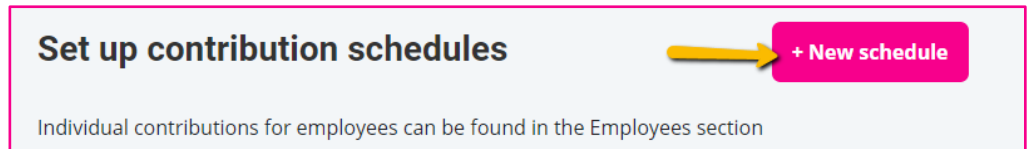
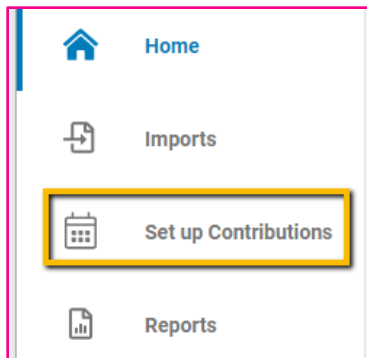
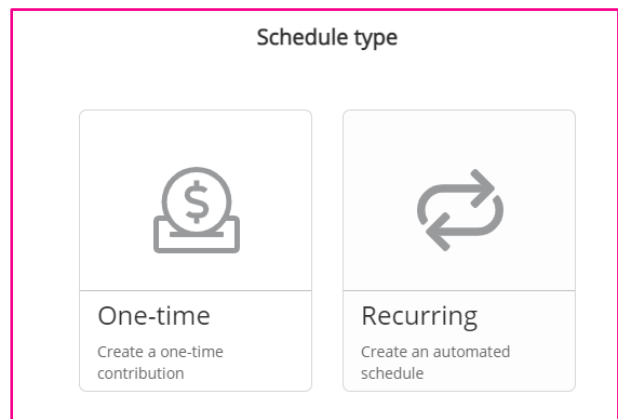


The one-stop portal gives you the tools you need to better support your employees in the management of their pre-tax benefit plans such as Health Savings Accounts (HSAs). You have the ability to set up contributions by following these steps:

Access the Employer Online Portal, Home page, Set up Contributions. Then select the “+New Schedule”.

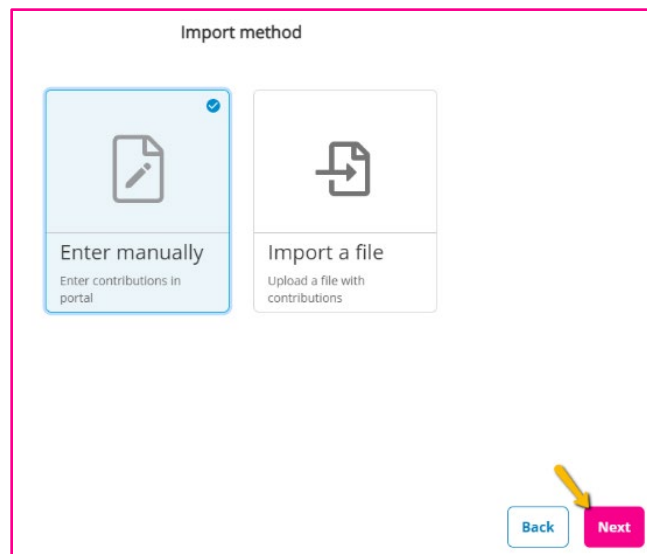
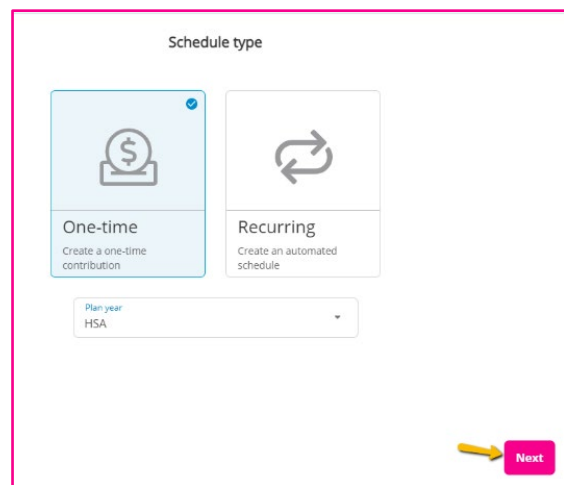


Select “One-time” if you are trying to catch up with the deduction that did not post to the participant’s HSA. Select “Recurring” if you want to set up the schedule for recurring deductions.



