

## Workday - Health Savings Account Amend Election

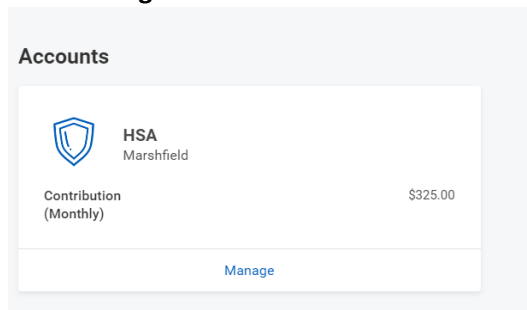
The following applies to HDHP participants who have opened a Fidelity Investments HSA. Do not initiate a Benefit Change UNTIL you have read this handout.

- Current HSA participants are able to amend their HSA pre-tax payroll deductions anytime during the year, not just during open enrollment
- New HSA participants must contact Human Resources for assistance in entering your initial HSA pretax payroll deductions: [benefits@marshfieldclinic.org](mailto:benefits@marshfieldclinic.org) or 715-387-9375 (ext. 7-9375)
- The default process is to divide the annual election by the remaining number of pay periods to determine the per paycheck deduction. Or, enter a per pay check deduction and the program will multiply by the remaining pay periods in the year to determine the annual election. If the annual election exceeds the statutory maximum, an error message will appear.
- If you want to “front load” or contribute an amount per paycheck that is greater than the statutory maximum divided by the remaining number of pay periods, contact Human Resources for assistance.

- Click the **Menu** in the upper left corner of your Workday page
- Click the **Benefits and Pay** application and click the **Change Benefits** button
- Change Reason- HSA Amend Election
- Benefit Event Date- The Friday preceding the paycheck you are expecting the change to be effective
  - Entry **MUST** be for a future paycheck.
  - Example: Payday is July 20, you will need to enter a Benefit Event Date of July 13 (Regardless of the date you are entering the change, the benefit event date **MUST** be the Friday preceding the pay check you expect the change to be effective
  - Failure to enter the correct Benefit Event Date may result in either a delayed effective date, a negative or a double deduction on the following paycheck
- Click **Submit**, then **Open**
- Click **Let's Get Started**:

Let's Get Started

1. Click **Manage** under the HSA Marshfield account:



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2. Click the **Confirm and Continue** button as participants are not able to change the Elect or Waive option:

Confirm and Continue

Cancel

- You can update the Per Paycheck (amount is the annual contribution divided by the remaining pay periods in the calendar year) OR the per paycheck amount multiplied by the remaining number of pay periods.

### Contribute

Your estimated contributions made this year 1,700.00

Per Paycheck 150.00

Annual 2,900.00

Remaining Paychecks 8

- Minimum and statutory maximum contribution is based on plan (single vs family) and age. If you want to contribute an amount greater than the calculated per paycheck amount contact Human Resources at 715-387-9375 or extension 7-9375 for assistance.
3. To complete your change **Save**
  4. Once you have finished, click on **Review and Sign**:

Review and Sign

Save for Later

5. After reviewing your changes, scroll to the bottom of the page, and click the **I Agree** button to agree with the Legal Notice and then click Submit:

I Accept

Submit

Save for Later

Cancel