

## Quick Reference Guide

# Aetna HealthFund® Health Savings Account (HSA)

You can manage your Aetna HealthFund® HSA, administered by PayFlex®, using these helpful online tools.

Visit [www.aetna.com](http://www.aetna.com) to log in to Aetna Navigator®.

- **If you are already registered**, enter your user name and password.
- **If you are not yet registered**, please take a few minutes to provide the requested information.

Once you log in to Aetna Navigator, under **Balances** on the left side of the screen, you will see **Health Savings Account**. To access your account, click on **Details**.

**You will then automatically be connected to the website of PayFlex, your HSA administrator.** This site is where you can manage your account information in the following ways:

### Sign up for account notifications

- From **My Dashboard**, select **My Settings**.
- Select **Manage Notifications** and identify the types of notifications you wish to receive and how you want to receive them.
- Click **Submit**.

### Access account balances and alerts

#### View account alerts, balances and account activity

- You can access **My Account** through **Accounts Snapshot** in **My Dashboard**, from the **My Accounts and Services** link, or under the **Financial Center** tab.
- From **My Account**, you can:
  - View your account balance
  - See your transactions
  - Make a deposit, payment or withdrawal
  - Link your bank accounts
  - View your investments

### Take account-specific actions

- On **My Dashboard**, select **My Account** on the left navigation bar.
- From here, you can link to:
  - **My Profile** — view and edit personal, insurance or beneficiary information
  - **Transactions** — view by date, type or status
  - **Link My Bank Accounts** — link other bank accounts for ease in making deposits or withdrawals
  - **Make a Deposit** — make a deposit into your HSA from a designated, linked account
  - **Make a Payment** — make a payment from your HSA to a designated provider or merchant
  - **Make a Withdrawal** — withdraw funds from your HSA and direct them to a linked bank account
  - **My HSA Receipts** — upload receipts and link to specific transactions
  - **Expense Manager** — view, add and remove Expense Categories to track and manage your HSA expenses
  - **My Investments** — view and select from a variety of mutual funds for investing your HSA dollars

### Make a payment

- On **My Dashboard**, select **My Account** on the left navigation bar.
- Then select **Make a Payment**.
  - **Step 1:** Select who you want to pay (payee) from the drop-down box, or add a new payee with the + sign.
  - **Step 2:** Enter the date the payment should be made (origination date), amount to be paid, expense category and date of service.
  - **Step 3:** Review your payment and click **Submit** to complete the payment or **Previous** to make changes.
  - **Step 4:** Print a copy of your confirmation.

## Withdraw funds

- On **My Dashboard**, select **My Account** on the left navigation bar.
- Select **Make a Withdrawal** to withdraw funds from your HSA and deposit into a linked bank account.
  - **Step 1:** Enter the amount you want to withdraw, select the linked account to which the funds should be directed (if expense is IRS eligible), a description of the transaction and the date the transaction should be executed (origination date).
  - **Step 2:** Confirm your entry and click **Submit** to complete the withdrawal or **Back** to make changes.
  - **Step 3:** Print a copy of your confirmation.

## Make after-tax contributions

- On **My Dashboard**, select **My Account** on the left navigation bar.
- Select **Make a Deposit** to make a deposit into your HSA from another designated, linked bank account.
  - **Step 1:** Complete the following fields: Contribution Amount, Contribution Year, Bank Account (linked account from which the deposit should be made), Description (of the deposit transaction) and the Origination Date (the date the transaction should be executed). Hit **Continue** when finished.
  - **Step 2:** Review the deposit entry and either click **Submit** to complete the deposit or **Back** to make changes. Once submitted, a confirmation page will be displayed.
  - **Step 3:** Print a copy of your confirmation.

**Note:** The **Make a Deposit** option displays only after you have linked one or more bank accounts to your HSA.

## Choose your investments

- From **My Account**, select **My Investments**.
- To open an investment account that allows you to invest your HSA dollars with a variety of investment funds, click **Submit**.
- Read and electronically sign the agreement to complete the investment account process, which may take up to 24 hours.
- Once your investment account is set up, you are then able to transfer funds into and out of your HSA interest-bearing account.

## Link to useful tools

In **My Dashboard**, from the left panel, you will find the information and tools you need the most.

- **My Accounts and Services** — accesses the Financial Center
- **My Calendar** — displays pending and historical scheduled transactions
- **My Documents** — accesses an archive of documents either sent or received, as well as account-related forms
- **Plan My Benefits** — directs you to the Benefits Center, allowing you to view and/or enter your plan information
- **My Settings** — allows you to provide your preferred e-mail address and customize your account notifications and security question
- **My Resources** — points you to the Resource Center with educational materials, calculators, FAQs and more

## Access account-related forms

- On **My Dashboard**, select **My Documents** on the left navigation bar.
- To download and/or print the following documents, click on the **Document Title**.
  - Enrollment Verification Form
  - Contribution Coupon
  - Beneficiary Designation Form
  - Trustee Transfer Form
  - Address/Change Form
  - Account Closure Form

## Questions about your HSA?

You can contact Customer Service at **1-888-678-8242**

**Monday – Friday:** 7 a.m. – 7 p.m. CT

**Saturday:** 9 a.m. – 2 p.m. CT

**Benefit Options**  
Choice Value Health



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