

Transfer Dates from HSA Bank to Liberty Health HSA Bank

1. Liberty Health HSA Bank Enrollment Form
 - a. Paper
 - b. Electronic - OES Forms
2. **Deadline Date** to Submit Transfer Form to IEBP
 - a. WET SIGNATURE Bank Requirement
 - b. **First Bulk Transfer: Return to IEBP by Oct. 20, 2017**
 - c. **Second Bulk Transfer: Return to IEBP by Jan. 19, 2018**
3. Bulk Transfer Dates
 - a. First Transfer = **Dec. 14, 2017**
 - i. Collect forms for first bulk transfer
 - Nov.22nd - Dec.14th Black Out
 - Not in HSA Bank Purse
 - Available Liberty Health HSA Bank Purse
 - b. Second Transfer = **Mar. 14, 2018**
4. Open Enrollment Package
5. Marketing Communication
 - a. Liberty's Customer Support: (844) 577-7792
 - b. Single Sign On (SSO) to New WealthCare Admin Portal: iebp.org
6. **Liberty Health Bank Disclosures**
 - a. [Liberty Health Bank Privacy Policy](#)
 - b. [Liberty Health Bank Patriot Act](#)
 - c. [Liberty Health Bank Terms & Conditions](#)
 - d. [Liberty Health Bank Full Disclosures](#)

Anniversary Plan Year Month	IEBP Transfer Form Due Date	HSA Bank Account Closed	HSA Bank Transfer Money to Liberty Health HSA Bank	Blackout Period	Employer Totals	Participants with Deposits	Participants without Deposits
<u>Plan Year Oct. 1st</u> Oct. 1 st thereafter, deposits will go to Liberty Health HSA Bank	Oct. 20, 2017	Dec. 12, 2017	Dec. 14, 2017	Nov. 22, 2017 - Dec. 14, 2017	19	316	49
<u>Plan Year Jan. 1st</u> Jan. 1 st thereafter, deposits will go to Liberty	Jan. 19, 2018	Mar. 13, 2018	Mar. 14, 2018	Feb. 21, 2018 - Mar. 14, 2018	25	632	203
<u>Plan Year Mar. 1st</u> Jan. 1 st thereafter, deposits will go to Liberty	Jan. 19, 2018	Mar. 13, 2018	Mar. 14, 2018	Feb. 21, 2018 - Mar. 14, 2018	1	2	0
<u>Plan Year May 1st</u> Jan. 1 st thereafter, deposits will go to Liberty	Jan. 19, 2018	Mar. 13, 2018	Mar. 14, 2018	Feb. 21, 2018 - Mar. 14, 2018	2	15	0
<u>Plan Year July 1st</u> Jan. 1 st thereafter, deposits will go to Liberty	Jan. 19, 2018	Mar. 13, 2018	Mar. 14, 2018	Feb. 21, 2018 - Mar. 14, 2018	2	6	7

HSA Issues Serviced by IEBP - (800) 282-5385

Basic HSA issues and questions should be handled by IEBP. Examples (*not a complete list*) of basic HSA issues are:

- What is my HSA account number?
- How do I reimburse myself from my HSA?
- How can I make deposits to my HSA?
- What is my HSA balance?

HSA Issues Serviced by Liberty Savings HSA Bank - (844) 577-7792

Liberty Savings HSA Bank specific questions that IEBP is not able to answer and more complex HSA issues should be directed to the Liberty Savings HSA Bank Customer Support team at the number above. Examples (*not a complete list*) of HSA issues that should be transferred to Liberty Savings HSA Bank Customer Support are:

- Do I qualify for the investment option and how do I access it?
- Can I use my HSA funds for anything other than medical expenses?
- I am leaving my Employer, what do I do?
- My Employer made a mistaken contribution to my HSA account, now what?