Optum Bank New Client Checklist

Send this completed form to accountservices@optum.com

Employer's Legal Name:
Federal Tax ID:
Physical Address:
City:
Zip Code:

Primary Contact

Name:	Email:
Address: City: Zip Code:	
Phone:	
*Roles:	

Contact #2

Name:	Email:
Address: City: Zip Code:	
Phone:	
*Roles:	

Add additional lines as needed for additional contacts.

***Roles:** Optum Bank will set up access to the employer portal based on your selection of Roles for each contact. Please note the required roles for each contact.

1. ***Benefits Administrator:*** Benefits View plans, employer dashboard, access resources and submit requests for your administrator
2. ***Employee Administrator:*** Manage individual employee data via an online form. Add new employees, add dependents, update employee profiles, update dependents, add, update and remove employee enrollments, cancel on hold contributions
3. ***Employee Reviewer:*** Search for employees and view employee details
4. ***Import Administrator:*** Import new files, view import queue, take action on file in the queue, access exception log to view file errors, update file errors and resubmit files. Schedule recurring contributions, cancel on hold contributions
5. ***Import Monitor:*** View the file import queue and access the exception log to view file errors
6. ***Informer:*** View plan and access
7. ***Report Manager:*** Request, view, remove reports and view employer dashboard
8. ***Report Reviewer:*** View scheduled reports and employer dashboards

Number of Employees Eligible for Benefits:	
Anticipated number of HSA enrollees:	
Will you offer employer contributions to the HSA?	Amount?
Will you offer payroll deductions to the HSA?	Frequency?
First Pay Date:	
File Contact, email address, and phone number:	