

# Health Savings Account (HSA) How to Transfer Funds

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# Welcome to Medical Mutual

- Now that you have enrolled in your Medical Mutual HSA, you may have the need to transfer funds from another HSA into your Medical Mutual HSA.
- You are able to transfer funds from another HSA into your Medical Mutual HSA as long as you are the owner of both accounts.
- These simple steps will walk you through the process of requesting funds to be moved into your new HSA.

# Step 1: Log in to your HSA Account

1. Go to MedMutual.com/Member
2. Log in or register for a My Health Plan account
3. Click My Spending Accounts under the Claims & Balances tab or on the My Spending Accounts icon under Quick Links
4. Accept the Terms and click Submit

The screenshot displays the Medical Mutual My Health Plan dashboard. At the top, the Medical Mutual logo is on the left, and navigation links for 'Contact Us' and 'Logout' are on the right. Below the logo, the 'My Health Plan' title is prominently displayed. A navigation bar includes 'Dashboard', 'Claims & Balances', 'Benefits & Coverage', 'Resources & Tools', 'Healthy Living', and 'My Profile'. The 'Claims & Balances' dropdown menu is open, showing 'Claims' (with a 'Claims Summary' link) and 'Balances' (with 'Deductibles and Coinsurance' and 'My Spending Accounts' links). The 'My Spending Accounts' link is highlighted with a red box. To the right of the navigation bar, there are 'Actions' (0) and 'Messages' (2) buttons. Below the navigation bar, a 'Quick Links' section is visible, containing two columns of links. The 'My Spending Accounts' link in the 'Quick Links' section is also highlighted with a red box. Other links in the 'Quick Links' section include 'Wellness Portal', 'My Care Compare', 'Preventive Care', 'ID Cards', 'Vision Benefits', 'Prescription Drug Benefits', 'Find a Provider', 'Who is Covered', 'Medical Benefits', and 'Dental Benefits'.

**Medical Mutual** My Health Plan

Dashboard **Claims & Balances** Benefits & Coverage Resources & Tools Healthy Living My Profile

Claims Summary Deductibles and Coinsurance **My Spending Accounts**

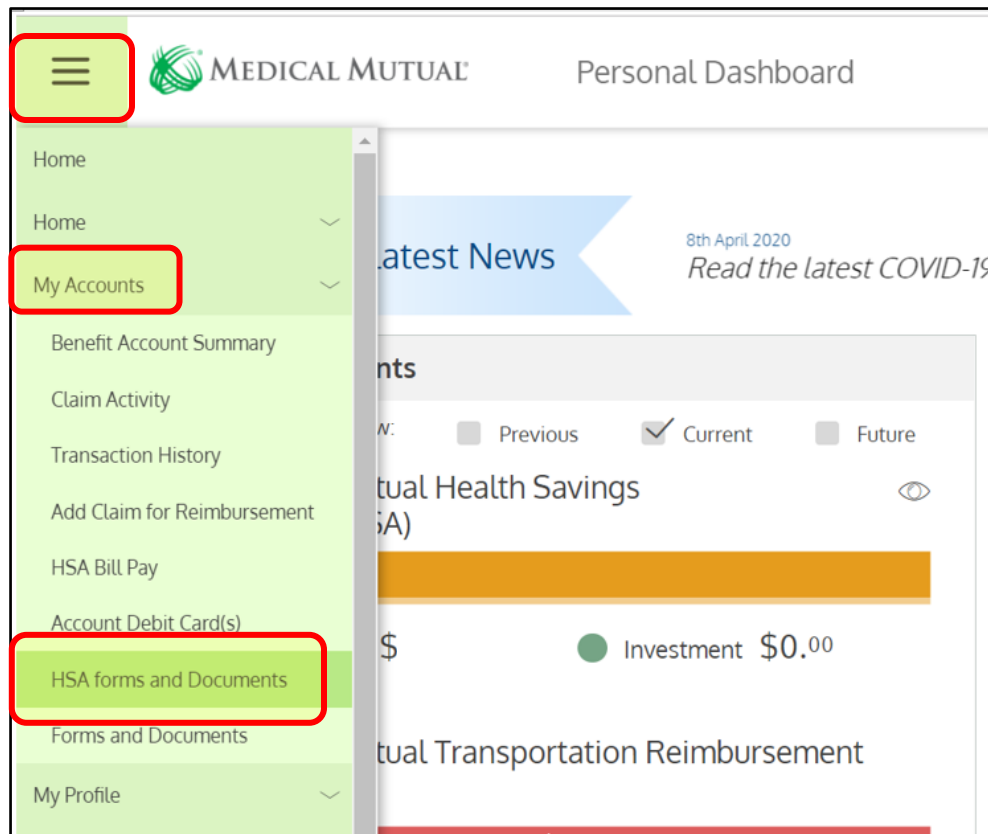
0 Actions 2 Messages

**Quick Links**

- Wellness Portal
- My Care Compare
- Preventive Care
- ID Cards
- Vision Benefits
- Prescription Drug Benefits
- Find a Provider
- My Spending Accounts**
- Who is Covered
- Medical Benefits
- Dental Benefits

