

How to review your health account balance

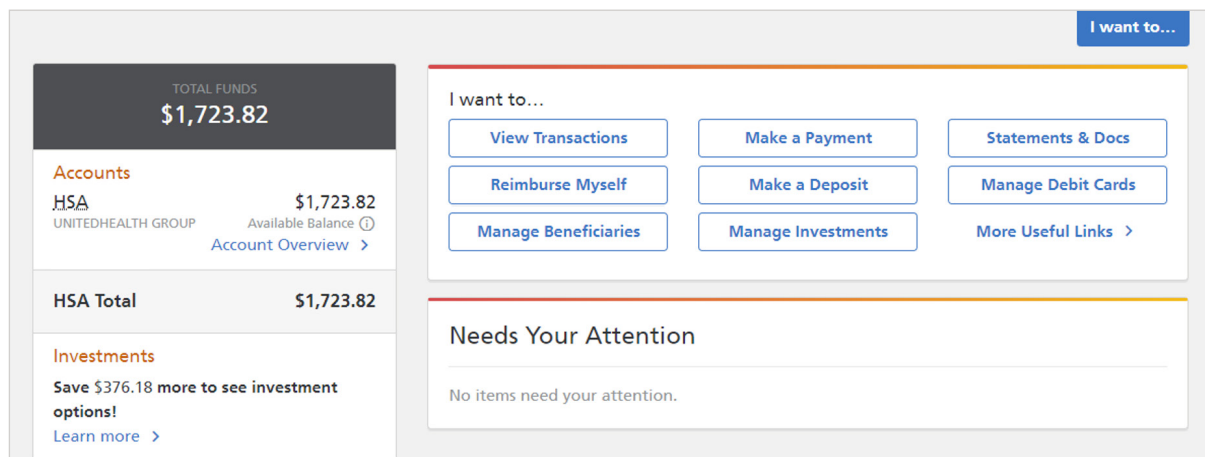


Review your balance at optumbank.com/tennessee

There are several places your balance displays in your Optum Bank account profile.

Account dashboard

1. Sign in to optumbank.com/tennessee.
2. The view you see upon logging-in is your account dashboard.
3. On the left-hand side, a list of all of your health accounts will appear. This may include, but is not limited to, a health savings account (HSA), and/or a flexible spending account (FSA) depending on which account types you have.
4. The dollar amount displayed under **Total Funds** is the total balance of all of your health accounts, if you have more than one.
5. Below this, each of your accounts is listed with its respective available balance. Click **Account Overview** to navigate to details of each account.



The screenshot shows the account dashboard interface. On the left, there is a summary card for 'TOTAL FUNDS' with a balance of \$1,723.82. Below this, it lists 'Accounts' with an HSA from UNITEDHEALTH GROUP having an available balance of \$1,723.82. A section for 'Investments' shows a message to 'Save \$376.18 more to see investment options!'. On the right, there is a 'I want to...' menu with buttons for 'View Transactions', 'Reimburse Myself', 'Manage Beneficiaries', 'Make a Payment', 'Make a Deposit', 'Manage Investments', 'Statements & Docs', and 'Manage Debit Cards'. Below the menu is a 'Needs Your Attention' section which currently shows 'No items need your attention.'

Pay or Reimburse an Expense

1. Sign in to optumbank.com/tennessee.
2. In the top navigation bar, select **Payments**.

The screenshot shows the Optum Bank website interface. At the top, the navigation bar includes 'Dashboard', 'Accounts', 'Payments', 'Contributions', 'Investments', 'Help & Tools', and 'Settings'. The 'Payments' menu is open, displaying options: 'Pay an Expense', 'Reimburse Myself', 'Expense Journal', 'Add or Edit Payee or Provider', 'Add a Receipt', and 'View Receipt Folder'. On the left, the 'Accounts' section shows an HSA account with a total balance of \$1,723.82. Below this, there are buttons for 'Transactions', 'Make a Payment', 'Statements & Docs', 'Reimburse Myself', 'Make a Deposit', 'Manage Debit Cards', 'Manage Beneficiaries', and 'Manage Investments'. A 'Needs Your Attention' section at the bottom indicates that no items need attention.



Need Assistance?

Contact Optum Bank at **866-600-4984**, 24/7 excluding major U.S. holidays, to speak to a highly trained account representative.



optumbank.com/tennessee

Health savings accounts (HSAs) are individual accounts offered or administered by Optum Bank®, Member FDIC, and are subject to eligibility requirements and restrictions on deposits and withdrawals to avoid IRS penalties. State taxes may apply. Fees may reduce earnings on account. Flexible spending accounts (FSAs) are administered by OptumHealth Financial Services and are subject to eligibility and restrictions. This communication is not intended as legal or tax advice. Federal and state laws and regulations are subject to change.