

Purpose: Enroll in or Change HSA / One-Time HSA Contribution

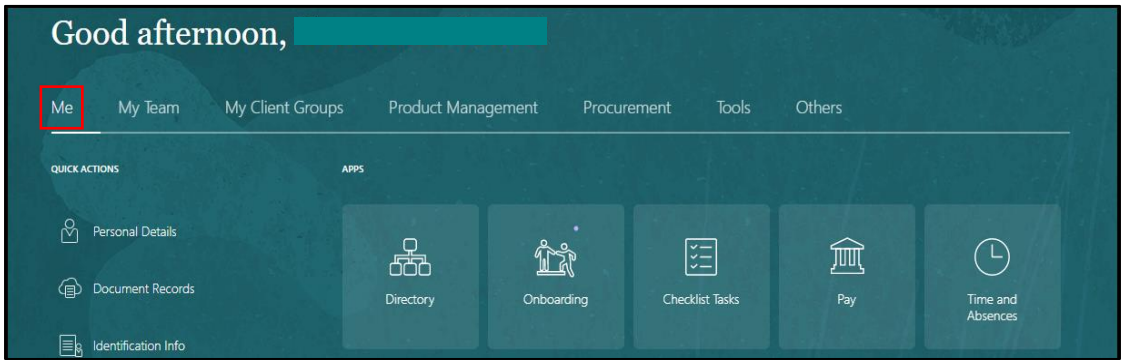
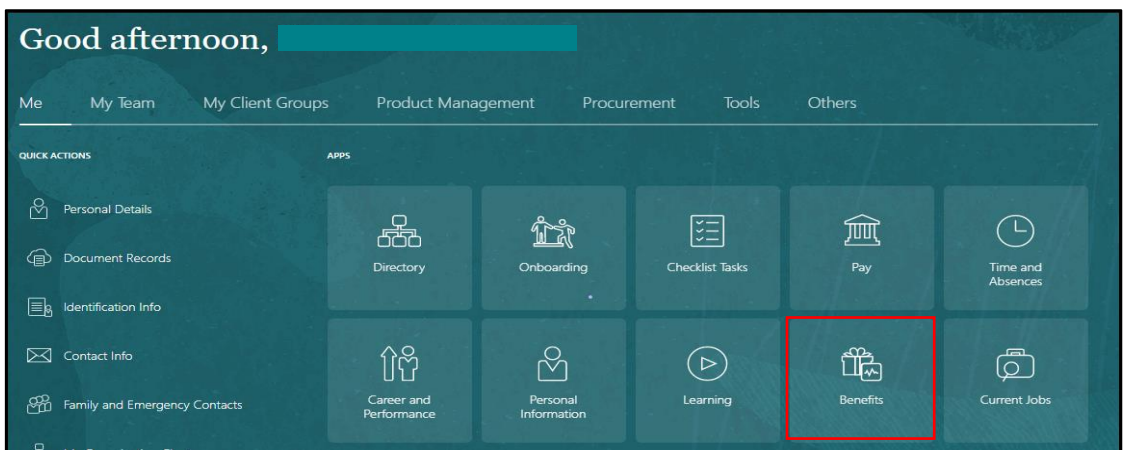
Audience: All Teammates



This job aid provides instructions **for enrolling in or making payroll contribution changes to your HSA**. See the [Create a One-Time HSA Contribution](#) instructions at the end of this job aid to make a **one-time** contribution.

Note: This job aid is for Greater Charlotte Region only.

1. Enroll in or Change HSA

NAVIGATION	ME → BENEFITS → REPORT A LIFE EVENT
<p>Step 1: Click on Me tab.</p>	 <p>The screenshot shows a user interface with a teal header. Below the header, there is a navigation bar with tabs: 'Me', 'My Team', 'My Client Groups', 'Product Management', 'Procurement', 'Tools', and 'Others'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two sections: 'QUICK ACTIONS' and 'APPS'. The 'QUICK ACTIONS' section contains three items: 'Personal Details', 'Document Records', and 'Identification Info'. The 'APPS' section contains five items: 'Directory', 'Onboarding', 'Checklist Tasks', 'Pay', and 'Time and Absences'.</p>
<p>Step 2: Click on Benefits tile.</p>	 <p>The screenshot shows the same user interface as the previous step. The 'Me' tab is still highlighted. In the 'APPS' section, the 'Benefits' tile is highlighted with a red box. The 'Benefits' tile is located in the second row of the 'APPS' section, between the 'Learning' and 'Current Jobs' tiles. The 'Learning' tile is highlighted with a red box in the previous step.</p>

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Step 3:
Click on **Report a Qualifying Life Event.**

The screenshot shows a 'Benefits' dashboard with a 'Make Changes' button at the top. Below it are several tiles: 'Pending Actions', 'Your Benefits', 'Report a Qualifying Life Event' (highlighted with a red border), 'Before You Enroll', 'Document Records', 'Benefits Tools and Resources', 'Need Help? Contact the Benefits Service Center', 'HSA Calculator', 'Dependent Care FSA Calculator', and 'Health Care FSA Calculator'. Each tile contains a brief description of its function.

Step 4:
Scroll down and click on **To add, update or change your HSA amount.**

Information

Select a life event to see if it provides you opportunities to elect new benefits or change existing ones.

