WrightPatt CREDIT UNION, INC.®

Health Savings Accounts

How to Submit HSA Forms Electronically

Erick R. and Mariangelica Q., Members Since 2022

At Wright-Patt Credit Union® (WPCU®), we've partnered with a trusted, third-party site to make filling out and submitting Health Savings Account (HSA) forms an easier and better experience for you!

Once you submit an HSA form through our HSA Service Center, depending on your request, a WPCU partner-employee will review your transaction once it is submitted and then complete the appropriate action on your account or contact you with any further questions.

If you're looking to:

Request a Rollover or Transfer

- If you'd like to move your HSA assets from another financial organization to your WPCU HSA.
- If you currently have a Medical Savings Account (MSA), Flexible Spending Account (FSA) or Health Reimbursement Account (HRA) with another custodian and want to roll those funds over to your WPCU HSA.
- If you have received funds from a distributing Health Savings Account (HSA), Archer Medical Savings Account (MSA), Flexible Spending Account (FSA), or Health Reimbursement Account (HRA) and want to roll those funds over to your WPCU HSA.

Make a Contribution

- If you would like to add money to your WPCU HSA via a check, another WPCU account, or from an account at another financial institution.

Add a Distribution

- If you want to take money from a Traditional IRA or Roth IRA and directly move it to your WPCU HSA.

Access Tax Forms

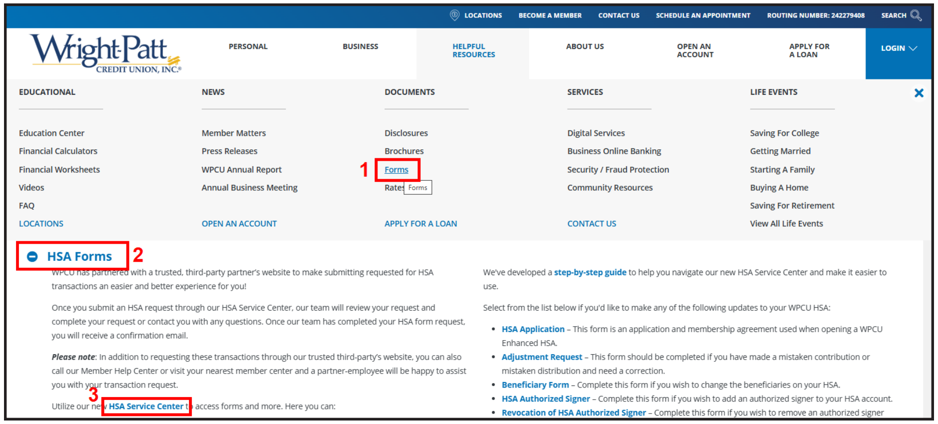
- If you would like to access a copy of your 1099-SA or 5498-SA tax forms (available at a future date).

Simply follow the steps to access our HSA Service Center and submit your HSA forms electronically.

Logging into the HSA Service Center:

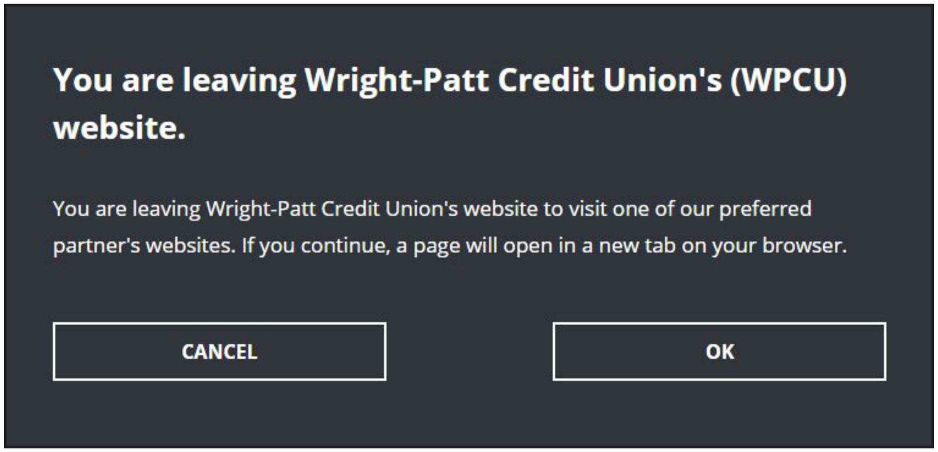
Step #1 – Visit WPCU.coop/Forms to Login

Visit WPCU.coop/Forms to login to our HSA Service Center. It is located under the HSA forms dropdown.



Step #2 – Select "OK" when you receive the trusted third-party website pop-up.

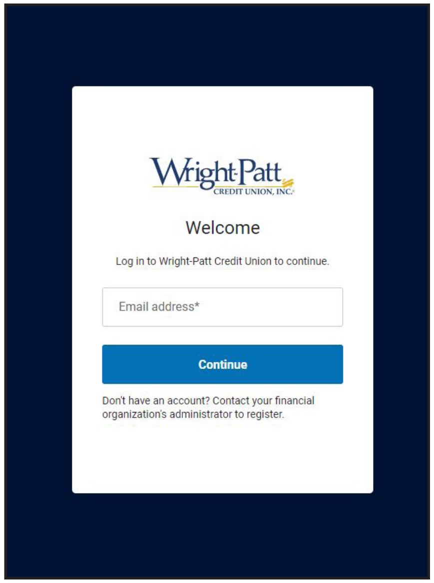
When you select the HSA Service Center, you will receive a pop-up "You are leaving Wright-Patt Credit Union's (WPCU) website." Select "OK" to advance to the HSA Service Center.



Step #3 – Enter your email address in the email address field.

When you access the HSA Service Center, you will be asked to enter your email address in the email address field and then will select "Continue".

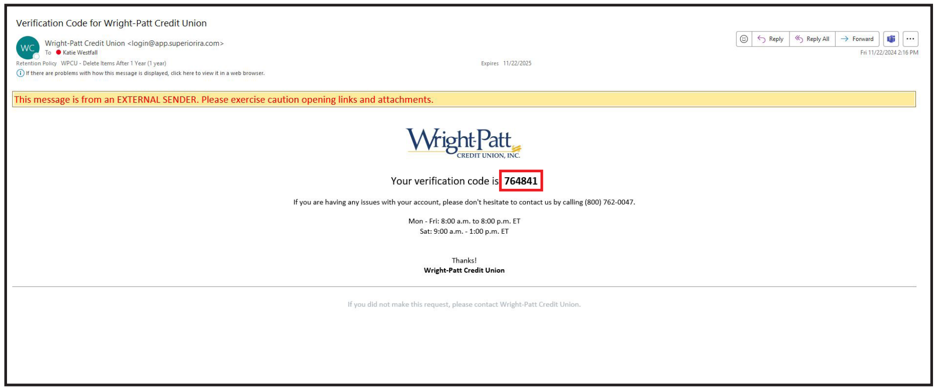
Please note: This email address is the email address assigned to your WPCU member account. Not sure what email address is assigned to your WPCU account? Log into Mobile or Online Banking and select "My Contact Information" to see the email address you've selected for your WPCU account.



