Health Savings Account (HSA)
How to Transfer Funds
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
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)
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)
Sign the Form

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

Signature: Click here to sign
Email: Enter your email address

Type your name above

[Image of sign-up form]

Cancel  Apply
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.