get your HSA open.

### **Questions?**

If you have any questions, please call us at **{=CallCenterPhone=}**. Customer Service representatives are here to help you Monday through Friday, 7 a.m. – 7 p.m. CT and Saturday, 9 a.m. – 2 p.m. CT.

Sincerely,

The PayFlex Team

## Steps to register your new HSA

Follow these steps to register your new HSA.

1. Log into Aetna Navigator®, your secure member website, and select **Access Your Account**. You can also go to [www.payflexdirect.com](http://www.payflexdirect.com) and click **Register Now**.
  - Enter your Member ID and zip code. (Your Member ID is either your Social Security number or your Employee ID.) Click **Register**.
  - Create a username and password. Select a security question and enter your answer. Enter your e-mail address and click **Confirm**.
2. Review the website terms of use. Check the box, enter your initials and click **Continue**.
3. Review the Custodial Account Agreement and account fees. Check the box, enter your initials and click **Continue**.
4. Select your marital status.
5. Review your High Deductible Health Plan (HDHP) start date. You can correct this date if you need to. Your HDHP start date is the date that you first enrolled in a high deductible health plan.
6. Select your coverage type – single or family plan. Click **Continue**.
7. If you want, you can link a bank account to your HSA. When you link a bank account to your HSA, you can easily transfer funds into and out of your HSA.
8. Enter your beneficiary information. Your beneficiary information won't automatically move to PayFlex.
9. Print the confirmation page for your records.

## Choose Your Account Notifications

You can set up alerts for your new HSA. These will help you to manage your HSA and to get timely updates. You can set up alerts about your balance, your contributions and other useful information.

### To set up alerts:

1. From My Dashboard, select **My Settings**.
2. Click on the notifications link.
3. Enter your e-mail address and select the notifications you want.
4. Click **Submit**.

## Order Additional Cards for Your Spouse and Dependents

You'll receive one debit card for your HSA. If you have not yet received your new card, you should soon have it. If you need more cards for your spouse or dependents, you can order them online. You can do this before your funds are in your new HSA.

### To order a card:

1. From My Dashboard, click **Manage My Debit Card(s)**.
2. Click **Order a Dependent Debit Card**.
3. Enter the spouse or dependent name.
4. Click **Submit**.