

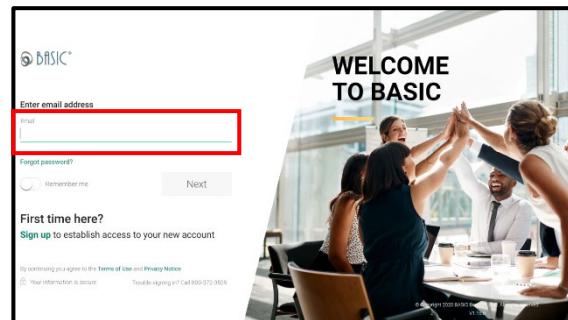
## INVESTMENT TOOL KIT INSTRUCTIONS

### 1. What is the Investment Tool Kit?

The assets in your Health Savings Account (HSA) are invested in mutual fund(s) that have been pre-selected for the plan by the Plan Fiduciary. You may also have the option of moving money between available investments depending on the provisions of your plan.

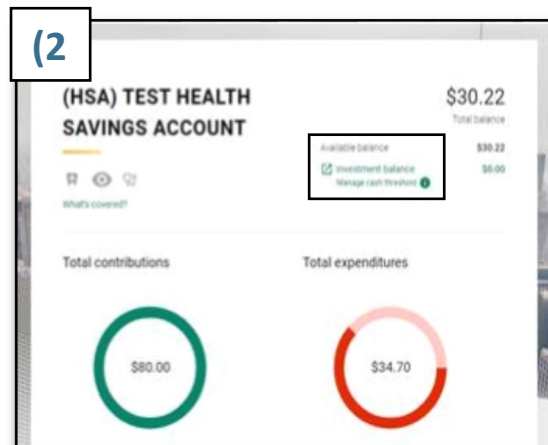
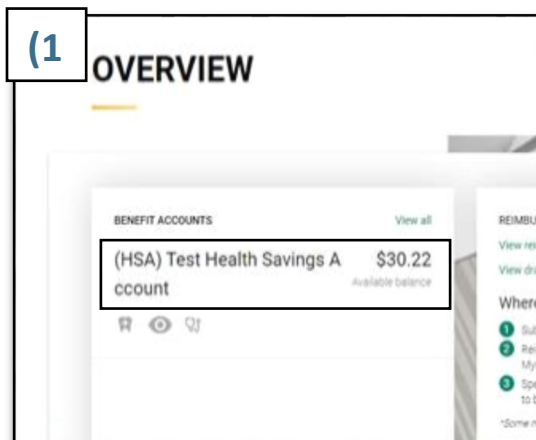
### 2. Sign in

Visit <https://cda.basiconline.com> and click the green *Sign into Consumer Benefit Accounts* button. Before you can sign into Consumer Driven Accounts for the first time, you must sign up for an account. Click the green *Sign up* link at the bottom of the screen. Enter your email address (the same one you used for enrollment) and create a password.



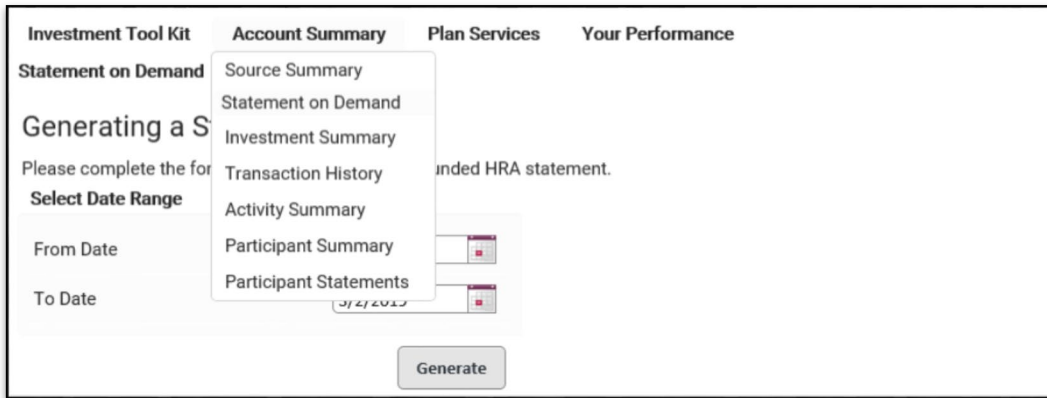
### 3. How do I access my investment balance?

From the Overview page, click on your HSA plan (1) on the left, then click on the green *Investment Balance* link (2) on the next screen. A pop-up will appear telling you that you are navigating to an external website – click on *continue* to proceed.



