

# Optum Bank Health Savings Account Online Enrollment Instructions

Created: April 2015

Employees who have chosen the Deductible based plan as their election for medical insurance can enroll in their Health Savings Account online, directly with Optum Bank. This option is a secure site and allows the employee to input private information, such as SSN, from the privacy of their home or office. The account is activated within 24 hours of completion of the process and therefore helps to ensure the account is open and active for the first deposit of funding from the University's payroll.

## Process:

1. Access the website [www.optumbank.com](http://www.optumbank.com).
2. In the upper right corner of the page, click on "Open an HSA" (see example, below).

The screenshot shows the Optum Bank website interface. At the top right, there is a search bar and a "Search" button. Below the search bar, there are links for "Account Holders: Log On", "Register for site", "Open an HSA", and "Employers: Log On". The "Open an HSA" link is highlighted with a mouse cursor. Below the navigation bar, there is a main banner with the text "Prepare for Emergencies with Your HSA" and a "Deposit Now" button. Below the banner, there are three columns of content: "Optum Bank Update", "Convenient & Secure Online Payments", and "Take these steps to take control of your health care spending". The "Take these steps..." section includes three numbered steps: "1 GET STARTED", "2 ENROLL ONLINE", and "3 USE YOUR ACCOUNT".

3. A disclaimer will be displayed; review the disclaimer and click "CONTINUE" once ready to proceed to the next step of the process.

4. The application process consists of 4 steps:

**Step 1:** Complete demographic information requested. For the verification code please follow the instructions provided by Optum.

**OPTUM Bank™**

## Health Savings Account Enrollment

STEP 1    STEP 2    STEP 3    STEP 4

**Account Holder Information** (\* required fields in Bold)

**Need Help?**  
Call us at 1-866-234-8913  
Hours: 8:00 AM - 8:00 PM ET

**Personal Information (Account Holder)**

- \* First Name
- Middle Initial
- \* Last Name
- \* SSN or Tax ID  -  -
- \* Date of Birth MM  DD  YYYY
- \* Home Phone  -  -
- Work Phone  -  -
- \* Email Address
- \* Re-enter Email Address
- \* Verification Code

**Identification Information**

PER THE USA PATRIOT ACT:  
To help the government fight the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify and record information that identifies each person who opens an account. When you open the account, we will ask for your

Please enter up to 10 letters (without spaces), such as your mother's maiden name, that can be used to verify your identity any time you call our customer service area.

The group number for the account is “**165058**”. Once the group number is entered, the “Employer Name” field should pre-populate reading “University of Hartford”. The “**HDHP Effective Date**” should be completed using the first day of medical insurance coverage. If you have questions regarding coverage effective date, please contact your designated HR Service Partner.

Identifying documents

Form of Identification

Identification Number

State of Issuance

**Home Address (cannot be a P.O. Box)**

\* Address:

Apt#:

\* City:

\* State:

\* Zip Code  -

Mailing Address is Different

**Medical Information - High Deductible Health Plan (HDHP)**

Not Enrolling Through Employer or Financial Advisor

Employer Name

**Group Number or Financial Advisor Number:**

\* Who is Covered

\* HDHP Effective Date MM  DD  YYYY

**CONTINUE** **PREVIOUS** **HELP**

**Step Two:** If you would like to add an additional Card Holder click the check box and completed the requested information.

The screenshot shows the 'Health Savings Account Enrollment' page at Step 2, 'Additional Cardholder'. The page has a grey sidebar on the left with 'Need Help?' information. The main content area is white with an orange header. It includes a progress bar at the top with steps 1 through 4. The 'Additional Cardholder' section has a checkbox to 'Add Additional Cardholder'. Below this are input fields for First Name, Middle Initial, Last Name, SSN or Tax ID, and Date of Birth. At the bottom of the form are 'CONTINUE', 'PREVIOUS', and 'HELP' buttons. A 'COMODO SECURE' logo is visible in the bottom right corner.

**Step Three:** Review the terms and conditions. Provide your electronic signature at the bottom of the document. This completes the enrollment for a Health Savings Account. Upon processing by Optum Bank, you will receive a confirmation email and a Health Savings Account card(s) for the active account.

The screenshot shows the 'Terms & Conditions' page at Step 3 of the enrollment process. It features a grey sidebar with 'Need Help?' information. The main content area is white with an orange header. It includes a progress bar at the top with steps 1 through 4. The 'Terms & Conditions' section contains a paragraph of text, a list of links for 'Custodial and Deposit Agreement', 'Schedule of Fees and Charges', and 'Privacy Policy', and a section for electronic signature with a checkbox to 'Accept and Agree to the Terms and Conditions as outlined above'. Below this is a section for 'Electronic Document Delivery Requirements' with a checkbox to 'I would like my welcome kit and other bank documents provided to me electronically and acknowledge that I have read the Electronic Document Delivery Requirements provided above. I will update the email address in my account profile if it changes. I understand that I can withdraw my