Web-Based HSA Deposits

User Guide 1.0

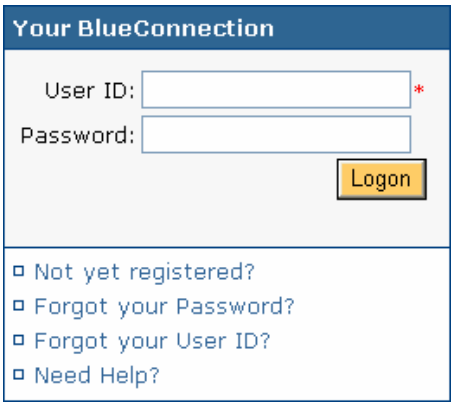
BlueCross BlueShield of Delaware

HSA Deposits Tool on *Your BlueConnection for Employers*

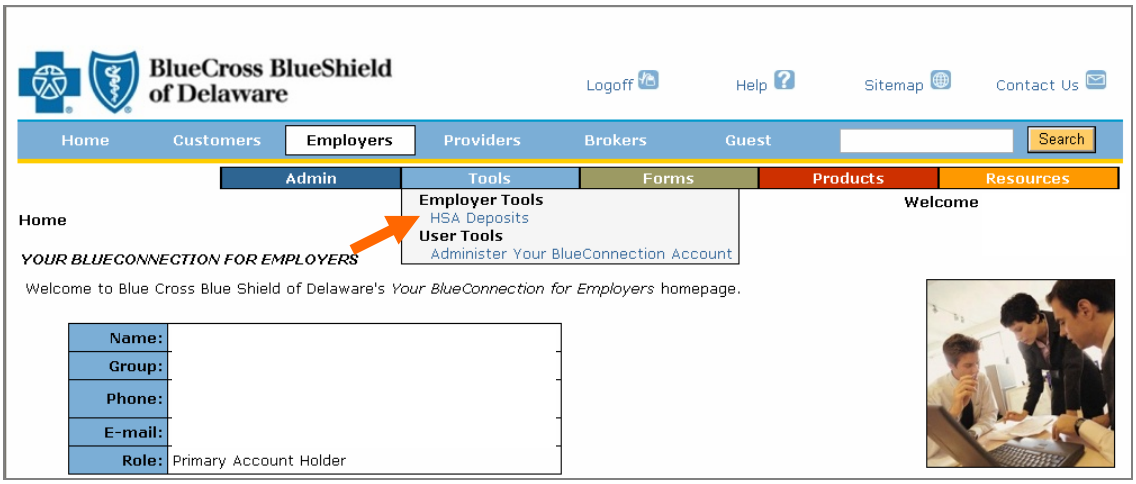
The *HSA Deposits* tool will allow employers to use the *Employers* portal on **bcbsde.com** to make HSA deposits online, eliminating the need to complete the deposit request by email or mail. This convenient tool will streamline the transaction process, and enhance the timeliness and accuracy of deposit requests. After electronic approvals from the employer and BCBSD, the transaction is completed between the employer's bank and the HSA bank.

Completing an HSA Deposit Transaction

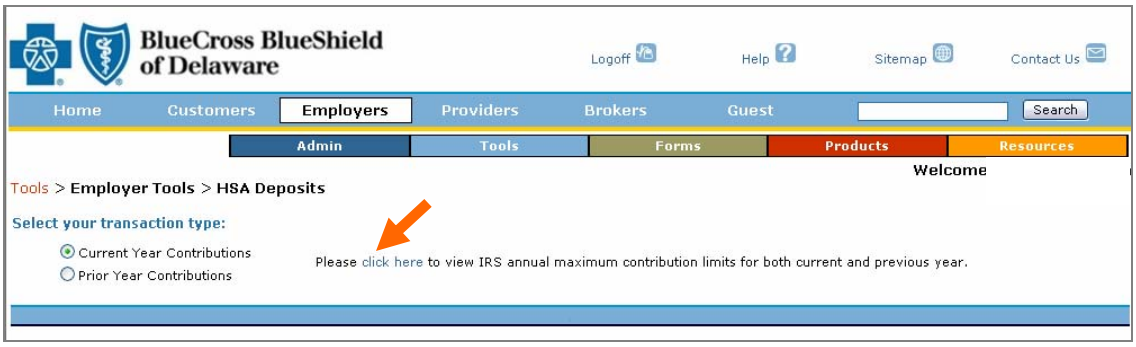
1. Under the *Employer* portal at **bcbsde.com**, find the *Logon* box on the left side of the page.
2. After you enter your User ID and password, click *Logon*.



