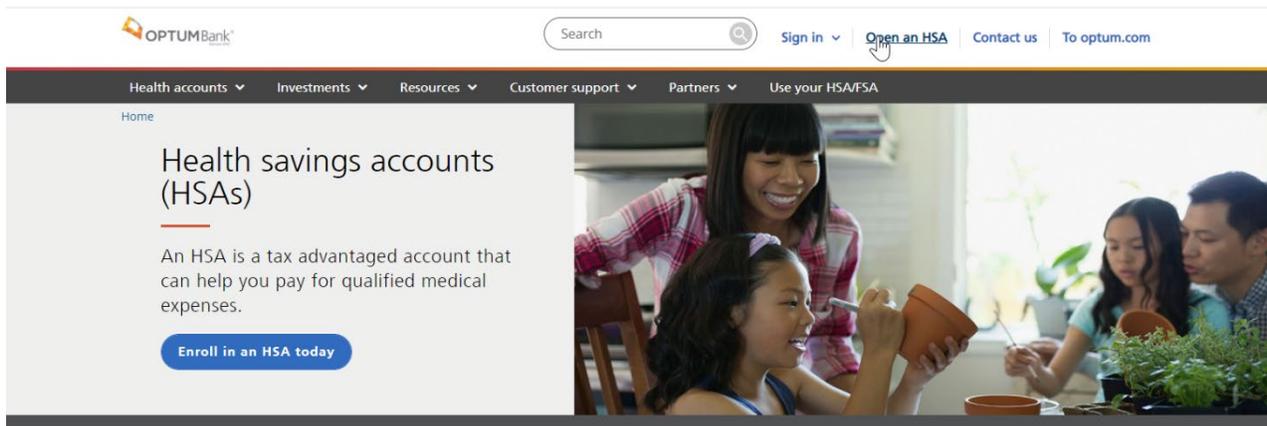


If you are participating on the MedSave 4500 plan or Med Save 7000 plan and would like to contribute to a Health Savings Account (HSA) please determine which scenario below best suits you and follow the instructions to set up your account with Optum Bank.

I am a new HSA participant with Helpside and have never had an HSA account at Optum Bank

1. Go to: <https://www.optumbank.com/> and click on **Open an HSA**.



The online enrollment process takes approximately 10 minutes to complete. Once you begin the enrollment process, you must complete it before you log off. If you log off before you complete the enrollment process, none of your information will be saved.

2. Under Group number or financial advisor number enter **HB5426** to associate the account with Helpside. Without this information, we will not be able to make deposits into your account from your payroll deductions.

Step 1: Account Holder Information

All fields required except where indicated.

Personal Information (Account holder)

First name
First name is required.

Middle initial (optional)

Last name
Last name is required.

Social security number or tax ID
SSN is required.

Date of birth
mm-dd-yyyy

Home phone
555-555-5555

Work phone (optional)
555-555-5555

Email address

Re-enter email address

Passcode

Please enter a word (up to 10 letters without spaces), such as your mother's maiden name, the city of your birth, the name of your first pet, or other word unique to you that you will remember. We may ask for your passcode to verify your identity when you call our customer care center.

Home Address

Home address
Cannot be a P.O. box.

City

State

Zip code -

Mailing address is different

To help the government fight the funding of terrorism and money laundering activities, the USA PATRIOT Act requires us to obtain, verify, and record information that identifies each person who opens an HSA. As a result, when you open an HSA, we will ask for your name, address, date of birth, Taxpayer Identification Number ("TIN") and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents. You must have a physical address in the United States and we reserve the right to decline your HSA request if we are not able to fully verify your personal information.

Medical Information - High Deductible Health Plan (HDHP)

Not enrolling through employer or financial advisor

Group number or financial advisor number

Employer name

Who is covered?

HDHP effective date
mm-dd-yyyy

[Next](#) [Cancel Enrollment](#)

3. Once Helpside receives confirmation from Optum that the account is set up, deductions will start being taken from your payrolls and deposited into your account.

I am a new HSA participant with Helpside and have an existing HSA account at Optum Bank

1. Contact Optum Bank at 1-800-243-5543 or use their online chat feature at <http://www.optumbank.com> to request your current account with Optum be associated with Helpside's group. They will need the group number of **HB5426**.
2. Once you receive confirmation that has been updated, please contact Helpside at service@helpside.com or at 800-748-5102 to notify us that you've completed the association to Helpside.
3. Once Helpside receives confirmation from Optum that the account is set up, deductions will start being taken from your payrolls and deposited into your account.

I am an existing HSA participant with Helpside and have an existing account at Optum Bank

1. Enjoy the rest of your day; you're done!

Please note:

- HSA Elections are not active until there is an account at Optum Bank associated with Helpside.
- Deposits are made once a week for deductions taken from paychecks the previous week.