



Step by Step – Online Instructions for the Health Savings Account

- Go to our website: www.cmefcu.org
- Click on “Open An Account”/blue box
- Click on “Open An Account”/blue box (again)
- Click on “Personal” Account
- **Eligibility:** “I qualify for membership because.....” Click in the box for “I live/work/worship or attend school in an eligible county”. Then use the drop down boxes to select your county & then select your employer the click on ‘continue’.
- Read “**Disclosure**” & scroll to bottom, click the small box next to... “I have read....” And hit “continue”.
- **Default Products:** Choose your first account. (The H.S. A. will be a ‘sub-account’....you must select the Advantage Share in order to move forward) So click the blue box that says “Select” for the Advantage Share. A box will pop up and click on “Add Account”, then “Continue”. In the box that pops up, be sure e-statements in marked with a checkmark and “Add Account” (Please note: You will not be actually sending us \$5 for the membership, we take care of that for you!)
- Click “Continue”
- **Available Products.** Click on the H.S.A. tab on the left hand side of the screen, a box will pop up and click on the blue “+” sign. Another box will pop up. Find where “Optional features” is, Click in the box that says “H.S.A. Debit Card, so that we order you one. Scroll down to where it says “Additional Info” – answer those questions in the drop down boxes. Family or Individual and Married or Unmarried. And click on “Add Account”.
- Next you will see **Review Products**. Be sure you have two listed: Advantage Share and the H.S.A. - Then click “continue”
- **Applicant Information:** Proceed in filling out all that necessary information.
 - **Phone** – be sure to add your cell phone number under “Home” phone, if you don’t have a land line phone at home.
 - **Employer** – be sure to mark, at least 1 month duration, if you are a new employee.
 - When you get to the bottom and see “Additional Info” And it asks, how did you hear about us– please select “Health Savings Account” That’s just so we can track where the account came from 😊
- Next you will see **Accounts** – please select a *username* and *password*.
- Next is **Beneficiary** – if something should happen to you and you have a balance in your account whom will be the beneficiary to those funds? You don’t *have* to have one listed, however, we recommend it. We just need their first and last name and birthday.
- **Account Funding** – In order to get through this screen, please use the drop down for Advantage Share & type in \$5. Then mark “Mail a check or money order” – But **DON’T** send a check or money order. And then mark the box “I agree...” & Continue.

Review Application – This is a snapshot of everything you filled out. If it looks correct, then mark the box at the very bottom that says: “By clicking the I agree...” and hit **Submit**.

Once you see this screen, you have completed the application for the Health Savings Account.

Next this application will be processed and you will receive an email from ‘DocuSign/CME’ – this is how we capture your electronic signature. Once that is done, we’ll order a debit card(s). Those will arrive in a plain white envelope in about 10-14 business days.

If you wish to rollover an existing HSA from another institution, please contact me directly at the number below. If there is something you don’t understand or not sure of, please email me or call me and I’d be happy to help!

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