Step #4 – Check your email for the verification code.

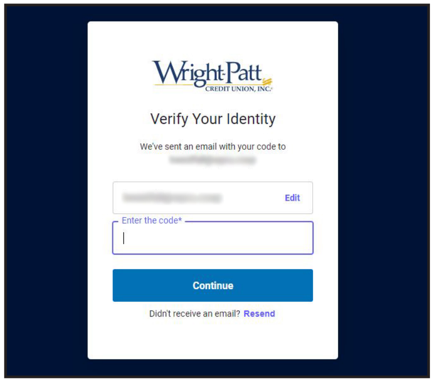
Once you enter in your email address, you will be sent an email from **login@app.superiorira.com** with the subject line "Verification Code for Your Wright-Patt Credit Union Account" with a verification code.

Please note: This verification code is valid for five minutes before you will need to re-submit your email address and receive a new code.



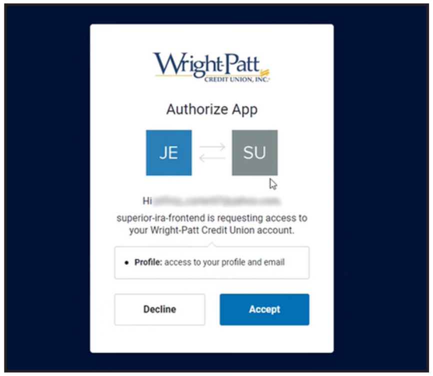
Step #5 – Enter the verification code.

Toggle back to the HSA Service Center screen and enter in the verification code you received in your email. Once you've entered the verification code, select "Continue."



Step #6 – Receive an Authorize App page.

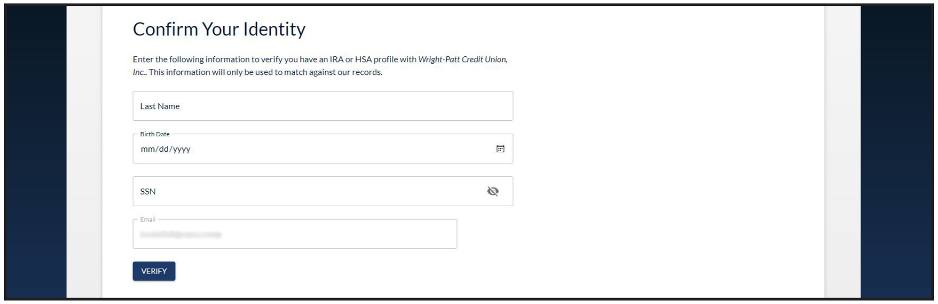
After you enter in the verification code, you'll be asked to "Accept" an Authorize App allowing our trusted third party to access your WPCU HSA account.



Step #7 – Confirm your identity.

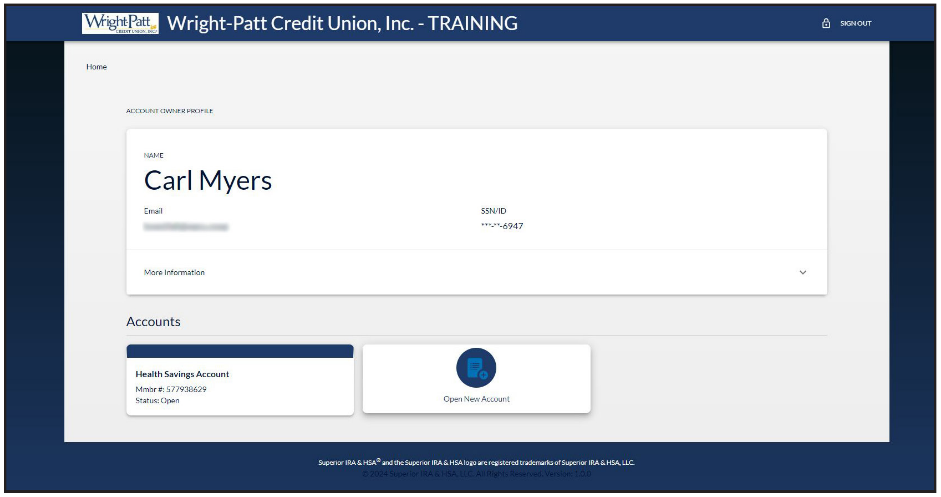
On the next screen, you will verify your identity by entering in your Last Name, Birth Date, and Social Security Number. Once you've entered your information, select Verify to finish logging in.

Please note: You will only be asked to provide this information the FIRST time you login. Once you've logged in for the first time, you will only enter in your email and new verification code moving forward.



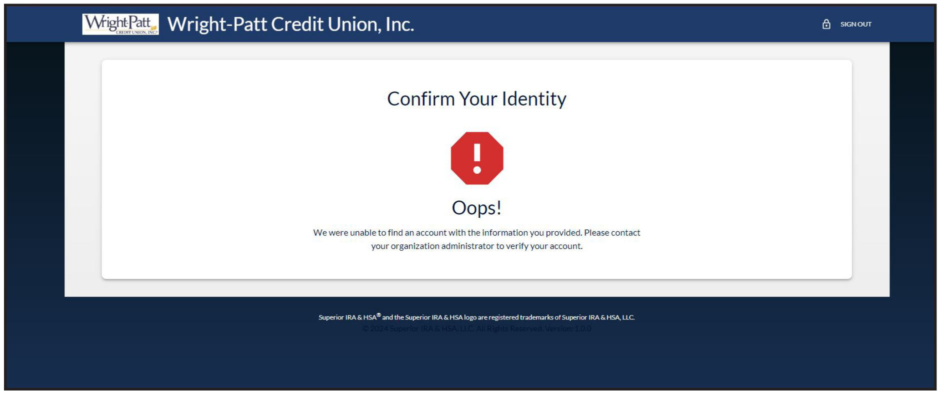
Step #8 – Your HSA Service Center dashboard.

Once you've logged into the HSA Service Center, you will see your member information. From here, you can access your HSA account and complete the necessary steps to request a transfer or rollover, make a contribution, add a distribution and/or view tax forms.



Please note: In the event the information you enter does not match the information tied to your WPCU account, you will receive the following screen. This means that the HSA Service Center was unable to find a WPCU HSA account with the information you provided. Please contact our Member Help Center at (800) 762-0047 to verify your account information.