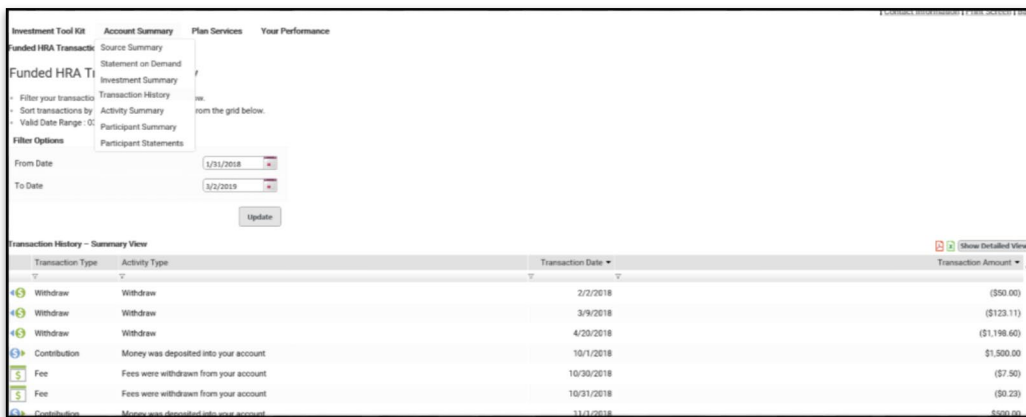
#### 4. How do I generate a statement on demand?

Investment statements are made available online on a quarterly basis following the end of the quarter and an annual basis following the end of the plan year. If you need an investment statement at any other time, under *Account Summary*, click *Statement on Demand*. Select the time period, then click *Generate*. Statements can be saved in PDF or Excel format to your own computer.



#### 5. Where can I find my Historical Transactions?

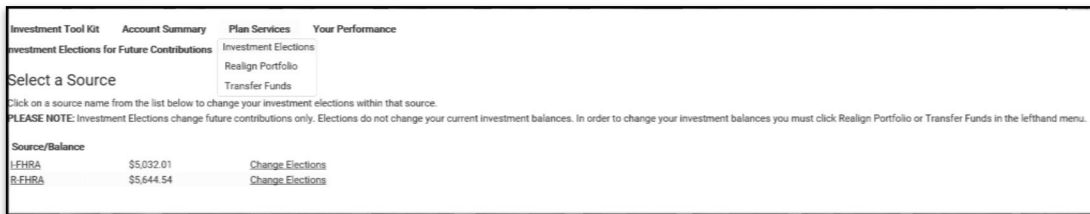
You can look up transactions that occurred within your Investment Accounts. The system makes available two years of history of all transactions of your account. Under *Account Summary*, click *Transaction History* and enter a *From Date* (mm/dd/yyyy) or click on the calendar to select a date. Enter a *To Date* (mm/dd/yyyy) or click on the calendar to select a date, then click *Update*.



Transaction Type	Activity Type	Transaction Date	Transaction Amount
Withdraw	Withdraw	2/2/2018	(\$50.00)
Withdraw	Withdraw	3/9/2018	(\$123.11)
Withdraw	Withdraw	4/20/2018	(\$1,198.60)
Contribution	Money was deposited into your account	10/1/2018	\$1,500.00
Fee	Fees were withdrawn from your account	10/30/2018	(\$7.50)
Fee	Fees were withdrawn from your account	10/31/2018	(\$0.23)
Contribution	Money was deposited into your account	11/1/2018	\$500.00

## 6. Where do I change how my contributions are invested?

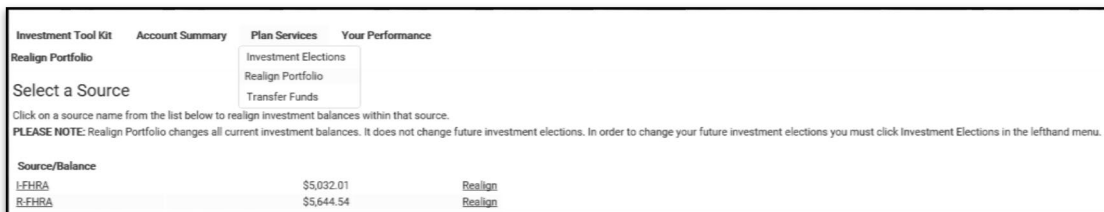
Click on your account from the left side of your screen. Then click on *Investment Balance*. You will get a warning stating that you are now leaving BASIC and navigating to an external website. Click on *Continue* to proceed. Click on *Plan Services* along the top and then select *Investment Elections* from the dropdown menu. Locate your account from the list on the left and click on *Change Elections*. On the right side you can select the percentages you wish to contribute to each investment. Please note, to successfully submit your investment elections change, the new percentages must equal 100%. For more information on each investment, under the heading *Link* you have access to a *Prospectus*, *Fact Sheet*, and a *Website*. When you have finished your elections click on *Submit Investment Elections*.



Source/Balance	Change Elections	Link
LFHRA \$5,032.01	Change Elections	
RFHRA \$5,644.54	Change Elections	

## 7. How do I change where my current balance is invested?

You have two options to change your current investment allocation: (1) Realign Portfolio or (2) Transfer Funds. You can realign your entire balance to fit into percentages for each fund or you can pick and choose how much of your current balance goes into each fund, by percentage or by dollar amount. To realign your current balance, under *Plan Services*, click *Realign Portfolio*. You have the option to realign all your sources, if you have more than one source, or you can realign by source. Click *Realign* to the right of your source. Under *Current %*, you will see what percentage of your current balance is in each fund. Under *New %*, you will select the percentage of your current balance that you want in each fund.

