

Optum Financial®

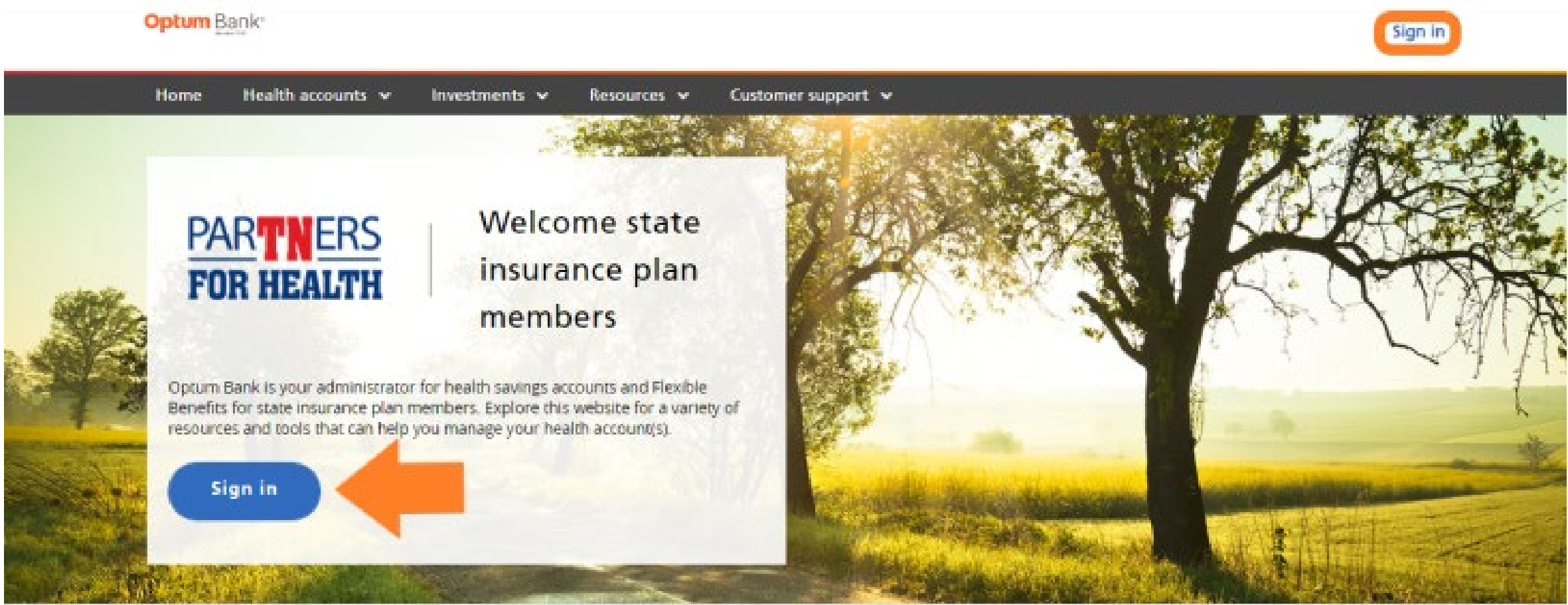
Online Account Registration and Portal Review

PARTNERS
FOR HEALTH

February 16, 2023



Getting started on optumbank.com/tennessee



HealthSafe ID sign in page

Optum Bank
Member FDIC

[Help](#) [Register](#)

HealthSafe ID

Sign in

Use your [HealthSafe ID](#) to sign in.

Username

Password

Remember my username on this [trusted device](#). (Optional)

[Sign in](#)

[Register now](#)

[Forgot username](#) or [password?](#)

Need Help?
We're here for you. Call us toll-free at [866-600-4984](tel:866-600-4984), During business hours.
[Sign In Help](#) | [Accessibility Statement for Individuals with Disabilities](#)

First time user?
Start the registration process to create your log in credentials username and password



HealthSafe ID registration page



Let's get you registered

Create your [HealthSafe ID](#) to help protect the security of your personal health information.