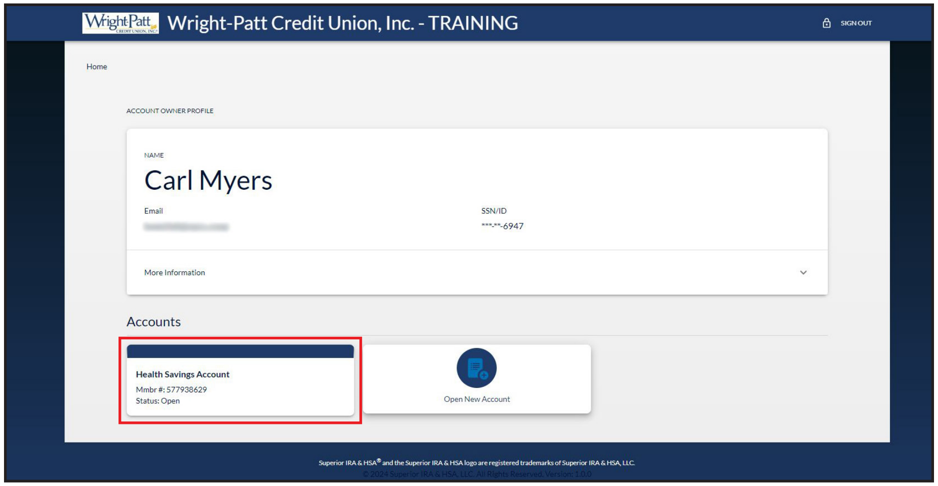
If you do not currently have a WPCU HSA account, you may open an account online by visiting WPCU.coop or by visiting a nearby Member Center.



Request a Rollover or Transfer:

Step #1 – Select “Health Savings Account” from the member dashboard screen.

Once logged into the HSA Service Center, select “Health Savings Account.”



Step #2 – Tap the “REQUEST ROLLOVER/TRANSFER” button next to Deposits.

Once you’ve selected “Health Savings Account,” you’ll want to select the button “REQUEST ROLLOVER/TRANSFER” located in the Deposits section.

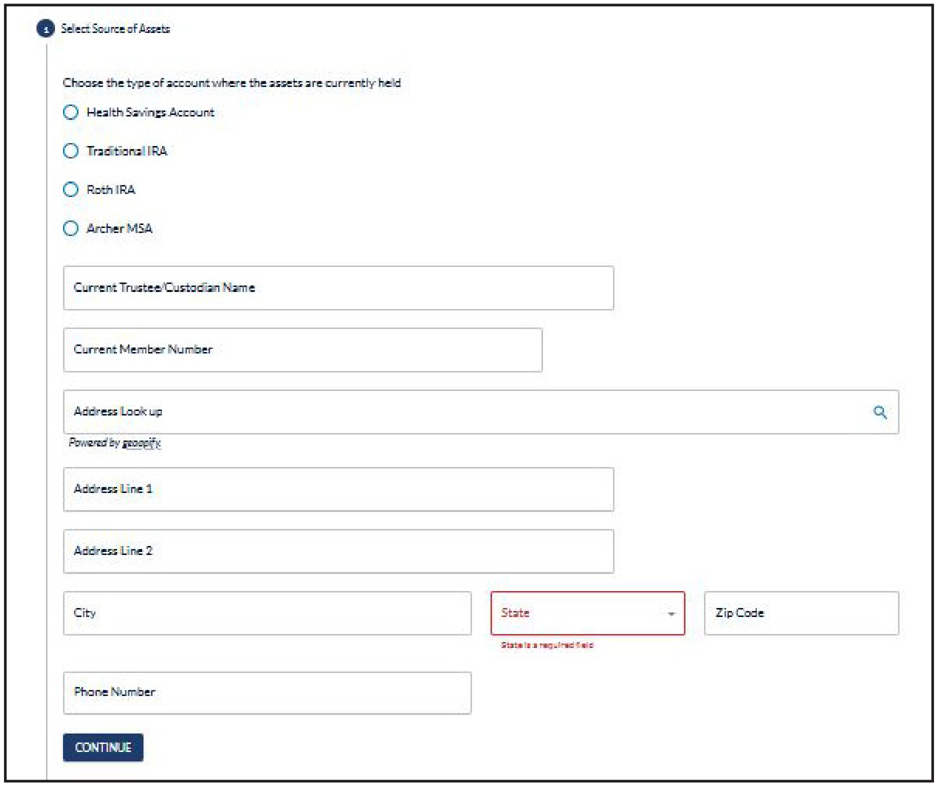
Step #3 – Follow the steps to complete the Rollover/Transfer request.

Once you’ve clicked on the “REQUEST ROLLOVER/TRANSFER” button, you will be asked to fill out the following information:

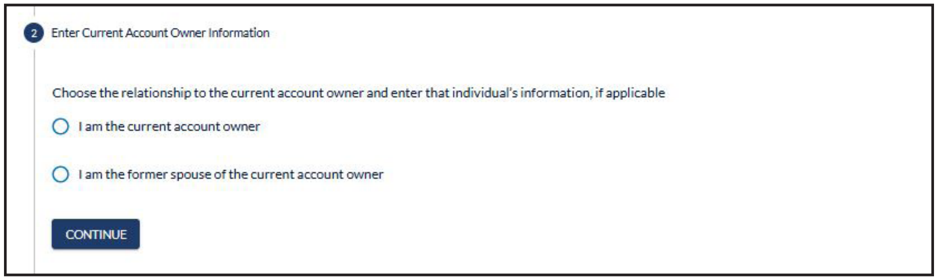
1. **Select the Source of Assets –** This is where you will choose the type of account where the assets **are currently held** (i.e., Health Savings Account, Traditional IRA, Roth IRA, or Archer MSA).

   You’ll also need to enter in the Current Account Information including Member Number, Address, and Phone Number.

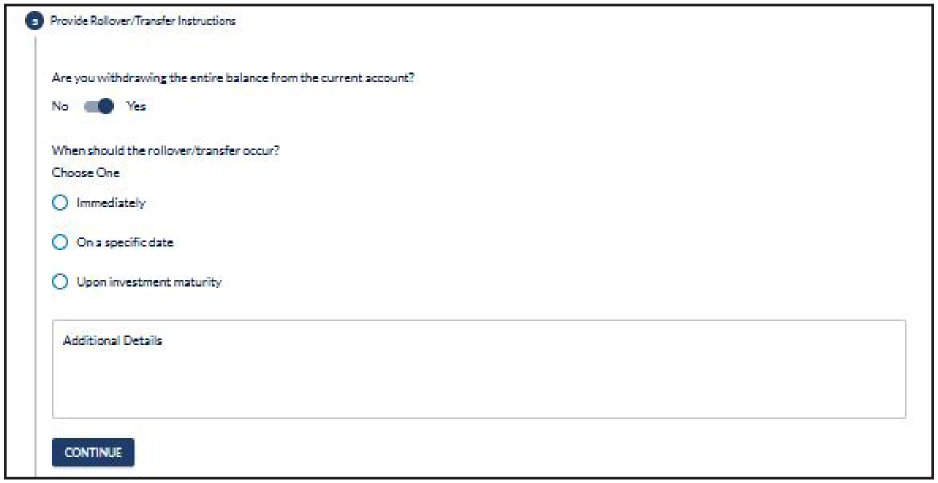
   Please note: The Current Organization Name, Address, City, State and Zip Code are required fields. You will not be able to continue unless you complete the information.



