



Step by Step – Online Instructions for the Health Savings Account

- Go to our website: www.cmefcu.org
- Look to the center top of the screen, click on “Open an Account or Apply for a Loan”
- Scroll down and look for ACCOUNTS, click in the list below, on “New Members Apply Here”
If you are an existing Member click “Existing Members Apply Here”
- **Eligibility & Products:**
 - Click on “I live/work/worship or.....” ...Use drop down to answer which county you live, work or worship in.
 - Then use the second drop down box to select your employer/group, if applicable
- **Required Products:**
 - Under Advantage Share, look to the right, on the blue circle with a “+” in it, click on that.
 - A box will pop up, click on “Add Account” This will be your basic savings which is required to be a Member at the Credit Union
 - Continue to add your Health Savings Account (**Please note HSA’s are Individual accounts only, never Joint**) & click on the blue circle with a “+” in it.
 - A box will pop up, click in the box that’s marked H.S.A. Debit Card (that way the system automatically will order you a card.)
 - Next, use the remaining drop down boxes to identify if your insurance coverage is for a family or individual and your marital status.
 - If you need a card for a spouse or college age child (for example) this is where you mark the appropriate number of additional cards and fill in their information. If you don’t need any additional cards, mark the number “ 0 “.
 - Once you completed that click continue
- Next you’ll begin to fill out your personal information.
- **Tell Us About Yourself/Personal Information:**
 - Go through the next section filling out your personal information
 - Click on the blue box that applies, Continue without Co-Applicant or Continue with Co-Applicant.
 - **Please note, you do not have to add a spouse (co-applicant) to an account in order to get them a card that’s tied to the account. You already addressed that in a previous section.**
- **Funding**
 - In this section the only thing you need to do, is the following:
 - To get through this section, please click on the box that says “Mail A Check” – but **don’t mail a check**, we actually fund that for you as a courtesy 😊
- **Review and Submit**

- In this section, you'll see a snapshot of all you filled out. Look it over, be sure it looks right.
- One last question: How did you hear about CME FCU?
 - Use the drop down and choose "Health Savings Account"
- **Read, Sign and Submit**

After you have read, the disclosure, there are two grey boxes, click in both.

There will be some questions to answer, since you've just gone online to apply. These questions will verify your identity. Just do the best you can to answer. If none of the choices applies, mark "none of the above"

We'll process the application on our end and if there is any additional information needed, we'll contact you directly.

Watch for DocuSign email to be emailed to you ...this is how we capture your electronic signature! ~

The debit card(s) will be mailed out within 7-10 business days and will arrive in a plain white unmarked envelope. So watch for them!

If you have any questions, don't hesitate to contact me!

Thanks!

Loraine Allison

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