



Spending Account Member Portal – HSA

Spending Account Member Portal



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Medicare Benefits You Deserve In 2021

Already enrolled? Find out more about your member benefits.

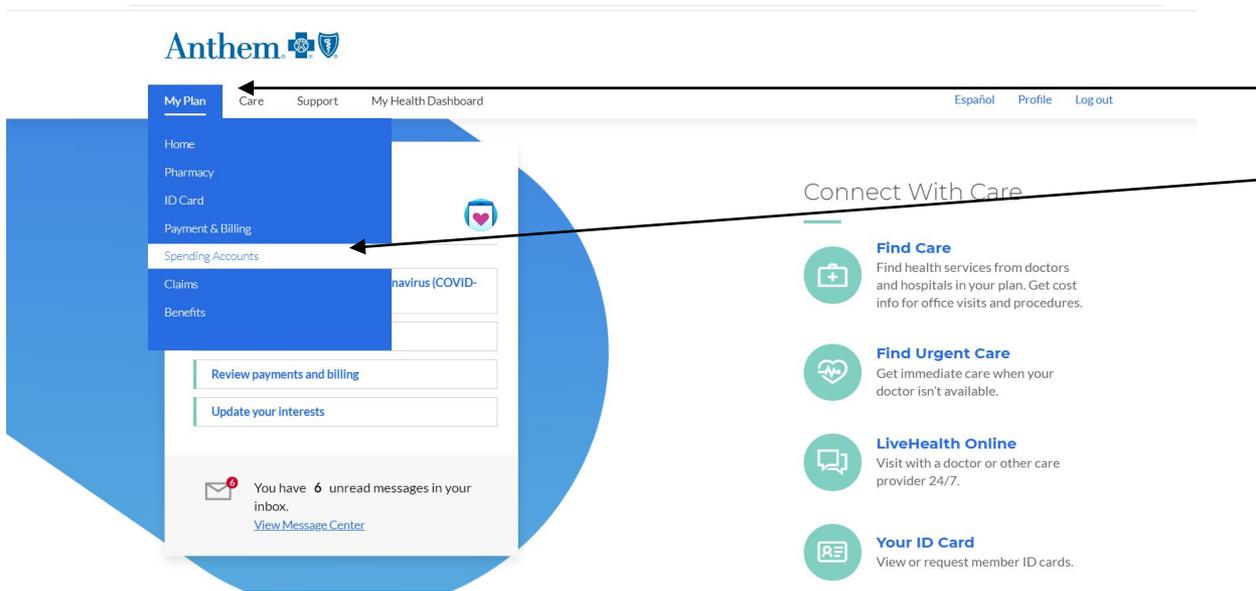
Medicare Member Needs

If you still need a plan for next year, we can help.
 Speak to a licensed sales agent
 1-800-578-2142 (TTY:711)
 Seven days a week, 8 a.m. to 8 p.m.

[Feedback](#)

Log In

Spending Account Experience



• Go to My Plan

• Spending Accounts

Spending Accounts

Current	Past
Anthem HSA+	\$3,961.26 Available Balance

Health Savings Account Plus (HSA+) ⓘ

Available Balance

\$3,961.26

Total Spent YTD

\$0.00

Click Manage My Account



[View Transactions](#) | [Manage My Account](#) ↗

Personal Dashboard (Landing Page)

Selecting the menus offers navigation to the following:

- My Accounts
 - Benefit Account Summary
 - Transactions
 - Enrollment
- Claims
 - Claim Activity (claims from the medical coverage)
 - Add claim for Immediate reimbursement
 - Add claim for future reimbursement
 - Reimbursement preference
- Resources
 - Announcements
 - Forms
 - OE Guide

The screenshot displays the 'Personal Dashboard' with three main account sections:

Limited Purpose Flexible Spending Account (FSA)

Account Balance: Available Balance \$2,600.00, Spent \$0.00

Account Summary	
Annual Election	\$2,600.00
Payroll Deposits YTD	\$125.00
Spent	\$0.00
Balance	\$2,600.00

Deadlines: Plan Start Jan 1, 2018; Plan End Dec 31, 2018; Last Day to Submit Claims Mar 31, 2019; Last Day for Spending Dec 31, 2018

Dependent Care Account (DCA)

Account Balance: Available Balance \$50.00, Spent \$375.00

Account Summary	
Annual Election	\$0.00
Payroll Deposits YTD	\$425.00
Spent	\$375.00
Balance	\$50.00