2. **Enter Current Account Owner Information –** In this step, you'll choose the relationship to the current account owner and enter in that individual's information (if applicable).



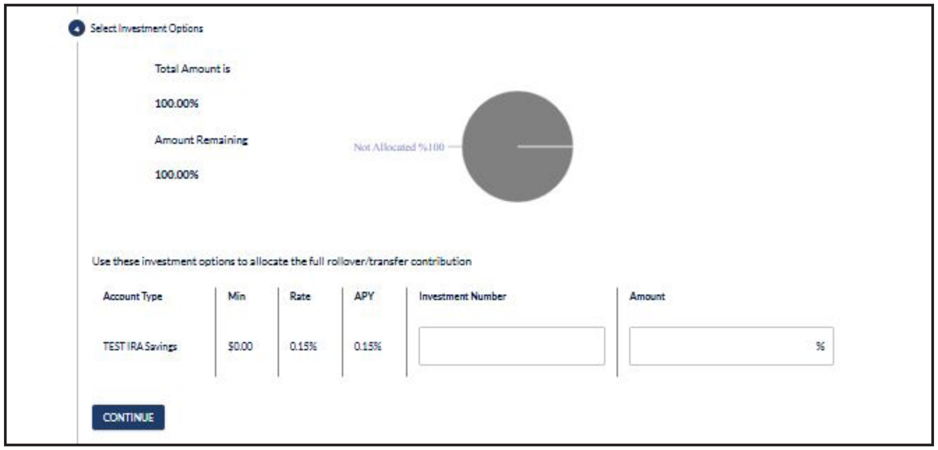
3. **Provide Rollover/Transfer Instructions –** There will be a few fields to answer in this next step like "are you withdrawing the entire balance from the current account" and when the rollover/transfer should occur.



Please note: There is an "Additional Details" box where you can enter notes for a WPCU partner-employee to review upon receiving the Rollover/Transfer request. Also, the question "When should the rollover/transfer occur?" must be answered, or you will not be able to continue.

4. **Select Investment Options –** In this step, you will use your investment options to allocate the full or partial rollover/transfer contribution.

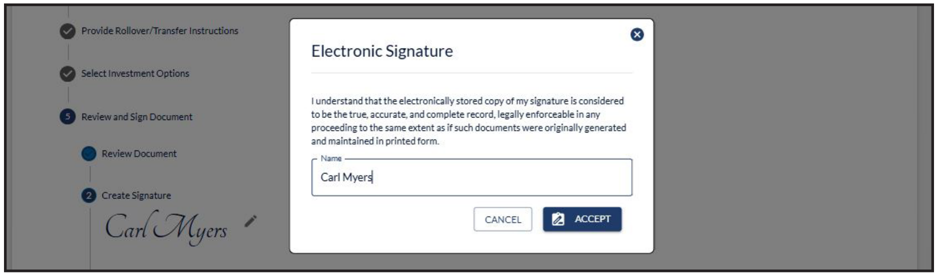
Please note: You will not be able to continue until you enter in the allocation percentage (%) amount.

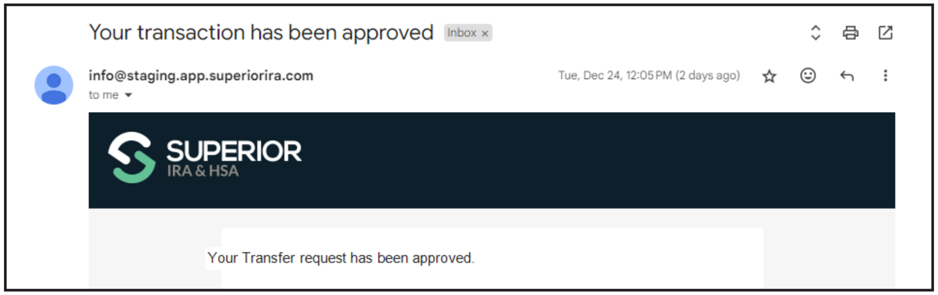


5. **Review and Sign Document –** Lastly, view and sign the electronic PDF document. You'll need to check the box "I have reviewed the document" once you've reviewed the document, otherwise, you will not be able to sign electronically.

Once you sign the document electronically, it will automatically be sent to the WPCU Deposit Services Team. They will review within two business days. You will also immediately receive a confirmation email.

Please note: It is important to note that the confirmation email is a receipt that the document has been **SENT** to WPCU and **NOT** that the transaction has been finalized.

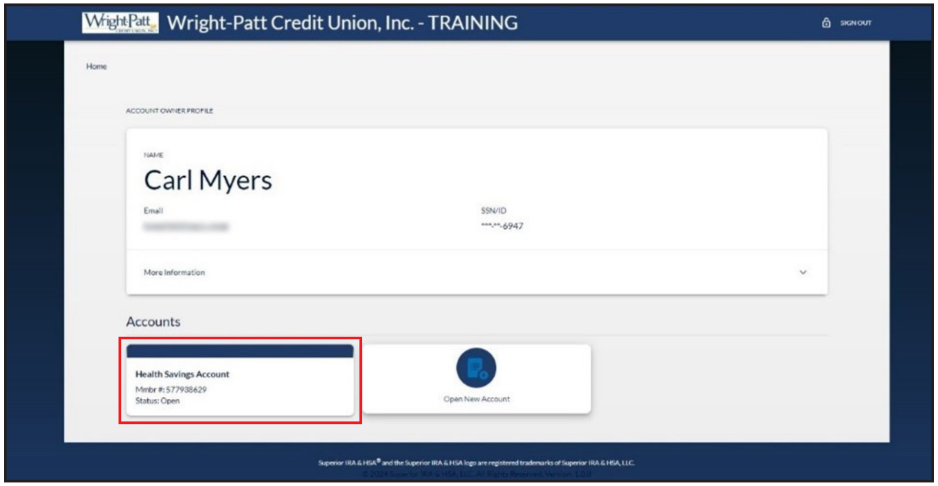




Make a Contribution:

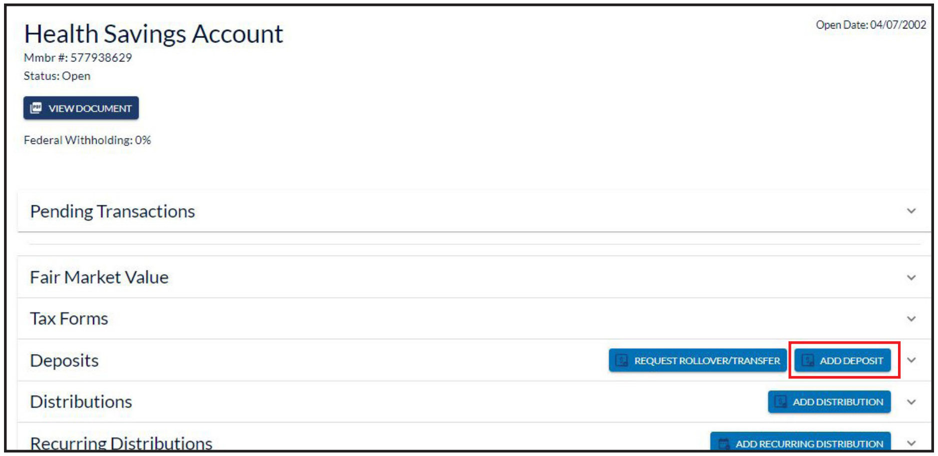
Step #1 – Select "Health Savings Account" from the member dashboard screen.

Once logged into the HSA Service Center, select "Health Savings Account."



Step #2 – Tap the "ADD DEPOSIT" button next to Deposits.

Once you've selected "Health Savings Account," you'll want to select the button "ADD DEPOSIT" located in the Deposits section.

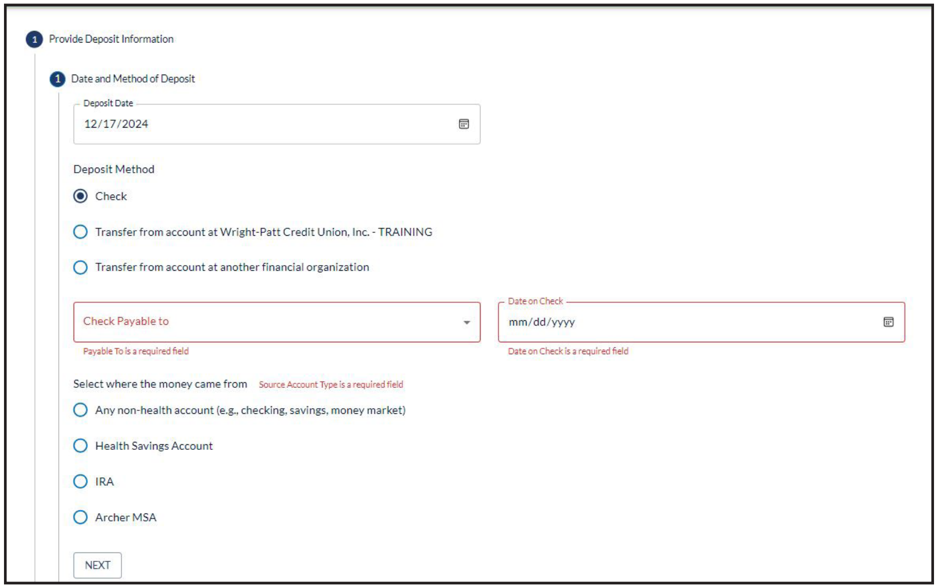


Step #3 – Follow the steps to complete the Add a Deposit request.

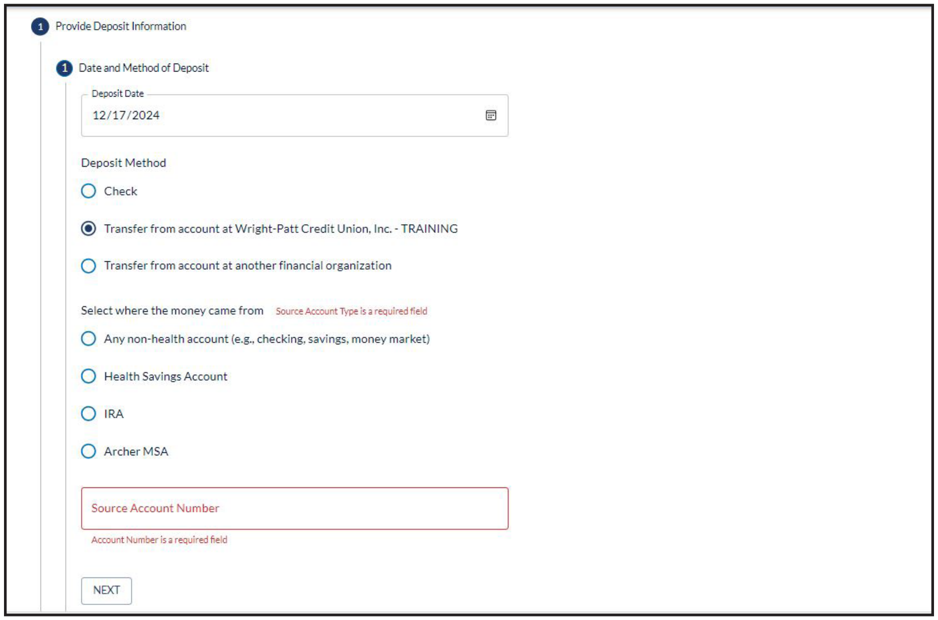
Once you've clicked on the "ADD DEPOSIT" button, you will be asked to fill out the following information:

1. **Date and Method of Deposit –** In this step you will be asked to complete the Deposit Date, Deposit Method, Type of Deposit and Deposit Amount.

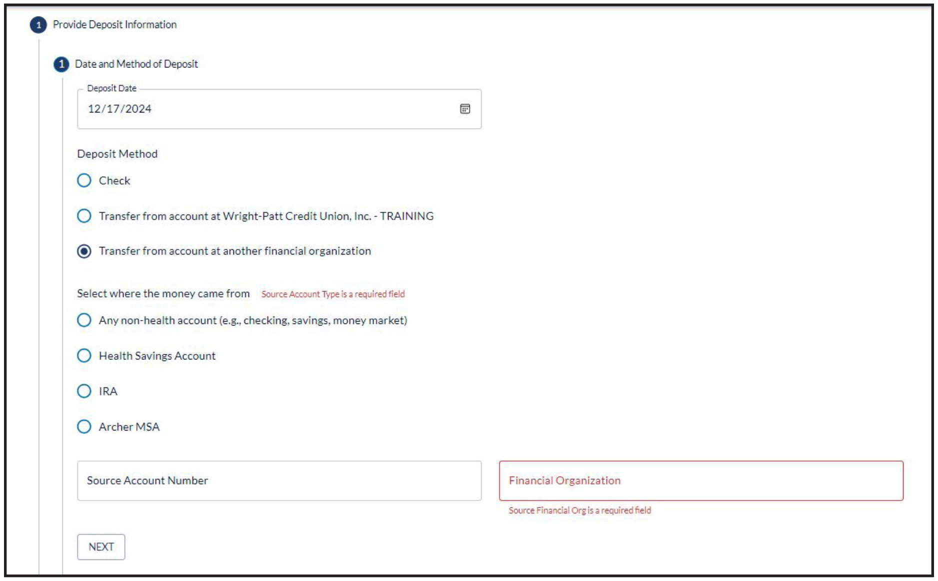
   Please note: Depending on the deposit method you select, there will be required fields that show in red text. Follow the steps to complete prior to clicking "NEXT."



