

Making an HSA Contribution

GETTING STARTED

Our Employer Portal (<https://employer.motivhealth.com/>) now has HSA features. From the Employer Portal dashboard below, you may get to the HSA feature a couple of ways:

1. The “HSA” drop-down menu on the right side of the top ribbon. Select “HSA Overview”
2. The “\$ HSA” icon under the “MOTIVHEALTH Dashboard”

The screenshot shows the MotivHealth Employer Portal dashboard. The top navigation bar has 'COMPANY', 'HSA', and 'CLAIMS' menus. The 'HSA' menu is highlighted with a red box. Below the navigation bar is the 'MOTIVHEALTH Dashboard' with tabs for 'COMPANY', 'CLAIMS', 'HSA', 'INVOICES', and 'INCENTIVES'. The 'HSA' tab is also highlighted with a red box. The dashboard displays various metrics: Surplus/Deficit (\$36,090.60), Incentives Earned (\$30), MotivU Graduates (29), Accounts Created (94%), and HSA Contributions (\$13,851). It also shows Savings Opportunities for Price Optimization and Prescriptions, both with 100% utilization. A 'What's New' section includes 'Investments Now Available' and 'On-Site Training'. An 'Invoice' section shows a due date of February 01, 2021, and a premium due of \$54,149.28.

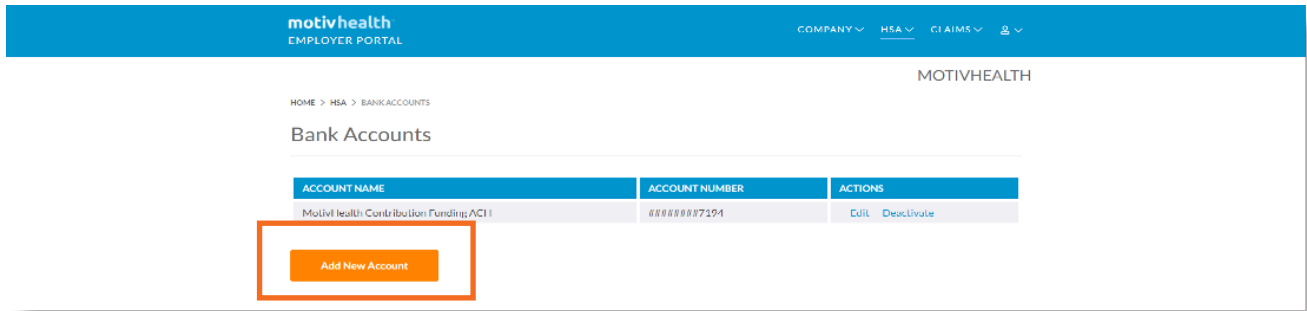
STEP #1

On the HSA Overview page, you can set up your banking information for funding via MotivHealth’s ACH originations. Click on the “Banking Info” link.

The screenshot shows the MotivHealth Employer Portal HSA Overview page. The top navigation bar has 'COMPANY', 'HSA', and 'CLAIMS' menus. The 'HSA' menu is highlighted with a red box. Below the navigation bar is the 'HSA Overview' page with tabs for 'MAKE HSA CONTRIBUTION', 'HSA CONTRIBUTION HISTORY', 'HSA REPORTS', and 'BANKING INFO'. The 'BANKING INFO' tab is highlighted with a red box. The page displays HSA Contributions for 2021 (\$13,851.00), Pending Contributions (\$0.00), and Avg Employee HSA Balance (\$2,057.00). It also shows a line graph for Average HSA Balance per Employee for 2021 and 2020. A table for Recent HSA Contributions is visible at the bottom.

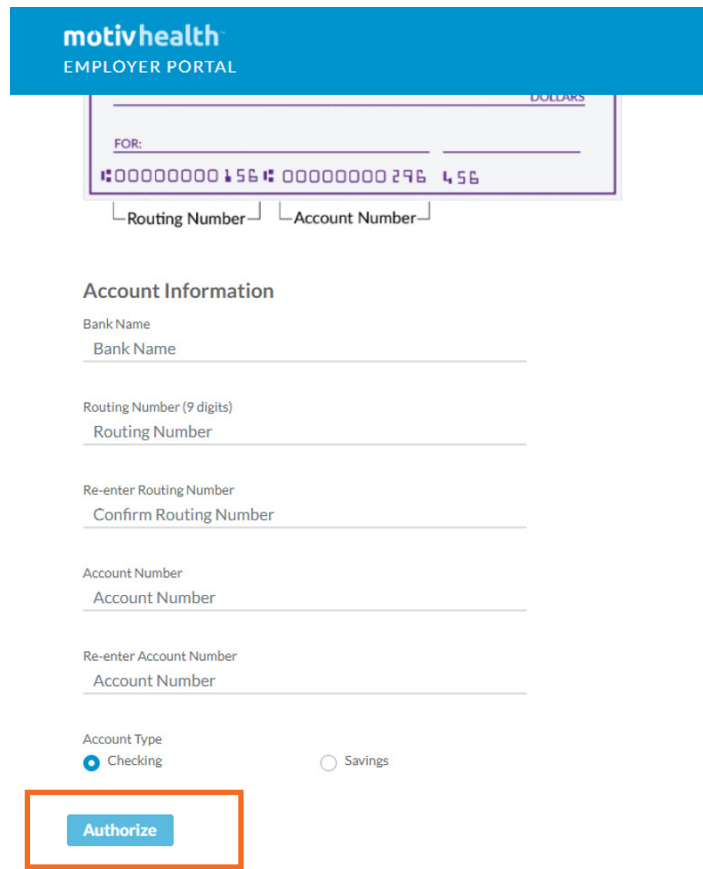
STEP #2

Click "Add New Account"



STEP #3

Enter bank account information and click "Authorize."



