

New HSA Quick Start Guide

Lively Health Savings Account (HSA)



1 Begin Enrollment

Visit secure.livelyme.com/signup. You will need to provide:

- Your email address
- A secure password

Please also agree to Lively's Terms & Conditions.

2 Determine Eligibility and Select Plan Type

You will need to be enrolled in a qualified health plan or have an existing HSA to enroll in your new Lively account. You can also select whether your high deductible plan covers just you or you and your dependents.

If you have an existing HSA at a different provider, you can also mark that you would like to transfer your assets over to Lively on the following page. Transfers are also available after account set-up.

3 Submit Your Demographic Information

You will need to provide your demographic information to continue. This step is required because of the USA PATRIOT Act. You will be asked to provide:

- Full Name
- Date of Birth
- Social Security Number
- Occupation
- Phone Number
- Home Address
- Mailing Address

4 Order Your Debit Card

You will be asked if you would like to order a debit card. Note that if you select 'No,' you can always order a debit card for yourself and your dependents in your Dashboard once your account is established.

5 Connect Your Bank or Credit Union Account (optional)

While this step is optional, we recommend connecting an external bank account to your Lively HSA. You can use this to add direct contributions or to reimburse yourself for eligible HSA expenses paid out-of-pocket.

6

Review Documents

Take a moment to review the Lively Terms and Conditions and any other documents. Acknowledge that you agree to them by following the instructions provided.

7

View Your New Lively Dashboard

After you agree to the Terms and Conditions, you will be directed to your new Lively dashboard. Remember to check your email to verify your email so that you can access all of your new HSA's features.

Once you begin contributing and using your debit card, which you will receive via mail after placing the order, you will see information such as recent contributions, purchases, and how much of your deductible you have spent thus far. Be sure to download the "Lively Benefits" mobile app, available for iOS and Android, to take your HSA on the go.

You're done!

If you ever have questions about your HSA, reach out to support@livelyme.com and we'd be happy to help.