1a. Check Example



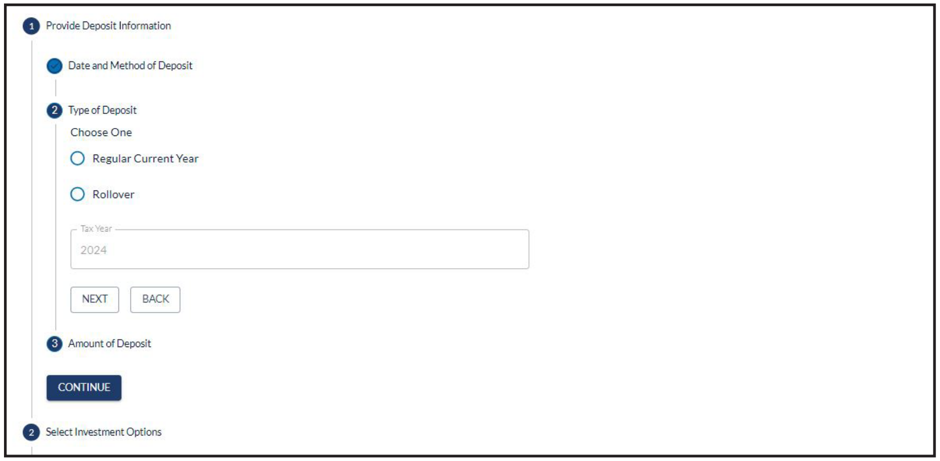
1b. Transfer from a WPCU Account Example



1c. Transfer from Another Financial Institution Account Example

2. **Type of Deposit –** Depending on which option you selected in the previous step, next you will select the type of deposit whether that's a current year or rollover (must be completed within 60 days of the original distribution).

   Please note: Depending on the type of deposit you choose, there will be required fields that show in red text. Follow the steps to complete prior to clicking "NEXT."



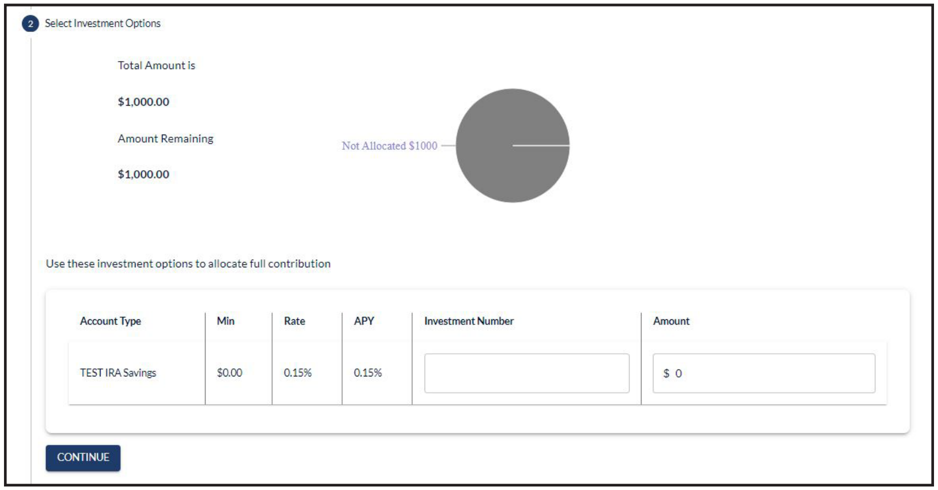
2a. Transfer

2b. Regular Current Year or Rollover

3. **Amount of Deposit –** Enter in the amount of the deposit in this step. The maximum amounts you're able to enter will show next to the "Amount" field in a light blue information box. Select "CONTINUE" to move to the next step.

4. **Select Investment Options –** In this next step, you will be able to "ALLOCATE ASSETS" or "SKIP" this step.

If you choose "ALLOCATE ASSETS," follow the steps to enter in the investment amount before selecting "CONTINUE."



5. **Review and Sign Document –** Lastly, view and sign the electronic PDF document. You'll need to check the box "I have reviewed the document" once you've reviewed the document, otherwise, you will not be able to sign electronically.

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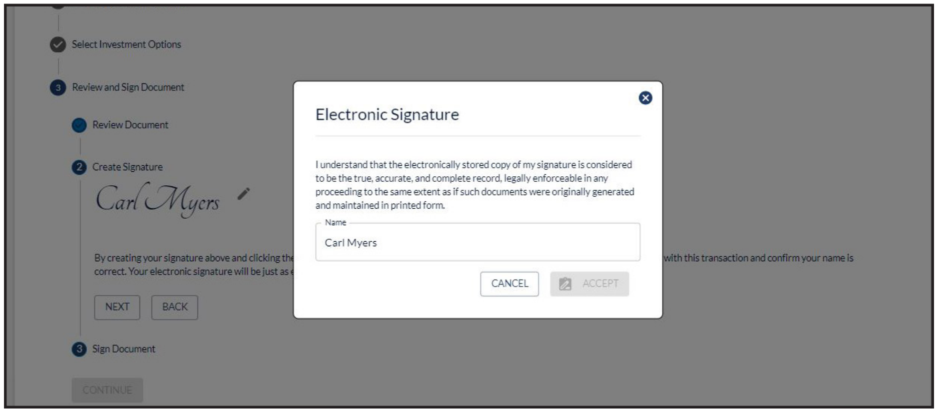
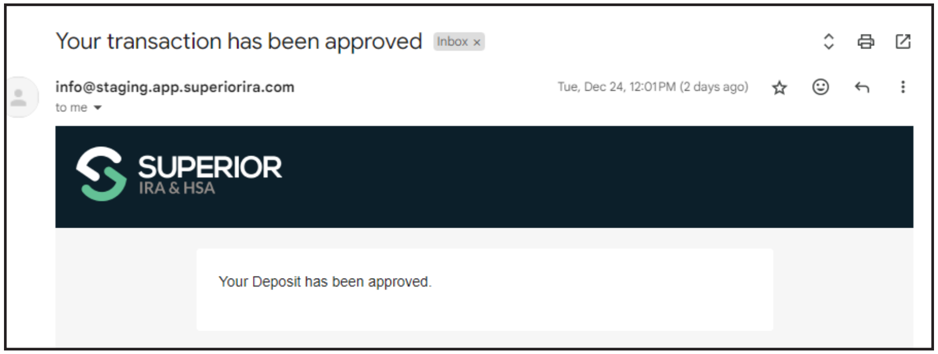
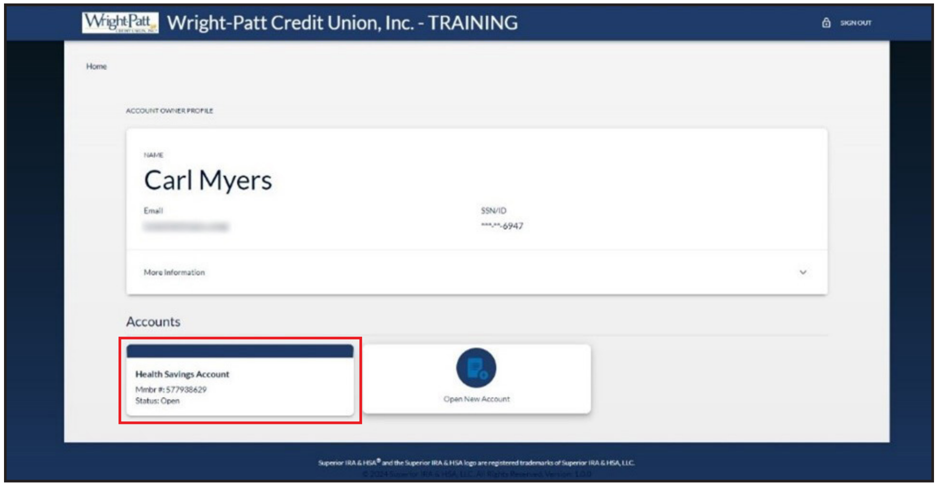