Qualifying Life Event	Documentation Needed	Region	How to Submit Documentation	Pending Action
Divorce Legal separation Loss of coverage elsewhere Gain in coverage elsewhere	Divorce Annulment Separations Letter/Papers Letter from Provider Copy of Insurance card/letter with coverage end date Letter from Provider Copy of Insurance card/letter with coverage start date	Atrium/Navicent	Upload supporting documentation to the "Document Records" page. Note: Documentation must be submitted and approved before enrollment or changes can be made. You will receive notification once documentation is approved	Pending Actions can be viewed under Me> Benefits> Pending Actions
Marriage Adoption or Birth	Marriage Certificate Birth Adoption Certificate	Atrium/Navicent	You will receive a documentation request from Alight Solutions, LLC. Compliance is time-sensitive and necessary for your dependent's coverage	Pending Actions can be viewed under Me> Benefits> Pending Actions

Select a Life Event

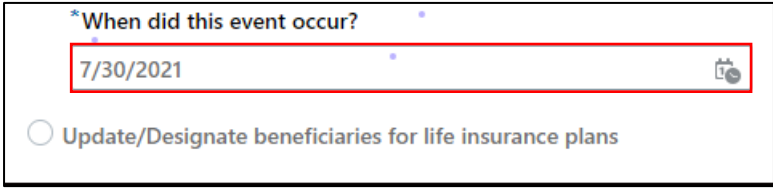

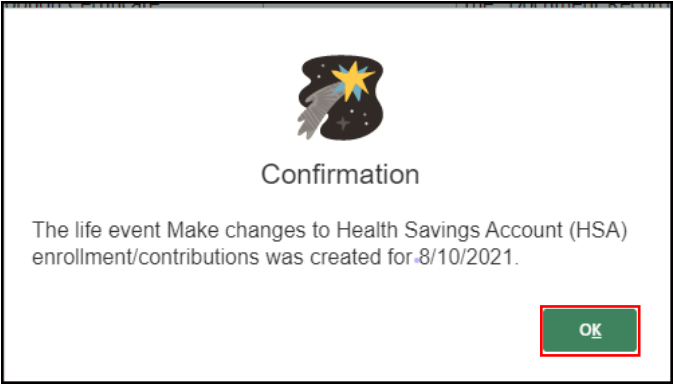
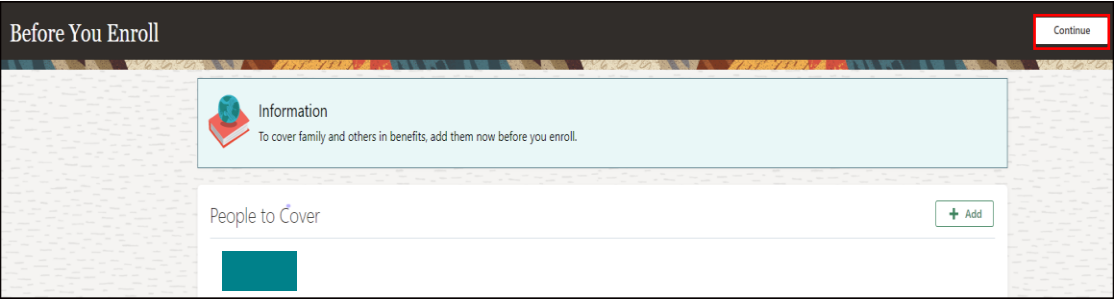
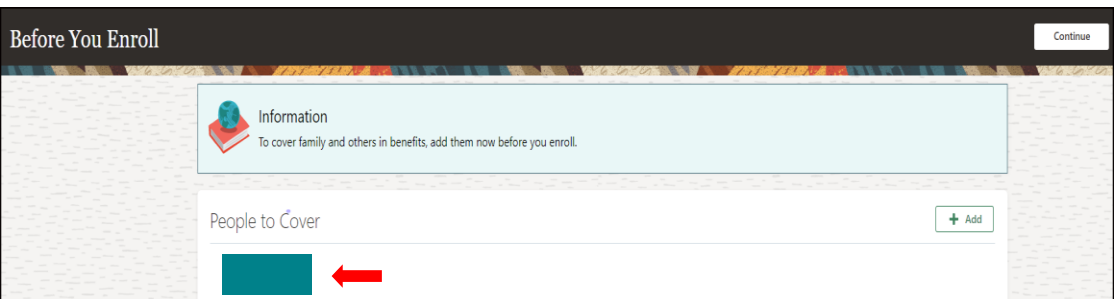
- Add a new child in your coverage as part of birth, adoption or legal placement
- Add spouse and/or dependent children due to marriage
- To add, update or change your HSA amount**

*When did this event occur?

- To add, update or change your designated beneficiary information.

