

Welcome to your CBIZ Health Savings Account! Now that you have established your payroll deductions with your Employer you will access the CBIZ Consumer Portal to accept the Terms and Conditions and establish an account for the Health Savings Account.

You must accept the “Terms and Conditions” in order to establish an account. Failure to do so could result in delayed access to funds.

Under the Message Center you will click on HSA Enrollment and go through the steps of:

- Entering Dependent Information for Family Coverage
- Add bank account information for Direct Deposit
- Enter Beneficiary information
- Review Terms & Conditions
- Review summary and confirm enrollment.

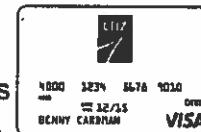
Enclosed you will find important information to help you manage your Health Savings Account.

- More detail on how to use the Consumer Portal to enter transactions, verify balances and view investment information online is provided in the [Consumer Portal QuickStart guide](#).

How to learn more about your accounts: You can access all of your health care account information on the Consumer Portal at myplans.cbiz.com. This one-stop portal gives you 24/7 access to view information and manage your accounts. It enables you to:

- Request a disbursement
- Track expenses
- View up-to-the-minute account balances
- View your account activity and payment (distribution) history
- Report a lost/stolen card and request a new one
- Update your personal profile information
- Change your login ID and/or password

How to use the funds in your accounts: DEBIT CARD: You may use your CBIZ Benefits Card to access funds in your health savings accounts. You will receive this card in the mail separately and may use the card at any health care eligible merchant or department stores and grocery stores that comply with IIAS for health care related items.



The CBIZ Benefit Debit Card can be used for your available balance in the Health Savings Account for qualified health care expenses such as:

- Prescription and health plan copayments, deductibles and coinsurance
- Dental expenses and Orthodontics
- Vision services and eyeglasses
- COBRA Insurance Premium and Long Term Care premiums



MOBILE: Conveniently manage your health savings account information when you want, from wherever you want. Whether on your couch or at the store, the CBIZ My Plans App for iPhone® or Android™ smartphones makes it easy to manage your benefit account on the go.



The mobile app from CBIZ, provides you with seamless account access since it is an extension of the CBIZ Consumer Portal. The CBIZ My Plans app provides time-saving options for you to:

- Check current HSA balances
- View account activity and receive alerts via text message
- View HSA transaction details
- Review expense information
- Enter a new expense

Get started with CBIZ My Plans in minutes! Simply download the App for your Android or iPhone (also compatible with iPad® and iPod touch®) and log in using the same password you use to access your CBIZ Consumer Portal and set up the 4-digit PIN number.

If you have any questions, please contact us at cbizflex@cbiz.com or 1-800-815-3023.

Sincerely,
CBIZ FLEX
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1-800-815-3023, Option 4

