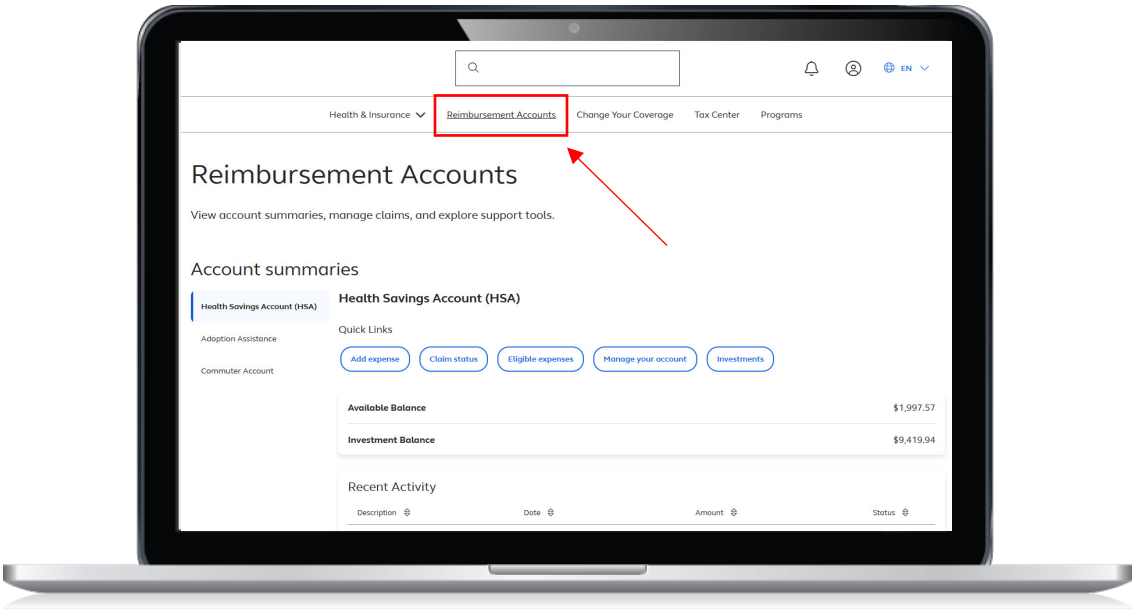
alight Smart-Choice Accounts®

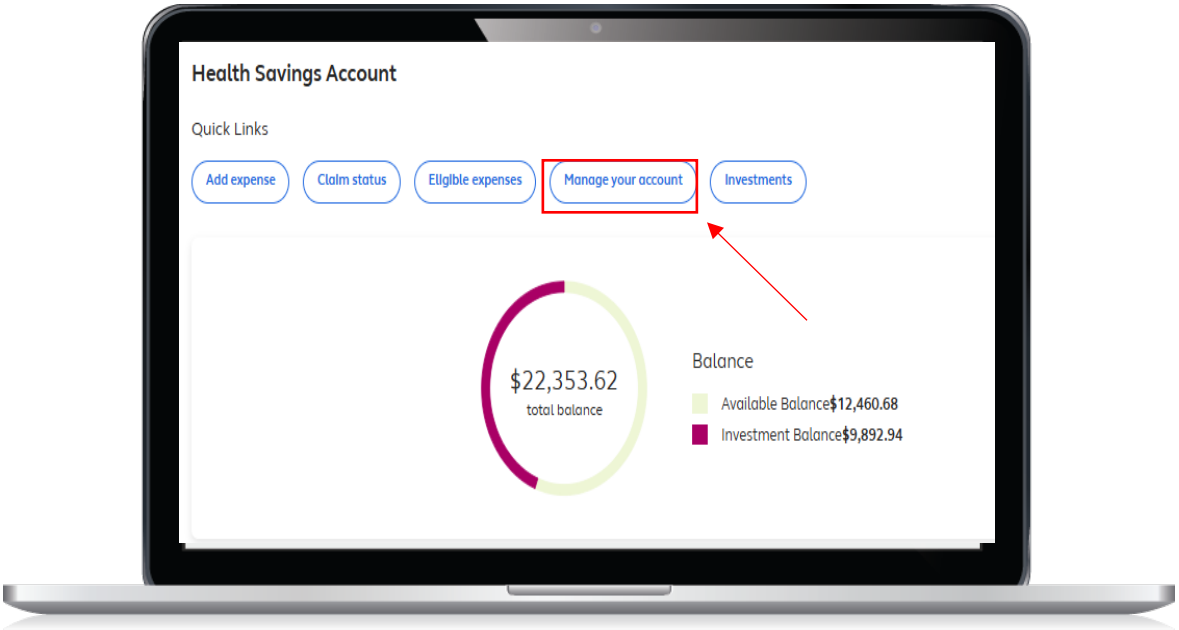
Adding HSA Beneficiaries Guide

HSA beneficiary information does not transfer from prior HSA custodians. Adding beneficiary information on your