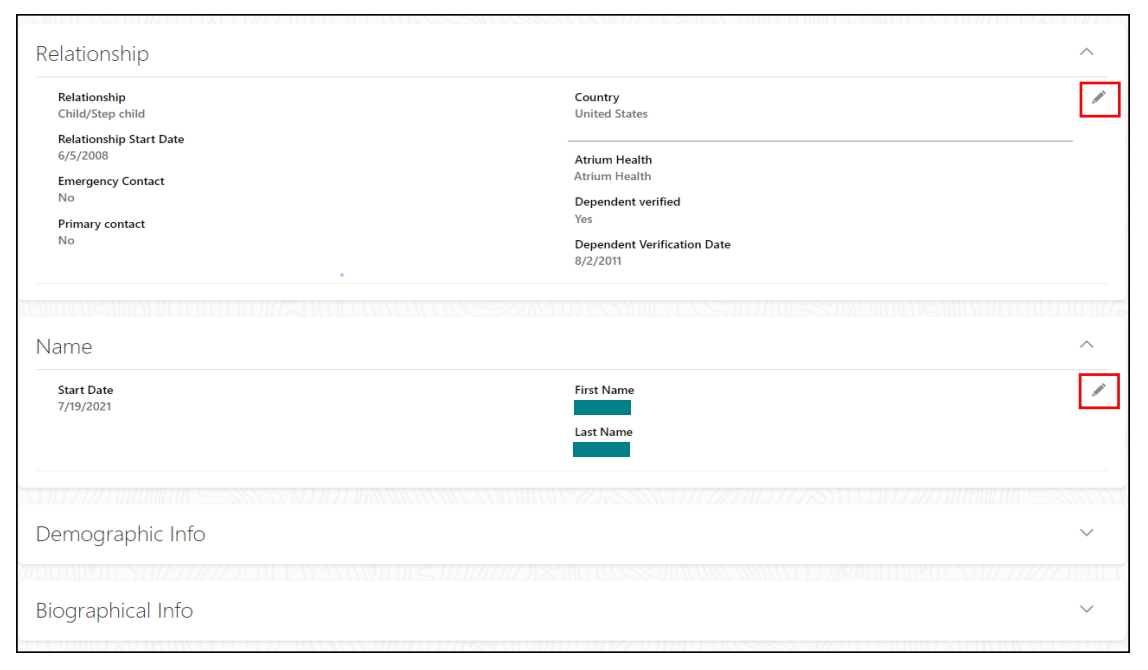
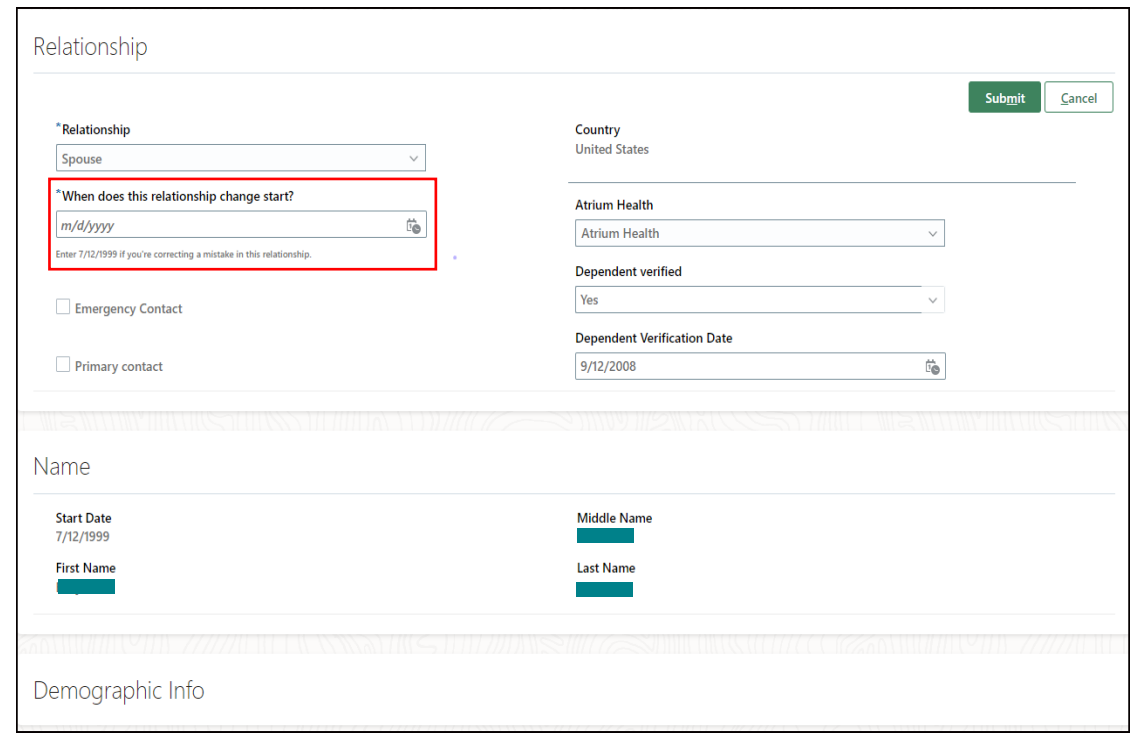

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<p>Step 5: Use the current date as the effective date.</p>	
<p>Step 6: Click Continue in top right corner.</p>	
<p>Step 7: You will receive a Confirmation. Click OK.</p> <p>See Tips: Step 7a for instructions on proceeding if you receive a message other than this confirmation.</p>	
<p>Note: Steps 8-9 are only for teammates who need to edit or add dependents/beneficiaries. Click Continue to bypass these steps and go directly to Step 10.</p>	
<p>Step 8a: To edit an existing dependent/beneficiary, click on the person's name.</p>	

