

Optum Investors Only – Actions Required



Optum Bank Investor Confirmation

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Home Accounts Tools & Support Message Center **79**

2020 Claim Filing Update

2020 Claim Filing Update FSA/HRA Claim for Reimbursement Form

Welcome
We're Making it Easy to Manage Your Healthcare Expenses

I Want To:

File A Claim Make an HSA Transaction Manage Investments Manage My Expenses

Accounts

HSA	01/01/2021-12/31/2021
Cash Account AVAILABLE [REDACTED]	Dependent Care 01/01/2... AVAILABLE \$0.00
Investment Account \$0.00	

If you are an investor, you will see an investment balance greater than \$0

Optum Investor Required Actions by January 31, 2022, at 4pm EST

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2020 Claim Filing Update

2020 Claim Filing Update FSA/HRA Claim for Reimbursement Form

Welcome
We're Making it Easy to Manage Your Healthcare Expenses

I Want To:

Make an HSA Transaction **Manage Investments** Manage My Expenses

Step 1: Select Manage Investments

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Investments / HSA Summary

Total Available Balance YTD Earnings YTD Performance

Investment Balance View details
\$125.82 11/2/2021

Cash Balance View details
\$983.90

Investment Auto-Transfer **ON** Edit
Threshold: \$1,000.00

→ Contribute
Add cash to your HSA

← Distribute
Withdraw HSA funds

Change Investments View all available funds

Step 2: Select Edit

Optum Investor Required Actions by January 31, 2022, at 4pm EST

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Investments / Manage Investments

Investment Transfer Threshold

You are eligible to invest a portion of the funds from your health saving account into an investment account. By setting your investment transfer threshold below, we will automatically sweep funds into the investment account once your available cash balance exceeds the sweep threshold amount by \$100.01 or more. Likewise when your available cash account balance falls below the sweep threshold by \$100.01 or more, funds will be automatically swept back to your cash account from your investment account.

Your investment transfer threshold may be set equal to or above \$1000. Please enter a value that is an increment of \$100.

Would you like auto-investment transfers on? Yes No

Transfer Funds to Investment When My Cash Balance Exceeds: \$ 1000

Investment Services: Not FDIC Insured • No Bank Guarantee • May Lose Value

Cancel Submit

Step 3: All investors need select “yes” for the auto-investment transfer.

Step 4: All investors need increase transfer threshold to **\$999,900**

Enter: 999900 (no \$ or comma), then select the submit button.

HSA Transfer + Current Optum Investors – 2 Important Steps

All Optum HSA accountholders

1

Complete consent in HSA Bank [E-Consent Microsite](#) by January 21, 2022

Code: K22UH6

Optum HSA Investors Only

2

In the Optum online portal, turn auto-investment transfers to “Yes” and Increase investment transfer threshold to \$999,900

Enter: 999900

Complete actions by 4pm EST on January 31, 2022.