



School District of Lancaster

Together We Can!

July 23, 2019

Our records show that you are enrolled in the High Deductible Plan for health care. As you are aware, the District has changed Health Savings Account (HSA) custodians from PNC (Alegus) to Optum Bank.

Your action is required if you would like to move all your funds from PNC (Alegus) to Optum, so you have one account to manage. **Please review this document carefully as you will need to take action on or before August 30, 2019.**

Why do I need to combine my HSA accounts?

The District currently pays the administrative fees for the PNC account. Since the District will be paying the administrative fees for the Optum administered accounts, it will stop paying the administrative fees for PNC accounts effective August 30, 2019.

What will happen if I don't take action by 8/30/2019?

Your funds will remain at PNC and you will be responsible for the monthly administrative fees. The District will stop paying the administrative fees for PNC accounts effective August 30, 2019.

How do I transfer my funds from PNC to Optum?

Instructions have been attached to this letter.

Will I retain access to both accounts through the transfer period?

No. From 9/9/2019 through 9/18/2019, you will only have access to the funds in Optum. The transferred PNC funds will be available in your Optum account as of 9/19/2019.

When were the Optum (new) accounts active?

The new accounts were active as of July 1, 2019. All employer and employee contributions are being deposited into your new Optum account.

What do I do if I have not received my Optum card?

Please call Optum at 1-866-234-8913 to obtain a new card.

Estevanny Jiménez Turns, Chief of Talent & Employee Engagement

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Who can I contact if I have additional questions?

Please call your designated HR Generalist in the Office of Talent and Employee Engagement.

We appreciate your patience as we work to ensure future stability in our HSA custodian.

Sincerely,

Estevanny Jiménez Turns
Chief of Talent & Employee Engagement (Equivalent to Director of H/R)



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