

# HSA Bank Communication Calendar

## Pre-Enrollment & Enrollment Communications

Timeline	Key Message Points	Recommended Communications
		* Item sent by HSA Bank directly to accountholder
<b>Enrollment Time</b>	Explain what an HSA is and how it works	<ul style="list-style-type: none"> <li>• What Can and HSA Do For You? Flash Presentation</li> <li>• Health Savings Account Brochure</li> <li>• About HSA Bank PowerPoint Presentation</li> </ul>
	Explain how to enroll in the HSA	<ul style="list-style-type: none"> <li>• Enrollment Instructions</li> <li>• Enrollment PowerPoint Presentation</li> </ul>
	Explain account options	<ul style="list-style-type: none"> <li>• HSA Bank prepared memos delivered via print or email (Topics: debit cards, investments, Internet Banking, customer service, automated banking, etc.)</li> </ul>
	Welcome employees and explain what to expect	<ul style="list-style-type: none"> <li>• Custom "Welcome" memo/email</li> <li>• Custom "What to Expect" memo/email</li> <li>• Account Welcome Kit*</li> <li>• Debit card mailer including how to use the card*</li> <li>• Account opening verification email*</li> </ul>

## Post-Enrollment & Ongoing Communications

Timeline	Key Message Points	Recommended Communications
		* Item sent by HSA Bank directly to accountholder
<b>January</b>	Provide HSA tax filing information	<ul style="list-style-type: none"> <li>• Year-end Status Report, IRS 1099-SA, IRS 5498-SA*</li> </ul>
<b>February</b>	Remind employees of prior-year contributions and cut-off dates	<ul style="list-style-type: none"> <li>• Email/mail reminders to employees who did not fund to the maximum levels for the prior year*</li> </ul>
<b>Annually</b>	Reminder of account features and value-added services	<ul style="list-style-type: none"> <li>• HSA Bank has prepared memos that can be delivered in print or by email. (Topics: debit cards, investments, Internet Banking, customer service, claims negotiation services, cost-saving resources, etc.)</li> </ul>

For assistance, please contact Business Relations

(866) 357-5232 Monday – Friday, 7 a.m. – 7 p.m., CT

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