3. Go to the *Tools* drop-down box and select *HSA Deposits* under the *Employer Tools* heading.

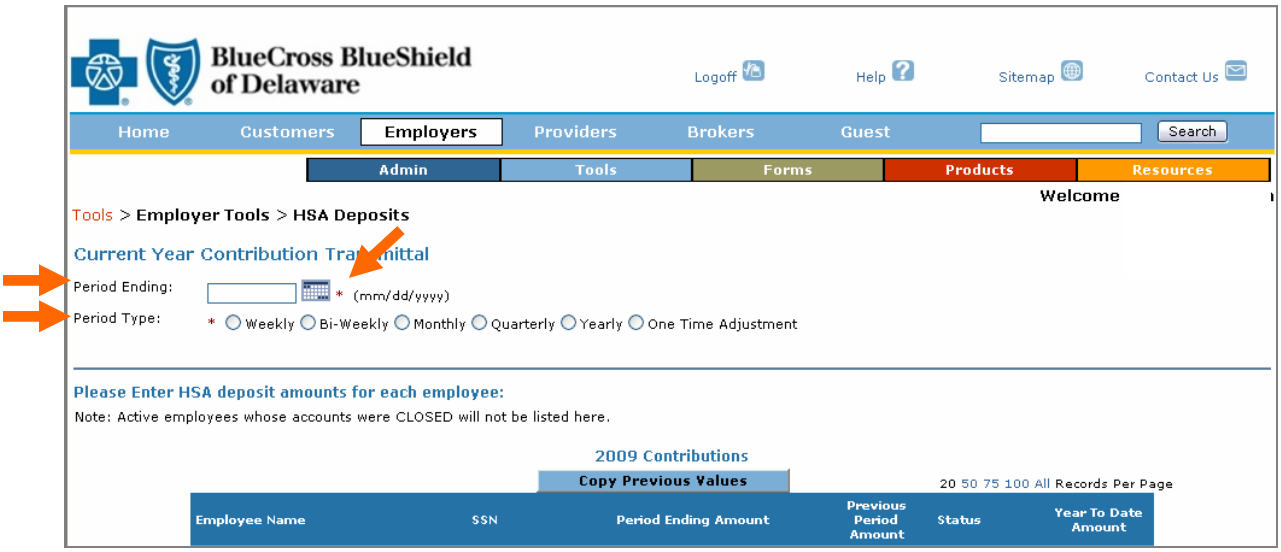


4. After you select *HSA Deposits* from the *Tools* menu, you will be given a choice between the current year contributions and the previous year.
    - If you are unsure of the maximum contribution allowed, click on the link (shown below) to view a PDF document of the IRS maximum contribution limits for either year.



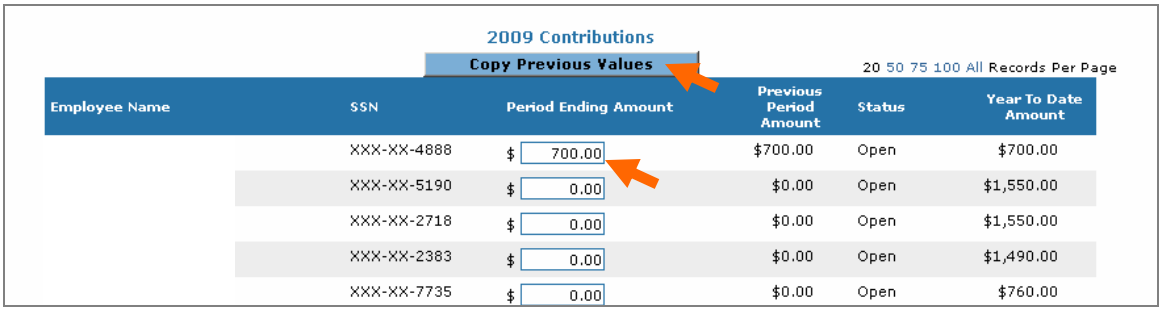
5. You will then see the *HSA Deposits* main page. This page includes a table of eligible employees, their masked social security numbers, the *Period Ending* amount column (open field), previous period contributions, account statuses, and finally, the year-to-date dollar amount of contributions.