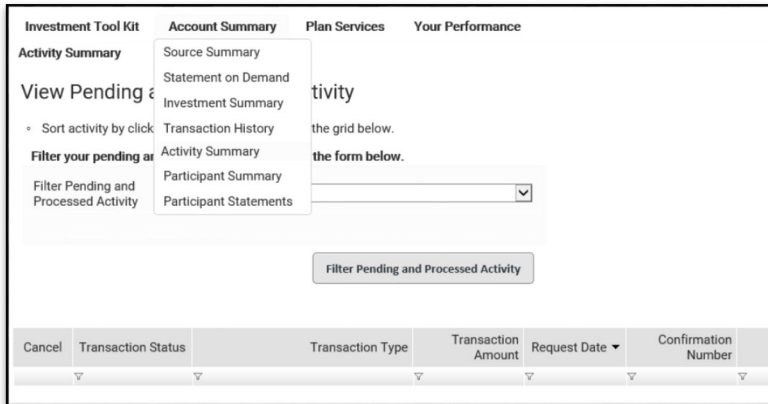


Source/Balance	Realign	Link
LFHRA \$5,032.01	Realign	
RFHRA \$5,644.54	Realign	

If you would like to transfer funds rather than realign, click *Transfer Funds*. Again, you have the option to transfer all your sources, or you can transfer by source. Click *Transfer* to the right of your source. You must select a *Transfer Type*, *Dollar to Dollar*, or *Percent to Percent*. Select your investment. The amount or percent that is available to transfer out of the fund appears at the bottom next to *Transfer Amount*. Enter in the amount to transfer out of the fund. Click *Continue*. In the next screen, you will select where you want to place the amount that you are going to transfer into the remaining fund(s). The amount to transfer is reflected under *Amount Remaining*. When you have placed the amount, click *Transfer*.

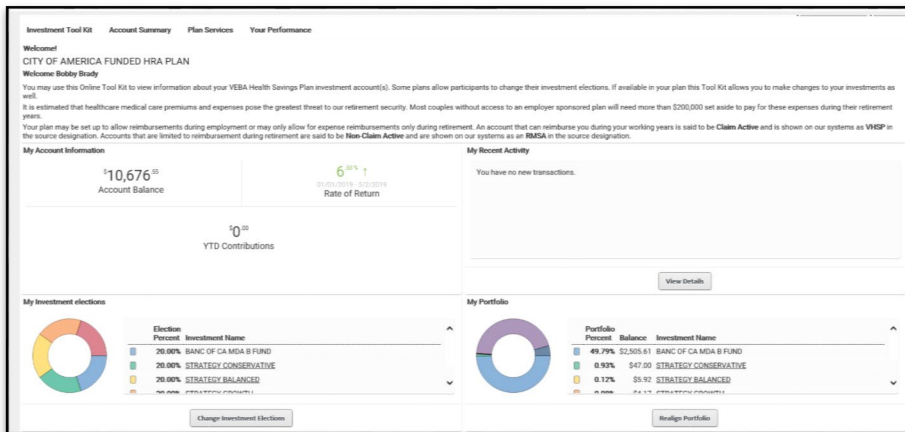
### 8. How do I know if my request has been received?

Under *Account Summary*, click *Activity Summary*. Any pending activity will be present here. Should you wish to cancel any transaction in pending status, click *Cancel*. You will also see at the top right corner of your screen the words *Pending Activity* in red. If you click there, it will automatically bring you to the *Activity Summary* screen.



### 9. How do I know if my request has been processed?

On the home page, you can see your new investment elections and or investment allocation. Please note, investment election changes are an overnight process and realignments/transfers may take up to three days to process. For more detail, under *Account Summary*, click *Investment Summary*. In addition, a confirmation letter will be mailed to your home address the following business day after your request has been processed.





## 10. Where can I find fund fact sheets for the funds?

Throughout the Investment Tool Kit, each time you see a fund that is underlined, you may click on the fund to view current fund information.

## 11. How do I submit reimbursement requests?

After you become claim active, you may submit reimbursement requests from your online BASIC CDA account. It's quick and easy! Before you begin, be sure to have the valid verification for your expenses handy. If you have your verification saved on your computer, you can save yourself a trip to the fax machine or post office by uploading them electronically when you file your request. If you only have paper copies of your verification, you can still file your reimbursement request online, and then send your verification via fax, email, or mail to BASIC.

To submit online reimbursement requests, follow these steps:

1. From your CDA account (<https://cda.basiconline.com>), click the green *Request a reimbursement* button.
2. Choose who the expense was incurred by, expense date, and expense type.
3. Enter expense amount and provider/merchant.
4. Attach verification (must contain date of service, product name or description of service provided, provider name, and recipient name (unless it is a store receipt for prescriptions or eligible over-the-counter items).
5. Review and submit.

