

Fidelity Health<sup>SM</sup>

# Fidelity HSA<sup>®</sup> Resource Listing for Plan Sponsors



Our goal is to support you in administering your HSA program. Highlighted below are materials that are useful to have at your fingertips and leverage throughout the year. Some of the information is available on Plan Sponsor Webstation (PSW<sup>®</sup>) and requires a login.

Topics	Resources
<b>General Administrative Resources</b>	
Administrative Training, Tutorials, and Resources	<a href="#">HSA Employer Resource Center</a>
HSA Year-end Planning Processes	<a href="#">HSA Year-end Tasks and Dates</a>
HSA Year-end File Requirements	<a href="#">Year-end File Requirements</a>
<b>Getting Started in PSW<sup>®</sup></b>	
HSA Administration Overview	<a href="#">HSA Administration on PSW<sup>®</sup></a> (11min Brainshark)
HSA Reporting Overview	<a href="#">Enhanced PSW<sup>®</sup> HSA Reporting</a> (7 min Brainshark)
Fidelity PSW <sup>®</sup>	<a href="http://psw.fidelity.com">psw.fidelity.com</a>
PSW <sup>®</sup> Technical Support	800-735-2862
<b>Employer Insights</b>	
Fidelity Health <sup>®</sup> Thought Leadership	<a href="#">Fidelity Workplace Resource Library</a>

## Topics

## Resources

### Employee Communication Toolkits on PSW®

Fidelity HSA® Employee Communications

[Fidelity HSA Employee Engagement and Education](#)

Pre-Annual Enrollment Planning Communications

[Driving Consideration of HSAs Before Annual Enrollment](#)

Fidelity Health® App Communications

[Educating Employees About The Fidelity Health® App](#)

### Educating Employees Prior To Annual Enrollment

HSA Employee Reference Guide

[Fidelity HSA® Reference Guide](#)

Tax Advantages of HSAs Infographic

[HSAs Let You Save Money On Taxes In Three Ways](#)

HSA Microsite, For Employees

[HSA Microsite](#)

Employees can text "HSA" to 343-898 and will receive a text with a link to this site.

HSA Microsite, For Young Employees

[Breaking Down Health Care](#)

Interactive HSA Savings Tool

[HSA Savings Tool](#)

Health Plan Comparison Calculator

[Plan Comparison Calculator](#)

Benefits of HSA-Eligible Health Plans and HSAs

[Exploring the Benefits of HSA-Eligible Health Plans & HSAs](#) (19 min Brainshark)

## Helping Employees Get Started with Their HSA

Using Your HSA [How To Use Your Fidelity® HSA](#) (3 min video)

Discovering the Potential of Your HSA [Discover the Potential of Your HSA](#)  
(11min Brainspark)

Transferring Assets to a Fidelity® HSA <https://www.fidelity.com/go/hsa/transfer>

Investment Options with the Fidelity® HSA  
Employees who currently have the Fidelity HSA® through their workplace benefits program, should login to NetBenefits® to view their investment options.

Within NetBenefits®, once on the Health Savings Account page, employees can select the Investing tab, which provides a list of Fidelity HSA® Funds To Consider and other investment options available.

## Employee Customer Service

Fidelity's HSA Customer Service Center 800-544-3716

Online and App Experience  
Employees can login to view their HSA on NetBenefits®, Fidelity.com, or via the Fidelity Health® app.

For more information about the resources available at Fidelity, please contact your client service team.

In identifying investment options to include in the Fidelity HSA Funds to Consider, Fidelity only considered Fidelity open-end mutual funds and open-end mutual funds offered by a limited universe of third-party fund companies that participate in an exclusive marketing, engagement, and analytics program with Fidelity for which they pay Fidelity an annual fee. The only third-party fund companies whose funds were eligible for this program were companies that generally have a track record of generating the strongest customer demand for their products from across Fidelity's customer channels and have been paying Fidelity a sufficient level of compensation for the shareholder servicing performed by Fidelity.

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