

Higher Education - How to Enroll in Flexible Benefits

If you are a Higher Education employee, you can contribute to a medical flexible spending account (FSA), limited purpose FSA, or dependent care FSA with ParTNers for Health. To enroll in your Flexible Benefits you will need to use the FSA Enrollment and Election Tool.

To get started, visit optumbank.com/tennessee and click on the "**Higher Education employees: Click here to enroll in your Flexible Benefits**" link. This will bring you to the Flexible Benefits Enrollment page. Once you are on the Flexible Benefits Enrollment page, select the "**Click here to enroll in your FSA**" link.

This will bring you to the FSA Enrollment and Election Tool. Click on "**Create your new username and password**" link under the "**New User?**" section. *Please note, this username and password is only for the FSA Enrollment and Election Tool.*

FSA Enrollment and Election Tool

1. Complete **Step 1: User Identification**. Enter your personal information to verify your identity: full legal first name, last name, zip code and Social Security number (SSN). Then click **Next**. *Please note, you will leave the "Employee ID" text field blank.*
2. Complete **Step 2: Security Questions**. Select your security question from the drop down menu and enter your applicable answer. Then click **Next**.
3. Complete **Step 3: Create Username and Password**. Enter a username of your choice and password. Enter your password of choice again in the "confirm password" text field. Then click **Submit**.
4. Click **Enroll Now** under the "FSA Enrollment and Election Tool" text.



DON'T FORGET:

- Carefully complete your enrollment application
- If you need to update or change your election choices, you may do so by visiting the FSA Enrollment and Election Tool and entering your username and password into the "**Existing User?**" section.

5. On the next page, click **Begin Your Enrollment Now** under the "Enrollment" banner at the top of your screen.
6. Verify your information on the profile page. If you plan to enroll in a Dependent Care FSA, select **Yes** for the "Do you have any dependents?" question to add dependents at this time. If you do not want to enroll in a Dependent Care FSA, you can select **No** for the "Do you have any dependents?" question. Then click **Continue**.
 - If you have selected **Yes** to add dependents, you will be prompted on the next page to enter your dependent(s) information to verify their identity: full legal first name, last name, Social Security number (SSN)*, birth date, gender*, student status and relationship to you. Once you have entered your dependents correct information, select **Add to List**. Then click **Continue** at the bottom of the page. *Please note, if you do not enter dependent information the "Dependent Care FSA" contribution information will not populate in the last step of the enrollment confirmation.*

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7. Check the boxes to confirm you understand the plan rules, and then click **Continue**. *Please note, you must check the boxes for all plan types in order to proceed to the next page.*
8. Enter your annual election amount(s). Then select **Continue**.
9. Review the check reimbursement payment method page. Then select **Continue**. *Please note, you will have the option to update your reimbursement method from check to direct deposit after the start of the year in January 2021.*
10. Review the verification page and then select **Submit** to complete your enrollment.
11. You will see an on-screen enrollment confirmation with your elections, which can be printed for your records.

After enrolling

In the coming weeks we'll send you a welcome kit and your Optum Bank payment Mastercard® in two separate mailings.

The welcome kit will contain your benefit information, details on managing your account and instructions on how to use your new Optum Bank payment Mastercard®.

The Optum Bank payment Mastercard® is one of the fastest, most convenient ways to pay for FSA-eligible expenses. With it there's no need to pay cash for out-of-pocket expenses, no waiting for reimbursements and there are no paper forms to complete. Plus card transactions happen in real time so your account balance is always up to date.

Beginning December 2020, you will be able to sign in and access your accounts, including a full suite of account features, on optumbank.com/tennessee.

We're always here

If you have questions about managing your Optum Bank FSA you can go to optumbank.com/tennessee or call **866-600-4984**, 24/7, excluding major U.S. federal holidays, to speak to a highly trained account representative.



**Informational fields that are not required.*

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.