6. The fields at the top of the page marked with a red asterisk (*) are required. Leaving any of these fields incomplete will prevent you from completing a transaction.



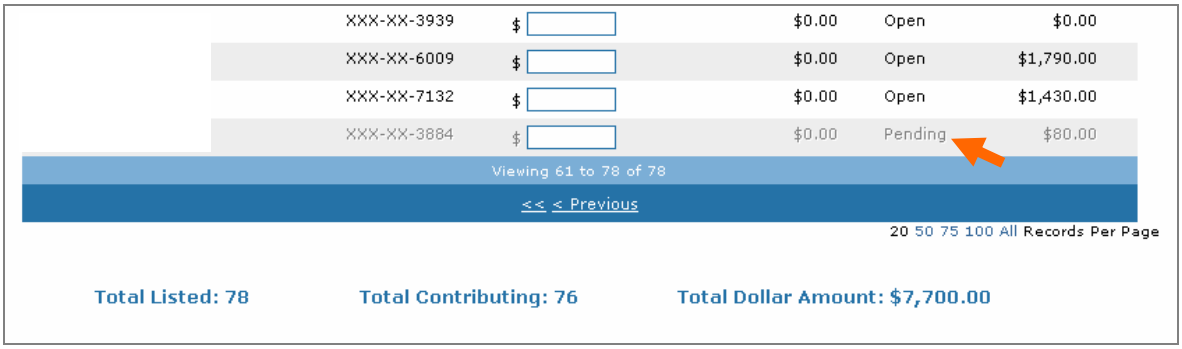
7. Enter the appropriate information for your desired contribution date under *Period Ending* and click on the type of contribution you are making (weekly, bi-weekly, monthly, quarterly, yearly or one time adjustment) under *Period Type*.

8. Once entered, you can complete the *Period Ending Amount* column with the desired contribution dollar amount for each employee. (If nothing is being contributed to an employee, you may leave the box empty).
    - If all values will be the same as the last period's contributions, click the *Copy Previous Values* button positioned at the top of the grid in the center; this will automatically apply all previous values to the list of current employees' active accounts.

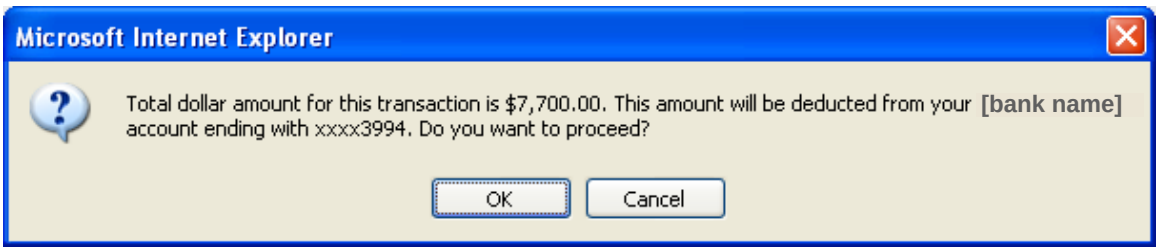


- If you attempt to deposit an amount that is over the annual statutory limit for an employee, you will receive an error message detailing the issue and the remaining maximum contribution allowed for that employee during the calendar year.

