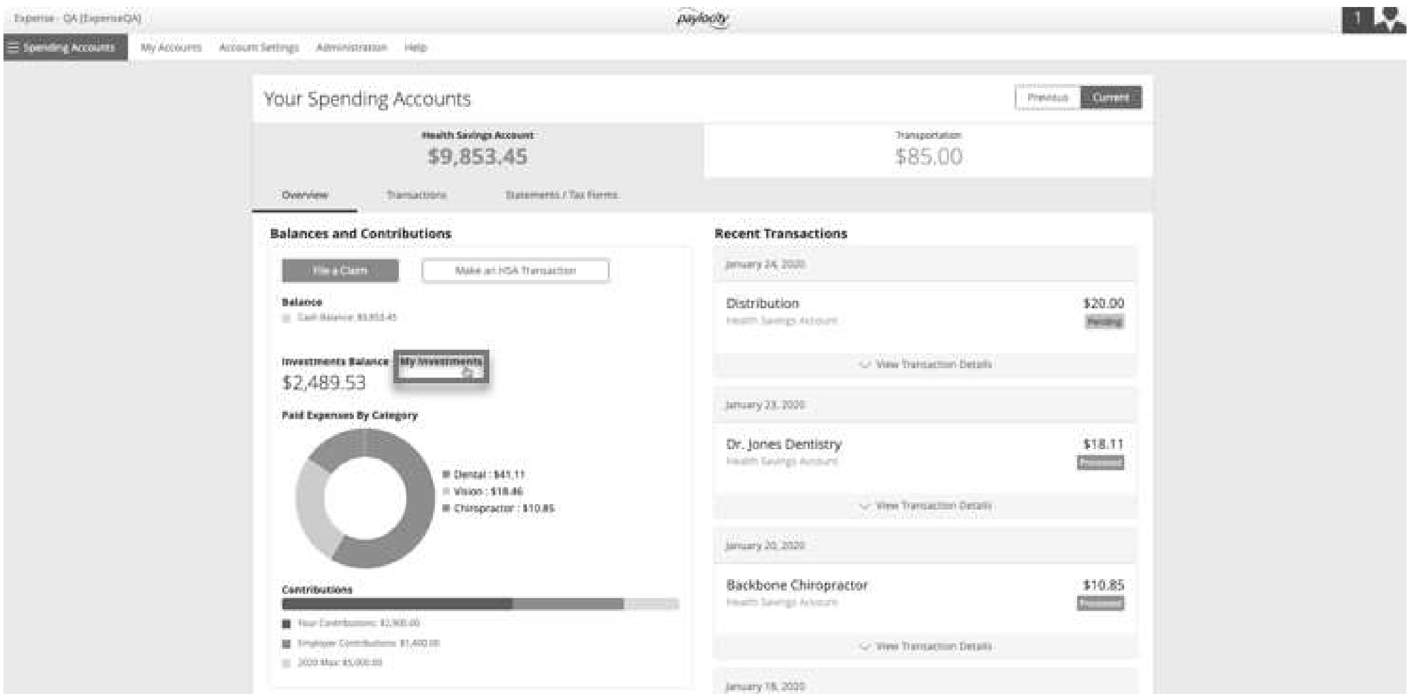
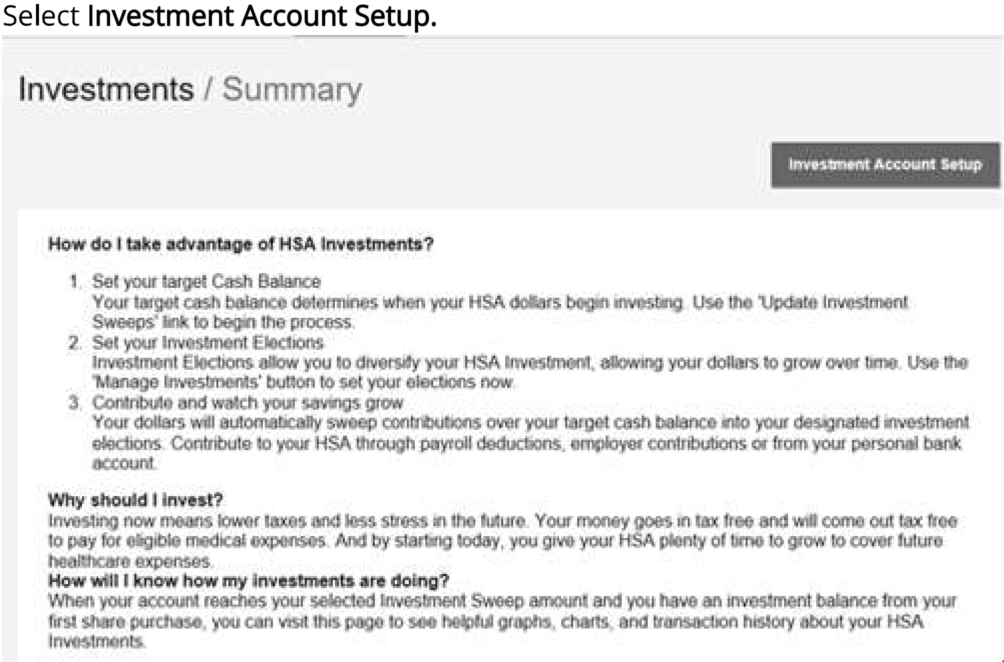
Article ID: PCTY-79380