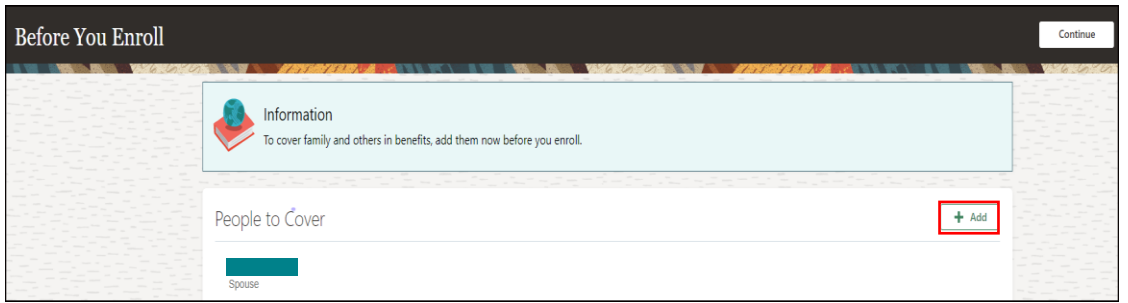
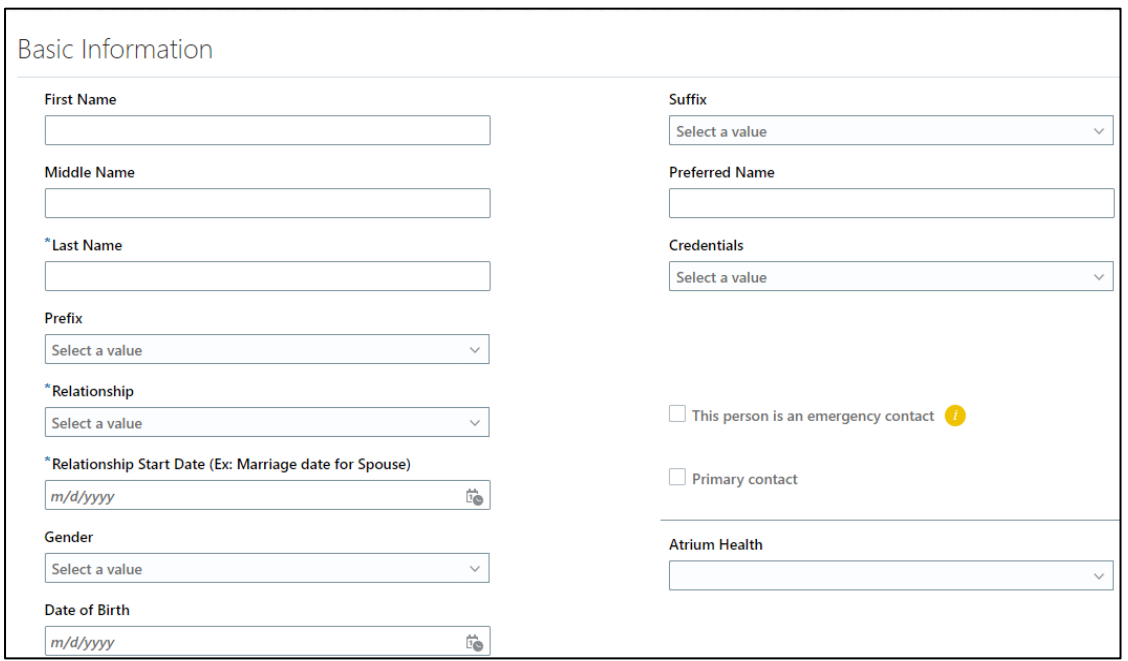


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<p>Step 8b: Click on the pencil edit icon(s).</p>	
<p>Step 8c: Edit each category as needed.</p> <p>Note: Enter date when name or relationship change occurred in appropriate categories.</p>	
<p>Step 8d: Click Submit.</p>	

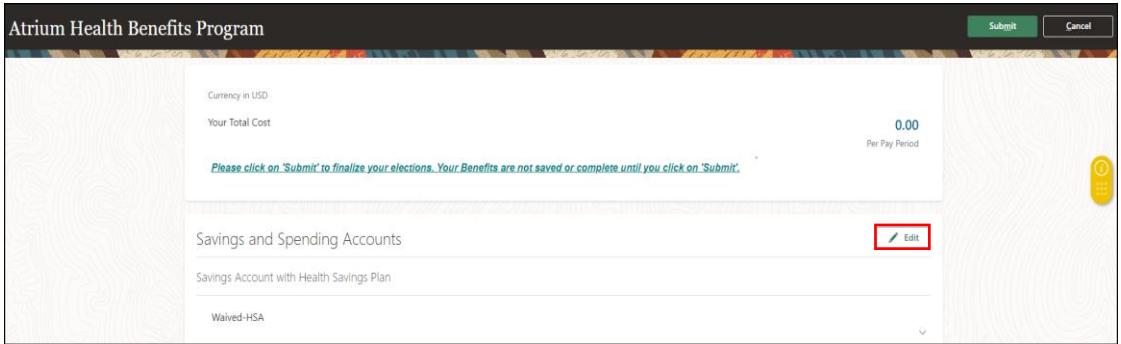
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<p>Step 9a: To add a dependent/beneficiary, click Add.</p>	
<p>Step 9b: Add dependent information on the Basic Information screen.</p>	
<p>Step 9c: Click Submit in top right corner.</p>	
<p>Step 9d: Click Continue.</p>	

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<p>Step 10: Click Accept.</p>	<p>Authorization</p> <h3>Atrium Health Benefits Attestation</h3> <p>By choosing and submitting my Benefits elections, I attest that the information I am providing is accurate and complete. I authorize the coverage selections and the associated payroll deductions for my costs of the benefits selected.</p> <p>I understand that once the enrollment period ends, I cannot make any benefits changes until the next Open Enrollment period or unless I experience a Qualifying Life Event (marriage, divorce/separation, birth or adoption, loss or gain of coverage, death of dependent). I further understand that once I am enrolled in one of the LiveWELL Health Plans, changing from one plan to the other is not a Qualifying Life Event; therefore, I will not be able to change plans until the next Open Enrollment period.</p> <p>I understand the following:</p> <ul style="list-style-type: none">• If I elect the Health Savings Plan, I can elect to contribute to a Health Savings Account (HSA), a Limited Purpose Flexible Spending Account (LPFSA) and a Dependent Care Spending Account (DCFSA)• I understand to maintain the HSA, my prior annual election will move forward as my new annual election, and I do have the option to edit before submitting. I further understand I can make changes to my HSA throughout the year, as needed.• If I elect the Co-Pay Plan, I can elect to contribute to a Health Care Flexible Spending Account (FSA) and a Dependent Care Spending Account (DCFSA). The LiveWELL Incentives I earn will be deposited in a LiveWELL Incentive Account. This is an account for Atrium Health contributions only and can be used for qualified medical expenses.• I understand to maintain the FSA, LPFSA and the DCFSA, I must re-enroll each year.• Benefit Enrollment remains in effect until changed or canceled by me during an annual Open Enrollment, or when permitted by a Qualifying Life Event. <p>I understand that the coverages I am applying for may require that I provide additional information.</p> <p>I understand that my eligibility for benefits may be affected if I experience a change in my weekly standard hours that changes my full-time or part-time status.</p> <p><input type="button" value="Accept"/> <input type="button" value="Decline"/></p>
<p>Step 11: Click pencil edit icon to make any final edits.</p>	

