



Enrolling in the Health Savings Account (HSA)

(Rev. September 2016)

You may contribute to a Health Savings Account (HSA) when you elect the PPO Plus HSA Plan. There are two steps to setting up your account: registering for your account and completing the BNY Mellon application.

REGISTERING FOR THE HSA

You must first register with WageWorks.

- Go to the WageWorks home page: www.WageWorks.com
 - Click on the “Log In/Register” tab at the top and then on “Employee Registration”
- Click on the “Next” tab at the top of the Instructions screen
 - Enter the requested information about yourself (first name, last name, date of birth and home zip code)
 - For the ID Code, enter the last four digits of your Social Security number
- Review the User Agreement and Term and Conditions, accept and click the “Next” tab at the top
- You will create your own username and password on the next screen
- Next, you will confirm (or update) your contact information and decide how you want to be reimbursed when you have eligible expenses
 - If you want to be reimbursed by direct deposit, you must provide the bank’s name, your account number, the bank’s routing number and the type of account
- Lastly, you will be asked to confirm your information and click “Submit”

COMPLETING THE BNY MELLON HSA APPLICATION

Once you have completed the WageWorks registration, you must apply for an account with BNY Mellon, the administrator of your Health Savings Account.

- Log back onto www.WageWorks.com; because you are now registered, you will land on your Dashboard
- Click the “Finish Opening HSA” box to launch the application process, then click on the “Next” tab
 - Enter the requested information (mailing address, home phone, date of birth and Social Security number and then click on the “Save & Complete HSA Application Process” box at the bottom
- You will be brought to the BNY Mellon site to finish the application process
- The first page provides an introduction to your Health Savings Account (including eligibility, contribution limits, balance information and requirements); then click on the “Finish Application” box at the bottom of the screen
- You must review the various Terms and Agreements and click “Accept”; you should also print out the agreement for yourself (Click on “Print Agreement”)
- You must read and consent to the “Bank Disclosure Form” on the next screen and then click “Continue”
- Now, you must confirm your information and click “Continue” again
- Next, you will be asked whether you want to receive your statements by paper or e-mail (Note, that 75 cents will be deducted from your HSA balance each quarter if you want a paper statement)
- You will then add a beneficiary for your HSA account (and click “Continue”)
- If you will be making post-tax contributions (NOT from your paycheck), you complete the next screen and click “Continue”
- Next, verify all of your account information and click the “Finish and Submit” box on the bottom
- Lastly, make sure to print out the Confirmation for the account application process and click “Close”