

Dear HSA Participant,

Wespath has announced a change in administration of your Health Savings Account ("HSA"). HSA accounts will be transitioning from WageWorks to HealthEquity this month. A welcome kit from HealthEquity will arrive this week and will include a purple and blue HealthEquity debit card that will replace your WageWorks card for your HSA account through HealthFlex. You will be able to start using the new card **May 22, 2020**.

No action is required except that it is recommended that you complete and return the new [beneficiary form](#) directly to HealthEquity.

Note that you will not be able to use your account during the transition from May 15 - 22. You will be able to request reimbursement of expenses through HealthEquity starting May 22.

If you are also enrolled in a limited use HRA and/or FSA account through [WageWorks](#) you will continue to use the WageWorks card for expenses. HealthEquity is only for HSA accounts at this time. You will be able to access HealthEquity through your [WebMD](#) account or directly at [HealthEquity](#). The HealthEquity member services can be reached at 844-341-6998.

Below are some important dates to keep in mind:

- **May 8, 2020:** Was the last day to contribute/invest dollars to your WageWorks HSAs.
- **Week of May 11, 2020:** Card(s) and welcome kits (mailed together) sent to accountholders allowing them to access the HealthEquity member portal.
- **May 14, 2020:** Last day to use your WageWorks HSA debit card (keep the card for HRA/FSA accounts).
- **May 15 - 22, 2020** - no account activity will take place. Reimbursement for claims during this time can be filed on or after May 22.
- **May 20, 2020:** Liquidation of your investments by BNY Mellon.
- **May 21, 2020:** BNY Mellon transfers account balances to HealthEquity.
- **May 22, 2020:** All funds available at HealthEquity.

Here are a few additional details about the transition:

- No individual consent, action, or re-completion of the Customer Identification Program (CIP) is required.
- The full 2020 history will be transferred to HealthEquity so only one tax form will be received.
- There is no change to the \$2/monthly low balance fee at this time.
- There will be a \$1.00 monthly fee for paper statements, avoided with electronic statements (waived through May 31, 2021)

Please let me know if you have any questions about your HSA or any other benefits.

Kind Regards,
Meg Kau
(503) 802-9224

Files: [healthequitybeneficiaryform.pdf](#)