

FREQUENTLY ASKED QUESTIONS

- 1. Will there be any time during the transfer that I will not be able to use my HSA card?**

Yes – As of midnight, May 10, 2017, you will no longer be able to use your current HSA debit card. Please destroy that card after May 10.
- 2. What happens if I need to access my HSA during the transition period?**

While we are converting your HSA to the new platform, you will not have access to your funds. Should you incur medical expenses during the conversion period, you will be able to reimburse yourself for these expenses.
- 3. Will my account number change?**

Yes – Your new HSA will have a new account number.
- 4. I currently have direct deposit to my HSA. How does this affect my direct deposit?**

You will need to provide your new HSA account number and the Avidia Health routing number 011375384 to your payroll department.
- 5. When should I expect my new HSA debit card?**

Your new HSA debit card will be mailed to you the week of May 1, 2017. To activate your new card please call 855.472.9399.
- 6. Will I receive checks for my new HSA?**

If you are writing checks on your current HSA account, you will receive a new checkbook after May 16. Please discontinue using the old checkbook.
- 7. I am a current Avidia Bank customer and use Avidia Bank Internet Banking. Will I be able to use the same site for my HSA?**

No – You will need to enroll on a different Internet banking site for your HSA account. Please visit www.avidiahealth.com to enroll for your HSA Internet banking. Instructions on how to enroll for HSA Internet banking will be sent to you.
- 8. I currently use Avidia Bank Mobile Banking, can I use the same mobile app?**

No – To access your HSA from your mobile device, download the new Mobile App. Please visit your mobile app store and download the new Avidia Health HSA Mobile App. Keep in mind, other than your Health Savings Account, the Avidia Bank app is still functional for all accounts maintained with Avidia Bank.
- 9. What other steps do I need to take for my new HSA?**

If you currently use a bill payment feature, you will need to re-enter your payment vendor information on the Avidia HSA Internet banking site. If you currently have payments automatically deducted from your account, you will need to notify payment vendors of your new account number and routing number. If you've given your current HSA debit card as an automatic payment method, you will need to notify the vendors of your new card number.
- 10. Will my new HSA account have an investment option?**

Yes – We have partnered with Devenir, a leader in healthcare investment funds. For more information on your investment options please call 855.472.9399.

11. **How will I receive my 2017 tax forms?**

Avidia Health will provide your tax forms for 2017. If you have qualifying transactions, you could receive up to four 2017 tax forms (two 1099SAs and/or two 5498SAs) depending on the date of your transactions. Avidia Health will provide tax forms for qualifying transactions that occurred prior to the upgrade and separate tax forms for qualifying transactions that occurred after the upgrade.

12. **What is the address for mail and deposits?**

Avidia Bank HSA
P.O. Box 981012
Boston, MA 02298-1012

13. **What phone number can I call for assistance?**

Prior to May 16, you will continue to call 800.508.2265. Beginning May 17, the new customer service number is 855.472.9399.



KEY DATES TO REMEMBER

- On **April 20**, you will receive a welcome email that provides information about your new Avidia Health Savings Account.
- During the first week of May, a new Avidia HSA debit card will be mailed to you. To activate your new debit card, call the number printed on the card.
- As of midnight on **May 10**, your existing HSA debit card will no longer be active and should be destroyed. Please plan accordingly or you have the option to be reimbursed.
- Direct deposits into your account will continue until the close of business **May 12**.
- No account activity will be possible from **May 13 – 16**, during the account transfer timeframe.
- Balance transfer will be complete and your new Avidia HSA account and debit card can be used **May 17**.