All fields are required unless marked as optional.

First Name 

Last Name 


Date of Birth (mm/dd/yyyy) 


Identification Type [Help](#)

Social Security Number

Employee ID

Last 6 digits of Social Security Number 

ZIP Code 



Complete each field
Use the same information from your benefit enrollment to match your HealthSafe ID with your Optum account

Create unique username and password

Optum Bank®
Member FDIC

Help Sign in

✓ Your information has been verified.

HealthSafe ID®

Set up your account

Create your [HealthSafe ID®](#) account by completing the fields below.

All fields are required unless marked as optional.

Username
✓ Create Username

Password
✓ Create Password

Email Address (must be unique per account)
✓ name@domain.com

✓ Remember my username on this [trusted device](#). (Optional)

✓ By selecting this checkbox, I have reviewed and agree to the [Terms of Use](#), [Privacy Policy](#) and [Consumer Communications Notice](#).

Continue

Complete each field
The email address should be your **personal email** address, so you receive important account notifications such as tax documents and statements are ready to view in your account.

You will need to log on to access this sensitive information

Create unique username and password

Example of 'Email me' confirmation step

You're almost done!

To get your HealthSafe ID, just complete this final step.

Many Optum websites use HealthSafe ID, which means you can access many of your health benefits with the ease of a single username and password.

Simply click the link below

[Confirm your email address >](#)

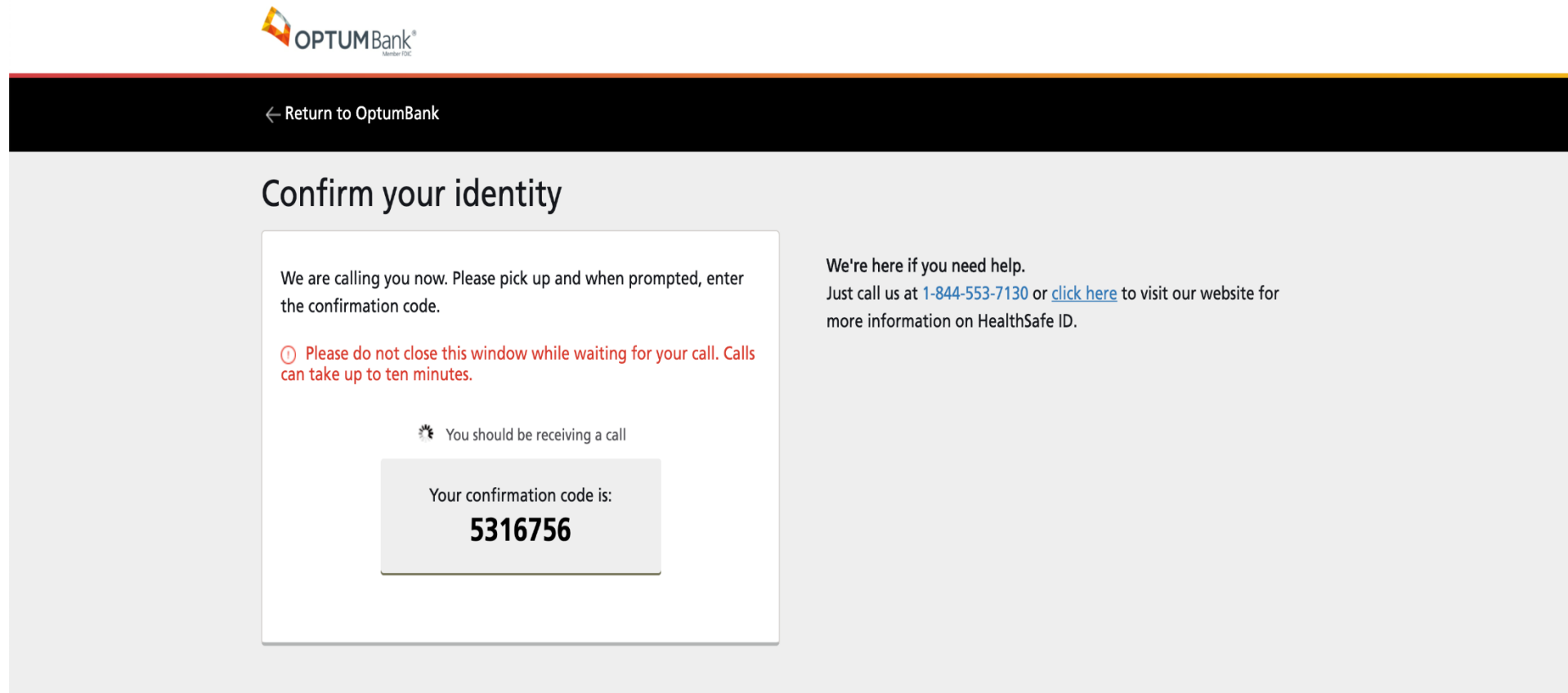
The link above will expire **90 days from when it was sent**.


