

# Linking a Personal Bank Account to your HSA

Linking a personal bank account to your HSA makes it easy to transfer funds between the two accounts. To get started, follow the simple steps below.

## Add an External Bank Account

- 1 Log into the HSA Bank [Member Website](#).
- 2 Navigate to the "Banking" section of the "Profile" tab.
- 3 Click on "Add Bank Account," and enter the information related to your checking or savings account, along with your financial institution's name and address.
- 4 Click "Submit."

The screenshot shows the 'Banking / Add Bank Account' form. The navigation bar includes Home, myHealth Portfolio, Accounts, Education & Support, Statements & Notifications, Profile, and I Want to... The left sidebar has Profile, Banking (selected), Payment Method, and Login Information. The main form area is titled 'Banking / Add Bank Account' and contains the following fields:

- Bank Account Information** (marked as \*Required):
  - Routing Number \* (text input)
  - Account Number \* (text input)
  - Confirm Account Number \* (text input)
  - Account Type \* (dropdown menu, currently showing 'Checking')
  - Account Nickname \* (text input)
- Bank Institution Information**:
  - Bank Name \* (text input)
  - Bank Address \* (text input)
  - Address Line one (text input)
  - City (text input)
  - Select a state... (dropdown menu)
  - Zip Code (text input)

At the bottom of the form are 'Cancel' and 'Submit' buttons.

HSA bank will then send a small deposit to your personal account within two business days. Once the deposit is received in your external account, you will need to validate your banking information using the following steps:

## Validate Banking Information

- 1 Navigate to the "Banking" section of the "Profile" tab.
- 2 Click on "Activate" under your bank account information.
- 3 Complete the activation process by entering the amount (\$0.01 to \$1.99) that Webster Bank deposited into your account, and click "Submit." Your account will now be available for direct deposit.

The screenshot shows the 'Banking / Activate Bank Account' form. The navigation bar includes Home, Accounts, Profile (selected), Statements & Notifications, Tools & Support, myHealth Portfolio, and I Want to... The left sidebar has Profile, Banking/Cards (selected), and Login Information. The main form area is titled 'Banking / Activate Bank Account' and contains the following fields:

- Activation Details**:
  - To activate this bank account you must verify the amount that was deposited to the account below. You are allowed only two attempts before the account will be locked.
  - Bank Name: KOHLER CREDIT UNION
  - Routing Number: xxxx8417
  - Account Number: xxxx4000
  - Amount \* (text input, showing '\$ 0.86')
    - Enter the amount deposited into your account.

At the bottom of the form are 'Cancel' and 'Submit' buttons.



Please call the number on the back of your HSA Bank debit card or visit us at [www.hsabank.com](http://www.hsabank.com)