new Smart-Choice HSA is important to ensure that your HSA funds are directed according to your wishes in case something happens to you.

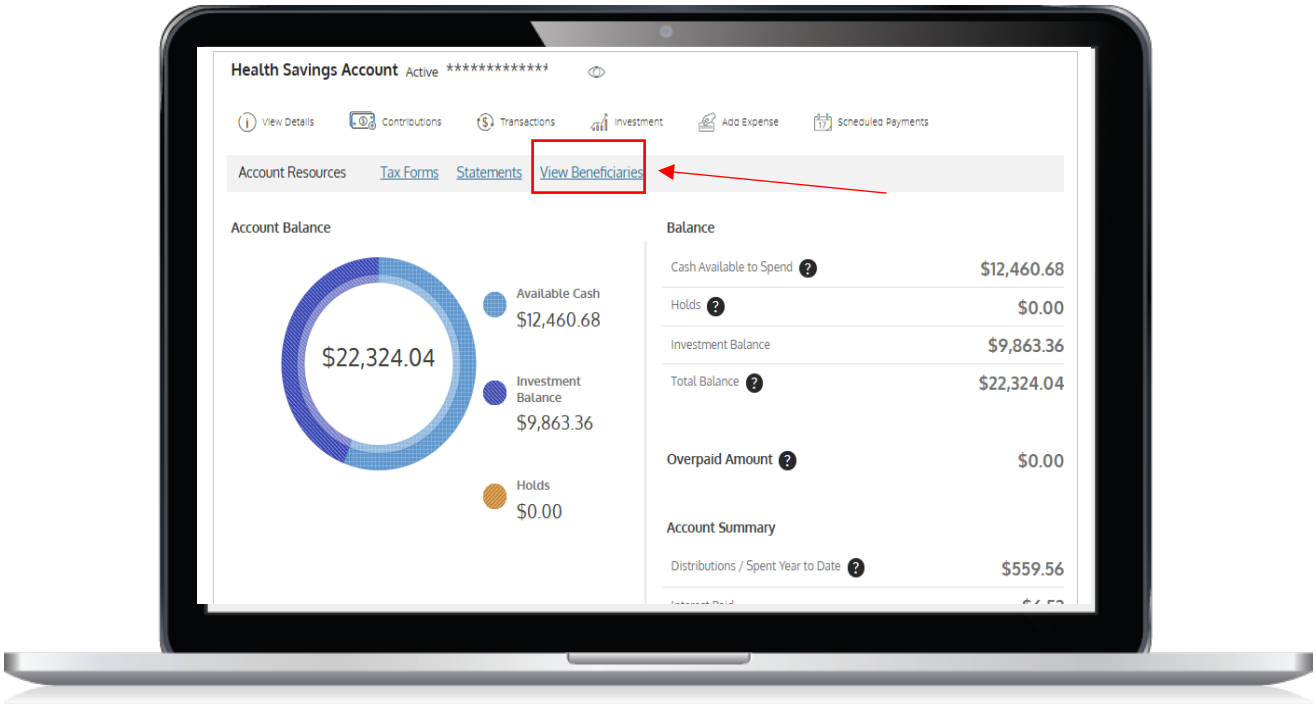
1. Log on to the benefits website and select the “Reimbursement Accounts” tab



