

## Access Spending Accounts via Employee Self Service

1. Navigate to the self service portal.
2. Review the **Benefits** tile for account and balance information.
3. Select **Spending Accounts** to display **Overview** tab of **Your Spending Accounts**. Or navigate to **Spending Accounts** from the main menu.

Benefits

YTD Compensation

| Your Account Balances  | Hide Totals |
|------------------------|-------------|
| Health Savings Account | \$9,853.45  |
| Transportation         | \$85.00     |

[Spending Accounts](#)

[Dependents](#)

[Retirement Plans](#)

[Benefits](#)

paylocity

HR & Payroll

Self Service Portal

HR & Payroll

Expense

Onboarding

Performance

Spending Accounts

Web Link

paylocity

Pay

View Checks

View Expenses

Time Entry

Benefits

YTD Compensation

Time Off

4. Review **Spending Accounts Overview**.

Your Spending Accounts

|  |                           |
|--|---------------------------|
| <b>Health Savings Account</b><br><b>\$9,853.45</b> | Transportation<br>\$85.00 |
|--|---------------------------|

Overview Transactions Statements

**Balances and Contributions**

[File a Claim](#) [Make an HSA Transaction](#)

**Balance**  
Balance: \$9,853.45

**Contributions**

Your Contributions: \$2,900.00  
Employer Contributions: \$1,400.00  
2019 Max: \$5,000.00

[My Investments](#)

**Recent Transactions**

|                  |  |                                   |
|------------------|--|-----------------------------------|
| January 21, 2019 | Distribution<br>Health Savings Account | \$20.00<br><span>Pending</span>   |
| January 20, 2019 | Distribution<br>Health Savings Account | \$18.11<br><span>Processed</span> |
| January 17, 2019 | Distribution<br>Health Savings Account | \$10.85<br><span>Processed</span> |

5. Click on the link below to access a video that provides assistance with managing your **Spending Accounts** through the Self Service Portal.

[https://docs.paylocity.com/webpay/admin/videos/paylocity\\_spending\\_account\\_portal.mp4](https://docs.paylocity.com/webpay/admin/videos/paylocity_spending_account_portal.mp4)