



HSA Bank Change

What you need to know

The checklist below was created to help you track important items as your Health Savings Account moves to HSA Bank.

Please refer to it often and also make sure to check out hsabank.com/members/dte1 for additional resources and information.

In addition, we recommend visiting www.chasehsa.com prior to the transition to verify profile and contact information are up to date, and to ensure future communications and materials are received without issue.

Your new debit card



- You and other cardholders will get a new debit card in late August. It will be sent in an envelope that says “Your new employee benefit materials are enclosed.”
- No activation is needed – just start using it Saturday, September 12, 2015.
- After Friday, September 11, 2015, your Chase card will stop working.

New checks



- If you currently use a checkbook, a new one will be mailed in late August.
- Start using your new checks after Saturday, September 12, 2015.
- Stop using your Chase checks after Monday, August 31, 2015. Please destroy any unused Chase checks. Any Chase check presented for payment after Friday September 11, 2015 will be returned.

Online account access



- On Friday, September 11, 2015 at 9pm ET, your online account for your Chase HSA will switch to “view-only” mode. You won’t be able to set online bill payments or EFTs, reach your investment account or make other changes.
- Starting Monday, September 14, 2015, use your new HSA Bank account at www.myhsabankaccount.com.

HSA investments



- Starting on Thursday, September 10, 2015 at 3:30pm ET, you will not be able to view or make changes to your investment account.
- On Monday, September 14, 2015, you can use your new investment account by logging in at www.myhsabankaccount.com.
- Electronic delivery of investment materials which includes periodic statements, trade confirms, and prospectuses will be available, free of charge. The first time that you log into your investment account on the HSA Bank website, you will be prompted to select your option of either electronic or paper delivery of these HSA investment materials. If you elect to receive these investment materials in paper you will be charged a \$2.00 Printed HSA Investment Materials Fee which will be waived for the first three months after your account transitions to the HSA Bank system.
- Your mutual fund investments, future elections and other automatic investment choices will transfer to your new investment account.