

HSA GROUP ONLINE



SIGN UP GUIDE

As the name suggests, the HSA Group Online is a fully digital product from end to end. Here are the steps for the employer and employee to set up a new plan.

There are two phases. The first phase establishes the Benefit Coordinator and company account. The second phase establishes individual employees.

Phase 1 – Establish Company Account

1. Direct the Benefit Coordinator (person in charge of benefits) to your Olympia partner website and click Sign Up Now.
2. There are 5 sections to establish the company account. There are info tabs marked by an “i” that can be clicked on for further information. Ideally you want to fully explain to your client prior to the sign up or be present when the client makes the application.
 - a. Company Information – Company contact information and Plan Year End
 - b. Benefit Coordinator Information – Contact information
 - c. Employee Classification and Benefits Limits – Establish Classification names and associated Benefit Limits
 - d. Claim Funding – Establish monthly funding amount
 - e. Company Banking Information – Establish online funding
 - f. Terms & Agreements – Review the agreement
3. The BC (Benefits Coordinator) will then be able to review the data they have entered
4. The payment is made by credit card
5. A confirmation email with login credential to access MY Olympia will be sent to the BC (Benefits Coordinator).
6. The BC (Benefits Coordinator) can login to their account. Upon logging in for the first time, they will be prompted to change their password.
7. The BC (Benefits Coordinator) will then be asked to confirm / enter their personal details