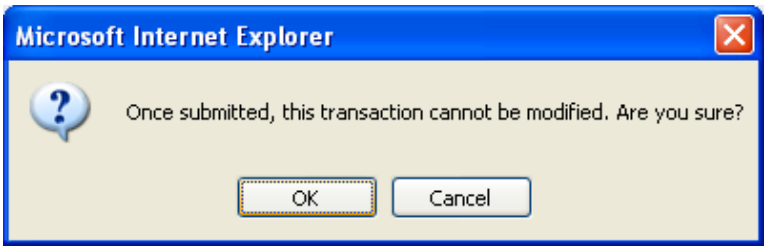
9. At the bottom of the page are the total listed (employees), total contributing and the total dollar amount for all contributions entered for the given period.
    - The number of listed employees may be higher than the contributing employees. If an individual is listed, but not eligible to contribute, his/her name and information will appear "grayed out," as pictured below, with his/her status listed as "pending."



10. Once all contributions have been entered into their appropriate fields, click *Submit*. You will be prompted to ensure that the total dollar amount, name of bank and bank account number are all accurate.

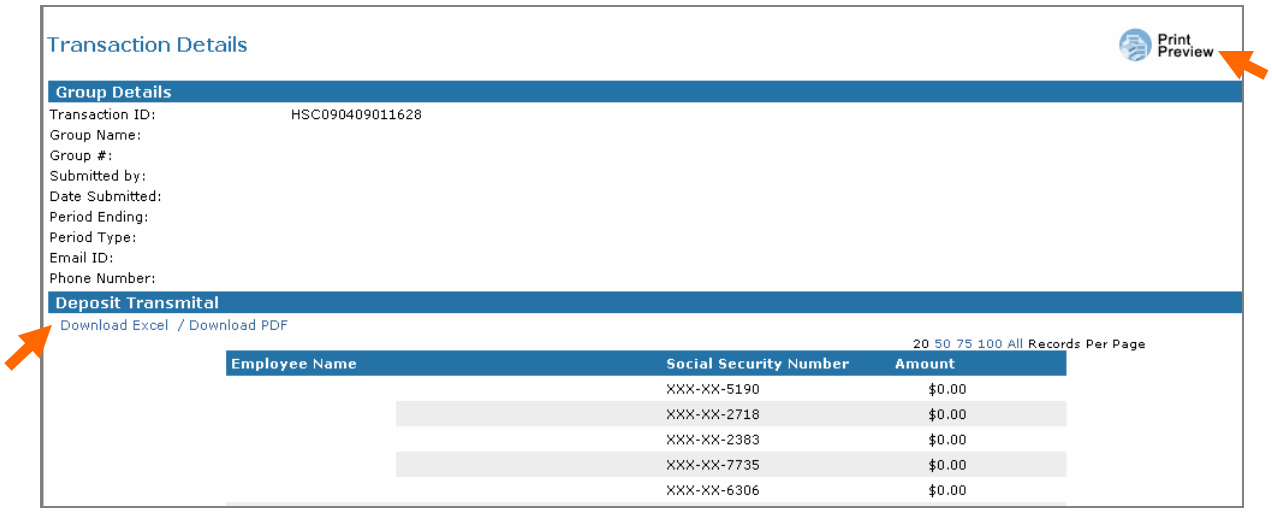


11. Click *OK* and another dialog box will ask you to re-verify that you wish to proceed with the deposit. Click *OK* again.



12. The next page will serve as your receipt for the transaction. You will see your group details at the top of the page, and the list below will reflect the contributions you have just entered for each employee.

    - There are two download options at the top of the *Deposit Transmittal* section. Clicking on either link will give you the option to save or open a copy of the transmittal in the selected format (Excel or PDF). Please note: if you click to open the copy, remember to save a copy for your files (click *Save a copy/Save as* under the File dropdown box, or click on the disk icon to save). You may also print a copy for your records by clicking *Print Preview* for a printer-friendly option.



It is recommended that you save a copy in some format for your records.

Reminder: **This information can no longer be modified** once you have reached this page and approved the transaction for processing.

Trouble Shooting

If you have any questions about your HSA transaction or the *HSA Deposits* tool, please email HSA@bcbsde.com.

Questions about obtaining your User ID and/or password for *Your BlueConnection for Employers* should be directed to the BCBSD Help Desk at helpdesk@bcbsde.com or 302.421.8430.