Manage HSA Investments

1. Access Spending Accounts via the Self Service Portal.
2. Navigate to the **HSA** tab to view Health Savings Account (HSA) cash and investment balances.
3. Select **My Investments** to set up or change investment elections for future contributions.

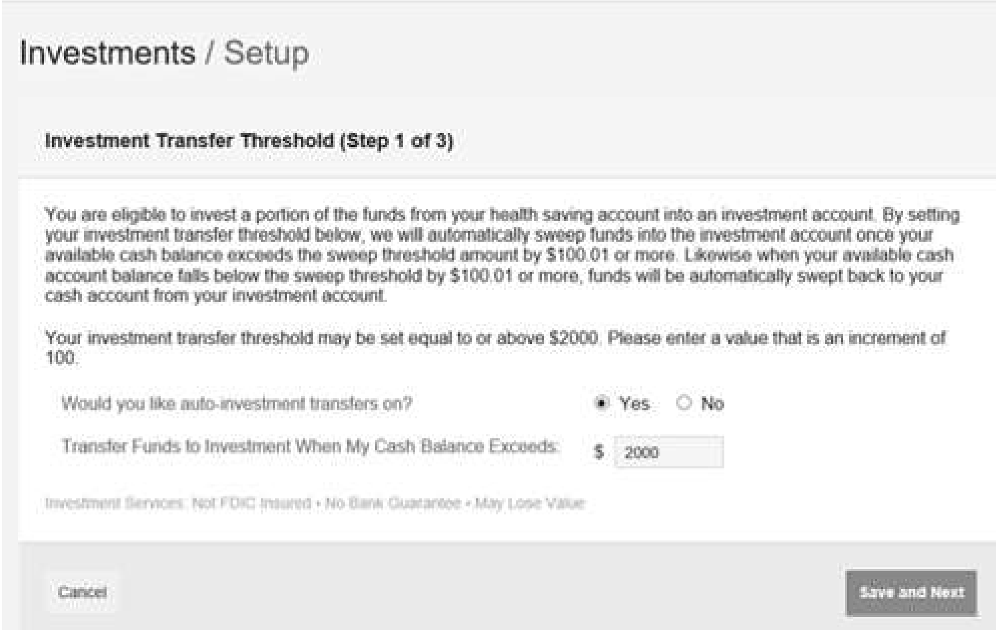