Deadlines: Plan Start Jan 1, 2018; Plan End Dec 31, 2018; Last Day to Submit Claims Mar 31, 2019; Last Day for Spending Dec 31, 2018

Health Savings Account (HSA)

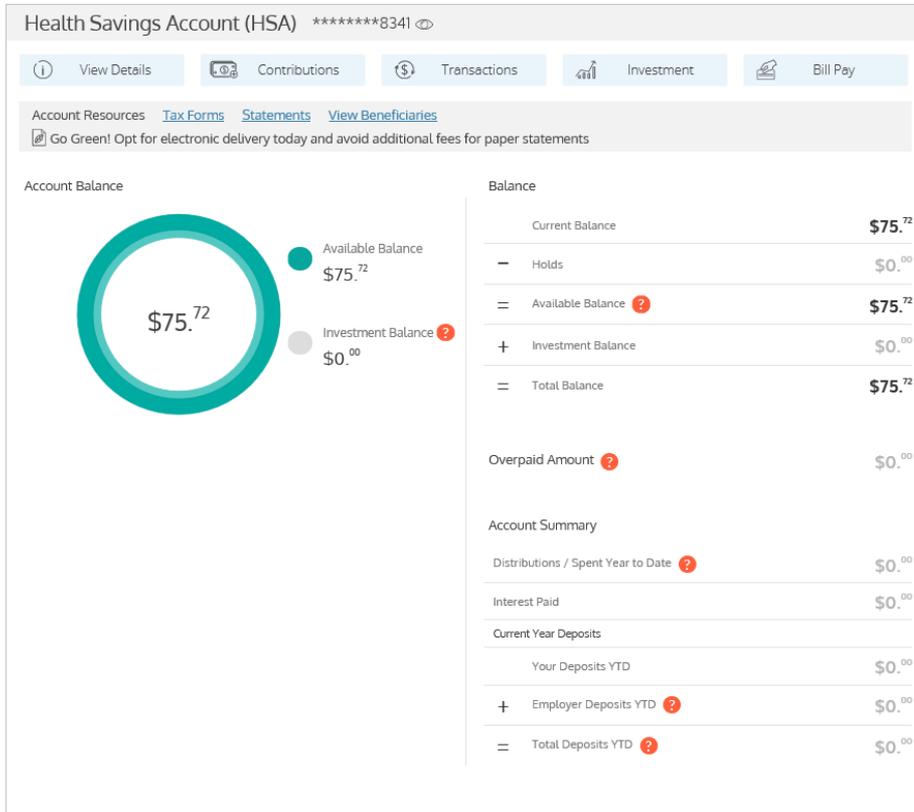
Account Balance: Available Balance \$75.72, Investment Balance \$0.00

Balance	
Current Balance	\$75.72
Minus: Holds	\$0.00
Available Balance	\$75.72
Plus: Investment Balance	\$0.00
Total Balance	\$75.72

Overpaid Amount: \$0.00

Account Summary	
Distributions / Spent Year to Date	\$0.00
Interest Paid	\$0.00
Current Year Deposits	\$0.00
Your Deposits YTD	\$0.00
Plus: Employer Deposits YTD	\$0.00
Total Deposits YTD	\$0.00

My Accounts –Benefit Account Summary



Current, available and investment balances.

Payroll and employer YTD deposits, distribution/spend year to date

Easy transition to transactions or investment or bill pay

Account resources include Tax Forms, Statement and Beneficiary designation

My Accounts – Transactions

Year, Plan and Type of transactions can easily be filtered

Transactions are displayed with most frequent first

Status – is color coded for ease of identification

Transactions can be exported to excel

The screenshot shows a web interface for viewing transactions. At the top, there's a 'Transactions' header and a 'Claim Activity' section. Below that, there are filters for 'Year' (set to 2018), 'Plan' (set to All), and 'Type' (set to All). There's also an 'Export to Excel' button. Below the filters, there are options to 'Add claim for immediate reimbursement' and 'Add claim for future reimbursement'. A section titled 'Which transactions do you want to view?' has a dropdown menu set to 'All'. There are also checkboxes for 'Approved/Posted' (checked) and 'Reimbursement Preference'. Below this, there are search and print buttons: 'SEARCH FOR TRANSACTIONS' and 'PRINT TRANSACTIONS'. The main area is a table of transactions, sorted by date. Each row shows the amount, account name, status, type, and date. The status is color-coded: green for Approved/Posted, blue for Authorized, and red for Denied.