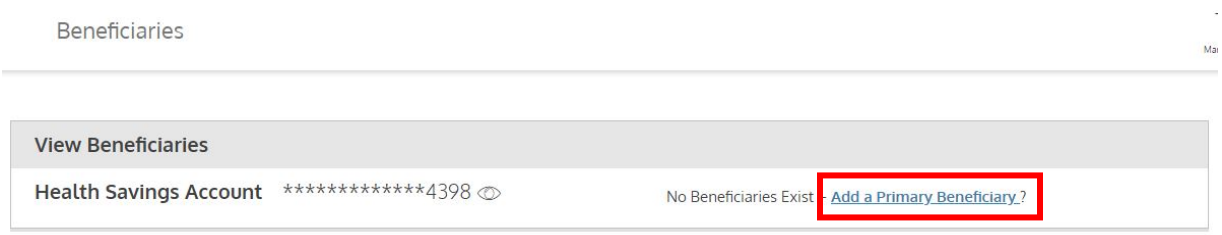
2. Select “Manage your Account”



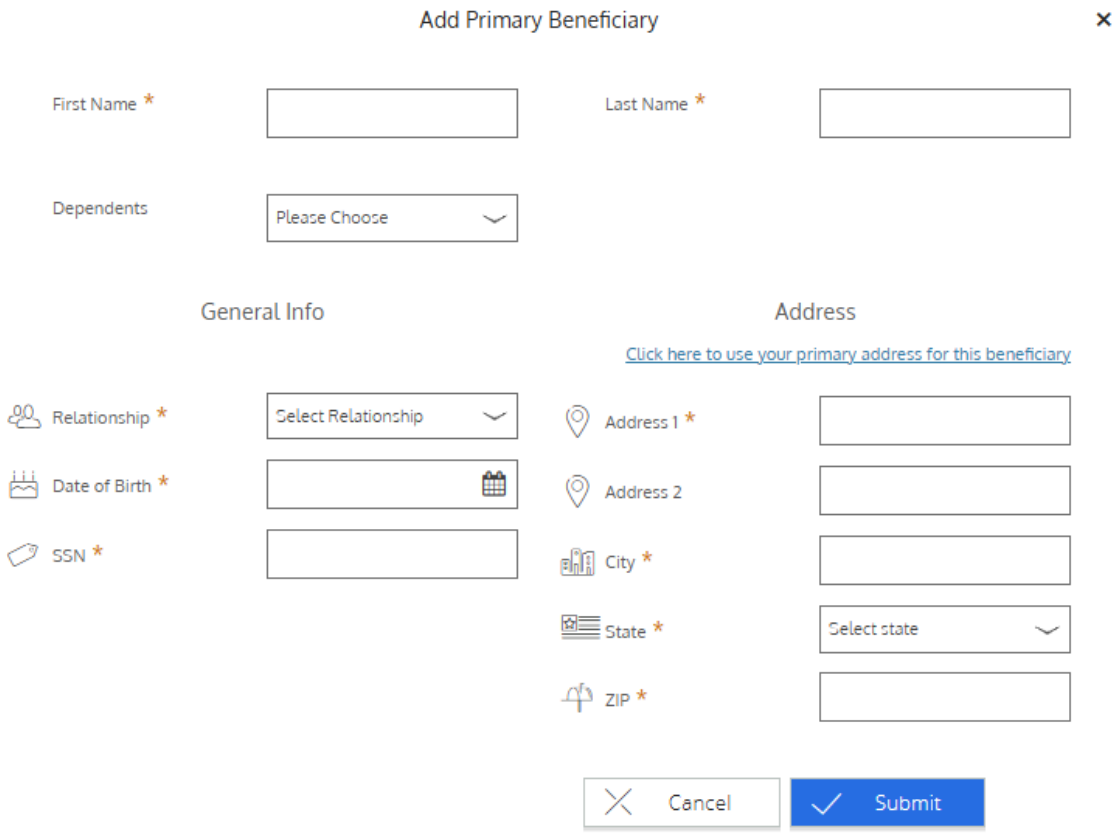
3. Select “View Beneficiaries” in the Health Savings Account on the Account Summary page Health Savings Account from the Smart-Choice Accounts website homepage.



