

Employee HSA Quick Start

Sign up for your new Lively HSA in
5 minutes or less

Step-by-Step Details

- 1 Check Your Email**

You will receive an email from your employer to enroll for your new Lively HSA. Click on the “Complete Enrollment” button within the email to get started.
- 2 Complete Enrollment**

You will be redirected to the Lively website to fill out the information necessary for enrollment. You will need to fill out:

 - Your first and last name
 - Your mobile phone number
 - Your email address
 - A secure password

Some of this information was likely already supplied by your employer, but double check that the information that’s listed is correct. Be sure to also agree to Lively’s Terms & Conditions.
- 3 Check Your Email (again)**

You will receive a verification email from Lively to ensure that the new email address that you listed is the correct one.
- 4 Verify Your Eligibility**

You will need to be enrolled into a qualified health plan or have an existing HSA to enroll into your new Lively account. If your employer enrolled you, you are qualified for an HSA. If you have an existing HSA at a different provider, you can mark that you would like to transfer your assets over to Lively on this page. You can also transfer your funds after you fully set up your account.



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Submit Your Demographic Information

You will need to provide your demographic information to continue. This step is required because of the United State Patriot Act. You will need the information below:

- Home Address
- Social Security Number
- Date of Birth
- Occupation

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Select Your Plan Type

You will have two plan options to choose from: an individual plan or a family plan. You can only choose the family option if you are currently covering another individual or have dependents covered by your healthcare plan. In all other cases, you will choose the individual plan as your option.

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Connect Your External Bank Account (Optional)

While this step is optional, we recommend connecting an external bank account to your Lively HSA. You can use this to add direct contributions, reimbursing yourself back into your personal checking account, or for paying investment fees.

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Submit Paperwork for Our Banking Partner

You will see the terms and conditions from our banking partner, Choice Financial. Check the box to agree to their terms and conditions.

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View Your New Lively Dashboard

Once you submit terms and conditions from our banking partner, you will be directed to your new Lively dashboard! Once you begin contributing and using your Lively debit card, you will see your recent contributions, purchases, and how much of your deductible you've spent thus far.

