

Manage Your HSA & Set Up Direct Deposit

With the Custom Flex Web Portal and Mobile App you can manage your HSA account 24/7 on a schedule that is convenient for you. The Web Portal and Mobile App offer the flexibility to manage your account without having to go to a bank during standard business hours.

The Custom Flex Portal allows you to

- View Your Account Balance
- Manage Investments
- Request a Distribution
- Manage Tax Forms
- View Transactions
- Request a New Card
- Update Your Personal Profile Information
- Sign up for Email Notifications

NOTE: YOU MUST LOG IN TO YOUR PORTAL TO ACCEPT THE TERMS & CONDITIONS OF THE HSA BEFORE YOU WILL BE ABLE TO UTILIZE YOUR FUNDS.

To access the portal:

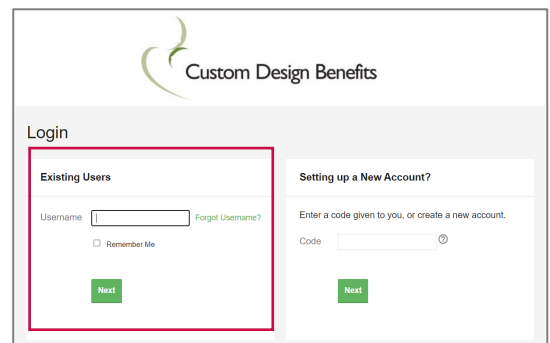
- Go to **www.CustomDesignBenefits.com**
- Click on **Login**, then click on **Custom Flex: FSA/HRA/HSA** to log onto the Custom Flex Portal
- If you are logging in for the first time
 - **Your Username is the first initial of your first name, your last name, followed by the last four digits of your Social Security Number**
 - **Your default password is Customflex**
 - You will be prompted to change your password the first time you log in

Username: FirstInitialLastNameLast4SSN

Password: Customflex



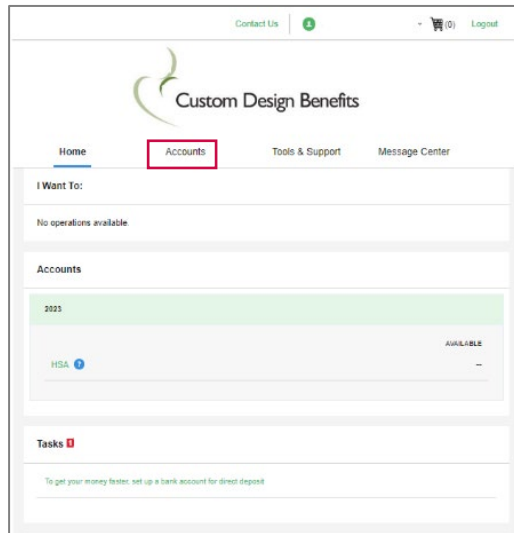
CUSTOM FLEX: FSA/HRA/HSA



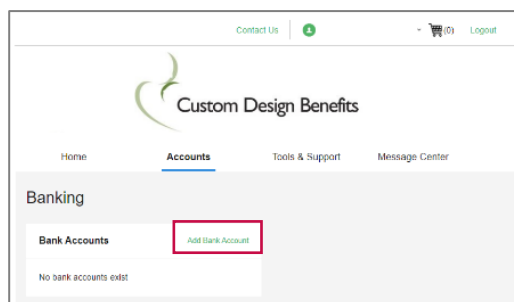
Example: John Smith, who has a Social Security Number of 333-55-9999, would have a Username of jsmith9999.

To set up direct deposit:

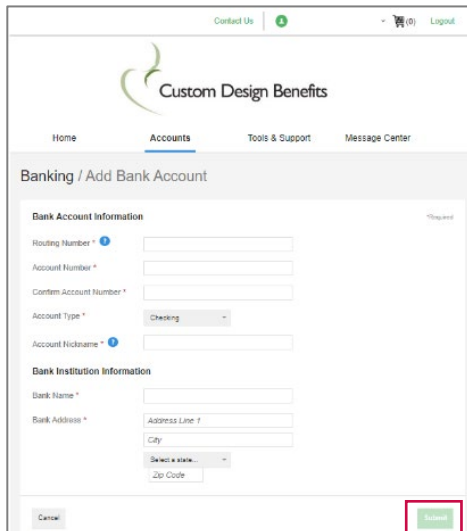
1 Click **Accounts**



2 Click **Add Bank Account**



3 Enter bank information and click **Submit**



The screenshot shows the Custom Design Benefits portal. The 'Banking / Add Bank Account' form is displayed. It has two main sections: 'Bank Account Information' and 'Bank Institution Information'. The 'Bank Account Information' section includes fields for 'Routing Number', 'Account Number', 'Confirm Account Number', 'Account Type' (set to 'Checking'), and 'Account Nickname'. The 'Bank Institution Information' section includes fields for 'Bank Name', 'Bank Address', 'City', 'State' (a dropdown menu), and 'Zip Code'. A 'Submit' button is highlighted in a red box at the bottom right of the form.

