

# Goodwill NCW Valet VITA

## Supplemental Questions: Health Savings Account

Please answer the following questions if you made any contributions to or distributions from a Health Savings Account (HSA) during the tax year:

1. We will need the following forms if you made contributions to or distributions from your HSA in 2021:
  - 5498-SA showing total contributions to HSA
  - 1099-SA showing total distributions from the HSA
  
2. What type of Health Savings Account (HSA) did you have?
  - Self-Only
  - Family
  
3. What type of contributions did you make to your HSA (check all that apply)?
  - Pre-tax on my paycheck through my employer (See W-2 Box 12, Code W). Note: The amount in Box 12 includes both employer and employee contributions.
  - I/others contributed to my HSA post-tax using (Ex: check/debit/charge transaction from a bank account/credit card). Amount: \$\_\_\_\_\_
  - I did not make any contributions during the tax year.
  
4. How many months during the tax year were you eligible for your HSA?  
\_\_\_\_\_ months
  
5. If you took distributions from your HSA, were all distributions for qualified medical expenses? Note: Over the counter medications qualify in 2021 (and 2020 if filing a prior year return).
  - Yes
  - No, I used \$\_\_\_\_\_ for non-medical expenses.