




HSA CONTRIBUTION ELECTIONS

This quick reference guide will walk you through the steps to update your HSA contribution elections.

for Employees

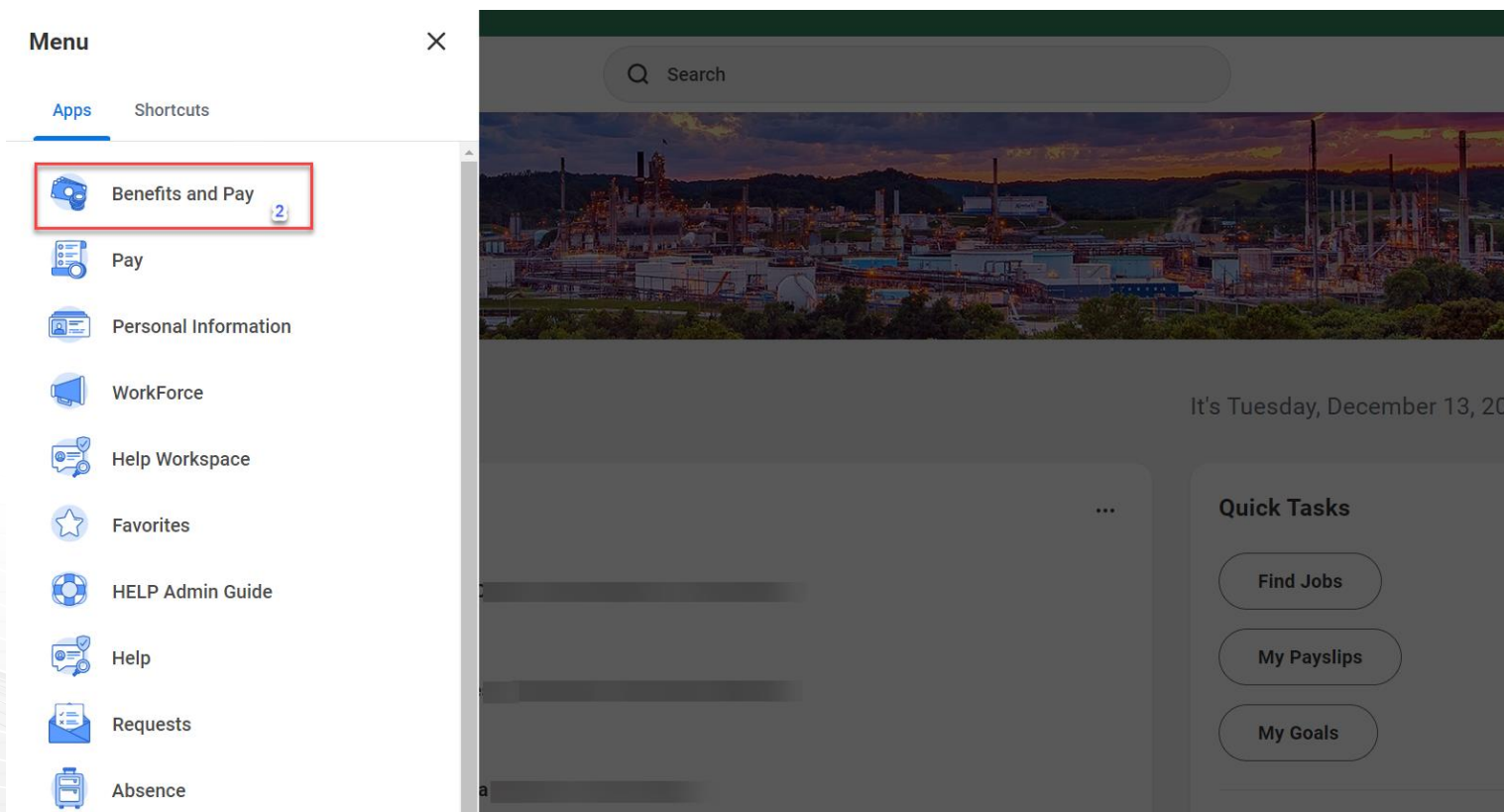
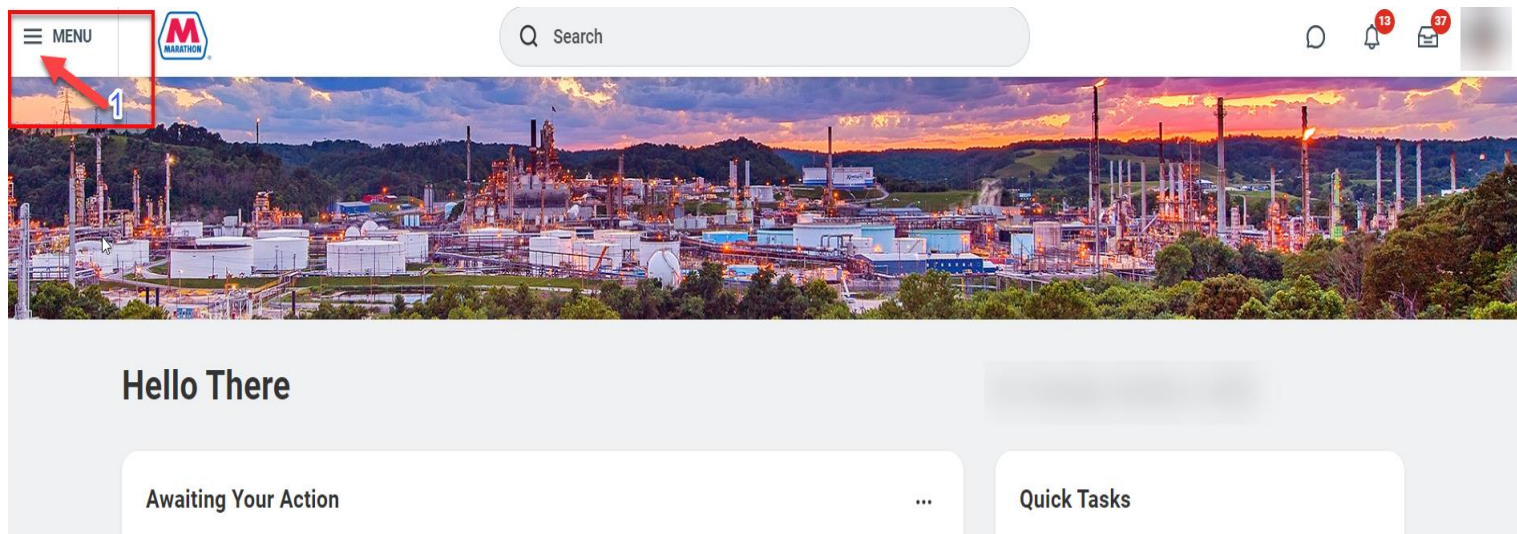
 Click each number for detailed instructions on how to complete the action.