If you have not confirmed your email address and you need a new confirmation link, you will receive one when you sign in.

If you did not register for a HealthSafe ID® or if you have any other questions, please call us at [1-844-553-7130](tel:1-844-553-7130).

Do not reply to this message, as replies are sent to an unmonitored mailbox.

Example of 'Call me' confirmation step




 **OPTUMBank**
Member FDIC

[← Return to OptumBank](#)

Confirm your identity

We are calling you now. Please pick up and when prompted, enter the confirmation code.

ⓘ Please do not close this window while waiting for your call. Calls can take up to ten minutes.

 You should be receiving a call

Your confirmation code is:
5316756

We're here if you need help.
Just call us at [1-844-553-7130](tel:1-844-553-7130) or [click here](#) to visit our website for more information on HealthSafe ID.

Optum Bank sign in page



Sign in

Use your [HealthSafe ID](#)[®] to sign in.

Username

Password

Remember my username on this [trusted device](#). (Optional)

Sign in

Register now

Forgot [username](#) or [password](#)?

Once online account is created, you can sign in using username and password you just created

You can log in *on your computer or from your mobile device* using the Optum Bank app



Download the Optum Bank app



Optum Bank post-login portal

- View transactions/balances
- Pay bills/File Claims
- Reimburse yourself
- Manage Beneficiaries
- Manage Debit Cards
- Access resources
- Manage investment activity


[I want to...](#)

TOTAL FUNDS

\$3,219.65

Accounts	
HSA	\$3,105.63
<hr/>	
HSA Total	\$3,105.63
<hr/>	
HSA Investments	
<hr/>	
Investments Total	
You're eligible to enroll in more investment options! Learn More >	

My Progress



Decide Open Use Manage Optimize

I want to...

View Transactions

Make a Payment

Statements & Tax Docs

Reimburse Myself

Make a Deposit

Manage Debit Cards

Manage Beneficiaries

Manage Investments

More Useful Links >

Needs Your Attention

No items need your attention.

HSA

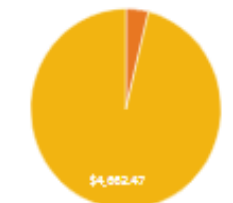
[Account Overview >](#)

Balance Summary as of January 19, 2023

Current HSA Cash Balance ⓘ	\$2,024.00
Available HSA Cash Balance ⓘ	\$2,105.63

Total Contributions	\$180.02
Contribution Limit *	\$4,000.00
Left to contribute *	\$4,002.47


Contributions



● Contributed so far
 ● Left to contribute

View your contributions

Links



What can I buy?
 Browse a list of products and services covered by health accounts. [View](#)

Pay the easy way
 Your payment card is there when you need it. From prescription refills to braces, just swipe your card to save and spend smart.

