

HSA Enrollment Instructions



Aetna HealthFund® Health Savings Account (HSA)

This instruction sheet outlines the necessary actions you need to take to enroll in the Aetna HealthFund HSA. By completing and signing the HSA Enrollment Form, you are selecting Aetna* as your HSA custodian and requesting Aetna to open an HSA on your behalf.

Please Note: Your enrollment kit may also include information about enrolling in your medical and/or dental insurance plan. You will need to complete additional forms to enroll in those benefits as well.

To enroll in the Aetna HealthFund HSA, please complete these steps:

- Read the Health Savings Account Custodial Agreement carefully and keep this agreement with your HSA records.**
- Complete the Enrollment (Small Group) form.**
 - Please do not submit check contributions at this time. If you wish to make a contribution by check, deposit slips will be included in your HSA Welcome Kit.
 - Dependents who go on COBRA can enroll in the Aetna HealthFund HSA by also completing the Enrollment (Small Group) form and putting COBRA in the Employer box.

- Complete the Beneficiary Designation form.**
- Complete the Electronic Funds Transfer Authorization (EFT) form, if applicable.**
- Keep a copy of these forms for your records.**
- You will need to submit the original HSA Enrollment forms to Aetna. Return these to your company representative, use the pre-addressed return envelope or send to:**

Attn: HSA Enrollment
Aetna, 151 Farmington Avenue
Hartford, CT 06156-8961

Email or fax copies of your form are not accepted. Print clearly in black ink, as all forms are scanned. White out and write over any errors or use a new form.

- You will receive an HSA Welcome Kit in 3 – 4 weeks. It will include your Aetna HSA Visa® debit card.** You will need to activate your debit card through the Aetna Navigator™ website to obtain your account number. Please note your debit card number and account number are not the same numbers. You can access Aetna Navigator through www.aetna.com.
- Once enrolled, if you have any questions, call the Member Services number on the back of your Aetna medical ID card.**

Note to Employers

- If you will be making regular payroll deductions, lump sum amount or periodic contributions to your employees' HSA accounts, you can obtain the Employer HSA Contribution Form by calling your broker or logging on to http://www.aetna.com/employer/small_group/current_clients/hsa.html.
- Initial funding of an employee's HSA account can be submitted no earlier than 10 days after the effective date of the HSA-Compatible High Deductible Health Plan (HDHP).
- Each employee's account will normally be credited within 3 – 4 business days after the form and check are received.
- Send the HSA Contribution form and check to:

Aetna HealthFund HSA
23127 Network Place
Chicago, IL 60673
- As a reminder, an HSA is a private bank account and only the member/account holder can access information about the account. Members can call the number on the back of their Aetna ID card for assistance.

*Aetna is the brand name used for products and services provided by one or more of the Aetna group of subsidiary companies. The Aetna company that underwrites benefits coverage is Aetna Life Insurance Company directly and also through an out-of-state blanket trust.

While this material is believed to be accurate as of the print date, it is subject to change.

We want you to knowSM



www.aetna.com