

Manage Your HSA & Set Up Direct Deposit

With the Custom Flex Web Portal and Mobile App you can manage your HSA account 24/7 on a schedule that is convenient for you. The Web Portal and Mobile App offer the flexibility to manage your account without having to go to a bank during standard business hours.

The Custom Flex Portal allows you to

- View Your Account Balance
- Manage Investments
- Request a Distribution
- Manage Tax Forms
- View Transactions
- Request a New Card
- Update Your Personal Profile Information
- Sign up for Email Notifications

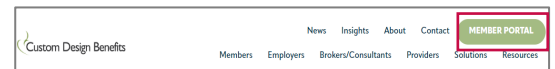
NOTE: YOU MUST LOG IN TO YOUR PORTAL TO ACCEPT THE TERMS & CONDITIONS OF THE HSA BEFORE YOU WILL BE ABLE TO UTILIZE YOUR FUNDS.

To access the portal:

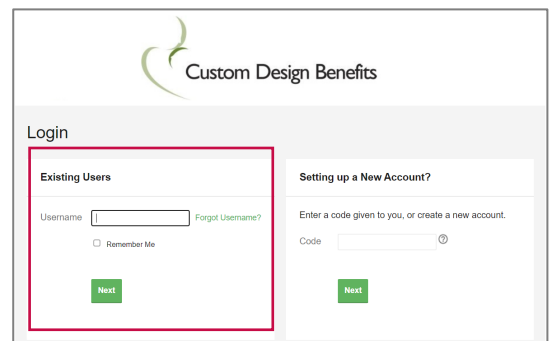
- Go to www.CustomDesignBenefits.com
- Click on **Member Portal**, then click on **Custom Flex: FSA/HRA/HSA** to log onto the Custom Flex Portal
- If you are logging in for the first time
 - **Your Username is the first initial of your first name, your last name, followed by the last four digits of your Social Security Number**
 - **Your default password is Customflex**
 - You will be prompted to change your password the first time you log in

Username: FirstInitialLastNameLast4SSN

Password: Customflex



CUSTOM FLEX: FSA/HRA/HSA



Custom Design Benefits

Login

Existing Users

Username: [Forgot Username?](#)

Remember Me

Setting up a New Account?

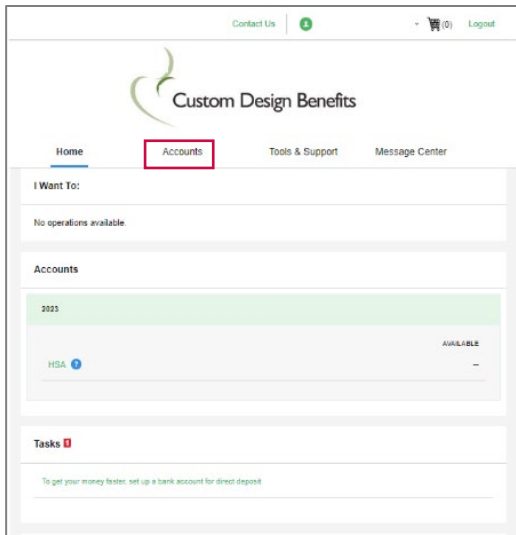
Enter a code given to you, or create a new account.

Code:

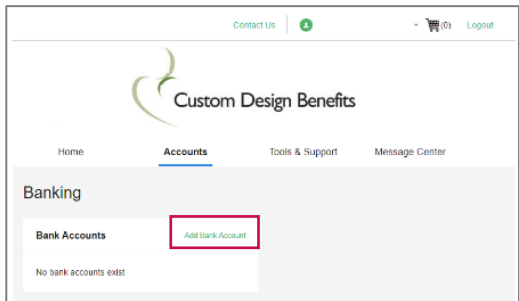
Example: John Smith, who has a Social Security Number of 333-55-9999, would have a Username of jsmith9999.

To set up direct deposit:

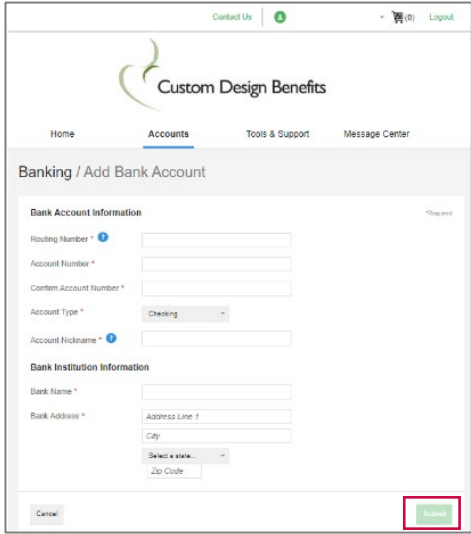
1 Click **Accounts**



2 Click **Add Bank Account**



3 Enter bank information and click **Submit**



To download the mobile app:

After you have logged into the Custom Flex Portal for the first time, you can download the free Mobile App.

Search for "Custom Flex" in the App Store.

