



How to make an electronic contribution

1. Set up direct deposit

The screenshot shows the BenefitWallet user interface. On the left, there is a 'QUICK LINKS' menu with 'My Account' expanded to show options like 'Contribution Center', 'Payment Card', 'Direct Deposit', and 'Update'. A callout box points to 'Direct Deposit' in this menu, stating: "From your landing page, select 'Direct Deposit' from the Quick Links on the left navigation menu."

The main content area shows 'Account Information' for an HSA account with a balance of \$921.33 and 'My Spending by Category' pie chart. Below this is the 'Direct Deposit Information' section, titled 'Bank Account Information'. It includes a form with the following fields:

- * Bank Name: Sovereign Bank
- * Account Type: Checking Account
- * Reimbursement Method: Direct deposit into this account

Below the form is a check image with the routing number 123456789 and account number 333333333. Brackets connect these numbers to the corresponding input fields below the check:

- * Routing Number: 123456789
- * Account Number: 333333333
- * Re-enter Account Number: [Empty field]

A callout box at the bottom left states: "Select 'Update,' then insert and save your direct deposit information, and select your preferred reimbursement method."

2. Select "Add or Change Contributions"

BenefitWallet™ Home Log Out

My Account Claim Center Communication Center FAQs Help Center

QUICK LINKS

My Account

- Contribution Center
 - Add or Change Contributions
- Payment Card
- Direct Deposit
- My Profile
- Alerts
- Password
- Order Checks
- HSA Statements
- Rate and Fees Schedule
- Investments
- Tax Forms

Contribution Center

Contributions from your personal bank account to your HSA will be funded by Electronic Funds Transfer (EFT). Follow these steps to set a Contribution Schedule.

- You must have Direct Deposit set up in order to make this type of transfer. Please verify your direct deposit information in the Bank Account Information section below. If you have not yet set up Direct Deposit, or if you want to make a change to your bank information, click the Direct Deposit link to make these changes before making any type of contribution.
- Fill in all required fields below to schedule for a Recurring Contribution, make a One-Time Contribution, or contribution.
- When finished, please verify all information before clicking the "CONFIRM" button.

***Please note: You may only enter one Contribution Schedule at a time. Entering a second Contribution the first has processed will overwrite the first contribution. Please wait until a Contribution Schedule is processed before entering a new Contribution Schedule.**

Transaction Schedule
Recurring Contributions are scheduled for the 1st of each month. If the date falls on a weekend or holiday, the transaction will be triggered on the next business day. Any One-Time Contribution will be triggered the same day unless requested on a weekend or holiday, in which case the transaction will be triggered the next business day. The actual transaction may take several days.

HSA Contribution Limits
Contributions should not exceed IRS limits:

- For the 2013 tax year, the maximum contribution for eligible participants with individual (or single) coverage is \$3250, and the maximum contribution for eligible participants with family coverage is \$6450. Any account holder age 55 or older (and not yet enrolled in Medicare) can make an additional "catch-up" contribution of up to \$1000.
- For the 2014 tax year, the maximum contribution for eligible participants with individual (or single) coverage is \$3300, and the maximum contribution for eligible participants with family coverage is \$6550. Any account holder age 55 or older (and not yet enrolled in Medicare) can make an additional "catch-up" contribution of up to \$1000.

Bank Account Information				
Bank Name	Routing Number	Account Number	Account Type	Email
Sovereign Bank	123456789	xxxxx3333	Checking Account	

Change Bank Account Information

Current Contribution Schedule Information		
* Amount	* Start Date	* Frequency
<input type="text"/>	<input type="text"/> (mm/dd/yyyy)	<input type="text"/>
		* Duration <input type="text"/>

Cancel Full Schedule Cancel Next Contribution Confirm

From the contribution center, select "Add or Change Contributions" from the Quick Links on the left navigation menu.

Enter your amount, start date, frequency and duration, then confirm your changes.

For more information

Contact the BenefitWallet Service Center at 1.877.484.5029.

