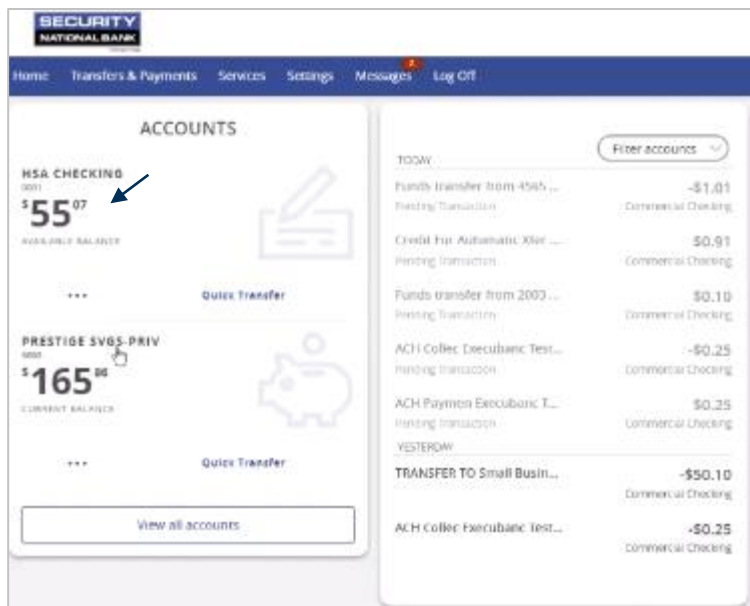
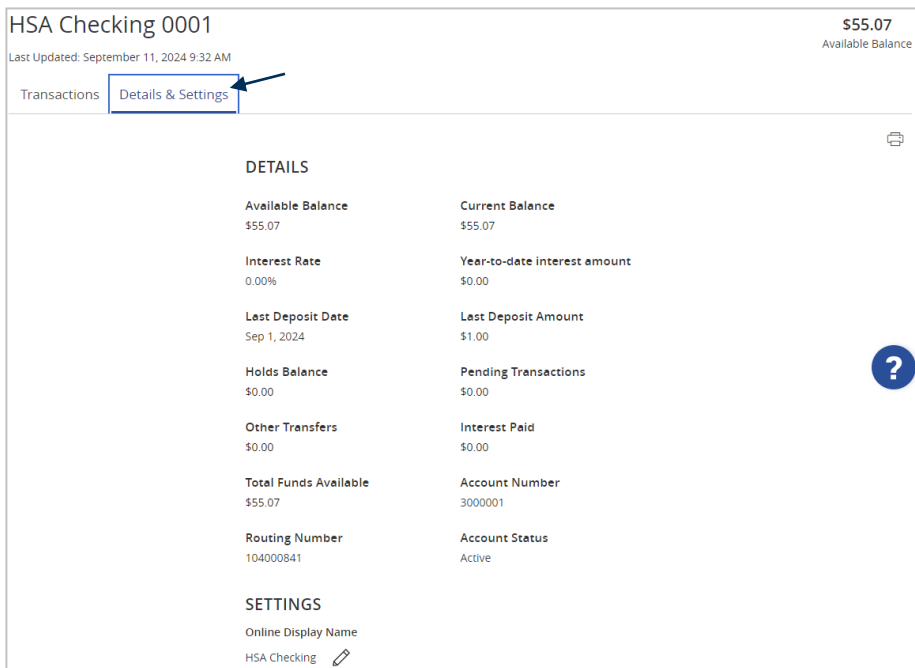




1. On the Home screen, click on an account to view a listing of the details and transaction history associated with the account.



Click the 'Details & Settings' tab to display the account details.



Questions? Please call our Customer Care Center toll-free at 855-614-4061.



2. Select the 'Filters' icon to view the various search criteria for transaction history.
3. Select 'Apply Filters' once the desired options have been selected.

HSA Checking 0001 \$55.07
Available Balance

Last Updated: September 11, 2024 9:32 AM

Transactions Details & Settings

Time Period

Description Transaction Type

Min Amount Max Amount

Starting Check # Ending Check #

Reset Apply Filters

NOTE: A listing of historical transactions associated with the account are listed on the screen. The newest transaction will appear on top by default.

Date	Description	Amount
SEP 4 2024	Funds transfer from 0001 to 4565	-\$50.07 \$55.07
SEP 3 2024	Funds transfer from 6666 to 0001	+\$1.00 \$105.07
AUG 29 2024	Funds transfer from 0006 to 0001	+\$1.00 \$104.07
JUL 1 2024	DEPOSIT	+\$1.00 \$103.07

4. Select the Export icon to display a listing of available formats. The export will include all transactions specified in the filter by the user.

Transactions Details & Settings

Search transactions

Date Description

SEP 4 2024 Funds transfer from 0001 to 4565

Spreadsheet (xls)
Spreadsheet (csv)
Microsoft OFX (ofx)
Quicken (qfx)
Quickbooks (qbo)

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- 5. Select the 'Quick Transfer' icon to perform a quick transfer.

HSA Checking 0001 \$55.07
Available Balance

Last Updated: September 11, 2024 9:32 AM

[Transactions](#) [Details & Settings](#)

Quick Transfer

From Account


To Account

HSA Checking 0001 \$55.07

Amount

\$

Transfer Date

09/11/2024 

[Advanced Options](#) [Transfer Funds](#)

Questions? Please call our Customer Care Center toll-free at 855-614-4061.



6. Select 'Options' to print.

HSA Checking 0001 \$55.07
Available Balance

Last Updated: September 11, 2024 9:32 AM

[Transactions](#) [Details & Settings](#)

Options

Print

Search transactions

Date	Description	Amount
SEP 4 2024	Funds transfer from 0001 to 4565	- \$50.00
		\$55.07

Questions? Please call our Customer Care Center toll-free at 855-614-4061.