Designate a beneficiary on your HSA

The image shows a navigation menu titled "I want to..." with several options: "View Transactions", "Reimburse Myself", "Manage Beneficiaries" (highlighted with a dashed border), "Make a Payment", "Make a Deposit", "Manage Investments", "Statements & Docs", "Manage Debit Cards", and "More Useful Links >".

An arrow points from the "Manage Beneficiaries" option to a screenshot of the "Add a New HSA Beneficiary" form. The form includes a sidebar with "Account/Plan Management" and "Questions?" sections. The main form area is titled "New Beneficiary Contact Information" and contains fields for:

- First name, M.I., Last name
- Phone number
- Street Address, Unit or Suite
- City, State (dropdown)
- Zip code, plus four (optional)
- Relationship (dropdown)
- Date of birth
- Social security number

Buttons for "Continue" and "Cancel" are at the bottom of the form.

Learn about qualified medical expenses

The IRS determines the list of qualified medical expenses

A few examples:

- Chiropractor or acupuncture visits
- Doctor's visits for colds and other routine illnesses
- Prescription co-pays
- Hearing aids
- Physical therapy
- Smoking cessation programs
- Medical and blood tests
- Urgent care visits
- Glasses or contacts



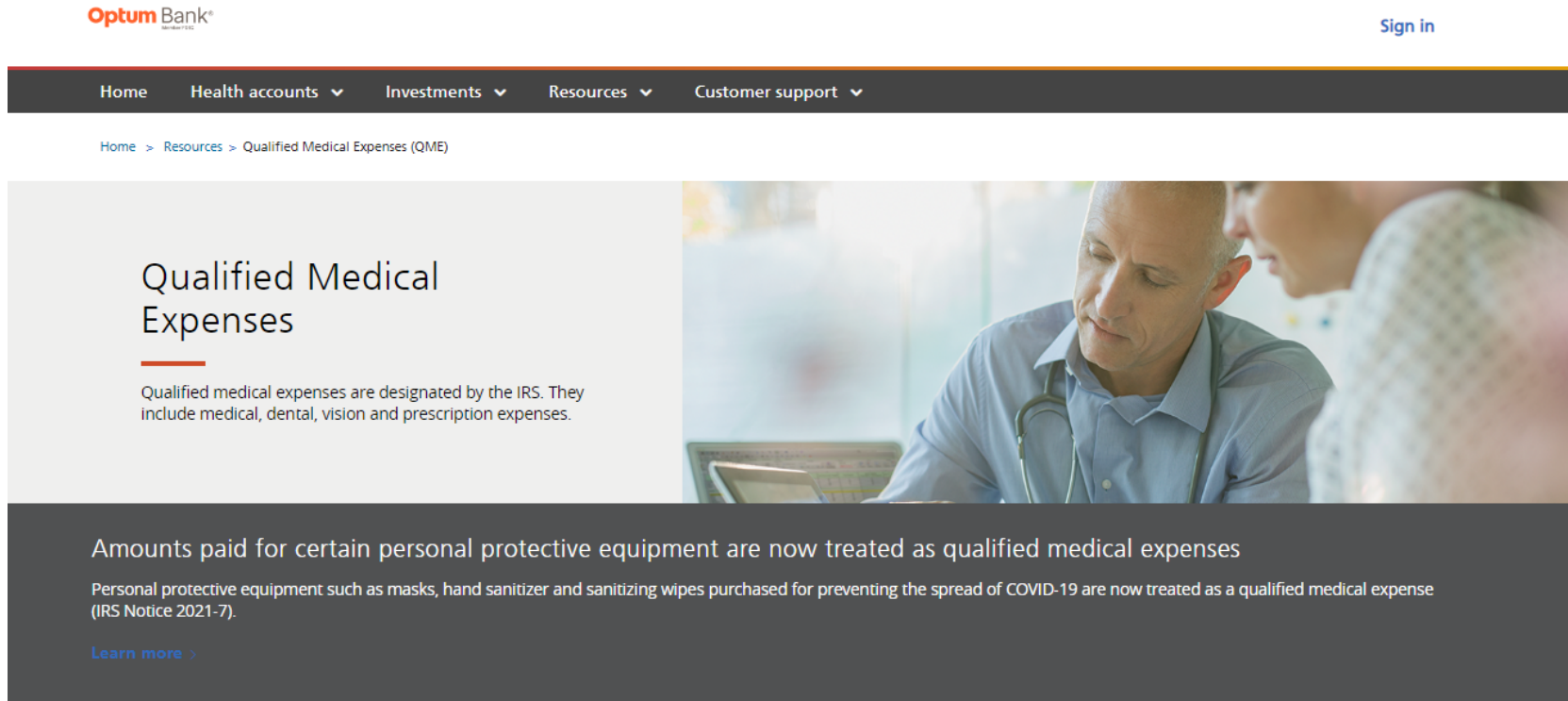
It's easy to upload your receipts online