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Step 13:
Select
Teammate Only
checkbox. You
may also
choose to waive
coverage.

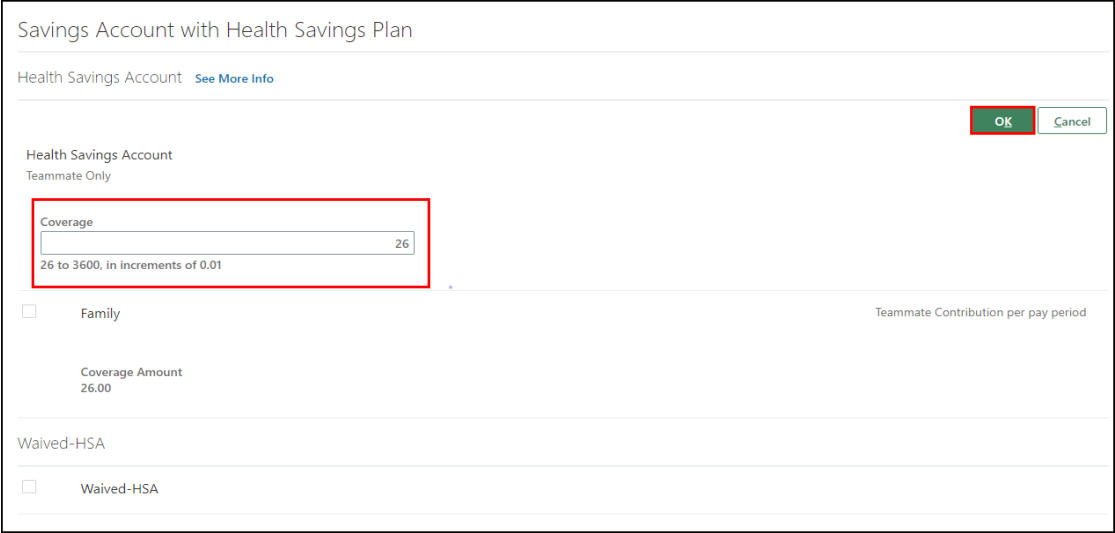



Savings Account with Health Savings Plan

Health Savings Account [See More Info](#)

<input type="checkbox"/>	Teammate Only	Teammate Contribution per pay period
	Coverage Amount 26.00	
<input type="checkbox"/>	Family	Teammate Contribution per pay period
	Coverage Amount 26.00	
Waived-HSA		
<input type="checkbox"/>	Waived-HSA	

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<p>Step 14: The Coverage checkbox will appear. Enter your per pay period contribution amount and click OK.</p>	
<p>Step 15: Click Continue.</p>	
<p>Step 16: Click Submit to finalize your elections.</p>	
<p>Step 17: You will receive a Confirmation.</p> <p>Note: if you receive a confirmation that differs from this one, call 704-631-1500, Option 1 for assistance.</p>	

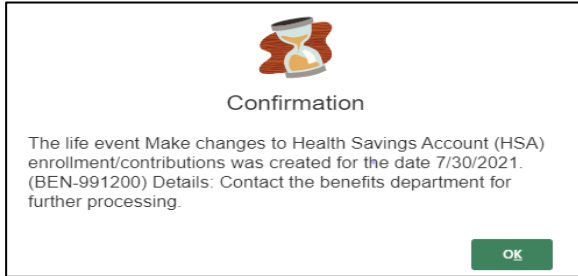
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Tips

Step 7a:

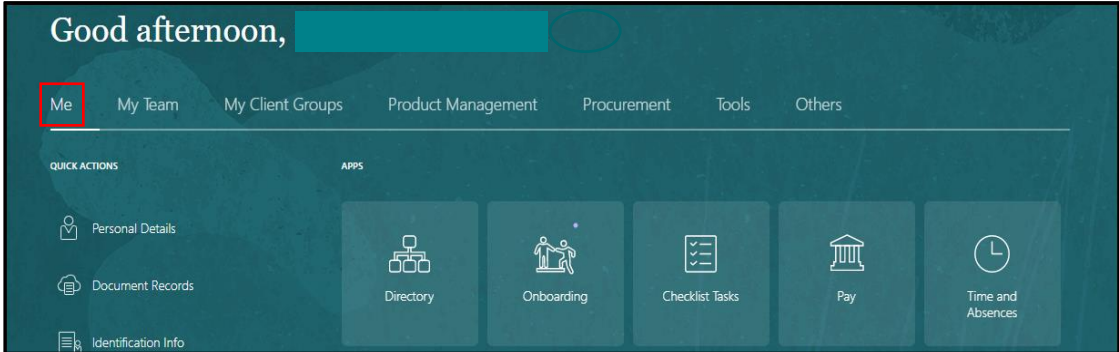
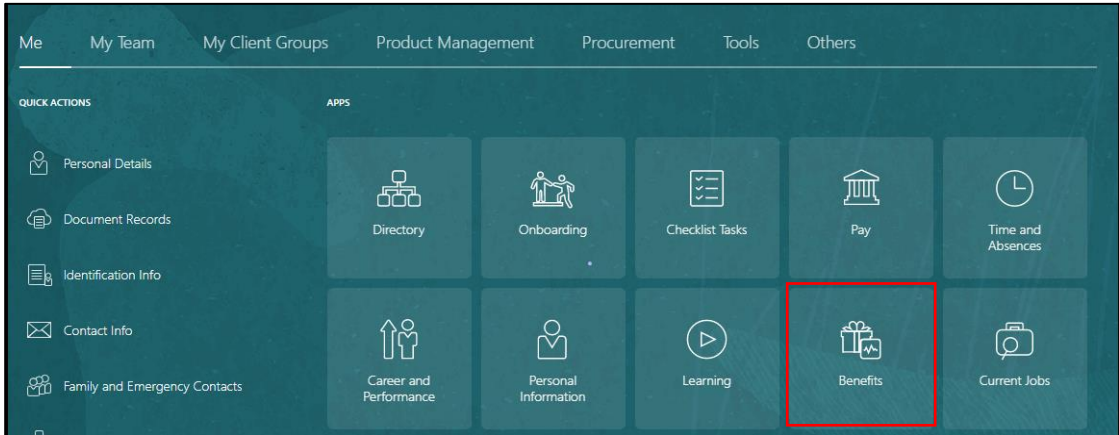
- If you receive the following Confirmation message, call 704-631-1500, Option 1.



Notes

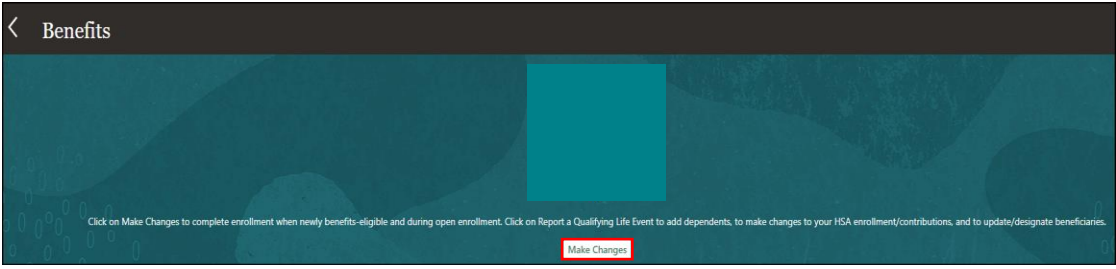
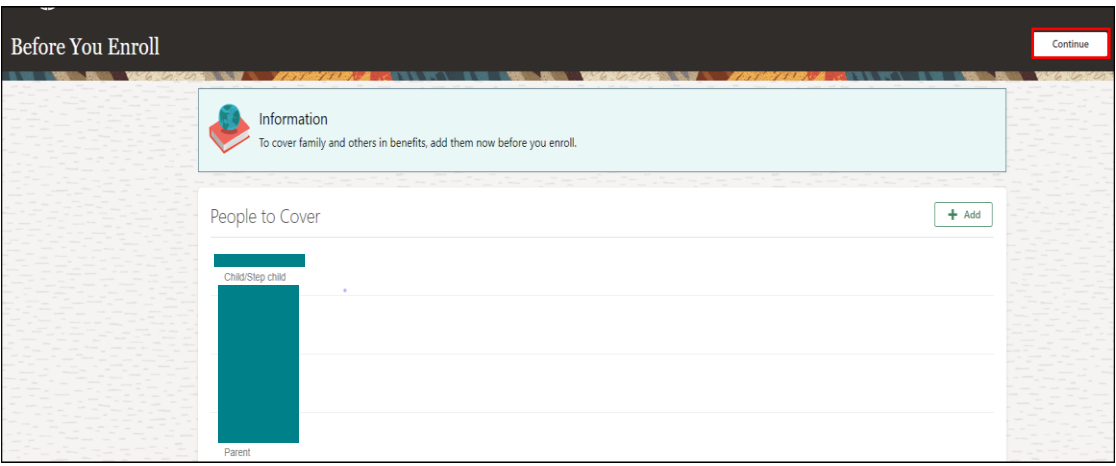
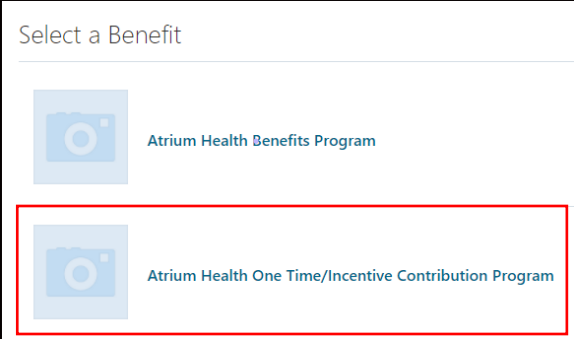
If you require assistance, please call 704-631-1500, Option 1.

2. Complete a One-Time HSA Contribution

NAVIGATION	ME → BENEFITS → MAKE CHANGES
<p>Step 1: Click on Me tab.</p>	 A screenshot of a user interface. At the top, there's a navigation bar with tabs: "Me", "My Team", "My Client Groups", "Product Management", "Procurement", "Tools", and "Others". The "Me" tab is highlighted with a red box. Below the navigation bar, there are sections for "QUICK ACTIONS" and "APPS". The "QUICK ACTIONS" section includes "Personal Details", "Document Records", and "Identification Info". The "APPS" section includes "Directory", "Onboarding", "Checklist Tasks", "Pay", and "Time and Absences".
<p>Step 2: Click on Benefits tile.</p>	 A screenshot of the same user interface as above. The "Me" tab is no longer highlighted. In the "APPS" section, the "Benefits" tile, which features a gift icon, is highlighted with a red box. Other tiles in the "APPS" section include "Career and Performance", "Personal Information", "Learning", and "Current Jobs".

