

# UMB Business Partner Portal

Access industry-leading tools and resources to benefit your clients

UMB leads the industry with the Business Partner Portal, the first portal to provide easy and secure access to real-time account information, extensive reporting tools and valuable resources to help your clients build a customized management approach for their Health Savings Account (HSA) program.

## Dashboard

Receive a real-time snapshot for all of your employer groups and individual businesses when you log into UMB's Business Partner Portal. From the Dashboard you can view pending and future-dated enrollment statuses for all employee accounts, as well as all open accounts for each of your groups.

Employer	City	State	Set-up Date	Pending Enrollments	Open Accounts
BUTLER CHEVROLET INC	Lima	Ohio		0	0
OHIO CUSTOM MACHINES INC	Bowling Green	Ohio		0	0
FINDLAY REAL ESTATE CORPORATION				5	0
CALLIN FINANCIAL GROUP LLC	Findlay	Ohio	7/25/2011	0	3
RUSH VETERINARY CLINIC	Tiffin	Ohio	6/30/2011	0	5
MCNAIR SALES & MARKETING LLC	Fostoria	Ohio	12/29/2010	0	75
TELFORD BUICK GMC	Findlay	Ohio		0	1

## Reporting

The UMB Business Partner Portal offers reporting tools for all employer groups, regardless of size, to increase your clients' understanding of accountholder activity. You can run reports by month or as of the current date and then export them to Excel or PDF format.

### Account Summary Report

- Total customer accounts
- Account breakdowns
- Investment totals
- Average account balance
- Contribution and distribution activity

ACME Manufacturing, Inc. Account Summary				
As Of: 10/12/2012				
	Open	Total	Average	Percentage of
	Accounts	Balance	Balance	Accounts
<b>HSA Totals</b>				
Base Health Savings Accounts	85	\$196,443.74	\$2,211.10	100%
<b>HSA Analysis</b>				
Number of Accounts with negative balance	0	\$0.00	\$0.00	0.00%
Number of Accounts with zero balance	1	\$0.00	\$0.00	1.18%
Accounts with a balance between \$0.01 - \$1,000.00	39	\$15,691.17	\$402.34	45.88%
Accounts with a balance between \$1,000.01 - \$2,500.00	19	\$32,013.20	\$1,684.91	22.35%
Accounts with a balance between \$2,500.01 - \$5,000.00	14	\$51,665.93	\$3,690.42	16.47%
Accounts with a balance between \$5,000.01 - \$10,000.00	10	\$67,524.16	\$6,752.42	11.76%
Accounts with a balance greater than \$10,000.00	2	\$29,549.28	\$14,774.64	2.35%
	<b>85</b>	<b>\$196,443.74</b>		
<b>HSA Investment Totals</b>				
Number of Money Market Sweep Investors	0	\$0.00	\$0.00	0.0%
Number of Self-Directed Brokerage Investors	0	\$0.00	\$0.00	0.0%
<b>Account Breakdown</b>				
Number of open accounts	85			Number of accounts closed in the last 18 months
Accounts opened this year	27			Accounts closed this year
Accounts opened this month	1			Accounts closed this month
				Total number of accounts (open + closed in last 18 months)
				85
<b>Year to Date Activity</b>				
<b>Contribution Activity</b>		<b>Total Amount</b>	<b>Average per Account</b>	
Employee Contributions Year to Date		\$113,826.75	\$1,339.14	
Employer Contributions Year to Date		\$95,541.00	\$1,171.07	
Total Contributions Year to Date		\$213,367.75	\$2,510.21	
<b>Distribution Activity</b>				
Distributions Year to Date		\$156,985.86	\$1,846.89	
<b>Current Month Distribution Activity</b>		<b># of Transactions</b>	<b>Total Spend</b>	<b>Average Spend</b>
Card Activity		114	\$12,849.82	\$112.72
Check Activity		0	\$0.00	\$0.00
Online & ACH Activity		7	\$1,999.57	\$285.65
		Broker = 00130		
		Selected Employer = All		

## Account Detail Report

Sort all HSA and enrollment activity associated with an employer group by:

- Location
- Date of activation
- Account status

SSN	Name	Address 1	Address 2	City	State	Zip Code 5	Zip Code 4	Account Status	Acct Open	Report As-Of
xxxx4975	HARVEY	216 COLUMBIA DR		LIMA	OH	45006		01	02/17/2012	02/24/2012
xxxx5175	DEAN WHEELER	1111 N OLD	APT 19	FINDLAY	OH	45640	5434	09	07/13/2011	02/24/2012
xxxx9763	HERB SEWELL	712 LOUIS AVE		FINDLAY	OH	45639	4602	01	01/17/2012	02/24/2012
xxxx1064	MAVIS LEONARD	486 NEWBURNE		JENERA	OH	45841		09	12/22/2011	02/24/2012
xxxx5915	JIM SADLER	930 CRESCENT		MCCOMB	OH	45658	2700	09	11/15/2011	02/24/2012
xxxx6442	CHRIS NORTON	545 SUFFIELD		HARROD	OH	45650	1240	09	06/08/2011	02/24/2012
xxxx2248	BOBBIE DOOLEY	22825 HIGHBANK		DUNKIRK	OH	45636	4742	09	10/28/2011	02/24/2012
xxxx2365	STEVE DOOLEY	7641 TURFILLUM		DOLA	OH	45635	4346	09	07/29/2011	02/24/2012
xxxx9258	RAUF AHNEEN	6636 DANLISON		DUPONT	OH	45637	2910	09	07/14/2011	02/24/2012
xxxx1495	COLLEEN KRISTIN	2075 ELLWOOD		HAVILAND	OH	45651	1022	09	12/22/2011	02/24/2012
xxxx4335	TED BELL	3460		ELGIN	OH	45638	2517	09	12/22/2011	02/24/2012
xxxx6677	AUSTIN AMARKA	3535 WOODDALE		GLANDORF	OH	45648		01	01/31/2012	02/24/2012
xxxx1428	STEVE BOSELL	72401 RUSS RD		FORT JENNINGS	OH	45644	4535	09	12/22/2011	02/24/2012
xxxx1870	MARGARET	7535 GARY AVE		FORT RECOVERY	OH	45646	2520	01	01/05/2012	02/24/2012
xxxx9445	JEFF DOWDER	2757 COURVILLE		KALIDA	OH	45653	1018	09	12/22/2011	02/24/2012
xxxx3836	CLARA BINGHAM	30337		LAFAYETTE	OH	45654	4749	09	11/08/2011	02/24/2012
xxxx9166	LARRY GROVER	547 BLOOMFIELD		LATTY	OH	45655	3876	09	10/17/2011	02/24/2012
xxxx2873	DAVE OLIVA	9400		LEPSIC	OH	45656	9780	01	01/27/2012	02/24/2012
xxxx9611	RC COLLINS	400 W NORTH ST	APT 1018	FOREST	OH	45643	1565	09	11/08/2011	02/24/2012
xxxx9686	RUDY CANOZA	303 HOLIDAY DR		GROVER HILL	OH	45649	2118	09	11/17/2011	02/24/2012
xxxx3449	VIOLA LEVOUIER	1148 CLEAR		BERKEY	OH	43504	3577	09	05/27/2011	02/24/2012
xxxx1610	DON PARSLEY	2982 CHARANN		DELPHOS	OH	45633	6611	01	01/25/2012	02/24/2012
xxxx1387	BOB GREEN	22831 SHAGBARK		ARLINGTON	OH	45814	4771	09	10/31/2011	02/24/2012
xxxx3531	APT GRIEGO	565 HAVERHILL		ANTWERP	OH	45813	3426	09	07/05/2011	02/24/2012
xxxx1776	DEB TURNER	1463 WIND RIVER		BELMORE	OH	45615	2693	09	09/08/2011	02/24/2012
xxxx6631	VERNON DOZIER	1001 EASTVIEW		BLUFFTON	OH	45617	9420	09	06/01/2011	02/24/2012
xxxx6607	DOUG DANINGER	881 ARLINGTON		BENTON RIDGE	OH	45616	1685	09	12/22/2011	02/24/2012
xxxx1923	WILLIAM RENNICK	508 PARKDALE		BEAVERDAM	OH	45608	5503	09	06/30/2011	02/24/2012
xxxx9378	LLOYD BONAFIDE	4145 WINDIATE		LIMA	OH	45607	1262	09	06/05/2011	02/24/2012

## Additional Resources

Go the extra mile for your customers with the following resources:

- **Employer Manager Tab** - Manage the Employer Group setup process by downloading the employer form and necessary setup information for your clients.
- **Partner Resources Tab** - Access marketing and sales materials, including our innovative benefit communication toolkits to help your clients build a successful communication strategy.
- **Benefit Communication Toolkits** - Help educate your clients, as well as increase participation in their HSA programs.
- **Learning Center** - Also access our Learning Center through the Partner Resources Tab for training and educational resources, as well as helpful information regarding HSAs.

Download our helpful marketing and sales materials to help make communication easy and improve the overall experience for your clients and their employees.

### For your clients

**Benefit Communication Toolkits**

- [Implementation Toolkit](#)  
Gets your clients started in rolling out their HDHP with an HSA
- [Launch Toolkit](#)  
Ensures high participation in your clients HDHP with an HSA
- [Ongoing Toolkit](#)  
Creates real change and success for your client
- [Employer Brochure \(.pdf\)](#)  
Helps clients understand the benefits of a UMB Healthcare Services' HSA
- [Accountholder Materials \(Coming Soon\)](#)

### For you

- [HSA fee comparison \(.pdf\)](#)  
See how UMB Healthcare Services Stacks up to the competition
- [Agent/Broker partner flyer \(.pdf\)](#)  
Find out how partnering with UMB can make you look great to your clients
- [Agent/Broker Commission and Rewards \(.pdf\)](#)  
Three ways to earn rewards
- [Agent/Broker Fee Schedule \(.pdf\)](#)  
Download our competitive pricing sheet
- [UMB Sales reps contact information for Agent/Broker \(.pdf\)](#)  
Locate your nearest UMB Healthcare Services sales rep
- [Wholesale partner flyer \(.pdf\)](#)  
See how our healthcare solutions can make you stand out from the crowd

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