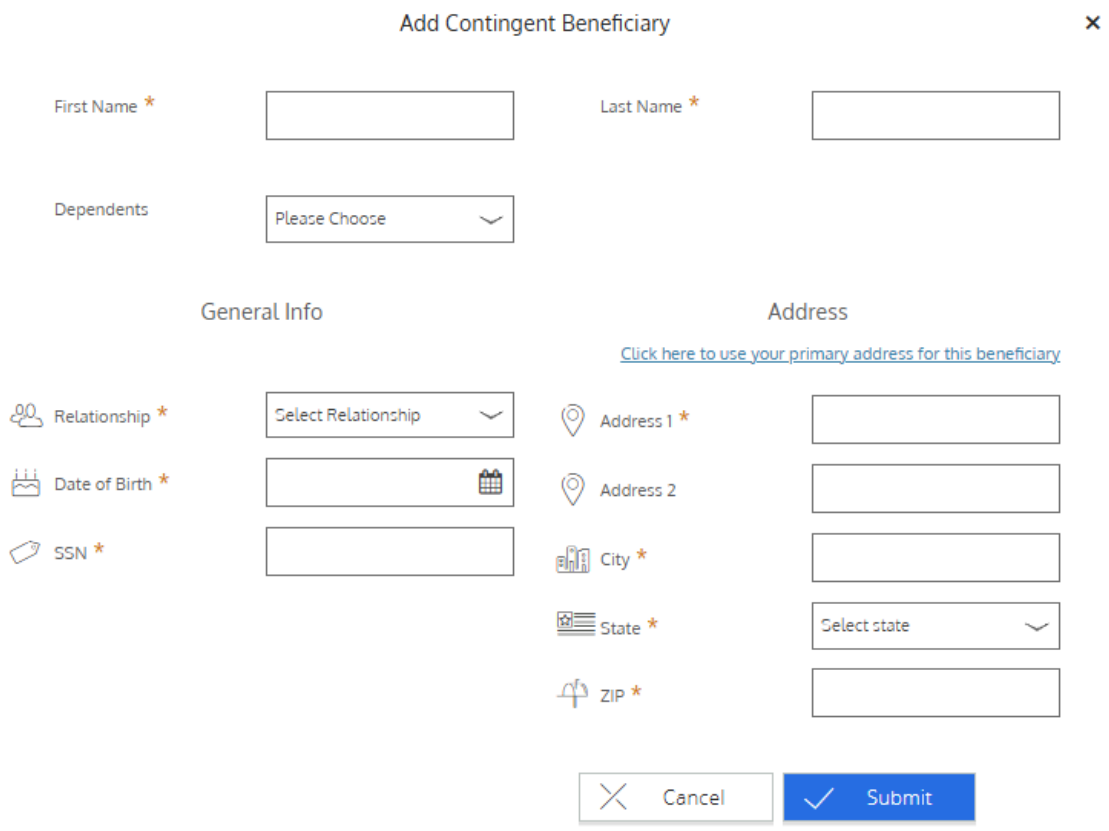
4. On the Beneficiaries page, select “Add a Primary Beneficiary”.



In the pop-up box that appears, enter your primary beneficiary’s information. All required fields are marked with an *. When finished, click “Submit”.



If you have contingent beneficiaries, click select “New Contingent Beneficiary”. In the pop-up box that appears, enter your contingent beneficiary’s information. All required fields are marked with an *. When finished, click “Submit”.



Your final beneficiary submission will display on the “View Beneficiaries” page. Make sure to confirm all is correct before leaving the page.

