Santa Clara County School’s Insurance Group  
Health Savings Account changes effective January 1, 2020

Below are important details in getting started with your 2020 Health Savings Account (HSA) with UHC/Optum.

<table>
<thead>
<tr>
<th>Services</th>
<th>Optum HSA Online Enrollment</th>
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</thead>
</table>
| **New Accounts** | • Effective 1/1/2020 new health savings account (HSA) will be required.  
• Milpitas Group #: 918667MU |
| **Online Enrollment** | • You will need to enroll through Milpitas Unified School District’s custom online enrollment URL:  
  https://enrollhsa.optumbank.com/hsaAppWeb/WelcomeAction.do?is_partner_post=Y&group_num=918667MU  
• The district’s information is prepopulated. You will need to enter your person demographic information (i.e. SSN, DOB, address) |
| **Enrollment Timing** | • You will need to enrollment and activate your account before the district can fund your payroll deductions.  
• You have the option to enroll anytime, but keep in mind funding cannot be validated until you activate your account. |
| **ID card & Welcome Kit** | • You will receive a Welcome Kit and your New Optum HSA debit card  
• You will be required to “Activate” your account |
| **Current PNC Bank Accounts** | • Your current HSA account with PNC Bank will remain active  
• You have the option of closing your account and transferring your account balance to Optum Bank  
• To transfer your account balance to Optum Bank, you will need to call Optum at (866) 234-8913  
• A transfer fee may apply |
| **Web** | • Employees have access to bank account information, HSA account information the www.optumbank.com website. |
| **Customer Service** | • Contact Optum Bank  
• (866) 234-8913  
• Hours: 8:00 a.m. to 8:00 p.m. EST |

**THINGS TO REMEMBER!**

Setting up an HSA Bank Account is subject to the same Patriot Act requirements as any other bank account. If you enroll in the UHC HMO Plans, you are not eligible to participate in the Optum Health Saving Account.
HSA Online Enrollment/Prefilled URL

From Optumbank.com
Welcome and HSA Eligibility Requirements

This screen outlines the general HSA eligibility requirements and information that the applicant will need to complete the online application.

Users can select next button to proceed with their enrollment.
Applicant Information: Top of screen

Applicants must complete all required fields before clicking next at the bottom of the screen.
Applicant Information: Bottom of screen

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?

Select

HDHP effective date

mm-dd-yyyy

Next

Need Help?
Call us at 1-800-234-8913
Hours: 8:00 AM - 8:00 PM ET

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Additional Cardholder

Step 2: Additional Cardholder
All fields required except where indicated.

Additional Cardholder Info

A Debit Card will be provided to you automatically when your account is opened. To request an additional Debit Card for an authorized user for your account, please add the cardholder information below.

- Add additional cardholder
- First name
- Middle initial (optional)
- Last name

• Applicants will automatically receive an Optum Bank® Health Savings Account Debit MasterCard® in their own name. On this screen, they can request an additional card for someone else i.e. a spouse or dependent.

Need Help?
Call us at 1-665-234-8913
Hours: 8:00 AM - 8:00 PM ET

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Verify Information

Step 3: Verify

Personal Information (Account holder)
- First name: Test
- Middle initial: test
- Last name: test
- Social security number or tax ID: XXX-XX-3433
- Date of birth: 11-11-1990
- Home phone: 801-111-9999
- Work phone: test
- Email address: testemail@yahoo.com
- Verification code: test

Home Address
- Home address: 123 test
- City: test
- State: AK
- Zip code: 84128 - 1111

Medical Information - High Deductible Health Plan (HDHP)
- Enrolling through employer or financial advisor: No
- Who is covered: Individual
- HDHP effective date: 01-11-2015

Need Help?
Call us at 1-806-234-8913
Hours: 8:00 AM - 8:00 PM ET

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• Applicants are presented with the custodial and deposit agreement, schedule of fees and charges, and the bank's privacy policy.
In addition to agreeing to the terms and conditions of the account, applicants must elect how they would like to receive their welcome kit and other bank documents. Finally, applicants must electronically sign the document.
The bank is required to meet Know Your Customer requirements. If the application requires additional review, this screen will appear when the application is submitted.

Applicants will hear from us via mail within 10 business days (to account for mail time).

Applicants will be requested to submit proof of identity (social security card, driver’s license and a copy of a utility bill), in most instances.

Common reasons for this: the Applicant is young or has moved or changed their name recently.
Enrollment Submitted: Process Complete

• Applicants will receive a welcome kit and debit card(s) within 10 business days.
Electronic Welcome Kit: Email

- Applicants who elected to receive their welcome materials electronically will receive an email notifying them when their welcome kit is available online.

- Subject Line: Your electronic documents are available

Your electronic documents are now available online

Thank you for making the decision to go green by receiving your Optum Bank®, Member FDIC, documents electronically. You currently have documents that can be retrieved by following the steps below:

**Step 1:** Go to [www.optumbank.com](http://www.optumbank.com).

**Step 2:** Click **Register for site** and follow the registration process by providing your SSN, Date of Birth, Last Name and your new Optum Bank debit card number, which you should be receiving in the mail very soon, if you haven’t received it already. You will also need to complete the security questions.

**Step 3:** Select **View statements and documents** from the Quick Links dropdown on your HSA Dashboard.

If you would like to change the email address used for this communication, please log on to your HSA and update your email address in your account profile.

This service message is being sent to you as an Optum Bank customer to provide you with updates and information about your account. The email address from which this communication was sent is not monitored for responses. If you have any questions, please contact our customer service center toll free at 1-866-734-8913. Customer service professionals are available to assist you Monday through Friday, 8 a.m. to 8 p.m. Eastern time.

Optum, 6300 Olson Memorial Highway MN 55110 - Golden Valley, MN 55427
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Electronic Welcome Kit: Online

- Per the instructions in the email, account holders who have elected electronic delivery during online enrollment can find their welcome kit on the Statements page of the portal.