

# HSA Quick Start Guide

Lively Health Savings Account (HSA)

## 1 Check your email

You will receive an email from Lively to enroll in your new HSA. Click on the “**Complete Enrollment Now**” button within the email to get started.

## 2 Complete enrollment

You will be redirected to the Lively website to complete enrollment. Depending on how your employer enrolled you, be prepared to provide:

- A secure password
- Your Social Security Number (SSN)

Please review and accept Lively’s Terms & Conditions and Privacy Policy. If you’re unable to complete enrollment with your email or SSN, reach out to Lively Support at [support@livelyme.com](mailto:support@livelyme.com) for help.

## 3 Log in to view your new Lively HSA account

Upon reviewing terms and conditions from our financial institution partner, you will be directed to your new Lively account. Once you begin contributing and using your Lively debit card (which will be mailed to you), you will see information such as your recent contributions, transactions, deductible tracking, and more.

## 4 Start the transfer process (if applicable)

If you have an HSA with a different provider, you may request to transfer your assets over to Lively. Account holders have the option of transferring cash assets through a Direct Rollover or a Trustee-to-Trustee transfer. The transferring of investments will require an In-Kind transfer.

For account holders with cash and investment assets to be transferred, we recommend starting the investments transfer process before transferring cash assets. Learn more about your transfer options [here](#).

## 5 Link your bank or credit union account (optional)

Navigate to the **Settings** page from the top-left menu of your HSA dashboard to connect your bank or credit union account. This allows you to add direct contributions or to manually reimburse yourself for HSA eligible expenses paid out-of-pocket.

6

## Set up your HSA to work for your goals (optional)

Securely connect your health plan information, so you can track your claims, or how close you are to hitting your deductible. You also have the option to connect external bank or credit union accounts through Lively's Expense Scout feature, which automatically scans for reimbursable transactions.

Use your HSA how you want — save, spend, or invest — and feel good about it.

New to HSAs? Check out Lively's [HSA Guide](#) to learn more, and our [What's Eligible](#) to learn more about eligible expenses with your HSA.

7

## Download the Lively mobile app (optional)

Download the 'Lively Benefits' mobile app to take your HSA on the go, available for iOS and Android.

# Have questions?

We're here to help.  
Email or call Lively for responsive, expert assistance.

