

Health Savings Account Enrollment Materials

As part of your High Deductible Health Plan (HDHP) and your Health Savings Account (HSA) benefit, your employer has selected Wright Patt Credit Union (WPCU) as your HSA Custodian and Navia Benefits Solutions as your third party HSA administrator. Your HSA program is designed to help you save and pay for your health care expenses on a tax-free basis and provide you with the resources you need to answer all of your HSA questions.

Health Savings Account Contribution Form: If you are interested in contributing to your HSA on a pre-tax basis, you must complete the HSA contribution form and forward to your employer's Benefits Administrator.

You will receive an email deposit confirmation whenever a deposit has been made as a result of a payroll deduction from your paycheck through your employer.



NEXT STEPS for WPCU HSA online enrollment:

Visit www.wpcu.coop/applyhsa to enroll in your new Wright-Patt Credit Union (WPCU) HSA.

Once your HSA is approved by WPCU, you will receive a WPCU Welcome Kit via email. **Please keep an eye on your e-mail/phone 48 hours after completing the online enrollment in case WPCU needs to request additional information from you.**

For Current WPCU Members:

- If you are a current member, you will enter your WPCU account number and enter your information online. In two business days, a WPCU representative will contact you to explain next steps. **Please note, the existing account must be in your name to be a current member.**
- You will have to go through the TrueSaver setup process and it will take you through the steps of paying the \$5.00 membership fee. However, they will not charge you the \$5.00 since you are a current member.

For New WPCU Members:

- If you are a new member to WPCU, you will enroll online and enter your information.
- A \$5.00 membership fee is required to open the account. To fund the \$5.00 deposit, you will be given the options to electronically transfer funds from another financial institution, by debit or credit card.

Please refer to the helpful tips below on Wright-Patt's online enrollment process.

- Choose **WPCU Membership is a benefit from my job (then select your employer in the drop down), I live or work in an eligible county, OR I am an existing member with WPCU.**
- As membership into the credit union, you will open a **TrueSaver Savings Account** and deposit \$5. Click the + sign on the right hand side of the page under Required Products to open your account.
- Click **HSA** under Available Products for the HSA Enhanced option.
- Click the + sign on the right hand side of the page to select additional options including ordering a debit card and adding an authorized signer. Click **Add Account** to finalize your selections
- Confirm your Selected Products are TrueSaver and HSA Enhanced.
- Check the box to **Read, Sign and Submit** your information and Click Submit
- Provide the requested personal information, address, employer, contact, identification, employment, and additional information. Click Continue
- Add your beneficiary information.
- Fund your Truesaver account (\$5.00 fee). Credit card, transfer from another bank, internal transfer.
- Review your information, answer three questions (you are not subject to backup withholding unless you owe taxes to the government), and click submit.



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Any fees noted in this packet are a general overview; the custodian will supply a comprehensive schedule in your welcome packet.