4. Select **Investment Account Setup.**

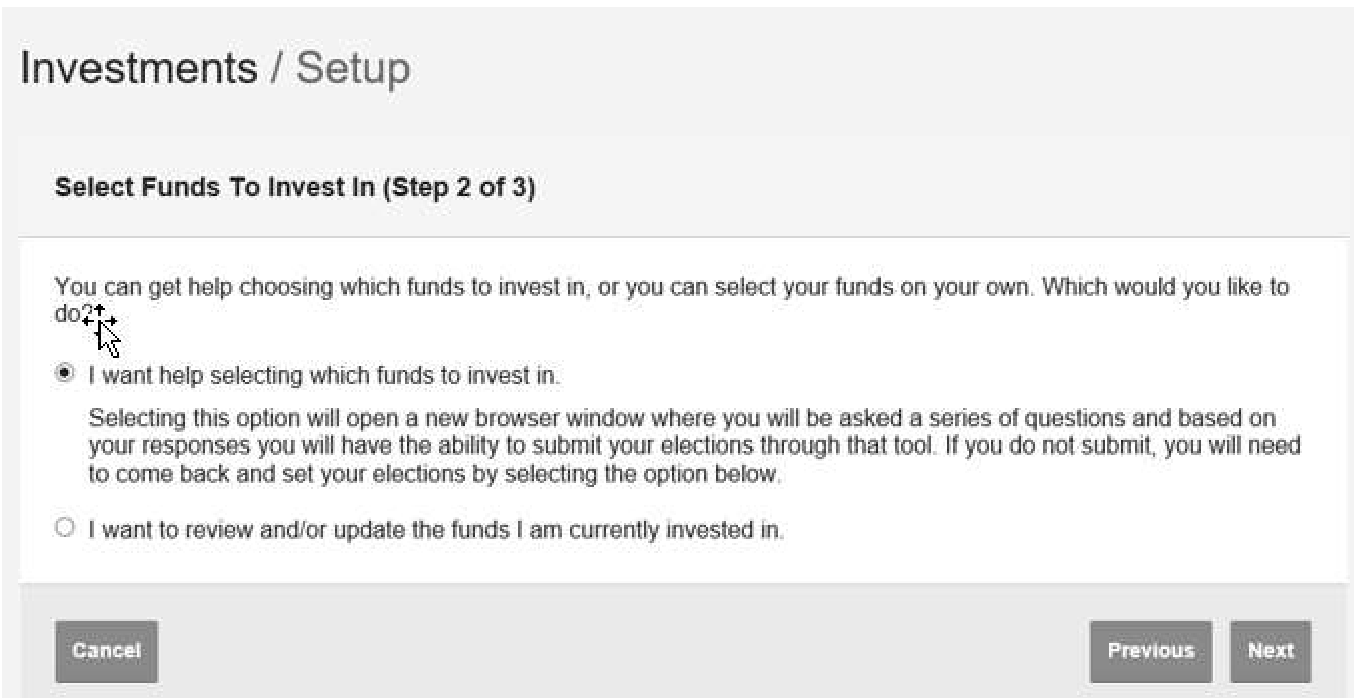


5. Select the appropriate option in the **Would you like auto-investment transfers on?** field.
6. Enter the appropriate amount in the **Transfer Funds to Investment When My Cash Back Balance Exceeds:** field.