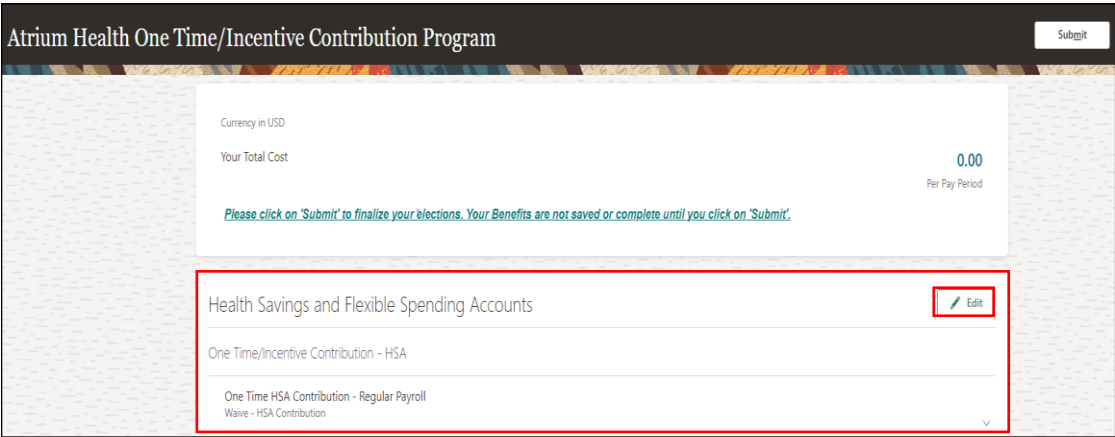
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<p>Step 3: Click on Make Changes.</p>	 <p>The screenshot shows a mobile app interface with a dark teal header containing a back arrow and the word 'Benefits'. Below the header is a large teal banner with a white 'Make Changes' button at the bottom right. A red box highlights the button. Small text at the bottom of the banner reads: 'Click on Make Changes to complete enrollment when newly benefits-eligible and during open enrollment. Click on Report a Qualifying Life Event to add dependents, to make changes to your HSA enrollment/contributions, and to update/designate beneficiaries.'</p>
<p>Step 4: Add or update beneficiary/dependent information if applicable. Click Continue in top right corner.</p>	 <p>The screenshot shows a mobile app interface with a dark teal header containing a back arrow and the text 'Before You Enroll'. A red box highlights the 'Continue' button in the top right corner. Below the header is a light blue box with a book icon and the text 'Information To cover family and others in benefits, add them now before you enroll.' Below this is a section titled 'People to Cover' with a '+ Add' button. There are two rows of input fields, one labeled 'Child/Step child' and one labeled 'Parent', each with a teal placeholder box.</p>
<p>Step 5: Click on Atrium Health One Time/Incentive Contribution Program.</p>	 <p>The screenshot shows a mobile app interface with a white background and the title 'Select a Benefit'. There are two options, each with a blue camera icon and a text label. The first option is 'Atrium Health Benefits Program'. The second option is 'Atrium Health One Time/Incentive Contribution Program', which is highlighted with a red rectangular box.</p>

