

2022 HSA/FSA/COMMUTER TRANSITION FAQ

Transfer of Assets Information (Updated 5/2/22)

As of January 1, 2022, HSA Bank is the administrator and custodian for the Robert Half sponsored Health Savings Account (HSA), Flexible Spending Accounts (FSA) and Commuter Accounts. This FAQ includes information on the transfer of your current Robert Half HSA, FSA, and Commuter account balance(s).

2021 MERCER/ TRI-AD HEALTH SAVINGS ACCOUNTS

The HSA Bulk Transfer process from Mercer Marketplace/ TRI-AD to HSA Bank is complete.

- **If you had a remaining HSA balance with Mercer/TRI-AD, your account was converted to a Retail HSA Account around April 1, 2022.**
- After converted to a retail HAS account directly with TRI-AD, it will no longer be accessible under the Robert Half Plan. You received notification from Mercer/TRI-AD regarding account access, your new debit card, fees, etc. Below are instructions on how to access the TRIAD retail HAS and a link to their FAQ. [FAQ | TRI-AD \(wealthcareportal.com\)](#)
- **Online:** Set up your new access at: <https://triad.wealthcareportal.com>.
 - **Registration ID:** Benefits Card Number
 - **Employer ID:** TIDTRIADHSA
 - **Employee ID:** Your SSN with no dashes.
- **Mobile:** Download “TRI-AD Benefits on the Go” App



TRANSFER YOUR TRI-AD Retail HEALTH SAVINGS ACCOUNT

If you wish to transfer your account to HSA Bank and:

1. You have a 2022 Robert Half-sponsored HSA with HSA Bank, you can transfer your account using the [Direct Transfer Request Form](#). Here are some helpful [HSA Transfer instructions from UMB to HSA Bank](#).
2. You don't have a 2022 Robert Half-sponsored HSA and:
 - a. **You are eligible* to elect an HSA** with HSA Bank. You can do so through the RH Benefits Enrollment site, Emyprean.
 - b. **You are not eligible* for an HSA.** You can open an HSA Retail Account directly with HSA Bank at [their public website](#). Monthly administrative fees for a Retail Account are \$2.25. Contact HSA Bank Client Assistance Center at 1.800.357.6246 with questions.

Alternatively, you can transfer your account to another HSA vendor/financial institution of your choosing. Transfer instructions would normally be found on the new vendor's website. Note that Fidelity offers HSAs without a monthly service fee. Call Fidelity at 1.800.544.3716 or go to [Fidelity.com](#) to transfer your HSA.

When you request the transfer, a \$25 account closure fee will be deducted from your balance.

**Not sure if you are eligible to elect an HSA? Review your Benefits Guide or contact Empyrean, our Robert Half Benefits Service Center at 1.855.RHI.BENE (1.855.744.2363) M- F, 5 to 5 PT*

2021 MERCER/ TRI-AD FLEXIBLE SPENDING ACCOUNTS AND COMMUTER ACCOUNTS

The Transfer of Commuter and Health Care Flexible Spending accounts from Mercer Marketplace/ TRI-AD to HSA Bank is complete.

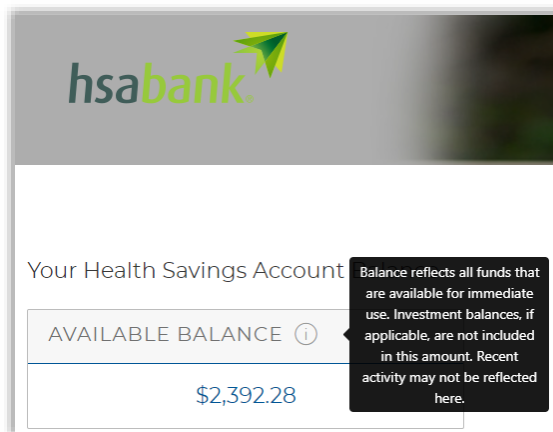
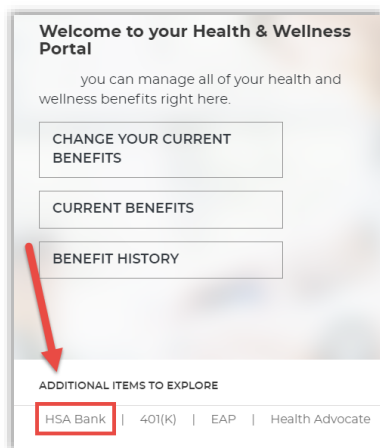
HSA Bank account(s) were opened for you if you did not elect the appropriate account with Empyrean but had a 2021 rollover balance(s). Now that the balance is rolled over, your funds are available to use for 2022 eligible expenses through HSA Bank debit card or filing claims (all but transit). With HSA bank, all transit passes must be purchased using your HSA bank debit card. You will not be able to file claims for transit expenses, but you will for parking.

Please note:

- Flexible Spending Accounts and Commuter (Transit and Parking) funds have separate accounts and funds cannot be commingled.
- Any Dependent Care account balance remaining in your 2021 FSA after the March 31, 2022 claims deadline passed was forfeited.
- Federal COVID-19 relief legislation permitted the rollover of 2021 unused balances to 2022. This will not be a permanent feature of the plan as FSAs will not carryover in a normal year.

HSA Bank Services representatives are available to answer any questions about your 2022 accounts.

- **24/7 Client Assistance Center:** 1.833.228.9354
- **Online:** myaccounts.hsabank.com
- Access your account directly from the Empyrean website. Click on the HSA Bank icon in the lower left-hand corner



For questions regarding your Mercer/ TRI-AD HSA/FSA or Commuter accounts, email benefits@roberthalfbenefits.com