7. Select **Save and Next.**



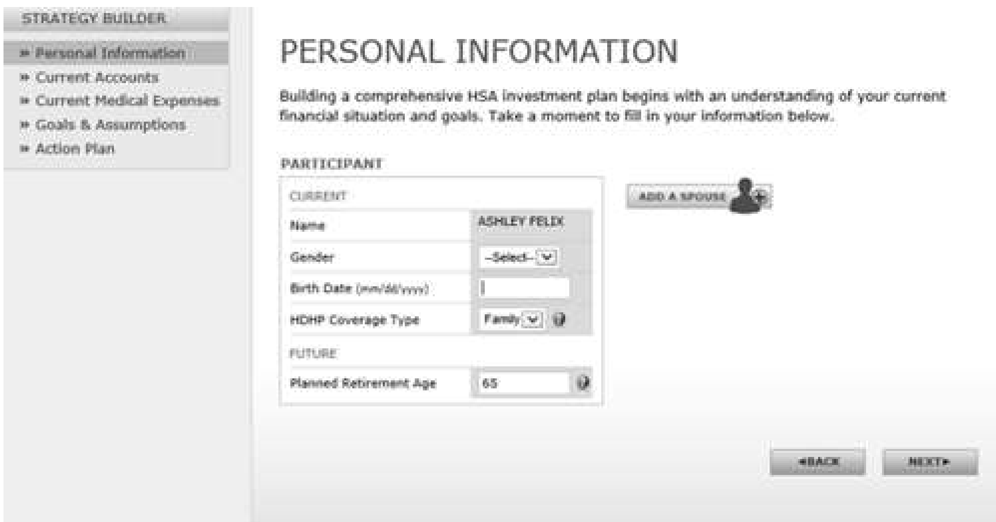
8. Select **I want help selecting which funds to invest in** to use the HSA Strategy Builder and develop a personalized action plan, or select **I want to review and/or update the funds I am currently invested in** to make selections without the Strategy Builder.
9. Select **Next.**



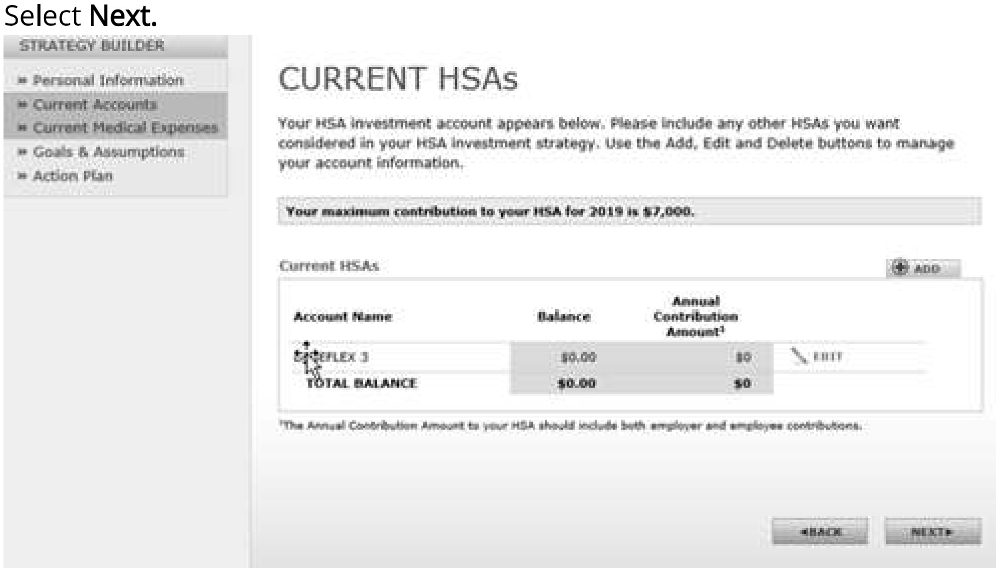
10. Complete the Strategy Builder, if applicable.
    - Review the information on the introduction page.