IRS.gov or optumbank.com/tennessee

Learn about qualified medical expenses

Click on Help and Tools for the qualified medical expense tool

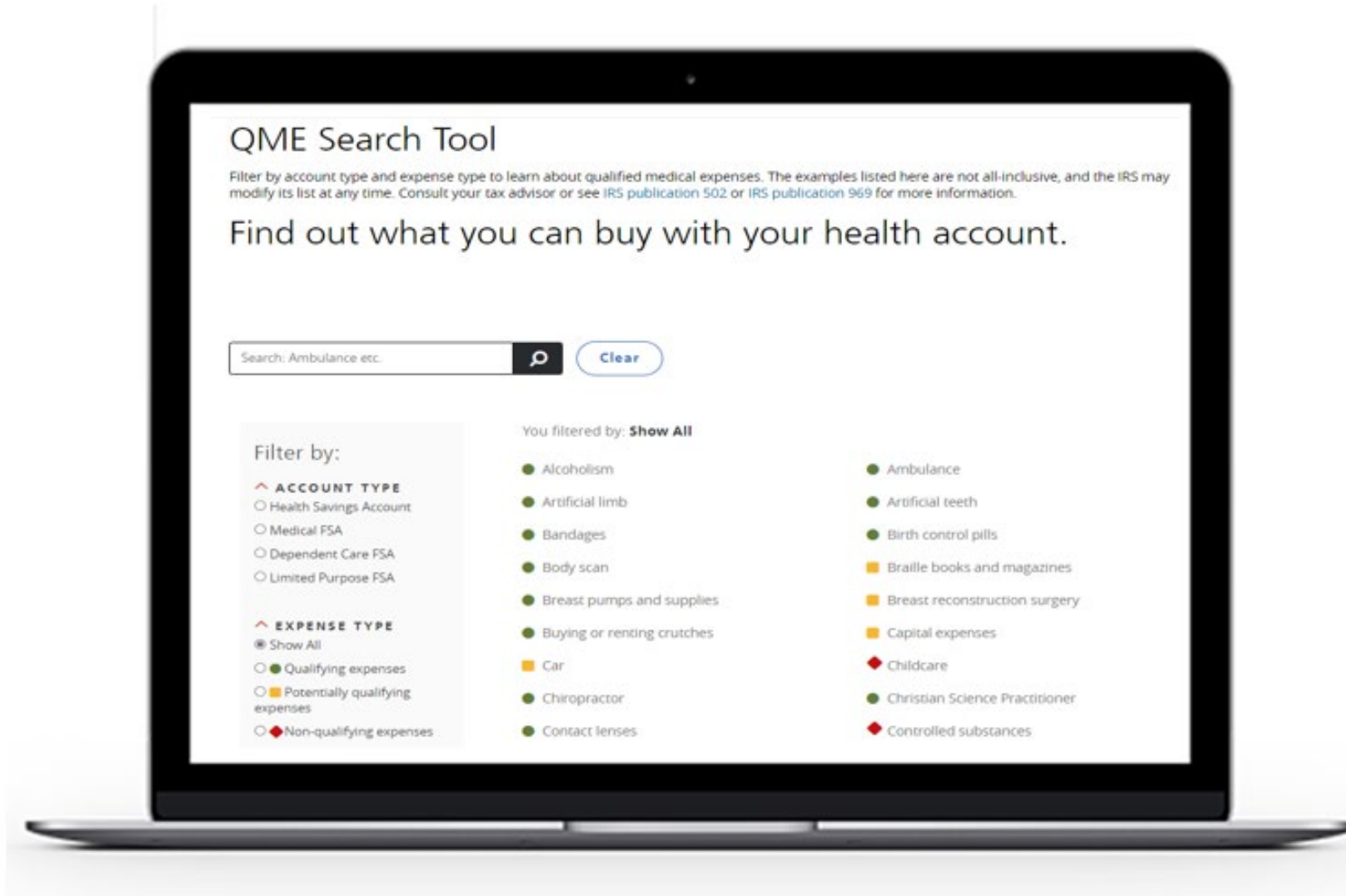


The screenshot shows the Optum Bank website interface. At the top left is the Optum Bank logo. At the top right is a "Sign in" link. Below the logo is a navigation bar with links for Home, Health accounts, Investments, Resources, and Customer support. Below the navigation bar is a breadcrumb trail: Home > Resources > Qualified Medical Expenses (QME). The main content area features a large heading "Qualified Medical Expenses" with a red underline. Below the heading is a paragraph: "Qualified medical expenses are designated by the IRS. They include medical, dental, vision and prescription expenses." To the right of this text is a photograph of a doctor in a light blue shirt with a stethoscope, looking at a tablet. Below the main content area is a dark grey banner with white text: "Amounts paid for certain personal protective equipment are now treated as qualified medical expenses" followed