Add a Distribution:

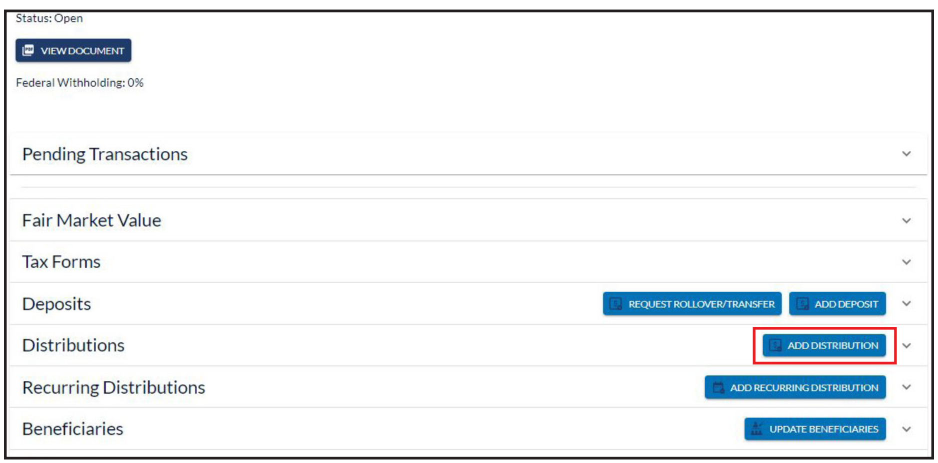
Step #1 – Select “Health Savings Account” from the member dashboard screen.

Once logged into the HSA Service Center, select “Health Savings Account.”



Step #2 – Tap the “ADD DISTRIBUTION” button next to Deposits.

Once you’ve selected “Health Savings Account,” you’ll want to select the button “ADD DISTRIBUTION” located in the Distribution section.



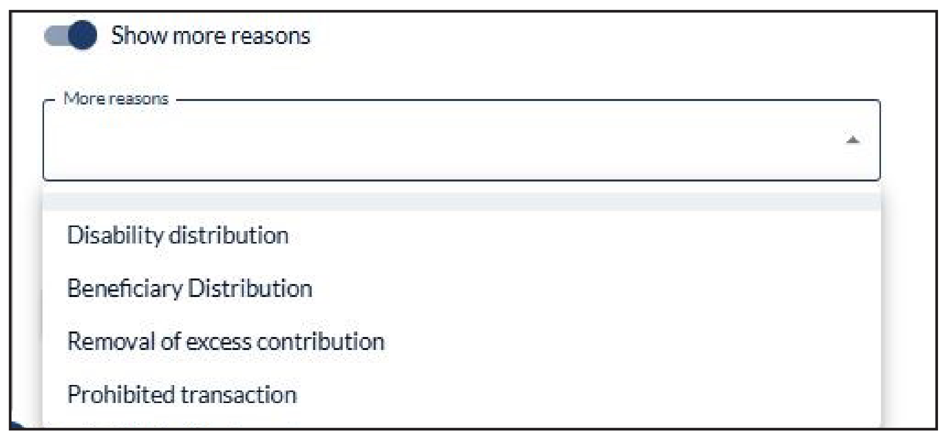
Step #3 – Follow the steps to complete the Distributions request.

Once you’ve clicked on the “DISTRIBUTIONS” button, you will be asked to fill out the following information:

1. **Select Distribution Reason –** In this step you will be asked to select “Normal distribution” or “Transfer to another HSA” before selecting “CONTINUE.”

   Please note: There is a toggle to “Show more reasons.” Select this toggle option for:

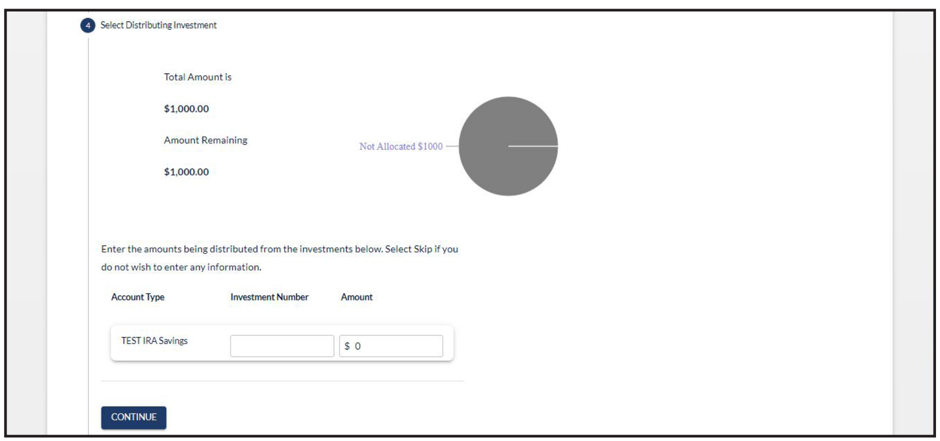
   - Disability Distribution
   - Beneficiary Distribution
   - Removal of Excess Contribution
   - Prohibited Transaction



2. **Provide Distribution Amounts –** In this step you will select to "Distribute the entire balance and close the account" or enter in the specific distribution amount.

