

Opening your Health Savings Account (HSA)

If you already have an HSA through UMB, you do not need to complete this step.

Visit oneschupan.com (Your **Benefits** tab and select **Benefits-at-a-Glance** then **Open Enrollment**).

- Go to the Signature HSA Compatible Medical Plan.
- You will see a link: [CLICK TO OPEN YOUR HSA ACCOUNT](#)

Your Enrollment Verification Number: THA0001-161045

Please see the following highlights to assist you through opening your account.

Answer the questions. The website will lead you through the process.

HSA Enrollment



Review Eligibility Requirements

In order to open an HSA, you must have a qualifying health plan. The following questions are designed to assist in determining if you are eligible for an HSA. Please note that UMB Bank is not responsible for providing tax advice. If you have any questions on how to respond or the impact of your responses on your potential HSA, please consult your tax advisor.

To determine if you are eligible to open an HSA, please answer the qualifying questions below:

1. Are you covered by a qualified high deductible health plan (HDHP)?

Yes

No

Enter the coverage effective date of your High Deductible Health Plan. (first of the month after hire date)

HSA Enrollment

Personal Information

Disclosures

Confirmation


Account Owner Personal Information

NOTE: To help the government fight the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When you open an HSA account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

A Health Savings Account is a single ownership in the name of the Account Owner.

Fields with an asterisk (*) are required.

Health Insurance Provider Information

Effective Coverage Date * 

01/01/2024

**You will be sent an email with a verification code.
Enter the code (see below).**

HSA Enrollment

Personal Information

Disclosures

Confirmation

Account Owner Personal Information

Fields with an asterisk (*) are required.

Please provide the current, correct personal email address you wish to use for receiving information about your HSA below and follow these steps to verify:

1. Enter your email address in the 'Email Address' field and then re-type the address in the 'Confirm Email Address' field.
2. Click on the 'Verify Email Address' button. A 'Verification Code' will immediately be sent to the email address you provided.
3. Open the email sent to you and retrieve the 'Verification Code'. Type the code into the field below labeled 'Verification Code'.
4. Click on the 'Continue' button to continue.

You will not be able to continue on with your enrollment without completing these steps.

If you require another 'Verification Code' email to be sent, click the 'Resend Verification' button.

If you wish to change the email address you are verifying with us, click the 'Change Email Address' button and repeat the steps above.

Email Address

jenna.peters@schupan.com

[Change Email Address](#)

Confirm Email Address *

jenna.peters@schupan.com

[Resend Verification](#)

Verification Code *

Click on and read each consent form (4 total). If you agree, click on "I consent".

HSA Enrollment

Personal Information > Disclosures > Confirmation

HSA Deposit Account Agreements and Disclosures

To open an HSA you must review and agree to the following documents (the "Documents"). You must select 'I Consent' below to indicate you have read and accept the Documents and agree to receive these Documents electronically. In order to access these materials in the electronic format provided, you will need a personal computer or mobile device with internet connection, 128 bit encryption and systems capability to open, save and print files in PDF format using [Adobe® Acrobat Reader®](#) or other compatible software. To utilize this site, the browser you use needs to be configured to allow pop-ups.

By clicking the 'I Consent' button below, I acknowledge and agree as follows:

- I have received and am able to access each of the below Documents in electronic form.
- I have read the Electronic Disclosure and Consent and I provide my consent to receipt, in electronic format, of the account terms, conditions and disclosures related to my opening the HSA.
- I certify that the information I provided as part of the online application, including my social security number, is true and correct.
- I have read, understand, and agree to the terms of each of the Documents presented here.

Electronic Disclosure and Consent	<input checked="" type="checkbox"/>
HSA Custodial Agreement	<input checked="" type="checkbox"/>
Terms and Conditions (Including Fee Schedule) and Electronic Fund Transfer Disclosure	<input checked="" type="checkbox"/>
Privacy Statement	<input checked="" type="checkbox"/>

Back I Consent

The last step is to review and confirm all the information is correct and submit!

Watch for your
**Welcome
Packet and Visa
Debit Card**
in the mail!

After receiving your
packet, you
can sign up for access to
the UMB portal,
Healthcare Services.
Visit oneschupan.com
to sign-up for HSA Online
Access.