Optum Investors Only
– Actions Required
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

Step 1: Select Manage Investments

Step 2: Select Edit
Optum Investor Required Actions by January 31, 2022, at 4pm EST

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

1. Complete consent in HSA Bank E-Consent Microsite by January 21, 2022
   Code: K22UH6

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.