- Select **Next.**

- Enter the required **Personal Information**.
- Select **Next.**

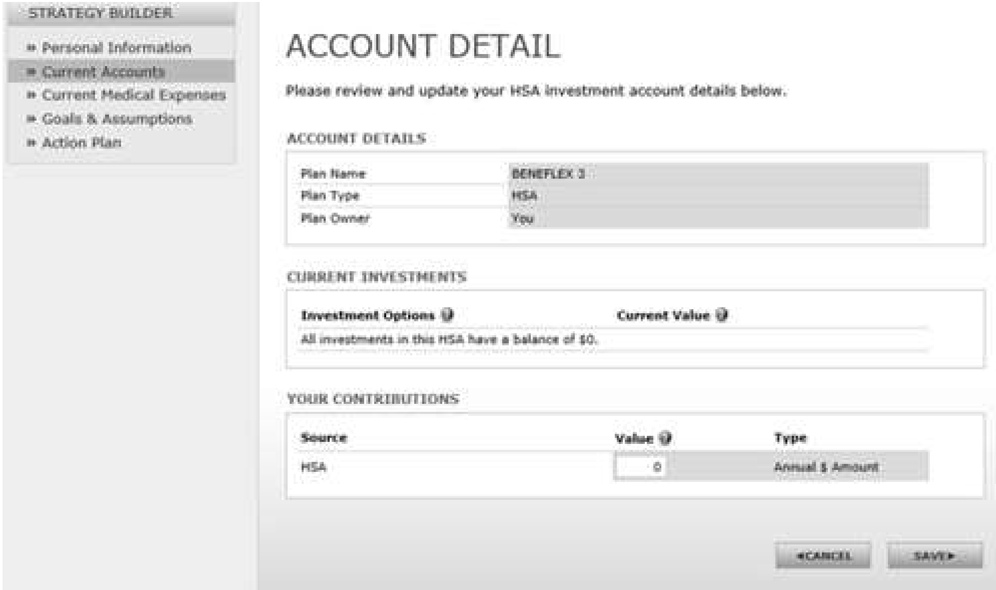


- Enter any necessary **Current HSA** information.
- Select **Next.**

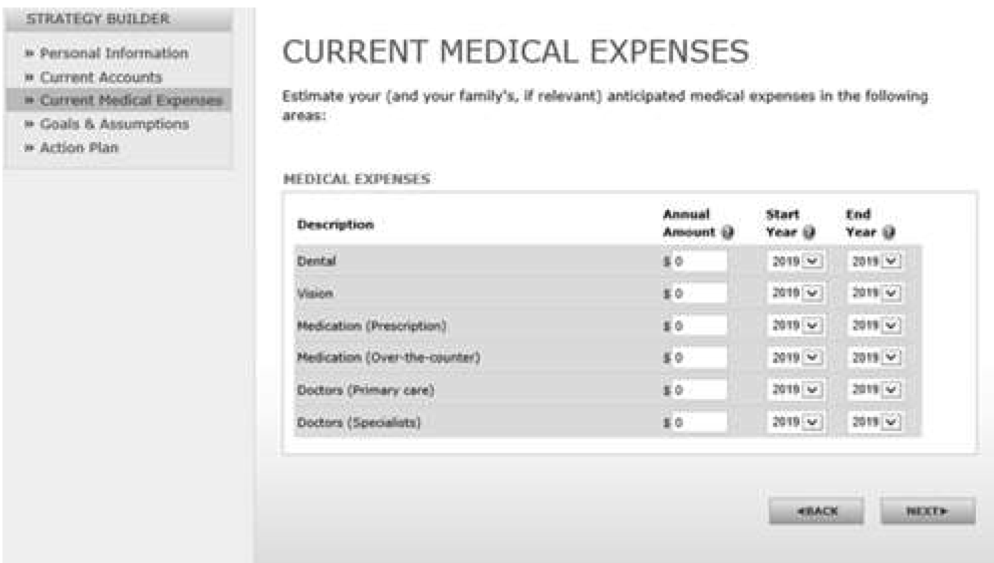


- Review the information entered.

