

# HOW TO COMPLETE AN HSA ROLLOVER

When initiating a **manual** rollover from an existing health savings account (HSA) to your new HSA account with **Blue Cross & Blue Shield of Rhode Island (BCBSRI)**, you must fill out the form called, "Health Savings Account (HSA) Transfer to UMB from Other Trustee" and return as instructed on the next page. UMB Bank is the HSA custodian for BCBSRI.

## REMINDERS ABOUT THE TRANSITION TO BCBSRI AS OF JANUARY 1, 2020

- If you have an HSA with Optum Bank and have already taken advantage of the easy online rollover period **as of February 3, 2020**, you do not need to complete this form.
- **After February 3**, if you wish to roll over your Optum Bank HSA funds, you must complete this form.
- It can take 3-4 weeks for Optum Bank to complete the rollover process. During this time, you will not have access to your Optum HSA funds.
- Please call the **State of Rhode Island Employee CARE Center** at **(401) 429-2104** or **1-866-987-3705** if you have additional questions or need assistance.

## Section 1 – Top of form

Enter your UMB Bank HSA account number at the top of the form. To find the number:

- Log in to your [bcbsri.com](https://bcbsri.com) account
- Click “Your HSA”
- Locate the account number in the HSA portal dashboard

## Section A

Provide the account owner’s name, full address, telephone number, and Social Security number.

## Section B

Check the first box, “HSA to HSA,” and indicate if you want to transfer the entire account balance or a smaller portion by dollar amount.

For **Optum Bank HSA account holders**, transferring a portion of the balance will keep the Optum Bank HSA account open, and you could incur a \$3.00 monthly maintenance fee.

## Section C

Provide the account number, and the name, business address, and telephone number for the trustee/ custodian of your current HSA account. Optum Bank HSA account holders can use the following contact information:

### Optum Bank

2525 Lake Park Blvd.  
West Valley City, UT 84120  
Phone Number: 1-800-791-9361

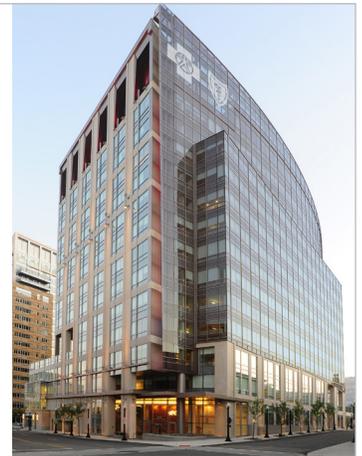
Sign and date the completed form where indicated, and mail the form to your current HSA trustee/ custodian. Optum Bank HSA account holders can use the address listed above.

## HAVE QUESTIONS?

### We’re here to help!

Call the **State of Rhode Island Employee CARE Center** at **(401) 429-2104** or **1-866-987-3705**

Monday – Friday, 8:00 a.m. – 8:00 p.m.  
Saturday, 8:00 a.m. – noon



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