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How to manage your health savings account (HSA) investments in your online account

Participant | Client | PS Agent | Client Agent

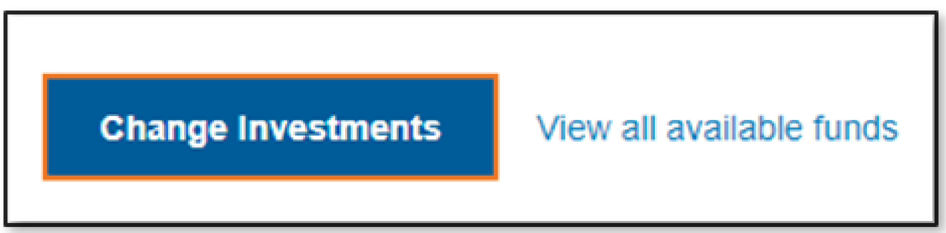
This article outlines how to manage your health savings account (HSA) investments in your online account.

Note: To watch a video tutorial, click here.

Important: You must first set up your HSA investments. See How to set up your health savings account (HSA) investments and transfer money to your investment account for instructions.

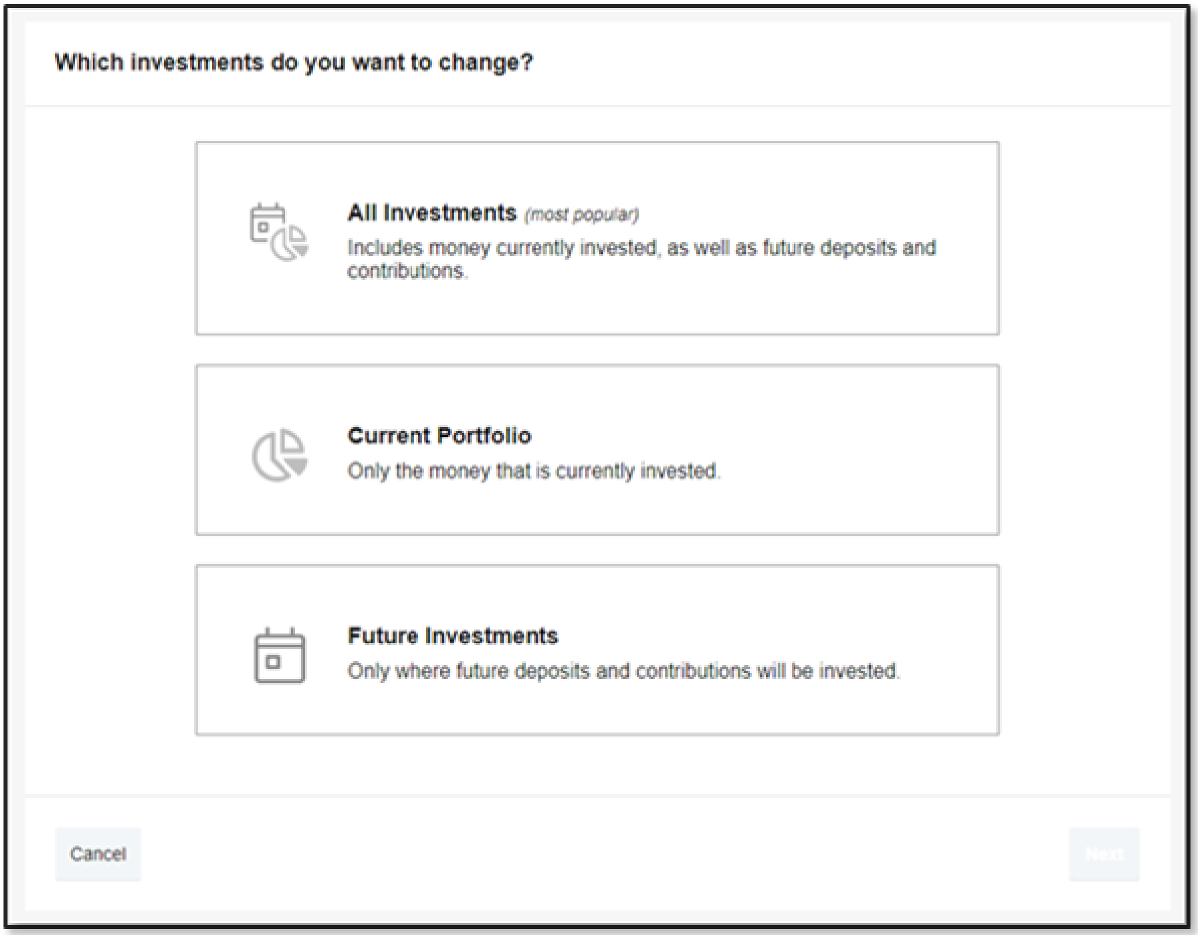
To manage your investments in your online account, complete the following steps:

1. Navigate to the Accounts tab and select "Investment Summary."
2. Click "Change Investments" within the Investment Balance section.



3. Answer your security question if prompted.

4. Click the appropriate action and follow the remaining steps.



Note: Requests submitted after 3 p.m. Central time will be processed the next business day. Trades require two business days for processing. They're submitted on the first business day and completed on the second business day.

Scenario	Resolution
You're enrolled in auto-investment transfers and attempt to complete a manual transfer.	Auto-investment transfers will be disabled.
You need more funds available in your cash account on a consistent basis.	Increase your transfer threshold amount. Funds will sweep back to your cash account within seven business days.
You want to move all invested funds back to your cash account.	In the Change Investments list, select one of the following transfer options from your investment account: • One-time transfer • Auto-transfer Funds will sweep back to your cash account within seven business days.

You want to make a one-time transfer from your invested funds to your cash account.	From the Home page, navigate to the Accounts tab and select "Investment Summary." Then click "Sell Investments" in the One-time Trades section on the right-hand side of the page.

Note: Integration with various money management applications (e.g., Quicken, Mint) isn't currently supported.
To review the prospectus as well as information about fees and performance for individual funds, complete the following steps:

1. Navigate to the Education section of the Accounts tab.
2. Click "Fund Performance."

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