1 UPDATING YOUR HSA CONTRIBUTIONS

UPDATING YOUR HSA CONTRIBUTIONS

Follow these steps to update your HSA Contributions.

1. Click on “Menu” on the lefthand side, near the top of your screen.
2. Select “Benefits and Pay” from the list of Apps.



UPDATING YOUR HSA CONTRIBUTIONS CONTINUED...

3. Click on "Change Benefits".
4. Select HSA Election Change as the Change Reason.
5. Enter in today's date or a future date.
6. Click "Submit".

MENU

Search

Benefits and Pay |←

Payment Elections **Change Benefits** ³

Overview

Most Recent Pay
Your next pay day is September 23, 2022.

Take Home Pay

Gross Pay

[View Most Recent Pay](#)

Current Benefit Costs

[View Benefit Details](#)

Change Benefits

- Change Reason *
- Birth/Adoption/Placement for Adoption
 - Divorce
 - Gain of Other Coverage
 - ⁴ HSA Election Change
 - Loss of Other Coverage - Dependent
 - Loss of Other Coverage - Employee
 - Marriage/Domestic Partnership

⁵ Date * MM/DD/YYYY

Submit Elections By (empty)

enter your comment

Instructions

If you are attempting to report a benefit change that occurred more than 31 days ago, please create a case in Workday Help for the Benefits Team.

⁶ **Submit**

Save for Later

Cancel

HSA Contribution Elections



UPDATING YOUR HSA CONTRIBUTIONS CONTINUED...

- 7. Click "Open".
- 8. Click "Let's Get Started".

The screenshot shows the top navigation bar with a 'MENU' button, the Marathon logo, and a search bar. On the left, a sidebar menu is open to 'Benefits and Pay', with sub-items: Overview, Benefits, Pay, and Compensation. The main content area features a 'Payment Election' button and a 'Needs Attention' section. A notification box titled 'You have submitted' is overlaid, showing 'Up Next: [redacted] | Change Benefit Elections' and a 'View Details' link. Below this, a 'Benefit Event' card is visible, marked 'NOT STARTED' and titled 'Benefit Event' with the subtitle 'HSA Election Change'. It includes the text 'Submit elections by December 14, 2022.' and an 'Enroll' link. A blue 'Open' button with a notification badge is highlighted with a red box.

The screenshot shows the 'Change Benefit Elections' page. The top navigation bar includes the 'MENU' button, Marathon logo, search bar, and notification icons (2 unread messages, 3 alerts). The page title is 'Change Benefit Elections'. Below the title, it shows 'Initiated On 10/04/2022' and 'Submit Elections By 10/04/2022'. A blue 'Let's Get Started' button with a notification badge is highlighted with a red box.



UPDATING YOUR HSA CONTRIBUTIONS CONTINUED...

- 9. Click "Manage".
- 10. Click "Confirm and Continue".


MENU  Search    

HSA Election Change


 

Projected Total Cost Per Paycheck
\$342.50

Accounts

 **HSA**
Fidelity

Contribution per paycheck \$342.50




 [Manage](#)

HSA

Projected Total Cost Per Paycheck
\$342.50

Plans Available

Select a plan or Waive to opt out of HSA.

1 item   

*Selection	Benefit Plan Details	You Contribute (Biweekly)	Company Contribution (Biweekly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Fidelity	\$342.50	\$38.47

Health Savings Account Instructions

General Instructions

IMPORTANT: We cannot process your HSA without your electronic signature. At the end of your enrollment, you will be presented with Fidelity's Terms and Conditions that you will be asked to agree to. You will be agreeing that Fidelity can rely on your electronic signature for authorization of withdrawals or other transactions on your account.

If you do not agree to Fidelity's Terms and Conditions, you will need to come back to this screen to waive your Health Savings Account election.

 [Confirm and Continue](#) [Cancel](#)



UPDATING YOUR HSA CONTRIBUTIONS CONTINUED...

11. Enter in your desired amounts. Note that Workday will not allow you to elect more than the allotted IRS limit.
12. Click "Save"
13. Click "Review and Sign"

HSA - Fidelity

Projected Total Cost Per Paycheck \$342.50

Contribute

Your estimated contributions made this year 4,695.00

11 Per Paycheck

Annual Remaining Paychecks 6

Maximum Annual Amount: \$7,300.00

Health Savings Account Instructions

Provider Website [Fidelity URL Address](#)

General Instructions

IMPORTANT: We cannot process your HSA without your electronic signature. At the end of your enrollment, you will be presented with Fidelity's Terms and Conditions that you will be asked to agree to. You will be agreeing that Fidelity can rely on your electronic signature for authorization of withdrawals or other transactions on your account.

If you do not agree to Fidelity's Terms and Conditions, you will need to come back to this screen to waive your Health Savings Account election.