To download the mobile app:

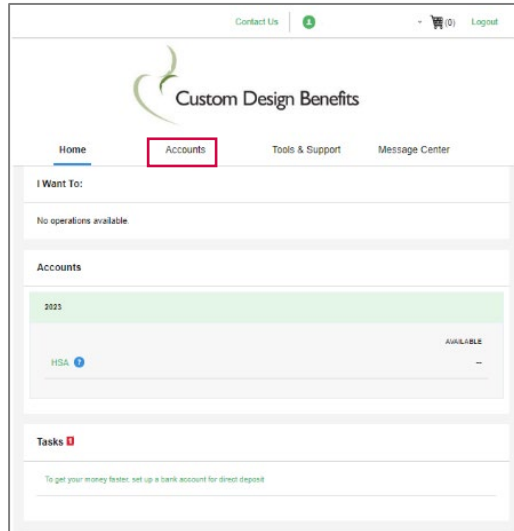
After you have logged into the Custom Flex Portal for the first time, you can download the free Mobile App.

Search for “Custom Flex” in the App Store.

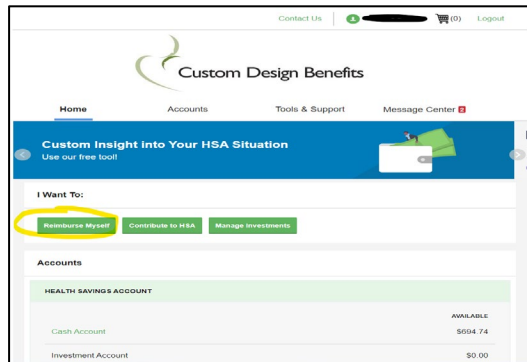


To request reimbursement:

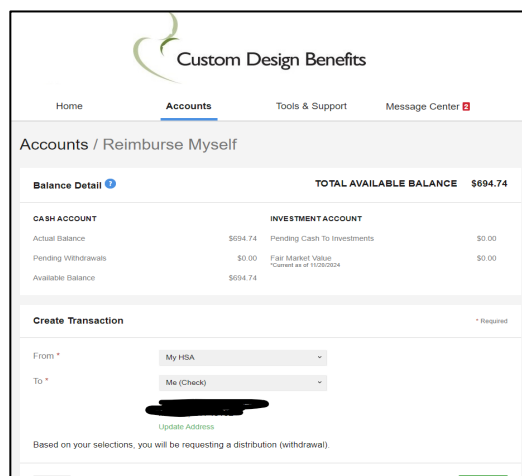
1 Click **Accounts**



2 Click **Reimburse Myself**



3 Select accounts to create Transaction and click **Next**



To download the mobile app:

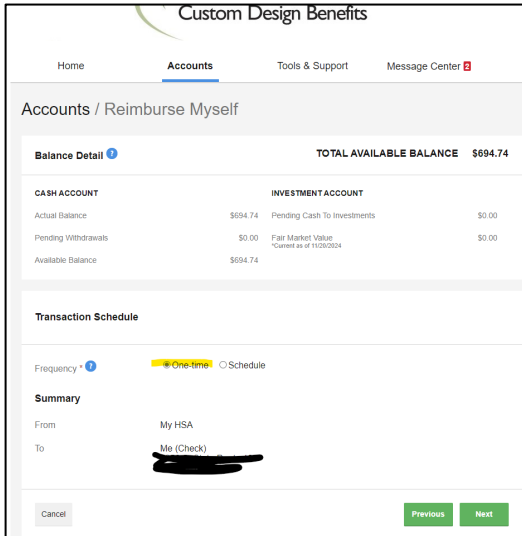
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To request reimbursement:

4 Confirm Transaction Schedule, click **NEXT**



Custom Design Benefits

Home Accounts Tools & Support Message Center

Accounts / Reimburse Myself

Balance Detail ? **TOTAL AVAILABLE BALANCE** \$694.74

CASH ACCOUNT	INVESTMENT ACCOUNT
Actual Balance \$694.74	Pending Cash To Investments \$0.00
Pending Withdrawals \$0.00	Fair Market Value \$0.00
Available Balance \$694.74	*Current as of 11/20/2024

Transaction Schedule

Frequency ? ☒ One-time ☐ Schedule

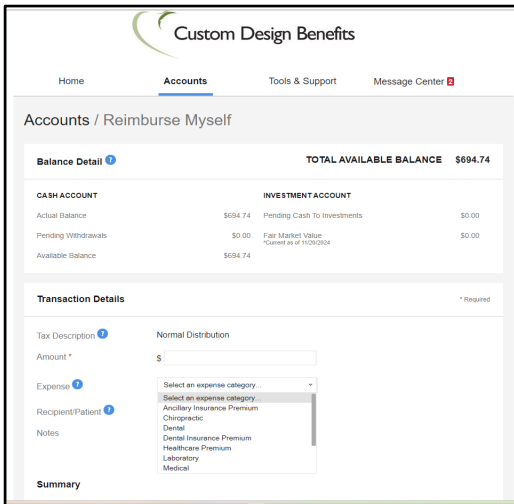
Summary

From My HSA

To Me (Check) 

Cancel Previous Next

5 Enter amount, select Expense Category, click **Next**, and complete submission



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Accounts / Reimburse Myself

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Available Balance \$694.74	*Current as of 11/20/2024

Transaction Details * Required

Tax Description ? Normal Distribution

Amount * \$

Expense ? Select an expense category...

Recipient/Patient ? Select an expense category...

Notes

Summary

- Auxiliary Insurance Premium
- Chiropractic
- Dental
- Dental Insurance Premium
- Healthcare Premium
- Laboratory
- Medical

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