

Optum Financial[®]

Open enrollment

Most frequently used resources

[Health saving accounts \(HSAs\)](#)







[Resources in Spanish](#)

[Open enrollment meeting resources](#)







Top health savings account (HSA) resources



Choosing an HSA

-  **HSA quick guide**
Overview of the benefits of an HSA
-  **Frequently asked questions: HSAs**
Answers to some of the most frequently asked HSA questions
-  **HSA qualified medical expenses**
List of qualified medical expenses that can be paid for with an HSA
-  **Why choose an HDHP with an HSA**
Explore reasons for enrolling in an HDHP paired with an HSA
-  **What can an HSA do for me?**
Overview of the benefits of an HSA
-  **Qualified Medical Expense Tool**
Interactive tool to search and filter qualified expenses


Using an HSA

-  **Technology at your fingertips**
Portal and mobile app overview (coming soon)
-  **How to use an HSA**
How to make deposits and withdrawals from your HSA
-  **HSA contribution calculator**
Personalized contribution and savings estimates
-  **Optum Bank mobile app**
Features of the Optum Bank mobile app

Investing in an HSA

-  **Investing with your HSA**
Growth options for HSAs
-  **Investing with an HSA**
How the investing feature works





Additional tools and resources

-  **Open enrollment webinar**
Recorded webinar for open enrollment time (coming soon)




Key:  PDF  Video  Online tools  Emails

Resources in Spanish

HSA


-  **Introduction to HSAs**
Overview of the benefits of an HSA
-  **Frequently asked questions: HSAs**
Answers to some of the most frequently asked HSA questions
-  **HSA qualified medical expenses**
Answers to some of the most frequently asked HSA questions
-  **Investing with your HSA**
Growth options for HSAs

FSA


-  **FSA enrollment brochure**
How FSAs help you plan, save and pay for health care
-  **FSA enrollment brochures with carryover**
FSA enrollment brochure for employers who offer the carryover option
-  **Dependent care FSA brochure**
How a dependent care FSA works

Commuter

Election model

-  **Commuter benefit (election model)**
Overview of how the commuter benefit payment card works

Ordering model

-  **Commuter benefit plan account user guide (ordering model)**
Step-by-step guide on how to place orders for transit and parking using the online ordering service

Health account comparison

-  **HSA-FSA-HRA comparison grid**
Chart comparing the benefits of HSAs, FSAs and HRAs
-  **HSA-FSA comparison grid**
Chart comparing the benefits of HSAs and FSAs

Key:  PDF  Video  Online tools  Emails

Additional open enrollment meeting resources

Open enrollment presentation



Scripted slides to use at open enrollment meetings (coming soon)

Open enrollment emails



Email templates to promote open enrollment to employees (coming soon)



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Investments are not FDIC insured, are not bank issued or guaranteed by Optum Financial or its subsidiaries, including Optum Bank, and are subject to risk including fluctuations in value and the possible loss of the principal amount invested.

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