

2025 Proclaim Customer Communications Calendar

	Type	J	F	M	A	M	J	J	A	S	O	N	D
Tax notification: 1099-SA available	Required												
Devenir Transfer-in-Kind (TIK) Emails	Required												
Tax notification: 5498-SA available	Required												
Onboarding 30/60/90 Emails (3 emails)	Standard												
Medicare and your HSA (63 1/2, 64, 64 1/2)	Standard												
Prior Year Catch-up	Standard												
Beneficiary	Standard												
Balance Transfer	Standard												
Mid-Year Check-in	Standard												
HSA Invest Education	Standard												
55+ Catch-up Contribution	Standard												
High Spender Targeted Email	Standard												
End of year Contribution	Standard												



As of April 2, 2025. Timing and topics are subject to change. Certain emails may not apply to all accountholders.

2025 Proclaim Customer Communications

New customers

Welcome

Debit card

10-14 days after account opening accountholders get their debit card.

Welcome email series

30 days after account effective date accountholders receive information on setting up their account online.

60 days after account effective date accountholders learn how to plan their savings.

90 days after account effective date accountholders learn to build savings for healthcare expenses.

Open enrollment support

- Resource Center
- Email templates
- On-demand presentations
- Flyers
- [HSA Contribution Calculator](#)
- [HSA Savings Calculator](#)
- [Tips to Navigate the Journey FAQs](#)
- Visit the [Proclaim Resource Center](#)

Current customers

HSA tax time

Own your health & wealth

Tax forms available email

In January, an email is sent when the 1099-SA tax form is available online, and again in May when the 5498-SA tax form is available.

Prior year contribution email

In February and March a series of 2 emails is sent to customers who haven't maxed out their prior year contributions with a reminder to contribute before the tax filing deadline.

Tax time FAQ

[Online FAQ](#) provides answers to common tax time questions.

Tax forms available notice

An online account notice directs accountholders to their 1099-SA tax form and 5498-SA tax form.

Personalized email campaigns

- 55+ catch-up contribution
- Beneficiary
- HSA transfer
- Mid-Year Savings check-in
- Year end reminders and contributions

Investment Education

- HSA Invest sign-up, investment options and resources

Online account notices

- Online account support
- Add/update beneficiary
- Saving tips

Transactional

- Account activity triggered communications
- Forms & documents
- Monthly statements

Resources

- Videos
- Online tools
- On-demand presentations



Timing and topics are subject to change and certain emails may not apply to all accountholders.