



Optum Bank® Online HSA Rollover

For current BenefitWallet HSA members:

- Refer to the HSA Rollover Guide (http://www.mcoho.org/departments/human_resources/mcbenefits/docs/HSA_Online_Rollover_Guide.pdf)

OR

- To rollover funds, go to the Contributions tab once registered.
- Select Make an HSA Contribution.
- Next, select Rollover/transfer from another custodian. Click continue. On the next page, you will be asked for your routing and account number as well as the name of the financial institution you are transferring funds from. Note that the institution and account number may be prepopulated. To obtain all of the information, log into your BenefitWallet account.
- The Account Type is Checking.
- Finally, enter the dollar amount to rollover and then click continue. On the following page, you should agree to terms and conditions.

Please note it may take up to 5 business days from the request date for funds to become available.

Also, it's very important to know that after submission, you will not be able to submit another rollover for 365 days. This means that if you do not elect to transfer your entire available amount, you will be paying maintenance fees on both your Optum Bank and your BenefitWallet/Mellon Bank accounts.

If you transfer your entire available balance, please call BenefitWallet Customer Service at 877-472-4200 to close your account or complete the Account Closure

form. (http://www.mcoho.org/departments/human_resources/mcbenefits/docs/HSA_Form_Account_Close.pdf)

Accounts do not automatically close due to a zero balance.

- ❖ If you have any questions, please contact the Benefits Office at 937-225-4018 or for help with registration, please call the Optum Care Help Team at 866-234-8913 or email at hsagroup@optumbank.com.