by "Personal protective equipment such as masks, hand sanitizer and sanitizing wipes purchased for preventing the spread of COVID-19 are now treated as a qualified medical expense (IRS Notice 2021-7)." and a "Learn more" link.

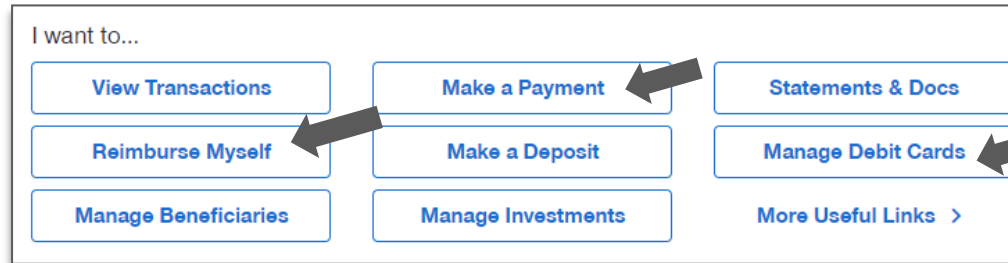
QME Search Tool

Filter by account type and expense type to learn about qualified medical expenses. The examples listed here are not all-inclusive, and the IRS may modify its list at any time. Consult your tax advisor or see [IRS publication 502](#) or [IRS publication 969](#) for more information.

Filter to easily detect eligible expenses



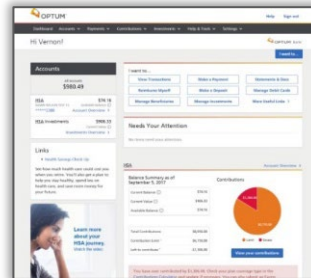
Manage debit cards, pay bills and reimburse yourself



File a Claim

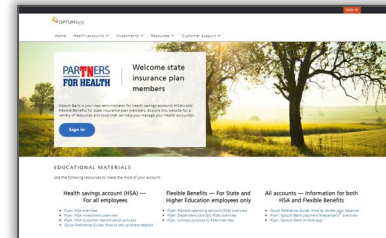
File a Claim appears in the I want to section when you have an FSA

Pay out-of-pocket and reimburse yourself



Click “Reimburse Myself” after logging into your account online. As part of your account set up, add a personal bank account so Optum can send your reimbursement quickly, via direct deposit.

