My Pay and Benefits

intel

Contents

Health Savings Account (HSA)* FAQs for Intel retirees

1. I'm enrolling in the IRMP Anthem HDHP. How do I open a Fidelity HSA?
You can open your Fidelity HSA online by following the steps below or by calling Fidelity's customer service at (888) 401-7377.

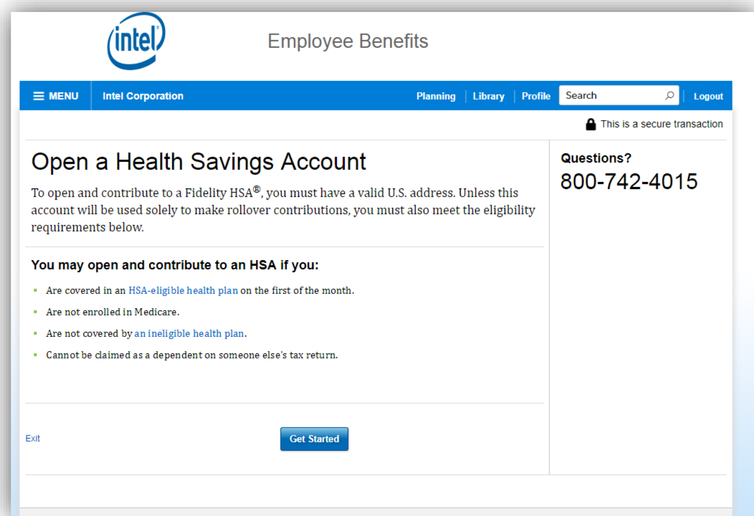
Once your HSA is open, you will receive your HSA debit card in the mail. You can also request additional debit cards for your qualified dependents through the HSA "Paying" tab on Fidelity NetBenefits® or by completing this application.

Steps to open a Fidelity HSA if you are enrolled in IRMP Anthem HDHP:

(a) Login to the Fidelity NetBenefits® site.

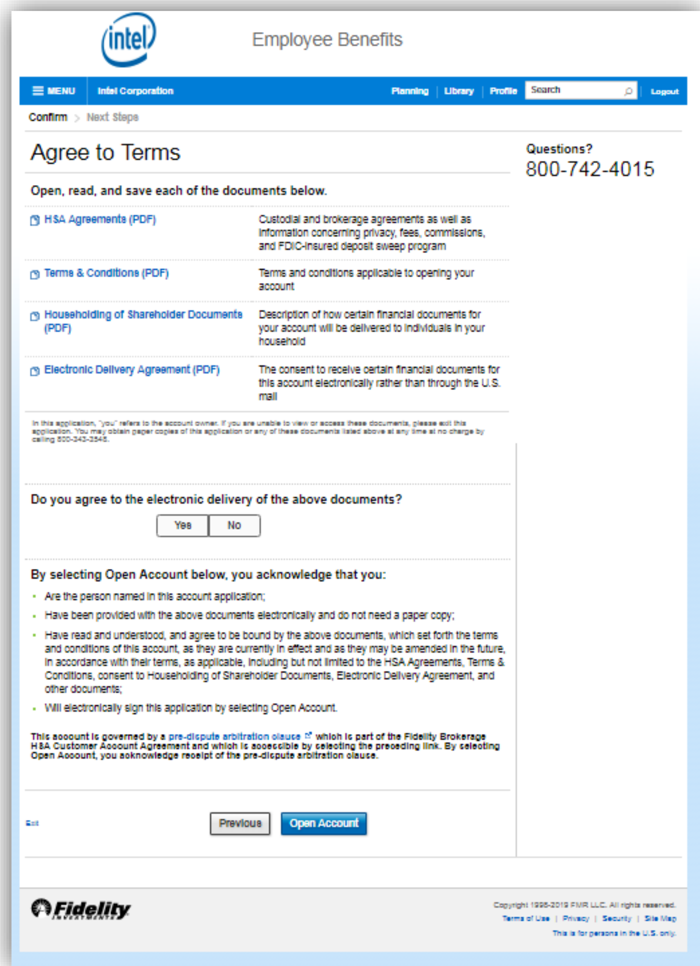
(b) Click the **Health Savings Account Open**

(c) Click the **Get Started** button.



* *HSA is not an Intel-sponsored benefit; eligibility requirements apply, and contribution limits are set by the IRS*

(d) You will go through a series of account opening windows, until you get to the final screen below, where you can select **Open Account**.



