

KEY EVENTS AND DATES – TPAS

By 11/15/2023	Employers will be asked to provide updated addresses and contact information for participant accounts – DFS will provide a method for importing this information.
Starting 11/15/2023	NATSD resignation letter will be mailed. Email notifications begin. These will provide information about upcoming events, including these key dates.
12/1/2023	Account owners may receive an email asking them to update contact information to help ensure successful communications going forward.
12/18/2023	If the account owner does not wish to have DFS as their account custodian, this is the last day to close or transfer their account. (Automatic conversion if they do nothing.)
12/18/2023	Deadline for Employer Groups to transfer their HSA accounts if they do not wish DFS to become their custodian. (Otherwise, conversion to DFS will be automatic.)
12/21/2023	Last day to invest until the custodial conversion has been completed.
12/22/2023	Investment blackout period begins. Online investing is disabled until 1/2/2024 to allow NATSD to transfer investment balances to DFS. Contributions received during the blackout period will post automatically to savings balances.
12/29/2023	Last day that contributions can be entered until the conversion has been completed. 2024 contributions – forwarded to DFS automatically 2023 contributions – posted to NATSD automatically
12/30/2023	CONVERSION WEEKEND. Full blackout of all HSA services until 1/1/2024.

1/2/2024 All blackout periods end.

1/2/2024 Account Owners regain access to all of their balances, including savings and investments.

1/2/2024 All account administration functionality is available, including investment options.