# Step 2: Access Your HSA

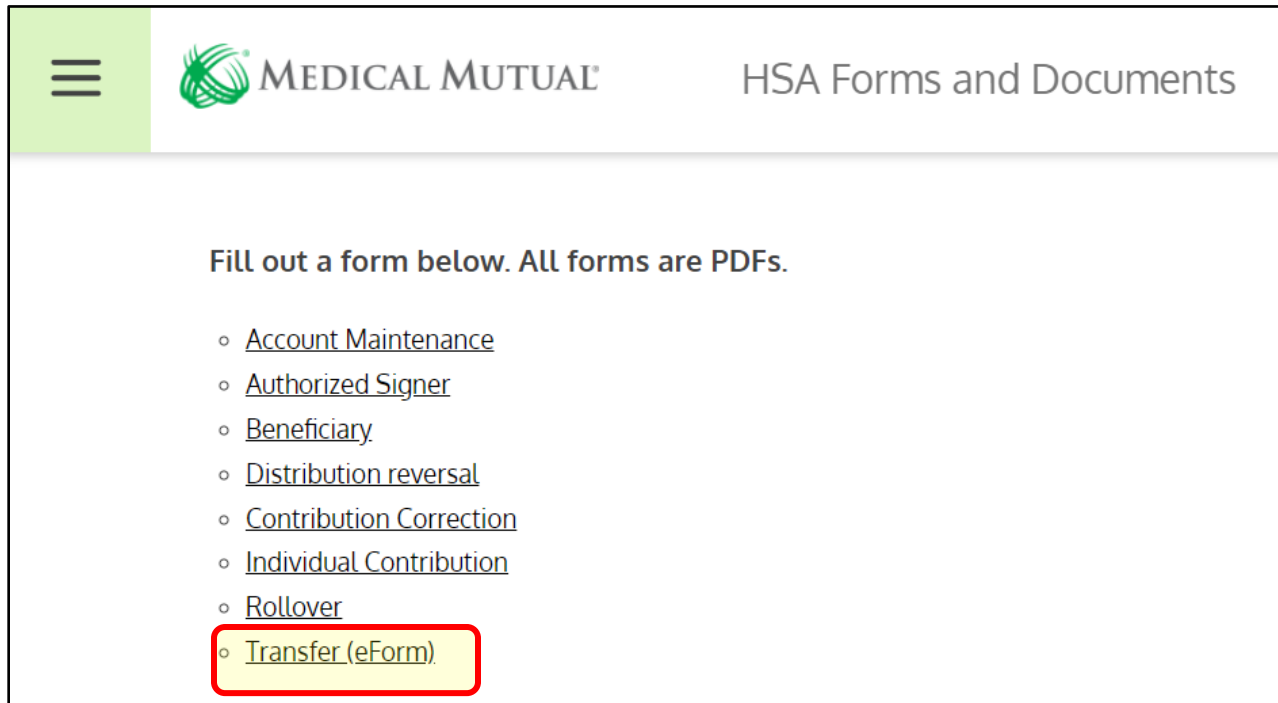
- Click on the My Accounts tab and select HSA Forms & Documents from the dropdown menu





# Step 3: Go to HSA Forms and Documents

- Click on Transfer (eForm)



Fill out a form below. All forms are PDFs.

- [Account Maintenance](#)
- [Authorized Signer](#)
- [Beneficiary](#)
- [Distribution reversal](#)
- [Contribution Correction](#)
- [Individual Contribution](#)
- [Rollover](#)
- [Transfer \(eForm\)](#)

# Step 4: Accept the Terms of Use

## Consent to do business electronically

From: Avidia Bank

Document: BTAI-HSA MMO Transfer Form


☐

*I agree to the [Terms of Use](#), have reviewed the [Consumer Disclosure](#) and agree to do business electronically with Avidia Bank*

Accept


# Step 5: Complete the Form

- Complete the fillable PDF form and sign the form (see next slide)

 **Avidia Bank** Powered by Adobe® EchoSign™

Alternative actions ▾ Please sign: BTAI-HSA MMO Transfer Form

Start

  
**MEDICAL MUTUAL®**

Instructions: Use this form to request Transfer. For assistance, call 1-800-525-9252 or send an email to: [myspendingaccounts@MedMutual.com](mailto:myspendingaccounts@MedMutual.com)

Account Holder Information

First Name \*

Last Name \*

MI \*

Street Address \*

City \*

State \*

Zip Code \*

Address Line 2 \*

Social Security Number \*

Daytime Phone \*

E-Mail Address \*

Avidia Bank HSA Account Number \*

Request Type

☐ Trustee to Trustee Transfer: I currently have HSA funds with another Trustee/Custodian and want to transfer the funds directly to my HSA account at Avidia Bank

Transfer Information

Current Custodian Bank Name \*

Current HSA Account Number \*

Street Address \*

City \*

State \*

Zip Code \*

Phone Number \*

Fax Number \*

Transfer Instructions

☐ Transfer the entire balance of the Current HSA listed above to Avidia Bank and CLOSE my account & Liquidate investments if applicable

