

WHAT TO EXPECT AFTER ENROLLING IN AN HSA

You've finished enrolling in your Health Savings Account (HSA) with Benefit Resource (BRI)! Here's what you'll receive over the next two weeks after opening your HSA:

- **1-2 business days:** an email confirming that your account has been opened.
- **5-10 business days:** a welcome letter from Benefit Resource and UMB that includes your account number and key information about how to access and use your account.
- **10 business days:** Beniversal® Prepaid Mastercard® will arrive in a plain white envelope. Money will start showing up on the card as you fund your HSA. See the card mailer for more details.



Important information about procedures for opening a new account: Federal law requires all financial institutions and their third parties to obtain, verify, and record information that identifies each person who opens an account. **What this means for you:** When you open an account, we will ask for your name, address, date of birth, and other information that will allow your identity to be verified. You may also be asked to provide a copy of your driver's license or other identifying documents. Requests for additional information will come from UMB. You will be asked to respond within 15 days to ensure your account remains open and account access is not affected.

ONGOING COMMUNICATIONS

Once your account has been established, you will receive the following ongoing communication items:

1 ACCOUNT STATEMENTS

You will receive periodic account statements by mail. A paper statement fee applies (see your HSA account holder agreement). Avoid this fee by logging into your account through BRIWeb and updating your statement preferences to receive electronic statements.

2 IRS FORM 1099-SA

- Mailed by January 31 each year
- Provides a record of your HSA withdrawals
- Access a year-end summary at [BenefitResource.com](https://www.benefitresource.com)

This document, along with a W-2 from your employer, will be used to report activity involving your HSA when filing your taxes.

3 IRS FORM 5948-SA

- Provided between April 15 and May 31 each year
- Gives confirmation of your HSA contributions

This document is provided for record keeping purposes only and does not require any action.

Pro Tip: Receive real-time account updates by signing up for BRIAlerts.

TIPS FOR MANAGING YOUR ACCOUNT

Login to BRIWeb: BRIWeb is your secure account management center. Get complete access to your HSA, including card transactions, account statements, and more!

Easily register with your Company Code and Member ID, provided by your employer.

Download BRIMobile: Get on-the-go access to your account balance and transaction information. Available from the Apple App Store or Google Play.

To log in, use your BRIWeb Login ID and Password. Follow the on screen instructions to register.

Contact Us: Participant Services is available to assist with your questions.



(800) 473-9595 (Monday–Friday, 8am - 8pm (ET))



ParticipantServices@BenefitResource.com



Live chat is available through the participant login