Amount	Account	Status	Type	Date
(\$1.50)	Health Savings Account (HSA) Posted	Approved/Posted	Fee PAPER SURCHARGE FEE	Dec 24, 2018
\$0.01	Health Savings Account (HSA) Posted	Approved/Posted	Interest payment INTEREST PAYMENT	Nov 30, 2018
(\$1.50)	Health Savings Account (HSA) Posted	Approved/Posted	Fee PAPER SURCHARGE FEE	Nov 23, 2018
\$0.01	Health Savings Account (HSA) Posted	Approved/Posted	Interest payment INTEREST PAYMENT	Oct 31, 2018
(\$1.50)	Health Savings Account (HSA) Posted	Approved/Posted	Fee PAPER SURCHARGE FEE	Oct 25, 2018
(\$1.50)	Health Savings Account (HSA) Posted	Approved/Posted	Fee PAPER SURCHARGE FEE	Sep 25, 2018
\$0.03	Health Savings Account (HSA) Posted	Approved/Posted	Interest payment INTEREST PAYMENT	Aug 31, 2018
(\$1.50)	Health Savings Account (HSA) Posted	Approved/Posted	Fee PAPER SURCHARGE FEE	Aug 24, 2018
(\$375.00)	Dependent Care Account Approved	Approved/Posted	Claim Purchase	Aug 18, 2018
(\$225.00)	Health Savings Account (HSA) Posted	Approved/Posted	Card	Aug 18, 2018

Claims – Claim Activity

Amount	Status	Claim Details	Action
\$55.00	Eligible For Reimbursement Medical	Manual Claim Medical #545678946 Date of Service: May 14, 2018 Date of Transaction: May 22, 2018	Request Reimbursement
\$30.00	Eligible For Reimbursement Medical	Manual Claim Medical #545678945 Date of Service: May 8, 2018 Date of Transaction: May 22, 2018	Request Reimbursement
\$75.00	Eligible For Reimbursement Medical	Manual Claim Medical #545678944 Date of Service: May 20, 2018 Date of Transaction: May 22, 2018	Request Reimbursement
\$15.00	Eligible For Reimbursement Medical	Manual Claim Medical #545678943 Date of Service: May 4, 2018 Date of Transaction: May 22, 2018	Request Reimbursement

Ability to request reimbursement, add expense or claim

Add receipts as needed

Export information to excel

HSA Bill Pay

Health Savings Account (HSA) *****2492

[View Details](#)
[Contributions](#)
[Transactions](#)
[Investment](#)
[Bill Pay](#)

Options to setup

- Pay myself or someone else
- Direct deposit or check payment
- One time or recurring payments

Add Payment X

You may transfer funds from your HSA to your personal bank account or you can make a payment to someone else such as your provider. You may not initiate transfers for amounts greater than the balance in your HSA Deposit Account.

i To withdraw funds and transfer directly to your personal bank account, select "Pay Me" below. You must have a Direct Deposit Personal Bank Account set up on the Withdrawal Bank Account page. To withdraw funds and make a payment to your provider, select "Pay Someone Else"

IMPORTANT: Payment requests are debited from your Health Savings Account on the requested withdrawal date. If a payment is being made to a provider, then the payment will be mailed and will arrive within 7-10 business days.

h Get your reimbursement as quickly and securely as possible by changing your reimbursement method to Direct Deposit. [Click Here to change your settings](#)

Withdrawal Account * Health Savings Account (HSA) ▼

Your Payment Request

Pay Someone Else
Pay Me

How would you like the funds to be sent to you?

Deposit to my account on file
Send me a check

Amount * \$

Payment Preferences

Once
Weekly
Monthly

Send out Payments on *

Description

I certify I am the HSA account holder and I am seeking reimbursement for the amount I have specified in this distribution request. I certify this distribution is only for expenses incurred for myself, my spouse, and/or my legal dependent(s), after my HSA account was established, and is in accordance with the terms and conditions of the HSA account. PNC Bank, its agents or its employees, will not be liable for any distribution request that I have submitted for ineligible expenses. The expenses, for which I am claiming reimbursement, have not previously been, nor will they be, reimbursed under any other benefit plan, and will not be claimed as an income tax deduction. I understand that the custodian and/or its designee cannot provide tax, accounting or legal advice. I also understand that I am responsible for any consequences resulting from this distribution, including any applicable income tax and/or related penalties.