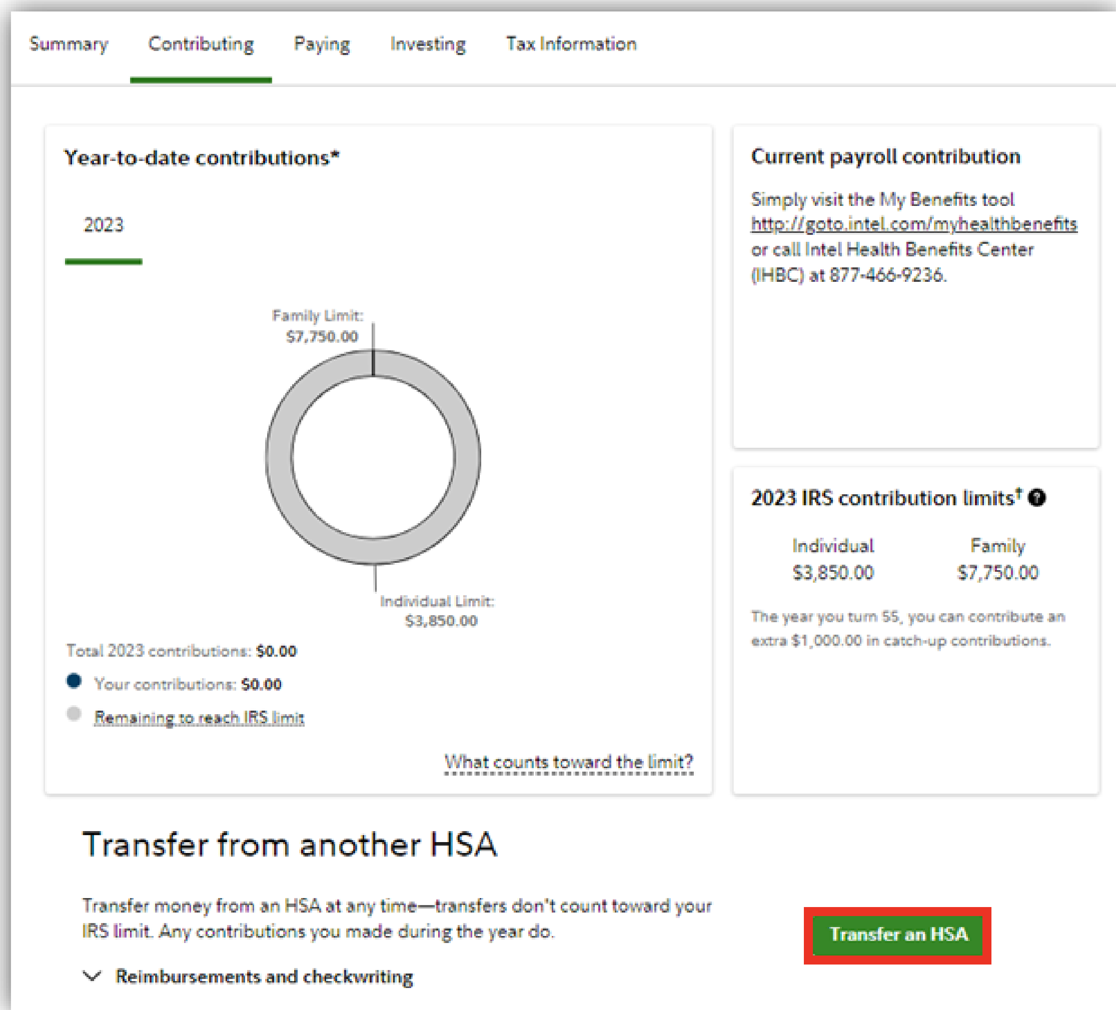
2. I'm enrolling in IRMP Anthem HDHP. How can I transfer my HSA balance from another HSA administrator to Fidelity?

Once you've opened your Fidelity HSA, you can transfer your HSA balance by going to Fidelity NetBenefits® portal and follow the steps described in the portal and also outlined below. Your former HSA administrator may charge you a fee to close your old HSA as part of the transfer.

