Accessing Tax Documentation

Document Purpose

Provide guidance on how to access and view HSA-specific tax documentation.

What tax forms are provided to Health Savings Account holders and when are they made available?

Two tax forms may be provided to Health Savings Account holders:

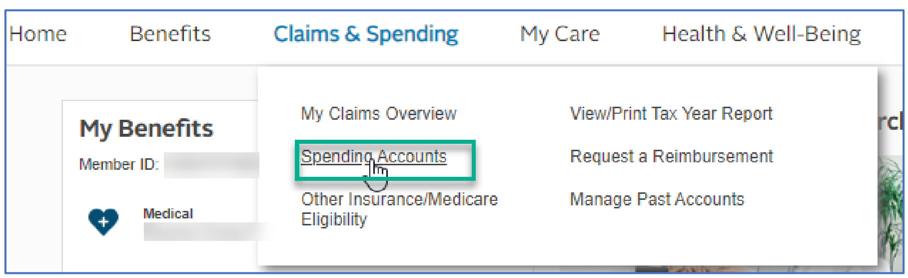
- **Form 1099-SA** details any funds that have been distributed from your health savings plan for the tax year. **Form 1099-SA** is typically available at **the** end of January.
- **Form 5498-SA** reports contributions to your Health Savings Account (HSA). The **5498-SA** forms are typically available in May allowing any contributions made in the calendar year, up to the April 15 tax deadline to be included in tax year reporting. Health Savings Account holders with no contributions for the calendar year will not receive a **5498-SA**.

Note that by default, account holders will receive paper versions of account statements and tax forms unless opted in to electronic delivery. Account holders who have not opted in to e-statements will be charged a $1.50 paper surcharge fee for the delivery of forms via U.S. mail.

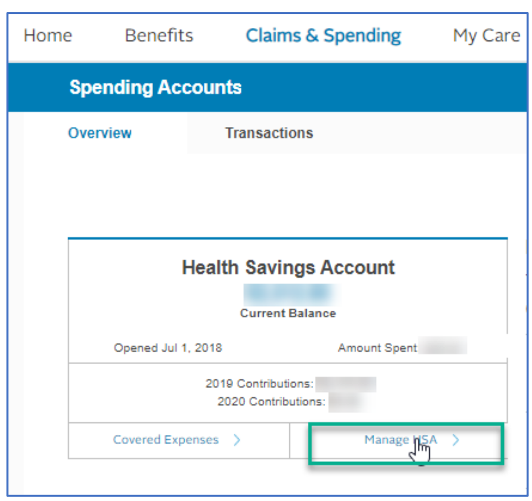
Accessing Tax Forms

To access annual tax forms, log in to the member portal, IBX.com.

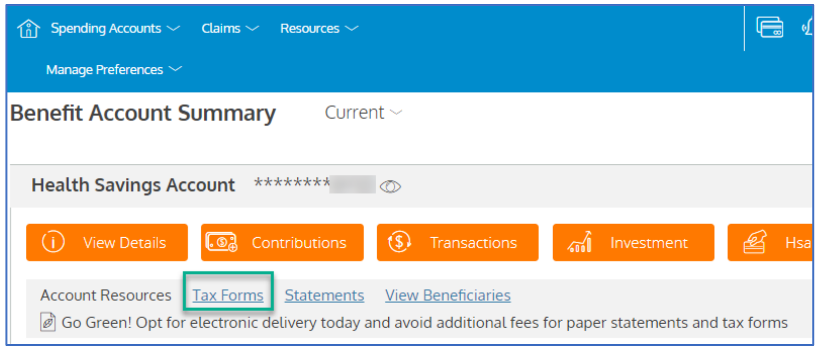
Click **Claims & Spending**; select Spending Accounts.



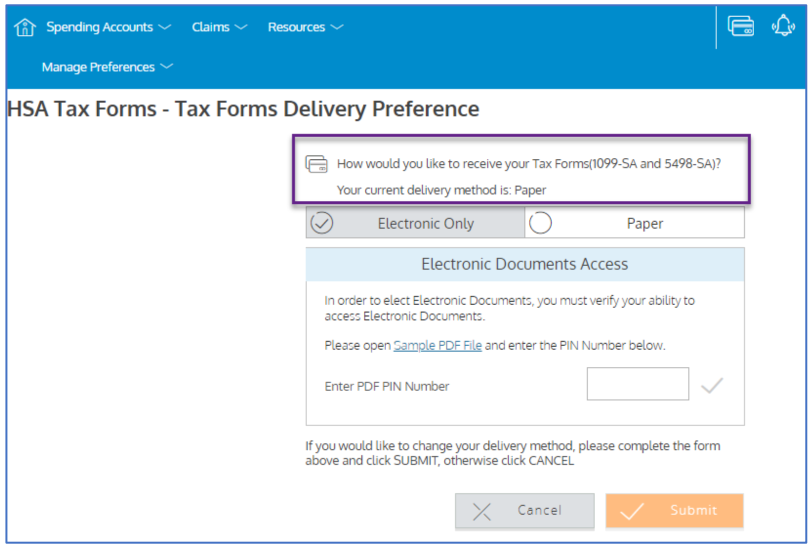
Choose **Manage HSA**



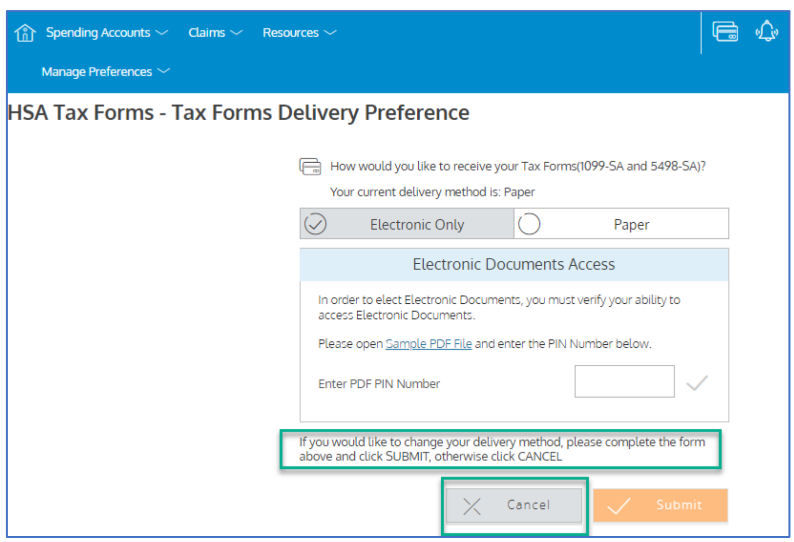
Click **Tax Forms**.



If your current delivery method is set to Paper, you will receive a paper copy of your tax forms via US Mail and will be charged a paper surcharge fee of $1.50 per form.



To receive electronic copies of tax forms, you must **verify** your ability to access electronic documents by clicking on the link to **open a sample PDF file**. This file will include a PIN number.
Enter the **PIN** number in the appropriate field and click **Submit**.



Once you have verified your ability to access electronic documents, when annual tax forms are available, click **Tax Forms** and you can access them there in PDF form.