

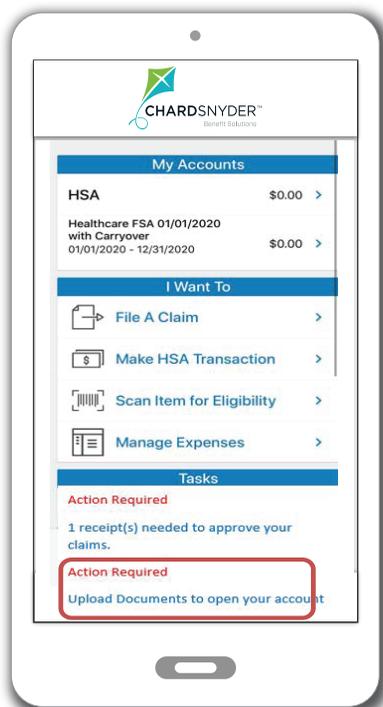
Upload HSA Identity Docs via Mobile App or Online



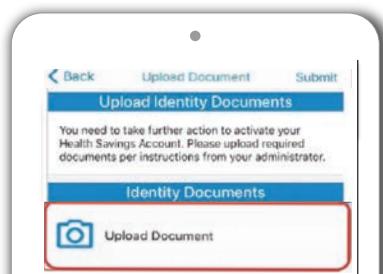
Verify ID on Mobile App

Use the Chard Snyder Mobile App to upload necessary Identification Verification (IDV) documents for your Health Savings Account (HSA):

1. Log onto the Chard Snyder Mobile App.
 - If you do not have the mobile app, it can be downloaded from the App Store (Apple-powered smartphones or tablets) or Google Play (Android).
2. Select the *Action Required* message that appears under the *Home* page *Tasks* section.



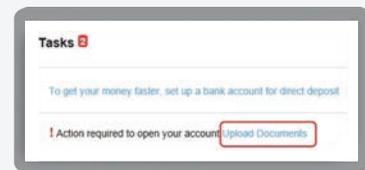
3. Select *Upload Document*.



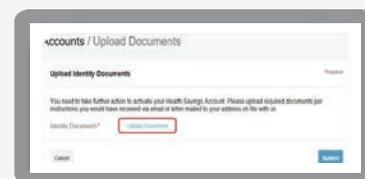
Verify ID on Your Online Account

Log in to your Chard Snyder online account to upload Identification Verification (IDV) documents:

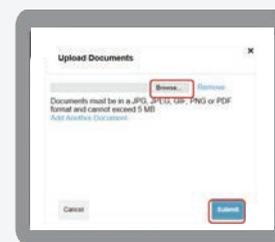
1. On the *Home* tab scroll down to *Tasks*, select *Upload Documents*



2. In the *Accounts/Upload Documents* window that appears, select *Upload Documents*



3. In the next window, select the *Browse* button and choose the required documentation from the computer, then select *Submit*. All documents must be loaded prior to selecting *Submit*.



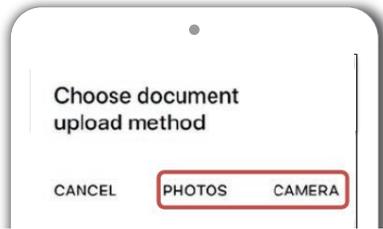
4. The below notification will appear when upload was successful



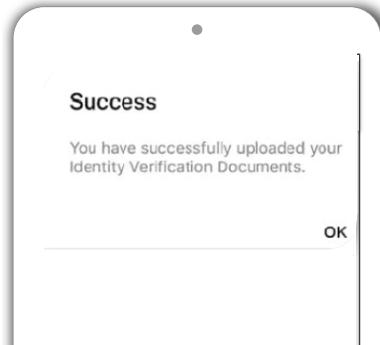
5. Once documents are submitted, the *Action Required* message will no longer appear in the *Home* tab *Tasks* section

Chard Snyder helps you get the most out of your HSA benefit.

4. After selecting *Upload Document*, use the photos or camera function to choose a document for upload.
5. After a document is chosen, it will display on the screen. Up to four documents can be uploaded.



6. Once all documents have been loaded, select *Submit*. As soon as the documents are uploaded, a success message displays, and the *Action Required* message will no longer appear on the *Home* page *Tasks* section.



Chard Snyder Website

www.chard-snyder.com

Once you've enrolled, access your Chard Snyder HSA online account from the website home page by clicking on the blue *Login* tab at the top right of the page.



Chard Snyder Participant Services

Our Participant Services team is here to help answer questions you may have about your HSA. Contact us via Live Chat on the Chard Snyder website or give us a call.



800.982.7715 www.chard-snyder.com