Supplemental Questions: Health Savings Account

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

1. We will need the following forms if you made contributions to or received distributions from your HSA in 2022:
   - 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/other 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.
   - [ ] Yes
   - [ ] No, I used $__________ for non-medical expenses.