- Select **Save.**

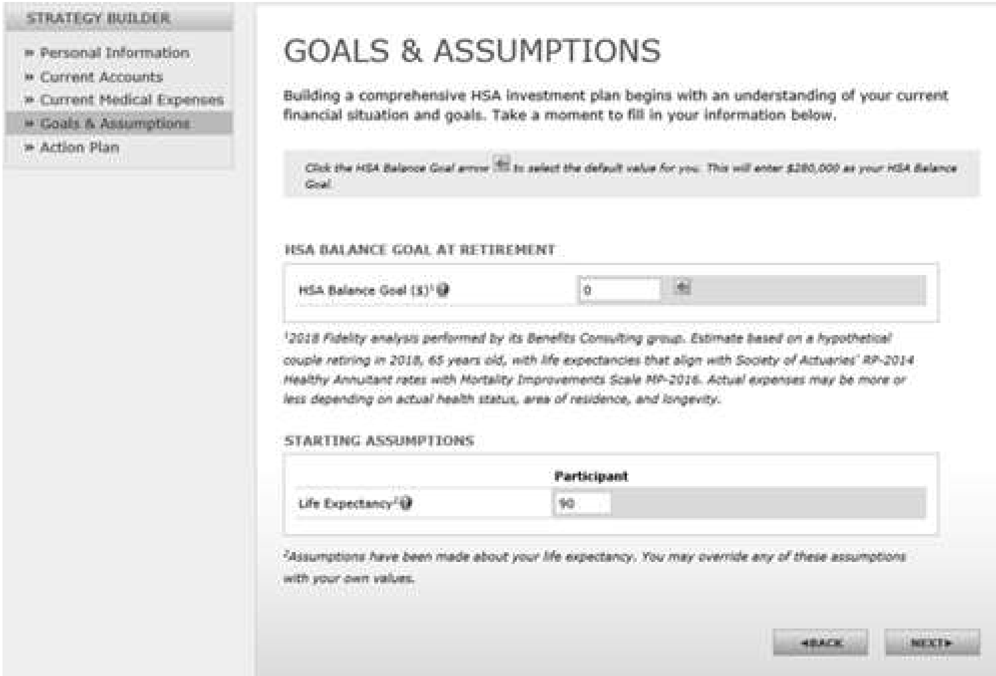


- Enter any **Current Medical Expenses.**
- Select **Next.**

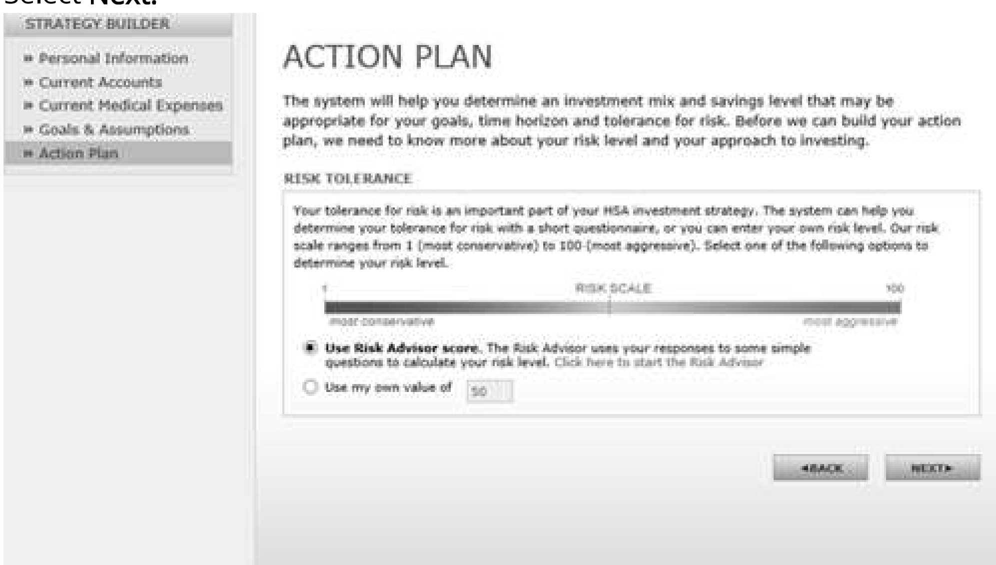


- Enter any applicable **Goals & Assumptions.**

- Select **Next.**

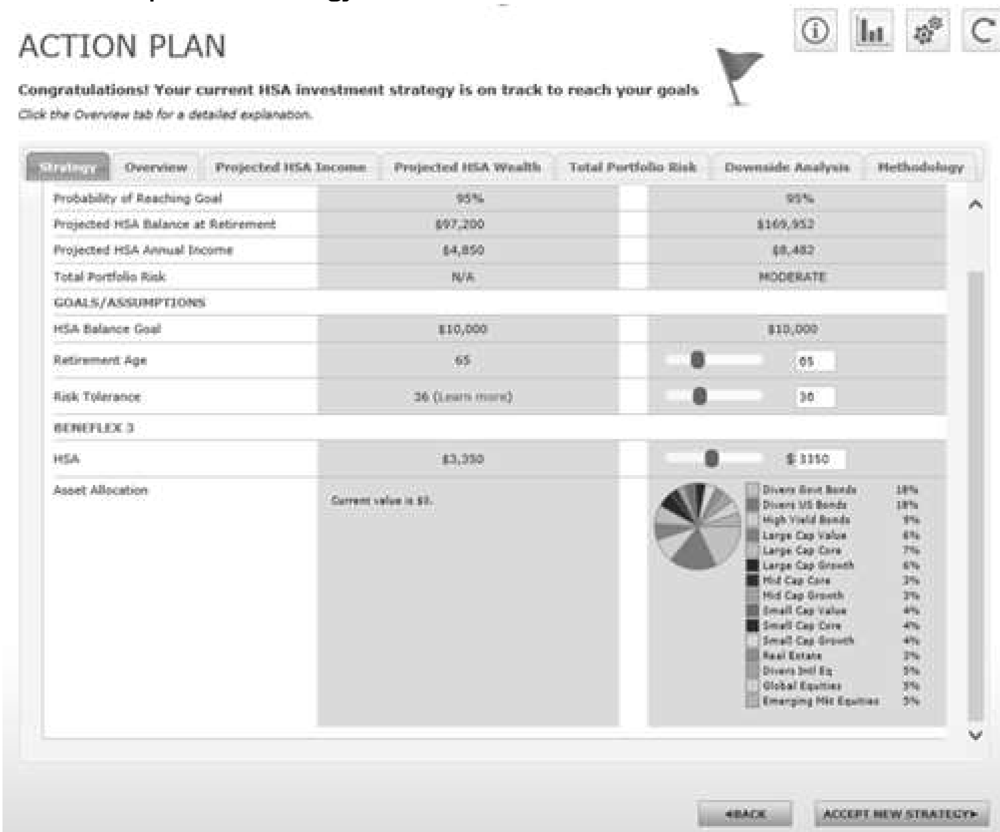


- Select the appropriate **Risk Tolerance.**
- Select **Next.**

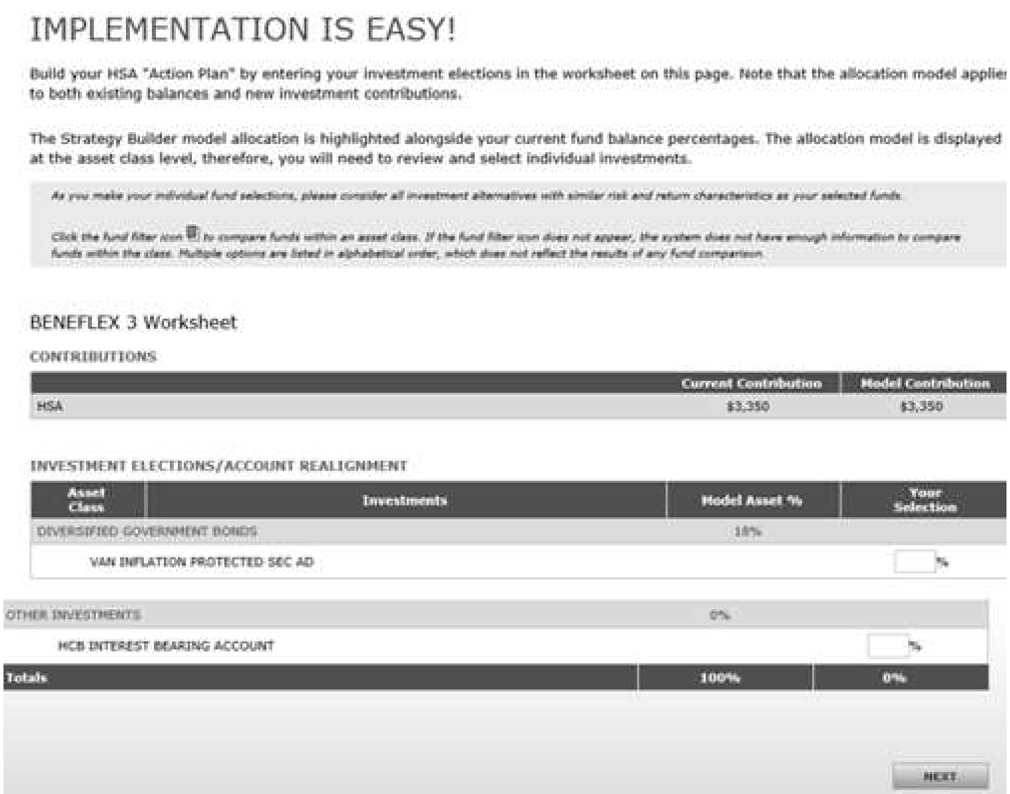


- Review the Action Plan created.
  1. Select **Back** to make changes.

