

Registration

As the world of healthcare becomes more complex, a Health Savings Account (HSA) is a great option for saving money and managing your healthcare costs. As you gain control over your healthcare spending, you may feel empowered to make more informed healthcare decisions. An HSA is smart for your health and your wallet!

Before you begin, you will need the following information:

- Code: 0AE-MBCHSA (*hint: the first character is a zero*)
- Social Security Number
- Dependent(s) Social Security Number and Date of Birth (*only if you plan to designate a dependent for secondary debit card or beneficiary designation during the enrollment process*)

To open an HSA online, visit www.midwestbankcentre.com/ and follow the simple steps below.

Step 1:

Enter your Code (provided above) under **New account** and select **Get Started**.

Step 2:

Enter your personal information.

- Fields with a red asterisk (*) are required.
- An email address is required to provide you with the necessary notifications, monthly account statements and other important information

Step 3:

You will be prompted to establish responses to security questions in the event that you forget your password or when you process certain account transactions. Select **Next** to continue.

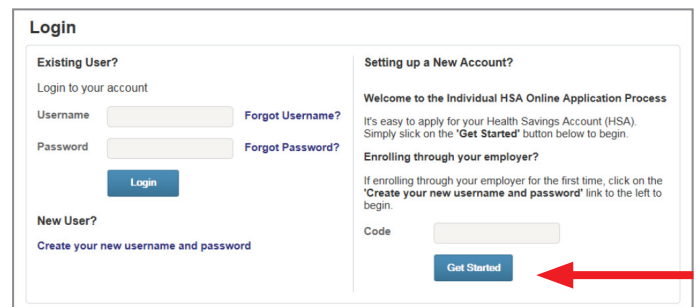
Step 4:

Read and agree to the HSA Enrollment Agreements displayed. Each document must be agreed to in order to continue with the enrollment. Select **Next**.

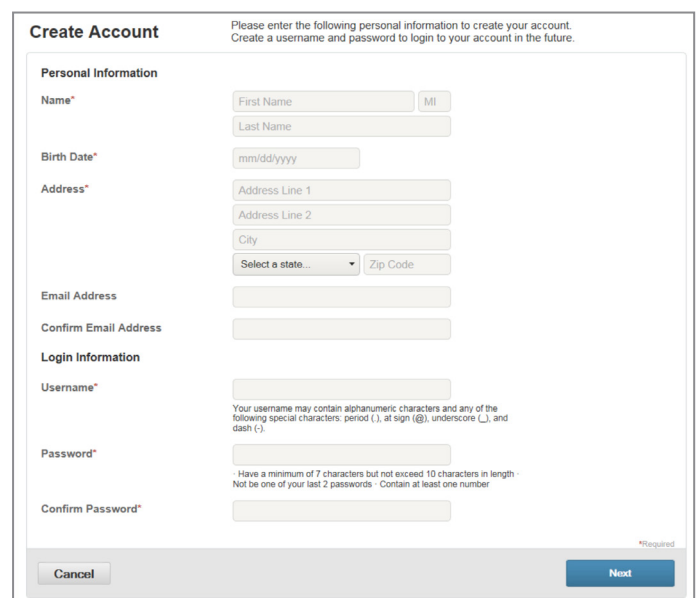
Step 5: (Only if adding dependents)

Enter Dependent information and select **Add Dependent**. Once added, the dependent(s) will display at the top of the page under the My Dependents section. Select **Next** to continue.

Note: If you intend to issue additional debit cards to eligible dependents, you must add them as a dependent first.



The screenshot shows the 'Login' page. On the left, there are two sections: 'Existing User?' with fields for 'Username' and 'Password', and 'New User?' with a 'Create your new username and password' link. On the right, there is a 'Setting up a New Account?' section with a 'Get Started' button. A red arrow points to this button.



The screenshot shows the 'Create Account' page. It has a title 'Please enter the following personal information to create your account. Create a username and password to login to your account in the future.' Below this, there are several sections: 'Personal Information' with fields for 'Name*' (First Name, MI, Last Name), 'Birth Date*' (mm/dd/yyyy), 'Address*' (Address Line 1, Address Line 2, City, State dropdown, Zip Code), 'Email Address' (Email Address, Confirm Email Address), and 'Login Information' (Username*, Password*, Confirm Password*). There are 'Cancel' and 'Next' buttons at the bottom.

Step 6:

Review the HSA Qualifications and certify that you are eligible for an HSA. Choose the Qualifying Health Plan Coverage level (Individual or Family) from the drop down menu. Select **Next** to continue.

Selecting additional payment types:

Step 7:

Review the Payment Methods and if selecting Direct Deposit to have reimbursements routed to your personal checking or savings account, enter your bank account information.

You will automatically receive an HSA Debit Card in your name. If desired, select Issue Card for your spouse and/or qualified dependent(s). **Note:** To issue a card for qualified dependents, they must be 18 years of age or older. Select **Next** to continue

Step 8:

Add new beneficiaries or select the beneficiaries from the Dependents box, located on the right-hand side of your screen (this will pre-fill the information), and adjust your Share Percentage (must be a whole number). Select **Add Beneficiary**.

Note: To add a contingent beneficiary, choose the individual from the Dependents box or complete the required fields and adjust Share Percentage. Select **Add Beneficiary**. Select **Next** to continue.

Step 9:

Review your Enrollment Summary and select **Update** if changes are needed. Select **Next** to continue.

Step 10:

Review the HSA Account Creation Authorization and **Check** that you have read and agreed to each paragraph. Select **Submit Enrollment** to continue.

HSA Account: Creation Authorization
Agreements Profile Dependents Eligibility Payments Beneficiaries Summary Confirmation

By submitting the enrollment, you are requesting that a Health Savings Account (HSA) be opened in your name.

I affirm that all information I have provided is true and correct and may be relied upon by the Designated Representative and the HSA Custodian.

I understand the eligibility requirements for this HSA and state that I am responsible for determining whether I qualify to make deposits to this HSA. I am responsible for:

A. Determining that I am eligible to make contributions to an HSA for each year I make a contribution;

B. Ensuring that all contributions are within the maximum limitations set forth by the tax laws, taking into account my coverage and the applicable deductible under a high deductible health plan;

C. The tax consequences of any contributions (including rollover contributions) or distributions;

Submit Enrollment < Previous

Congratulations!

An HSA Enrollment Confirmation screen will appear when you have successfully enrolled. Please print this confirmation page for your records.

Your HSA debit card(s) will be mailed within 7 – 10 days.

Thank you for selecting the Midwest BankCentre HSA; we look forward to serving you.

If you have any questions, please contact HSA Consumer Services at myhsa@healthaccountservices.com or call 877-780-3399, Monday – Friday, 7:00 a.m. – 7:00 p.m. CT.

HSA Enrollment: Confirmation
Agreements Profile Dependents Eligibility Payments Beneficiaries Summary Confirmation

Successfully Enrolled in Health Savings Account

Congratulations, you have enrolled in your health savings account. Please print this page for your records.

Home Print