STEP #4

You can now make HSA contributions. From the “HSA Overview” page select the “\$ MAKE HSA CONTRIBUTION” or select “File Contribution” in the HSA drop-down menu.

HSA Overview

[\\$ MAKE HSA CONTRIBUTION](#) | [HSA CONTRIBUTION HISTORY](#) | [HSA REPORTS](#) | [BANKING INFO](#)

HSA Contributions 2021 **\$13,851.00**

Pending Contributions **\$0.00**

Avg Employee HSA Balance **\$2,057.00**

Average HSA Balance per Employee

Month	2021	2020
Jan	\$0	\$0
Feb	\$0	\$0
Mar	\$0	\$0
Apr	\$2,400	\$2,400
May	\$2,200	\$2,300
Jun	\$2,300	\$2,400
Jul	\$2,400	\$2,400
Aug	\$2,400	\$2,400
Sep	\$2,300	\$2,400
Oct	\$2,100	\$2,300
Nov	\$2,200	\$2,300

Recent HSA Contributions

CONTRIBUTION ID	DATE	AMOUNT	FUNDING SOURCE	# OF CONTRIBUTIONS	STATUS	ACTIONS
DtXg9yg6AAA	01/28/2021	\$16,251.45	MotivHealth Contribution Funding ACH	177	Completed	Details

STEP #5

This will take you to the “Upload a Contribution” screen. Get the contribution upload template by clicking “Download the file upload template here.”

Upload a Contribution

Tax Year*
Select Tax Year

Funding Source*
Select Funding Source

[Download the file upload template here](#)

Drop file anywhere to upload or
[Select File](#)

File must be xls, xls, or csv
Maximum upload file size: 30MB
File Name:

[Upload & Verify](#)

** If Employer ACH account (Funding ACH ***-XXXX) is selected, you authorize MotivHealth to store this bank account information and to initiate funds transfers from the account indicated.

** Please contact your financial institution and provide them with MotivHealth ACH company ID #9473906935 to allow ACH transactions to be accepted (white-listed).

STEP #6


Prepare and save your contribution upload. Be sure to record a value in each column for each row utilized. If there is no employee or employer contribution, then enter "0".

	A	B	C	D	E	F
1	Person ID	First Name	Last Name	Employee Contribution	Employer Contribution	
2	12345	John	Smith	0.00	20.00	
3						
4						
5						
6						
7						
8						

STEP #7

Upload your file by clicking "Select File." Then select Tax Year and Funding Source. You'll then contact your bank with MotivHealth's ACH company ID to allow our ACH origination to be accepted, then click "Upload and Verify."

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EMPLOYER PORTAL

COMPANY ▾ HSA ▾ CLAIMS ▾ 

MOTIVHEALTH

HOME > HSA > UPLOAD

Upload a Contribution

Tax Year*

Select Tax Year ▾

Funding Source*

Select Funding Source ▾

[Download the file upload template here](#)

Drop file anywhere to upload
or

[Select File](#)

File must be xlsx, xls, or csv
Maximum upload file size: 30MB
File Name:

** If Employer ACH account (Funding ACH ***-XXXX) is selected, you authorize MotivHealth to store this bank account information and to initiate funds transfers from the account indicated.

** Please contact your financial institution and provide them with MotivHealth ACH company ID #9473906935 to allow ACH transactions to be accepted (white-listed).

[Upload & Verify](#)

STEP #8

If you have any errors, they will appear on the next screen. Resolve these errors by removing them from your contribution upload and/or contacting employer services@motivhealth.com or 385-308-4400.

**It is suggested to upload a test file of \$0.01 contributions ahead of payroll to identify any potential errors to be resolved. If no errors, then review the summary and click “Finish” at the bottom of the page.

processing and then another two business days for funds to be available to your employees. Funds sent less than the amount below will not be applied. The entire amount will be returned to the originating sender within 14 business days if no further instruction is provided to MotivHealth on how to apply the funds. Funds sent in excess of the above amount will be returned to the originating sender within 60 days if no further instruction is provided to MotivHealth on how to apply the overpayment.

ACH Transfer Request: Jan 29, 2021

Funding Source: MotivHealth Contribution Funding ACH***7194

Tax Year: 2021

Total Contributions: \$0.02

Total Employer Contributions: \$0.01

Total Employee Contributions: \$0.01

Total Contribution Transactions: 2

Please print this page for your records. If you are mailing a check, attach a copy of this page with your check.

NAME	ID NUMBER	EMPLOYER / EMPLOYEE	CONTRIBUTION
Fairbourn, Chris	28928	Employer	\$0.01
Fairbourn, Chris	28928	Employee	\$0.01
Total			\$0.02

← Back

Finish

STEP #9

You will then receive a “Success!” confirmation. Your contribution upload is now complete.

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EMPLOYER PORTAL

COMPANY HSA CLAIMS

MOTIVHEALTH

HOME > HSA > UPLOAD

✓ Success!

Your contribution transfer request was uploaded successfully.