

HSA Notice to Employees Regarding Employer Contributions to HSAs

For Employer - Instructions: Employers that make employer HSA contributions are required to provide this notice to each eligible employee who has not established an HSA by December 31 or if the employer does not know if the employee established an HSA. The employer may provide this notice to other employees as well. However, if an employee earlier notified the employer that he or she has established an HSA, the employer may not condition making the HSA contribution on receipt of any additional notice from that employee. For each calendar year, a notice is deemed to be timely if the employer provides the notice no earlier than 90 days before the first HSA employer contribution for that calendar year and no later than January 15 of the following calendar year.

For Employees - Purpose: This notice explains that you may be eligible to receive Health Savings Account (HSA) contributions from your employer if you are covered by a High Deductible Health Plan (HDHP).

1. Employer Information (completed by employer)

Employer/Business Name: _____
Year of HSA Contribution: _____ (insert year HSA contribution is being made for)
Contact: Name: _____ (Contact person for HSA questions and to notify of HSA establishment)
Address: _____
E-Mail: _____ Phone: _____
HSA Eligibility Requirements: _____

SAMPLE

_____ (Include a short description of your HSA program and include the requirements the employee must meet to receive the HSA contribution.)

2. Notice of HSA Contributions (Legal notice for employee to read)

The employer named above provides contributions to the Health Savings Account (HSA) of each employee who meets the employer's eligibility requirements stated above ("eligible employee"). If you are an eligible employee, you must do the following in order to receive an employer contribution:

- (1) Establish an HSA** on or before the last day in February of the year after the year of the HSA contribution (the year of the HSA contribution is listed in Section 1 above), and;
- (2) Notify the contact person** named above of your HSA account information on or before the last day in February of the year after year for which the contribution is being made. Please provide the information required in Section 3 of this form regarding the details of your HSA.

If you establish your HSA on or before the last day of February in the year after the year for which the contribution is being made and notify the contract person above of your HSA account information, you will receive your HSA contributions, plus reasonable interest (if established late), for the HSA contribution by April 15 of the year after the year for which the contribution is being made. If, however, you do not establish your HSA or you do not notify us of your HSA account information by the deadline, then we are not required to make any contributions to your HSA for the year of the HSA contribution. You may notify us that you have established an HSA by sending a written notice to the contact person named (complete and return this form). If you have any questions about this notice, please connect with the contact person named above.

3. Personal HSA Account Information (Completed by employee and returned to contact person)

Name _____ Soc. Sec # _____
HSA Custodian/Trustee Name: _____ HSA Account # _____
Address of Custodian/Trustee: _____

Signature

Date