Employer Enrollment Instructions

Purpose: Follow these instructions to enroll your company with HSA Resources and open HSAs for your employees .

1 Enroll Online

Enrolling online is simple 3 step process that **takes less than 5 minutes**, just **Enroll Now** to get started.

Register your company – to begin you need to create a login ID and password and provide us with some information about your company, your contact person and how you plan to fund your employees HSAs.

Add your employees – login to the employer site using the ID/password you just created and add the name of each employee that will be participating in your HSA program along with the amount of their initial contribution.

Create your Initial Contribution Statement – After you have added all of your employees and contribution amounts select *Submit Contributions* and *Submit by Check* to print your Initial Contribution Statement.

2 Complete Employee Applications

Each employee that will be participating in your HSA program must complete and sign an HSA Application. Please note that banking regulations require that we receive a copy of each employees driver's license or ID to verify their address.

***Transfer Form.** Individuals transferring HSAs from another HSA custodian must complete and return a Transfer Form. Include that in the package to us and we will take coordinate the transfer process.

3 Mail in the Completed Package

Congratulations, you're almost done with the initial set-up. Please send us a package containing: (1) completed applications, (2) your Initial Contribution Statement, and (3) a check for the total made payable to Falcon National Bank (note: we cannot open HSAs without funding). We will email you a confirmation when the HSAs are opened. Mail completed package to: Falcon National Bank
HSA Department
1010 West St. Germain St., Suite 150
St. Cloud MN 56301

Making Recurring Payments After Your Accounts Are Open

Now that you are done with set-up, you may want to work on the best method to send in your next HSA payment for your employees. We are flexible and work with you on how to do this. Below are the three most common methods.

Check. To submit a contribution via check at any time, simply login to the Employer site, review/change employee contribution amounts and click *Submit Contributions* in the right-hand toolbar. Then click *Submit by Check* and print out the Contribution Statement and mail it along with your check. If you'd prefer, we will also accept your own spreadsheet

Electronically – We Assist. We can help you set up your payments to occur electronically using the ACH system. You must complete our ACH agreement. This option requires a little work at the beginning but is fast and easy once established because the money is pulled electronically from your corporate checking account and placed into your employees' HSA. You will receive notification when contributions are due. You login to the Employer site and submit your contributions by ACH. This is quick and simple and you do this each time you want to make a contribution (we do withdraw from your corporate checking account without your action each time). Call 866.757.4727, extension 2 to get started.

Electronically - Using Your System. You can also use your existing cash management system or your bank's online banking to set up an ACH contribution on your end. This gives you full control. Please let us know if you would like to use this option and we will provide your employee's account numbers and other required banking information.

Need help? Call an Employer Assistant at 866.757.4727, extension 4