3. **Select the Distribution Method –** Next, select a distribution method like Check, transfer from a WPCU account or transfer to an account with another financial institution.

4. **Select Distributing Investment –** Use this option to document the distributing investment for the distribution "ENTER ASSETS" or "SKIP."



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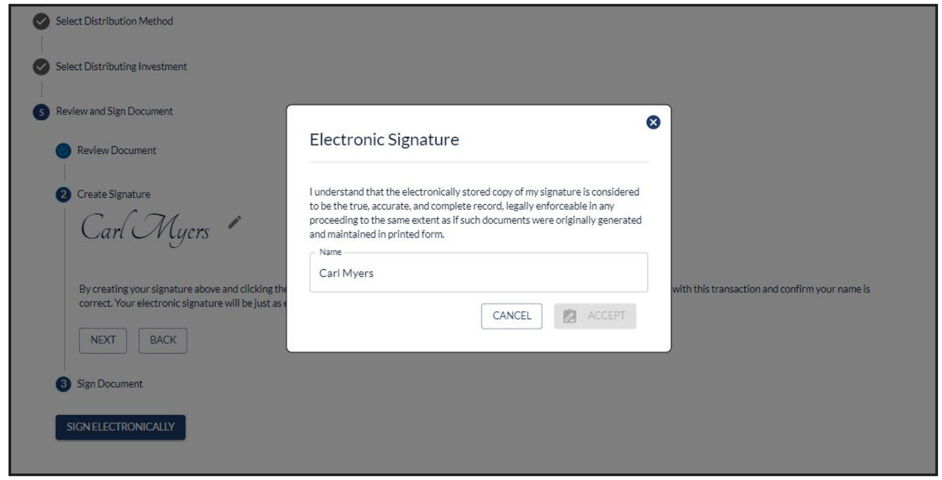

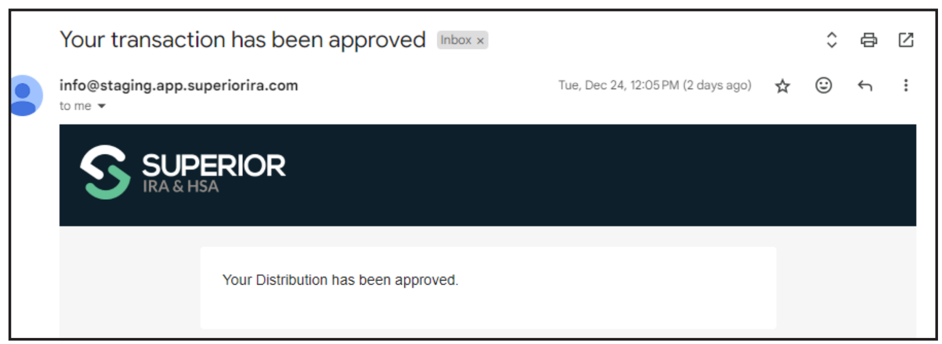

Access Tax Forms:

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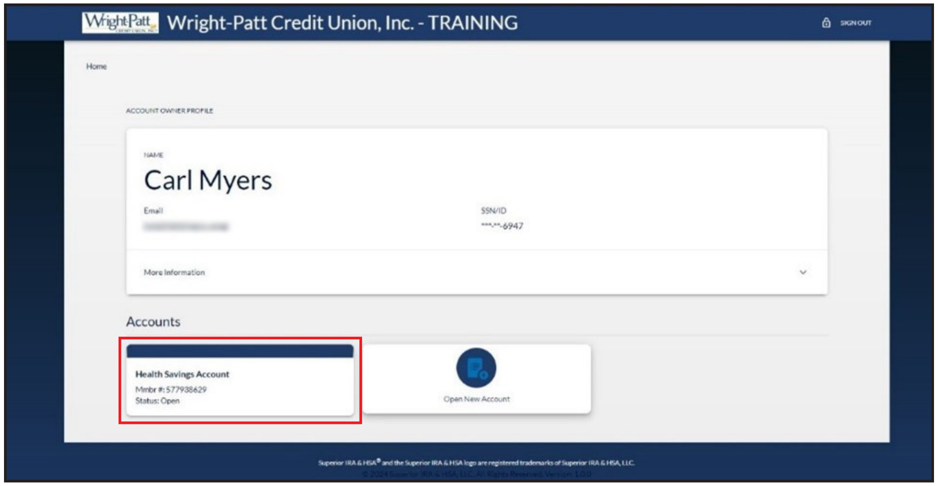
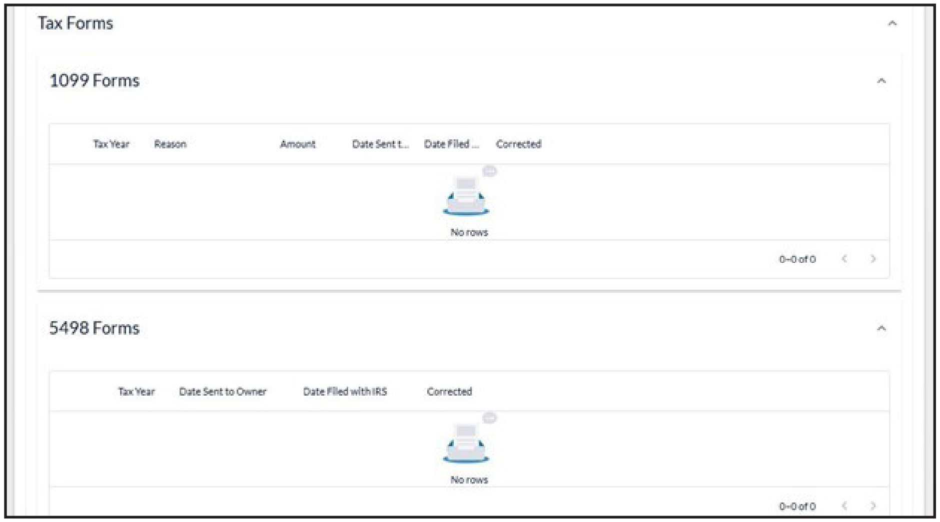


Step #2 – Toggle the arrow/carrot next to "Tax Forms"

Once you've selected "Health Savings Account," you'll want to click on the downward arrow/carrot to expand the "Tax Forms" section.

Step #3 – Expand the 1099-SA Forms or 5498-SA Forms section

Next, select the downward arrow/carrot to expand either the 1099-SA Forms section or 5498-SA Forms section to view an electronic copy of your tax form.



At Wright-Patt Credit Union, we're doing whatever we can to make your life a little easier and that includes providing some of our HSA forms electronically through our new HSA Service Center. If at any time you have questions while submitting your HSA forms, we invite you to call our Member Help Center at (800) 762-0047 and one of our partner-employees would be happy to help you.

If you do not currently have a WPCU HSA account, you may open an account online by visiting WPCU.coop or by visiting a nearby Member Center.

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