

Employee HSA Quick Start Guide

First Mid Health Savings Account, powered by Lively

1

Check Your Email

You will receive an email from Lively to enroll for your new HSA. Click on the “Complete Enrollment Now” button within the email to get started.

2

Complete Enrollment

You will be redirected to the Lively website to complete your enrollment. Depending on how your employer enrolled you and your colleagues, be prepared to provide:

- A secure password
- Your social security number

Some information was likely already supplied by your employer, but please double check that the information listed is correct. Be sure to also agree to Lively’s terms and conditions.

3

View Your New Lively Dashboard

Once you submit terms and conditions from our banking partner, you will be directed to your new Lively dashboard. Once you begin contributing and using your Lively debit card (which will be mailed to you), you will see information such as your recent contributions, purchases, and how much of your deductible you’ve spent thus far. Be sure to download the “Lively HSA” mobile app, available for iOS and Android, to take your HSA on the go.

4

Check Your Email (Again)

You will receive a verification email from Lively to ensure that the new email address that you listed is the correct one.

5

Verify Your Eligibility

You will need to be enrolled into a qualified health plan or have an existing HSA to enroll into your new Lively account. If your employer enrolled you, you are qualified for an HSA. If you have an existing HSA at a different provider, you can mark that you would like to transfer your assets over to Lively on this page. You can also transfer your funds after you fully set up your account.



6

Connect Your External Bank Account (Optional)

While this step is optional, we recommend connecting an external bank account to your Lively HSA. You can use this to add direct contributions or to reimburse yourself for eligible HSA expenses paid out-of-pocket.

You're done! If you ever have questions about your Lively HSA, reach out to support@livelyme.com and we'd be happy to help.

Member FDIC

FDIC insured through First Mid Bank & Trust, for so long as funds remain uninvested and on deposit with First Mid Bank & Trust.