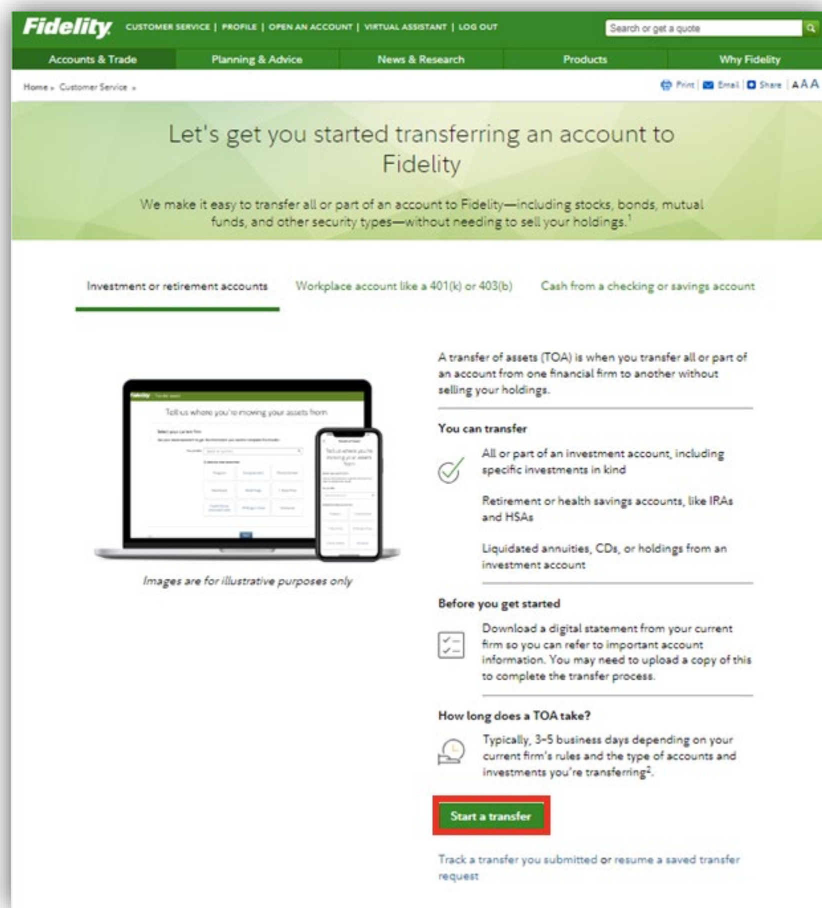
<u>Online HSA transfer process, if you are enrolled in IRMP Anthem HDHP:</u>

(a) Once your Fidelity HSA is opened, you can transfer funds from another HSA provider by going to the **Quick Links** option on the Fidelity home page, then click on **Contributions.** You can also request funds transfer by going to www.fidelity.com/toa.

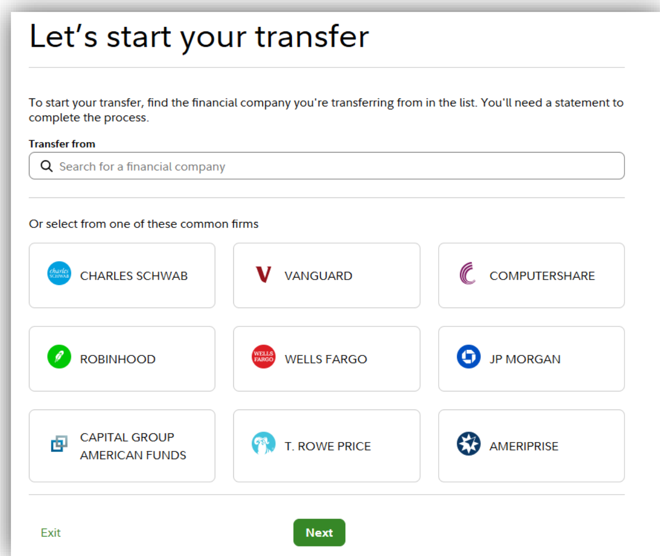
(b) Click on **Transfer an HSA**



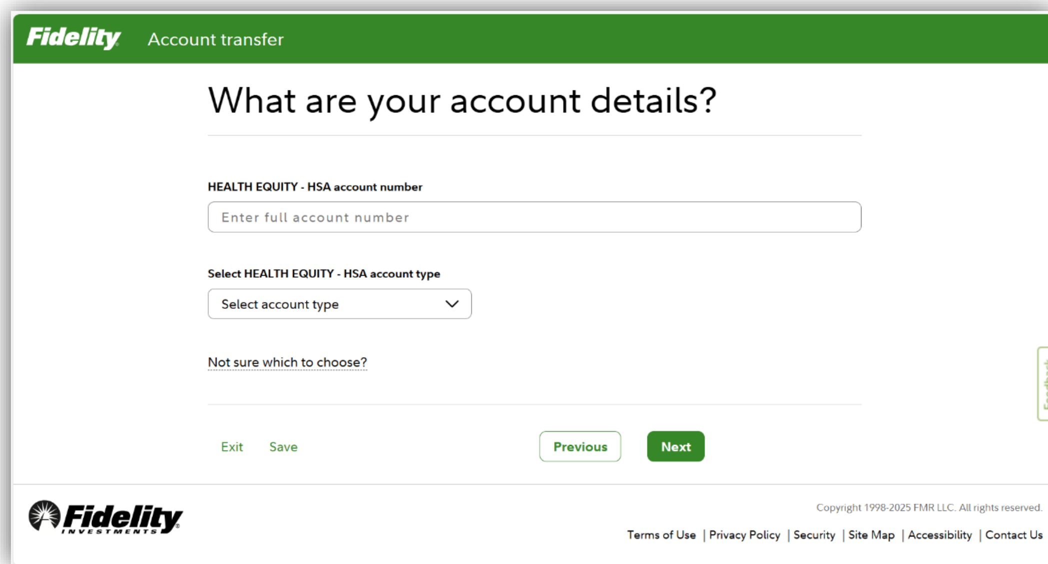
(c) Click **Start a New Transfer**



(d) Enter where your HSA is currently located.