☐ Please transfer \$ \* of the Current HSA listed above to Avidia Bank and DO NOT CLOSE my account

Make Check Payable to : Avidia Bank as Custodian for \*  
\*Account Owner's First & Last Name

Return the Transfer Check to Avidia Bank, PO Box 370, Hudson MA 01749

Instructions

Complete this form online and provide your e-Signature (below). Once e-signed, this form is automatically returned to Avidia Bank. We will initiate the Trustee to Trustee Transfer on your behalf. Depending upon the previous Custodian/Trustee Bank's processing time, it may take 4-6 weeks before your funds are sent to Avidia Bank. If you have not received your funds and would like Avidia Bank to follow up on your behalf, please contact us at 855-472-9399 or by e-mail at [HSA@avidiabank.com](mailto:HSA@avidiabank.com).


Account Holders Authorization

I authorize the transfer of the HSA assets in the manner described above and certify that all of the information provided by me is correct and may be relied upon by the Custodian.

Accepting HSA Custodian

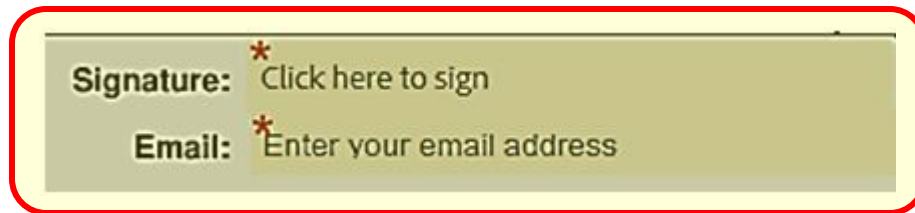
Avidia Bank agrees to serve as the new Custodian for the account of the individual who is authorizing the Transfer. As the newly designated Custodian, we agree to accept the aforementioned transfer. Please remit a check payable to Avidia Bank as Custodian of the HSA Account Number listed above for the amount of \$ \*.

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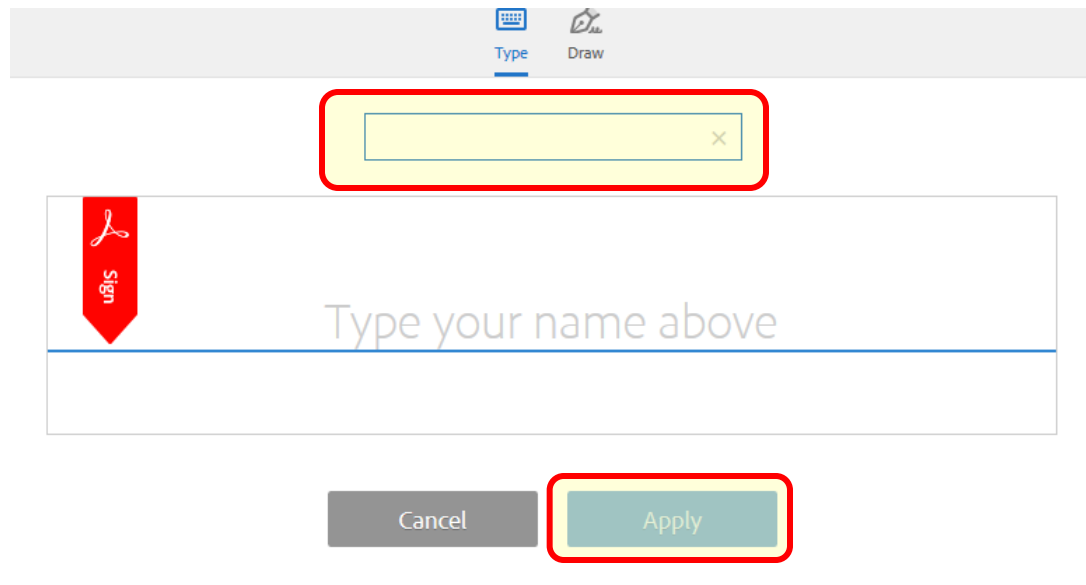
 **MEDICAL MUTUAL®**

# Sign the Form

- Sign the HSA Transfer Request Form electronically and provide your email. Then click Apply.



A yellow rectangular box with a red border containing two input fields. The first field is labeled "Signature:" with a red asterisk and the text "Click here to sign". The second field is labeled "Email:" with a red asterisk and the text "Enter your email address".



The main form interface features a grey header bar with "Type" and "Draw" icons. Below it is a yellow input field with a red border and a close button. A large white box contains a red "Sign" button with a document icon and the text "Type your name above". At the bottom are "Cancel" and "Apply" buttons, with the "Apply" button highlighted with a red border.

# Next Steps

- Thank you for transferring your non-Medical Mutual HSA funds into your new Medical Mutual HSA.
- It may take up to six weeks for funds to transfer to your Medical Mutual HSA.
- We are here to help you understand how to take full advantage of your HSA. Our goal is to provide you with an affordable, convenient and smart approach to begin saving for your medical expenses.
- If you have any questions, please call us at 1-800-522-2037.