2. Select **Accept New Strategy** to move on.

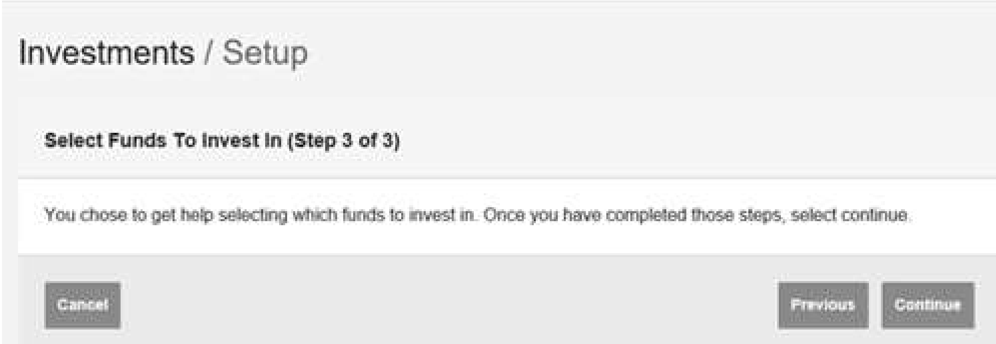


- Complete the worksheet.
- Select **Next.**

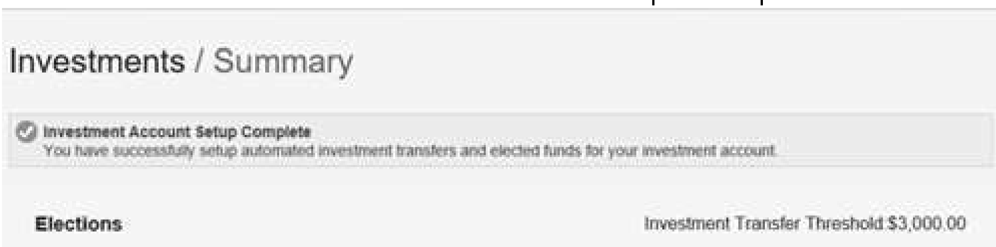


- Select **Submit.**

11. Select funds to invest in, if not using the Strategy Builder.



12. Receive notification that Investment Account Setup is complete.



Important Information: If users do not choose specific investments, 100% of any contributions will be in the HCB Interest Bearing Account. Users can choose to allocate funds among any of the investment options listed by entering the specific percentage. Please note any changes will affect investment elections for future contributions but will not change the investment of the current balance.

You can view this article at:
https://paylocity.egain.cloud/system/templates/selfservice/pcty/help/agent/locale/en-US/portal/308600000001000/content-version/PCTY-79380/PCTY-816719/Manage-HSA-Investments