### One-Time Contribution:

Select the Plan Year in the drop down and select “Next”.



Select “Enter Manually” and click “Next”.

Select the date and click “Next”.

You will see all the participants that are enrolled in the HSA and can add their deduction amounts and employer contributions. Here is where you also need to update any deductions for the participants here.

Once the deductions have been entered, scroll to the bottom of the page and select “Submit”.

*Note: If you want to process the one-time schedule for the same day, once you submit the schedule, there will be small period of availability to correct any mistakes as it will process very quickly. Once the process complete, you would need to contact isolated to have any banking corrections that are required.*

Contribution details

Effective date  
3/1/2023

Back Next

Items per page: 10 | 1-10 of 268 items | 1 of 27 pages

<b>Total payroll deductions</b>	<b>\$0.00</b>
<b>Total employer contributions</b>	<b>\$0.00</b>

Cancel Back Submit

### Recurring Contributions:

Select the Plan Year in the drop down and select “Next”.

Schedule type

One-time  
Create a one-time contribution

Recurring  
Create an automated schedule

Plan year  
HSA

Select “Enter Manually” and “Next”.

You will then Enter in the Contribution Details – including Start date and the Frequency, day of the month and monthly frequency for the recurring contributions. Once completed, select “Next”. We do not recommend entering in an “end date” as that would require you to access the schedule at the beginning of the plan year and add schedules and deductions again.

You will see all the participants that are enrolled in the HSA and can add their deduction amounts and employer contributions. Here is where you also need to update any deductions for the participants here.

Once the deductions have been entered, scroll to the bottom of the page and select “Submit”.

Item	Amount
Total payroll deductions	\$0.00
Total employer contributions	\$0.00

Once you have set up a recurring schedule, you will see that under the Main page under Set Up Contributions>Active Schedules.

Click on the schedule and select “Edit” to make changes or “Delete” to remove it completely.

**Active schedules**

**HSA** Recurring  
Next posting date: 3/24/2023

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Accounts	Effective date	Schedule
Health Savings Account	3/24/2023	Every 2 weeks on Friday

Delete
Edit

## Reports > HSA Funding Collection Notification

This report details the funds that have pulled for HSA funding. This report is made available once it's been generated via the Home page where Recently Created Reports are listed, as well as via the Reports tab.

**Reports** View all reports

Employer Funding Notification <small>EXCEL</small>	Mar 15
Claims Reimbursement Notification <small>PDF</small>	Mar 15
Debit Card Funding Notification <small>EXCEL</small>	Mar 15
Debit Card Funding Notification <small>EXCEL</small>	Mar 14
Debit Card Funding Notification <small>EXCEL</small>	Mar 14
<b>HSA Funding Collection Notification</b> <small>CSV</small>	Mar 11

OR the report can be found under “Reports” from the left menu & then HSA Funding Collection Notification.

- Reports
- Employees
- Tools
- Requests

<b>Claims Reimbursement Notification</b> <small>View all claims scheduled to be reimbursed on a specific date.</small>	<small>Last run Mar 15, 2023</small> >
<b>Debit Card Funding</b> <small>View a summary of the debit card transaction amounts and fee amounts by plan.</small>	<small>Last run Mar 15, 2023</small> >
<b>Debit Card Transactions</b> <small>View a list of all of the debit card transactions by settlement date.</small>	<small>Last run Mar 3, 2023</small> >
<b>Employer Auto-Enrollment Notification</b>	<small>Last run Jan 16, 2023</small> >
<b>Employer Contributions</b> <small>View employer contributions in applicable plans as of specific contribution date.</small>	<small>Last run Mar 10, 2023</small> >
<b>Employer Fee Funding Notification</b> <small>View all fees to be funded on a specific date.</small>	<small>Last run Mar 1, 2023</small> >
<b>Employer Funding Notification</b> <small>View the summary and details of the claims that need to be funded along with any fu...</small>	<small>Last run Mar 15, 2023</small> >
<b>HSA Account Detail</b> <small>View an overview of each consumer's HSA along with individual payroll deduction and...</small>	<small>Last run Dec 2, 2022</small> >
<b>HSA Funding Collection Notification</b> <small>View HSA funding notifications sent to the employer containing the payroll deductio...</small>	<small>Last run Mar 11, 2023</small> >
<b>Payment History</b>	<small>Last run Sep 1, 2022</small> >

The **HSA Account Detail Report** is similar to the Account Balance Detail Report and includes HSA Balance information.

**HSA Account Detail**

View an overview of each consumer's HSA along with individual payroll deduction and...