

HEALTH SAVINGS ENROLLMENT INSTRUCTIONS

Here are the directions for new employee enrollments. This is the preferred method of enrolling. There is a lot less room for human error and the accounts are opened in real time. Once you logon here – you will fill in all of your information and account is opened!

Once you have completed the enrollment process, email me at cscott@bedford.k12.va.us to let me know you have completed the process of enrolling.

Enrollment

Go to <https://hsaa.ipx-sys.com/Login.aspx>

Click on "New>Member Portal>"

Account Number / User Name: **enroll_BedfordCoS**

Password: **enrollme**

Before sitting down to fill out your enrollment form, it is a good idea to have a couple things on hand:

- *Authorized Signer Name, DOB and SSN (if applicable)*
- *Beneficiary Name and DOB*

HealthSavings is required to comply with the Patriot Act, which requires banks to verify the identity of new account holders. Your employees may be requested to answer questions or provide additional information as part of this process. If more information is needed, an email with instructions will be sent to the employee. If an employee does not provide the requested information, the account will NOT be opened and cannot be funded.

Be very careful in completing the enrollment process as there is two (2) places to sign; and you must make sure your selections of the debit card and/or Vanguard funds total 100%.

NO MONIES WILL BE DEPOSITED INTO A HEALTH SAVINGS ACCOUNT UNTIL WE RECEIVE VERIFICATION FROM THE ADMINISTRATORS THAT YOUR ENROLLMENT HAS BEEN COMPLETED. MONIES WILL BE ADDED AS OF THE ENROLLMENT MONTH.

Should you wish to make additional contributions from your payroll check into your HSA, you may email Diana Perkins (Payroll Supervisor) at dperkins@bedford.k12.va.us and let her know the amount you want withheld.

Charlene Davis Scott,
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