



HSA Routing Numbers

Avidia Bank routing number = 011375384

BBP Admin Wealthcare Saver routing number = 075072157

How to run a report for HSA account numbers for Participants

1. Login to your Employer account at: <https://www.wealthcareadmin.com> and choose “Employer”
2. Once you have logged into your employer account, please click on the “Day-to-Day Menu” (3 horizontal lines) in the top left corner –

HealthCare Admin: - Internet Explorer
<https://www.wealthcareadmin.com/welcome.aspx>

Admin

Welcome to the BBP Admin Employer Portal

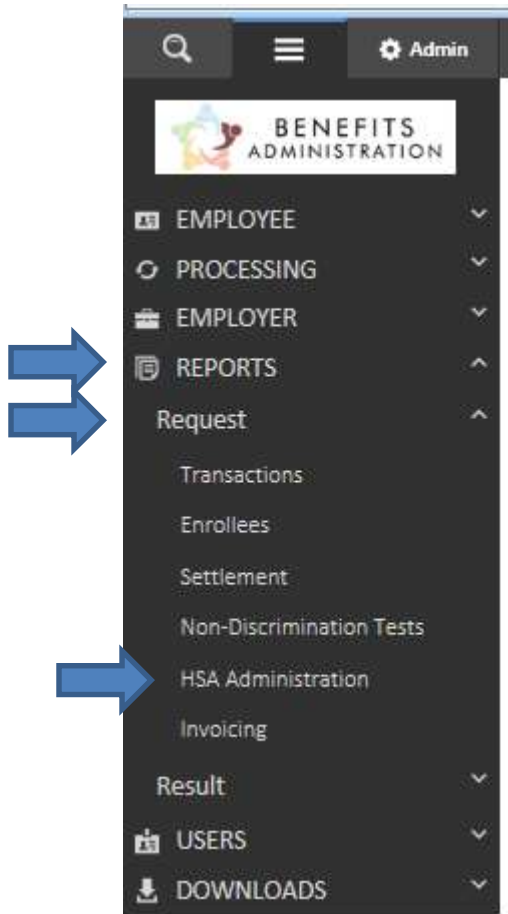
About the Employer Self Service Portal

Using the Employer Portal you'll be able to view your employee's account balances, view bank account activity, run reports, manage payroll contributions, To begin, just select one of the shortcut links below. You can search for an employee by using the search or advanced search functionality at the top of the

Employee Home

Contribution Manager

3. After clicking on the Day-to-day, click on Reports → Request → HSA Administration

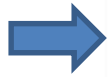


4. After choosing HSA Administration, you will be brought to another page with different report options. Please choose the “HSA Account Details Report”

REPORTS / Request

HSA Administration Reports

To proceed for submitting request for report generation, click on the name



Name	Description
HSA Future Contribution Report	The Future Contributions Report allows administrators and employers to report on future dated benefit account deposits. View Details...
Employee Deposit Log	The Employee Deposit Log report shows all deposit activity to participant benefit accounts. View Details...
Employer HSA Summary Report	The Employer HSA Summary Report is a summary of HSA accountholder account statuses, transactions and investments by employer.
HSA Account Details Report	The HSA Account Detail Report can be used by Administrators to view details about Product Partner HSA accounts within WCA. View Details...
HSA Funded Contributions Report	The HSA Funded Contribution Report can be used to confirm the status of payroll contributions submitted within a specified date range. View Details...
HSA Payroll Reconciliation Report	The HSA Payroll Reconciliation report provides a list of payroll funded HSA credits within a specified date range. View Details...
HSA Terminations Report	List of HSA terminations either at the employee demographic level or at the HSA account level.

7 HSA administration reports found.

5. Once you are at the page below, please select the Product Partner (indicated by red arrow) and select Avidia Bank or Wealthcare Saver. Then change the "Mask Bank Account Number" (Indicated by blue arrow) to "no". Then click "Generate".

HSA Account Details Report

Product Partner: Avidia Bank

Admin: BBP Admin

Employer: Better Business Planning, Inc. Better Business Planning, Inc. List All

Partner Account Upload Status : <All>

Partner Bank Account Status : <All>

Billing Group: <All>

Account Segment: <All>

Subgroup: <All>

Mask Bank Account Number : No

Division : <All>

Account Type : <All>

Class : <All>

Exclude HSA Account Balances : Yes

Employee ID : NULL

Include HDHP Eligible non-Enrolled Employees : No

Mask Employee ID: Yes

Format: Excel 2003 (xls)

Optional Columns : <All>

Mask SSN : Yes

Sort By : Employee Last Name

Accounts Create On or After : 1/1/1900

Accounts Create On or Before : 7/29/2019

Report Delivery Options:

UI Download Email FTP

Email address of recipient*:

Email address of sender*: joseph@bbpadmin.com

Generate

*Field is required.

6. Once you have generated the report, click back on the Day-to-day and click on Reports → Result → View Reports