Summary

Annual Company Contribution \$423.06

Total Annual HSA Contribution \$7,173.06

12 **Save** Cancel

HSA Election Change

Projected Total Cost Per Paycheck \$342.50

Your HSA changes have been updated, but not submitted

Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

Accounts

REVIEWED

HSA Fidelity

Contribution per paycheck \$342.50

Manage

13 **Review and Sign** Save for Later

UPDATING YOUR HSA CONTRIBUTIONS CONTINUED...

- 14. Click "I Accept".
- 15. Click "Submit".

I am eligible to open a Health Savings Account ("HSA") and I am a U.S. citizen or lawful permanent resident with a valid U.S. street address, and I am of legal age to enter into an agreement in my state of residence. I request to open a new Fidelity HSA with Fidelity Brokerage Services LLC ("Fidelity") for which Fidelity Personal Trust Company, FSB will serve as custodian. I understand that this request will be processed as soon as administratively feasible upon Fidelity's receipt of required information. A Fidelity HSA opened through this Simple HSA Service will accept contributions and allow me to request distributions, but will otherwise be restricted, and I will not have the ability to place trades, designate beneficiaries, and indicate my communication preferences, until I go to Fidelity's website and provide additional information that is accepted by Fidelity, and will promptly do so. If I already have or open a non-managed Fidelity HSA prior to Fidelity receiving this request, notwithstanding my election below, my request to open a Fidelity HSA through this Simple HSA Service shall be disregarded. I authorize my employer to disclose information about me to Fidelity as needed to open my account. I have provided my employer with current and accurate information about me and agree to promptly update Fidelity with changes thereto. Fidelity may communicate with me based on this information, including electronically to my employer email address.

*I can access, retain, have read, understand and agree to be bound by these terms and the Fidelity HSA Documents, the Electronic Delivery Agreement and the Terms and Conditions. I have internet access and a web-browser that is Java-script enabled. I can access documents provided in HyperText Markup Language (HTML), Portable Document Format (PDF) or other compatible formats. If I do not have the ability to access or retain these documents, or do not consent to receive them electronically, I will contact Fidelity at 800-544-3716 for a free paper copy. By proceeding I confirm my device is equipped to access these documents.

*My name, legal address, date of birth, and government issued identification number are required by federal law to verify my identity. Fidelity may not open, or may restrict and/or close my Fidelity HSA if it cannot obtain and verify information to confirm my identity. Fidelity will not be responsible for any losses or damages (including, but not limited to, lost opportunities) that may result if my account is restricted or closed.

*I agree to notify Fidelity if I am or become employed by or associated with a broker-dealer, stock exchange, exchange member firm, the Financial Industry Regulatory Authority (FINRA) or a municipal securities dealer. Absent such notice from me, I represent and warrant to Fidelity that this does not apply. If I am so affiliated, I understand that Fidelity must obtain consent and report my trading activity and other account data to my employer or other affiliated company. I understand that my account will continue to be restricted until such consent is received by Fidelity.

*I agree to notify Fidelity if I am or become, or an immediate family/household member is or becomes, a director, corporate officer, or 10% shareholder of a publicly held company or a control person of a public traded company under SEC Rule 144. Absent such notice from me, I represent and warrant to Fidelity that this does not apply.

*Contributions to my Fidelity HSA will be deposited into the FDIC-insured Deposit Sweep Program, which will generally sweep funds to one or more Program Banks assigned to this account from the HSA Program Bank List provided in the Fidelity HSA Documents above. I understand that such Program Banks may change between the time I request this account and the HSA is actually opened, and if a Program Bank is not available, my funds may be swept to a money market mutual fund as described in the Fidelity HSA Documents.

*I acknowledge that the Fidelity HSA is governed by a pre-dispute arbitration clause, which appears on the last page of the HSA Brokerage Customer Agreement in the Fidelity HSA Documents accessible above, and which I represent having read and agreed to.

I Accept 14

enter your comment

Process History

Change Benefits for Life Event - Awaiting Action

15

Submit

Save for Later

Cancel