Pay bills online



Access the “Make a Payment” feature online by logging into your account online, for HSA accounts.

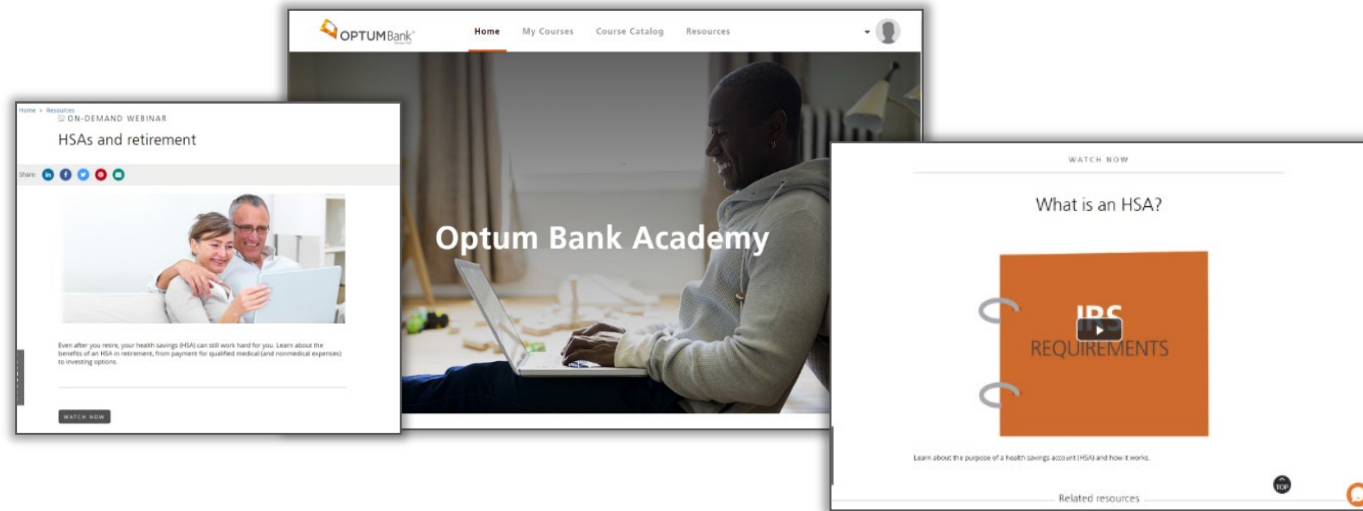
Optum Bank debit Mastercard®



You can order an additional Optum Bank debit Mastercard® for family members to access funds. Each card has a unique number and name of the individual. To order, add the dependent to your profile first by going to “settings” and selecting “Family Profile”. To order the dependent card go to “manage debit cards” in the I want to section. Then select “add dependent card”.

Access to tools and resources

Click on help and tools on the home page



- Calculators
- Contribution tracker
- View and file receipts
- Asset allocation calculator
- Health savings checkup tool
- Qualified Medical Expense search tool
- Videos
- Optum Bank Academy

Summary

Five important steps for registering your account and using the Optum portal

- 1 Create Health Safe ID
- 2 Log in to Optum account
- 3 Designate a Beneficiary on your HSA
- 4 Set up bank account for reimbursements
- 5 Explore your resources

What if you have more questions?

Call

Optum Bank Customer Care
866-600-4984

Email

service.tennessee@optum.com

Visit

www.optumbank.com/tennessee



Thank you for attending

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Mutual fund investment options are made available through the services of an independent investment advisor. Shares are offered through Charles Schwab & Co., Inc., a registered broker-dealer. Orders are accepted to effect transactions in securities only as an accommodation to HSA owner. Optum Bank is not a broker-dealer or registered investment advisor, and does not provide investment advice or research concerning securities, make recommendations concerning securities, or otherwise solicit securities transactions.

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