(e) Enter your HealthEquity HSA information and Fidelity will coordinate the funds transfer.



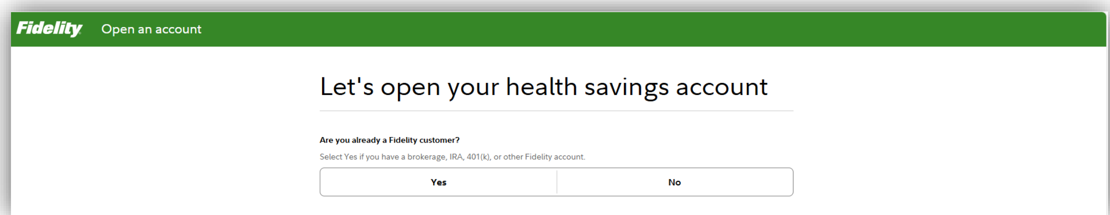
3. I'm not enrolling in IRMP Anthem HDHP. Can I open a Fidelity HSA to transfer my balance from another HSA administrator to Fidelity?

Yes, you can open a retail Fidelity HSA and transfer your HSA balance. As an Intel retiree, Fidelity won't charge you an administrative fee for your Fidelity HSA.

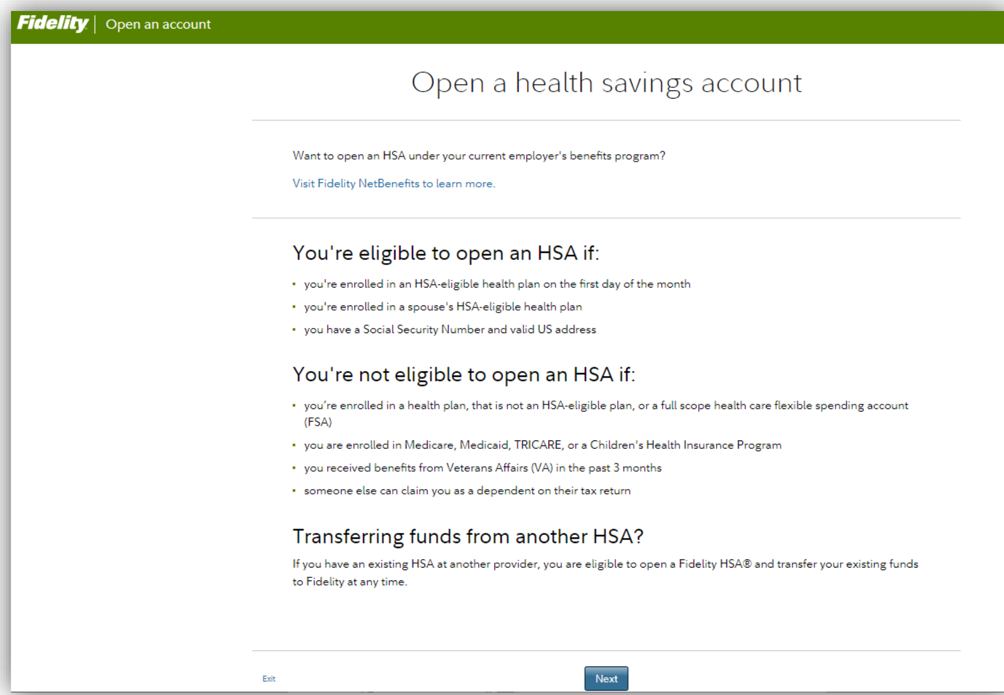
<u>Instructions to open a retail Fidelity HSA and request the funds transfer online:</u>

(a) Click here to open Fidelity's website.

(b) Select the Yes or No to confirm whether you are already a Fidelity customer.



(c) Select **Next**



(d) You will go over a series of windows where you will be requested to enter your personal information. Once you enter the information and agree to the Terms, you will be able to open your HSA account. If you do not have a username and password, you will prompted set up one.

(e) Once your account is ready, you can proceed to initiate your funds transfer request by following these instructions: https://www.fidelity.com/toa