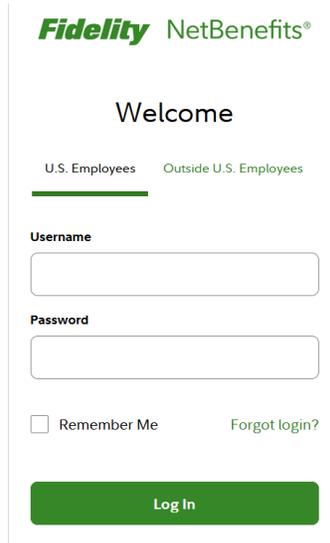


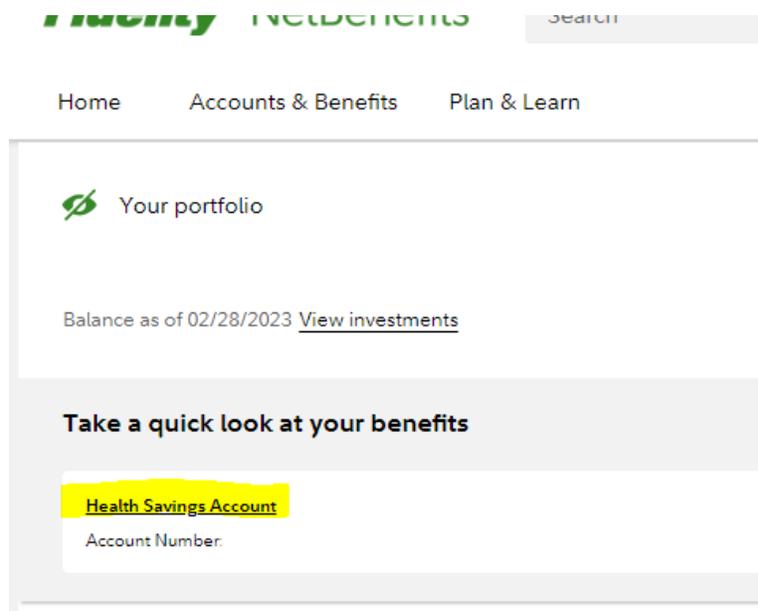
How to check the status of your HSA funds transfer from Optum to Fidelity

- Log into netbenefits.com



The screenshot shows the Fidelity NetBenefits login page. At the top, it says "Fidelity NetBenefits®". Below that is "Welcome". There are two tabs: "U.S. Employees" (which is selected and underlined) and "Outside U.S. Employees". Below the tabs are two input fields: "Username" and "Password". There is a checkbox for "Remember Me" and a link for "Forgot login?". At the bottom is a green "Log In" button.

- After logging in click, the “Health Savings Account” link highlighted in yellow below.



The screenshot shows the Fidelity NetBenefits dashboard. At the top, there is a search bar. Below that are navigation links: "Home", "Accounts & Benefits", and "Plan & Learn". The main content area has a section titled "Your portfolio" with a green icon. Below that, it says "Balance as of 02/28/2023" and a link for "View investments". There is a grey box with the heading "Take a quick look at your benefits". Below this heading, the text "Health Savings Account" is highlighted in yellow. Underneath, it says "Account Number:".

- Click the “Contributing” link

Health Savings Account (HSA)

[View your HSA on Fidelity.com](#)

Account Number:

[Connected to Your Health Plan](#)

[Update Personal Info](#)

[Update Beneficiaries](#)

[Summary](#)

[Contributing](#)

[Paying](#)

[Investing](#)

[Tax Information](#)

Scroll down and click the “Transfer an HSA” button

the year.

Transfer from another HSA

Transfer money from an HSA at any time—transfers don't count toward your IRS limit. Any contributions you made during the year do.

[Transfer an HSA](#)

[> Reimbursements and checkwriting](#)

- Click the “Track a transfer you submitted” link

» [Customer Service](#) »

[Print](#) | [Email](#) | [Facebook](#)

Transfer an account to Fidelity

We make it easy to transfer all or part of an account to Fidelity—including stocks, bonds, mutual funds, and other security types—without needing to sell your holdings.¹

[Start a transfer](#)

[Track a transfer you submitted](#) or [resume a saved transfer request](#)

- Click the drop down plus sign

Status Tracker

See the status of actions for your personal investing accounts, including transfer of accounts, margin and options applications, bank set up and more.

Did you find what you were looking for here?  

START DATE FEB-17-2023

 Transfer from OPTUM BANK - HSA to Fidelity 

2 of 3 Completed

START DATE DEC-16-2022

 Your Account Request for 

 Complete

- Your estimated completion date of your transfer should be listed in opened up drop down

Status Tracker

See the status of actions for your personal investing accounts, including transfer of accounts, margin and options applications, bank set up and more.

Did you find what you were looking for here?  

START DATE FEB-17-2023

 Transfer from OPTUM BANK - HSA to Fidelity 

AS OF FEB-27-2023

The estimated completion date of your transfer is Mar-15-2023

Your transfer is in progress at OPTUM BANK - HSA.

Reference ID: W516059-17FEB23

2 of 3 Completed