You can manage your HSA, using these helpful online tools.

Accessing your account online
To access your account online, go to PayFlexDirect.com, or if you are an Aetna member, you can also access your account through Aetna Navigator®.

- If you are already registered at PayFlexDirect.com, enter your user name and password.
- If you are not yet registered at PayFlexDirect.com, click on Register and then follow the online prompts.

Sign up for account notifications
- From My Dashboard, select My Settings.
- Select Manage Notifications and identify the types of notifications you wish to receive and how you want to receive them.
- Click Submit.

Access account balances and alerts
View account alerts, balances and account activity
- You can access My Account through Accounts Snapshot in My Dashboard, from the My Accounts and Services link, or under the Financial Center tab.
- From My Account, you can:
  - View your account balance
  - See your transactions
  - Make a deposit, payment or withdrawal
  - Link your bank accounts
  - View your investments

Take account-specific actions
- On My Dashboard, select My Account on the left navigation bar.
- From here, you can link to:
  - My Profile — view and edit personal, insurance or beneficiary information
  - Transactions — view by date, type or status
  - Link My Bank Accounts — link other bank accounts for ease in making deposits or withdrawals
  - Make a Deposit — make a deposit into your HSA from a designated, linked account

Make a payment
- On My Dashboard, select My Account on the left navigation bar.
- Then select Make a Payment.
  - Step 1: Select who you want to pay (payee) from the drop-down box, or add a new payee with the + sign.
  - Step 2: Enter the date the payment should be made (origination date), amount to be paid, expense category and date of service.
  - Step 3: Review your payment and click Submit to complete the payment or Previous to make changes.
  - Step 4: Print a copy of your confirmation.

Withdraw funds
- On My Dashboard, select My Account on the left navigation bar.
- Select Make a Withdrawal to withdraw funds from your HSA and deposit into a linked bank account.
  - Step 1: Enter the amount you want to withdraw, select the linked account to which the funds should be directed (if expense is IRS eligible), a description of the transaction and the date the transaction should be executed (origination date).
  - Step 2: Confirm your entry and click Submit to complete the withdrawal or Back to make changes.
  - Step 3: Print a copy of your confirmation.
Make after-tax contributions
- On My Dashboard, select My Account on the left navigation bar.
- Select Make a Deposit to make a deposit into your HSA from another designated, linked bank account.
  - Step 1: Complete the following fields: Contribution Amount, Contribution Year, Bank Account (linked account from which the deposit should be made), Description (of the deposit transaction) and the Origination Date (the date the transaction should be executed). Hit Continue when finished.
  - Step 2: Review the deposit entry and either click Submit to complete the deposit or Back to make changes. Once submitted, a confirmation page will be displayed.
  - Step 3: Print a copy of your confirmation.

Note: The Make a Deposit option displays only after you have linked one or more bank accounts to your HSA.

Choose your investments
- From My Account, select My Investments.
- To open an investment account that allows you to invest your HSA dollars with a variety of investment funds, click Submit.
- Read and electronically sign the agreement to complete the investment account process, which may take up to 24 hours.
- Once your investment account is set up, you are then able to transfer funds into and out of your HSA interest-bearing account.

Link to useful tools
In My Dashboard, from the left panel, you will find the information and tools you need the most.
- My Accounts and Services — accesses the Financial Center
- My Calendar — displays pending and historical scheduled transactions
- My Documents — accesses an archive of documents either sent or received, as well as account-related forms
- Plan My Benefits — directs you to the Benefits Center, allowing you to view and/or enter your plan information

- My Settings — allows you to provide your preferred e-mail address and customize your account notifications and security question
- My Resources — points you to the Resource Center with educational materials, calculators, FAQs and more

Access account-related forms
- On My Dashboard, select My Documents on the left navigation bar.
- To download and/or print the following documents, click on the Document Title.
  - Enrollment Verification Form
  - Contribution Coupon
  - Beneficiary Designation Form
  - Trustee Transfer Form
  - Address/Change Form
  - Account Closure Form

Questions?
You can contact Customer Service at 888-678-8242 Monday - Friday, 7 a.m. - 7 p.m. and Saturday from 9 a.m. - 2 p.m. CT.

About PayFlex
PayFlex Systems USA, Inc., one of the nation's leading account-based third party administrators, has become part of the Aetna family and provides administrative services for Aetna's Consumer Financial Solutions products. PayFlex's robust account tools make it easy for you to manage your tax-advantaged accounts. Key features include real-time account balances, customizable account alerts, a mobile application if offered by your employer and the ability to decide if, how and when to use your account.

This material is for informational purposes only and is not an offer of coverage. It contains only a partial, general description of plan benefits or programs and does not constitute a contract. All spending accounts have limitations and exclusions. Information is believed to be accurate as of the production date; however, it is subject to change.

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