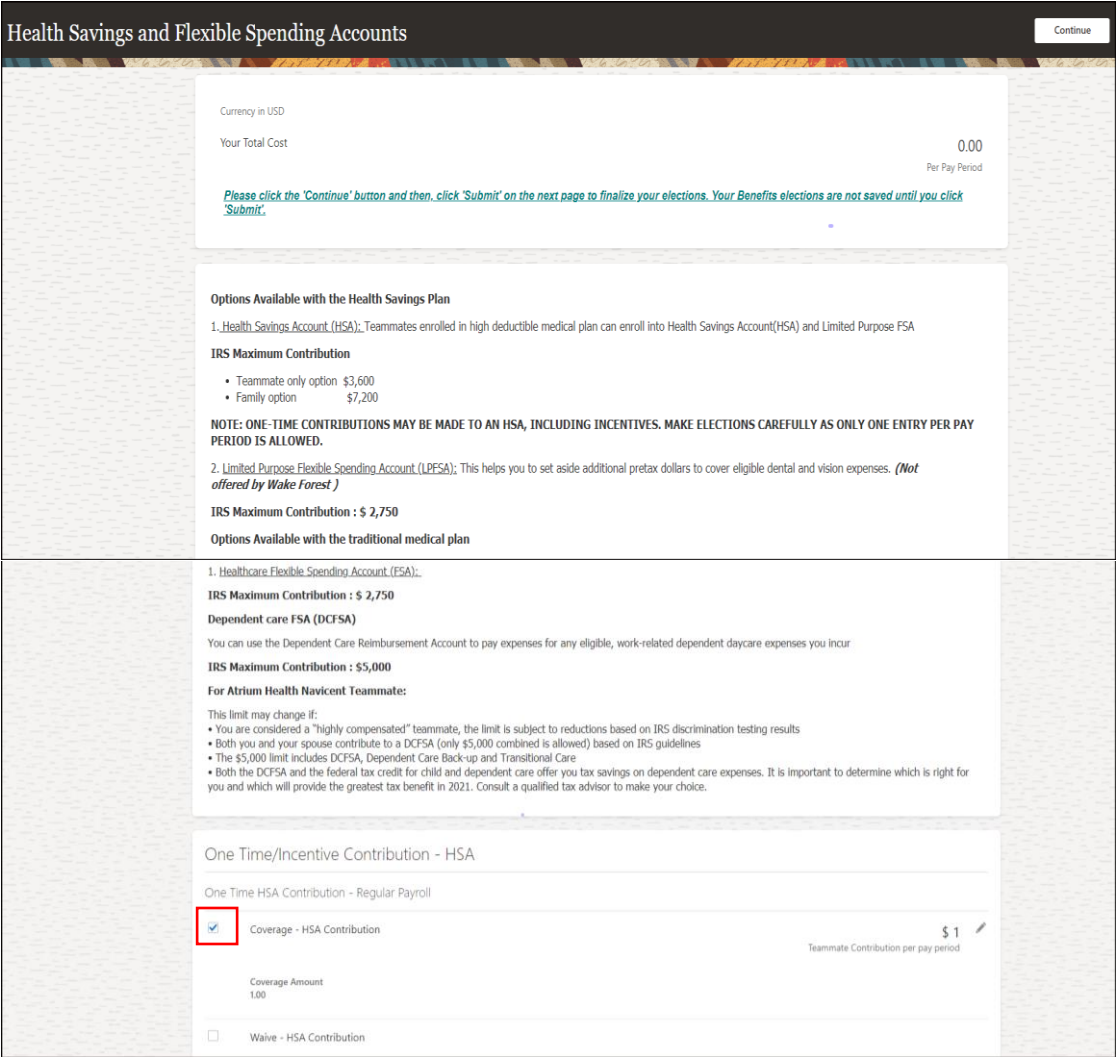
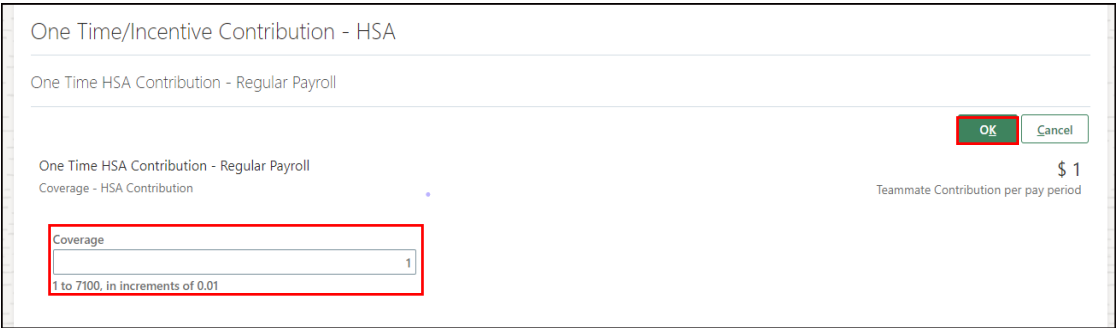

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<p>Step 6: Read the attestation, then click Accept.</p>	<p>Authorization</p> <hr/> <h3>Atrium Health One Time/ Incentive Contribution Attestation</h3> <p>By choosing and submitting my one-time HSA contribution, I attest that the information I am providing is accurate and complete. I authorize the coverage selections and the associated payroll deductions.</p> <p>I understand that once I have made a one-time HSA contribution; I cannot make any changes until the next Pay Period or applicable Incentive Payout.</p> <p>I understand the following:</p> <ul style="list-style-type: none">• ONE-TIME CONTRIBUTIONS MAY BE ONLY MADE TO AN HSA, INCLUDING INCENTIVES• ONE ELECTION PER PAY PERIOD IS ALLOWED.• The amount elected for one-time contribution will be deducted only in the Pay Period in which it is being elected.• Though the amount entered is mentioned as "Per Pay Period Contribution" the enrollment amount will be deducted only for the Pay Period in which the enrollments are made and will not be carried forward to any subsequent pay period.• I must have an active HSA account to make a one-time contribution.• My one-time contribution OR contribution from Incentives will not be deducted if my eligibility for the HSA plan changes in between the applicable pay period making me ineligible for the HSA plan, including a family status change or change in standard hours, making me ineligible for benefits. <p><input type="button" value="Accept"/> <input type="button" value="Decline"/></p>
<p>Step 7: Click pencil edit icon to make changes to your Health Savings and Flexible Spending Accounts.</p> <p>Note: Click Submit if you have no changes. You will go directly to Step 11.</p> <p>See Tips: Step 7a and Step 7b for additional instructions.</p>	


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<p>Step 8: Click on pencil edit icon in One Time/Incentive Contribution - HSA field near the bottom of the page and select Coverage - HSA Contribution box.</p>	
<p>Step 9: Enter the one-time contribution amount in the Coverage box that appears, then click OK.</p>	
<p>Step 10: Click Continue, then click Submit.</p>	

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<p>Step 11: You will receive a confirmation that your benefit elections were submitted.</p>	<div data-bbox="678 285 1230 443" style="border: 1px solid black; padding: 10px;"><p>Your benefit elections were submitted. Last day of enrollment for this event is 11:59 PM EST, 9/2/2021</p><p>Confirmation</p></div>
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Tips

Health Savings and Flexible Spending Accounts
One Time/Incentive Contribution - HSA
One Time HSA Contribution - Regular Payroll
Waive - HSA Contribution

Step 7a:
You may see the term, “waived” in this field, as this is the default for a one-time contribution. This **does not** mean that your HSA plan is waived.

Step 7b:
Certain incentives, such as PPI/MAIP, will have special election options. Teammates will be notified and receive instructions when these events occur.