I have read, understand, and agree to the information and terms above.

✔ Submit
✕ Cancel

Request a new debit card



Cards

10 Notifications

Click

	**** -3344	Active	JOSEFINA NUNO	 VIEW PIN
Issue Status:	Sent	Activation Date:	Jan 4, 2022	REPORT LOST / STOLEN
Mailed Date:	Dec 8, 2021	Expiration Date:	Dec 31, 2024	

Tax Forms – Tax Form Delivery Preference



 How would you like to receive your Tax Forms(1099-SA and 5498-SA)?

Your current delivery method is: Paper

<input checked="" type="radio"/> Electronic Only	<input type="radio"/> Paper
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Electronic Documents Access

In order to elect Electronic Documents, you must verify your ability to access Electronic Documents.

Please open [Sample PDF File](#) and enter the PIN Number below.

Enter PDF PIN Number

If you would like to change your delivery method, please complete the form above and click SUBMIT, otherwise click CANCEL



Beneficiaries

View Beneficiaries

Health Savings Account (HSA) *****2070

No Beneficiaries Exist – [Add a Primary Beneficiary?](#)

Add Primary Beneficiary ✕

Full Name *

Dependents

General Info **Address**

[Click here to use your primary address for this beneficiary](#)

Relationship *

Date of Birth *

SSN *

Address 1 *

Address 2

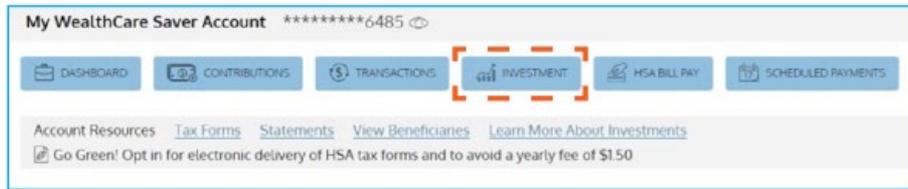
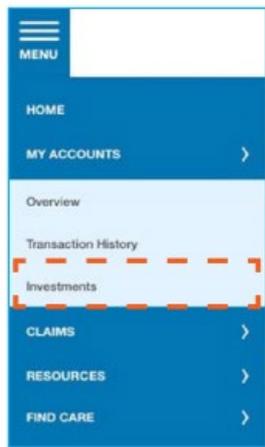
City *

State *

ZIP *

Opening an Investment Account

1. Log in to your HSA portal.
2. Expand the menu and click 'investments' or navigate to your HSA account summary and click on the 'investment' button.



A \$1,000 minimum balance is required for all investment options.

Making Investments



Hi Madison, welcome to your HSA investment experience!

There's no doubt your HSA is a great way to pay for current-year eligible medical expenses, but did you know it can also be used as a long-term investment vehicle? By investing your HSA, you give your money a chance to grow, maximizing opportunities to boost your savings and prepare for the future, including retirement.

Currently, you have **\$6,000.00** available to invest.

Opening an investment account is simple. To take full advantage of all the long-term savings opportunities your HSA delivers, click the button below!

START INVESTING

Able to invest



Great!

Please select your preferred Investment account type.

Managed

0.075% of investment balance charged monthly in arrears
Fee example: If you had a \$5,000 investment balance, you would be charged \$3.75 per month

Designed for novice investors who prefer to have our advisor tool automatically select and rebalance investments on an ongoing basis in accordance with their age and/or risk profile.

This account type delivers a "do-it-for-me" approach to investing.



Effort to Manage

SELECT

Self-Directed

0.033% of investment balance charged monthly in arrears
Fee example: If you had a \$5,000 investment balance, you would be charged \$1.67 per month

Designed for intermediate investors who have the desire to self-select from a menu of monitored investment options covering multiple asset classes to diversify their portfolio, and then rebalance their portfolio manually. This account type provides a balance between do-it-for-me and DIY.



Effort to Manage

SELECT

Brokerage

0.033% of investment balance charged monthly in arrears
Fee example: If you had a \$5,000 investment balance, you would be charged \$1.67 per month

Designed for adept investors who desire to perform advanced research and trading across hundreds of individual stocks and ETFs. This account type offers a hands-on, DIY approach to investing.



Effort to Manage

SELECT