How to Access Statements and Tax Documents

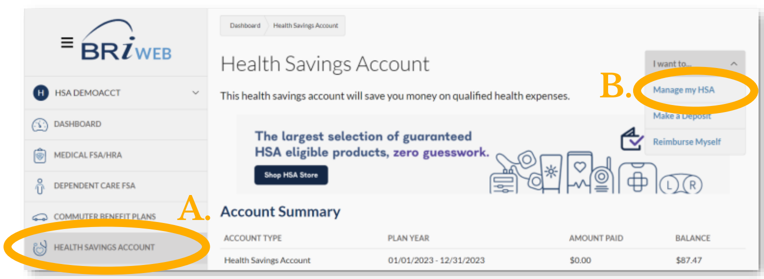
Health Savings Accounts (HSAs) are individually-owned bank accounts which result in account statements and tax documents. Account statements will be available on a monthly basis. Tax documents are generated based on the type of activity you have in your account in a given year. These may include:

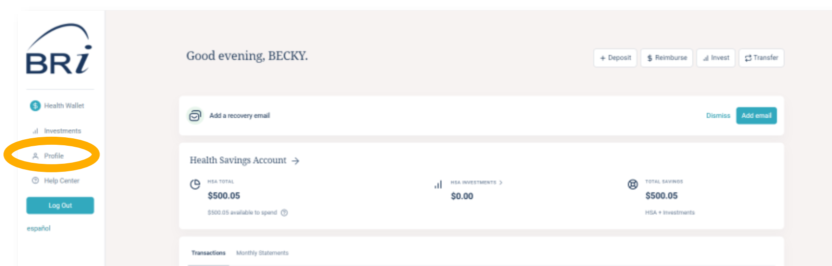
- 1099-SA: You may receive one or more forms if funds were withdrawn from your HSA. A separate form is created for each withdrawal (or distribution) type and may include: normal distributions, excess contributions, disability, death distribution, and prohibited transaction.
- 5498-SA: You may receive one form if funds were deposited into your HSA for a given tax year. It reports contributions made in the calendar year, contributions made for the prior year in the current year, rollover contributions and fair market value of the HSA. A preliminary report is available by January 31 for the prior year. A final copy is provided between April 15 and May 31 to capture any contributions made in the current year for the prior year.

Tax reporting note: If you do not have any deposits or withdrawals in your account in a given tax year, you will not receive any tax documents. In addition to your tax forms, any pre-tax contributions made through your employer will be reported on the W-2 from your employer.

HOW TO ACCESS STATEMENTS AND TAX DOCUMENTS

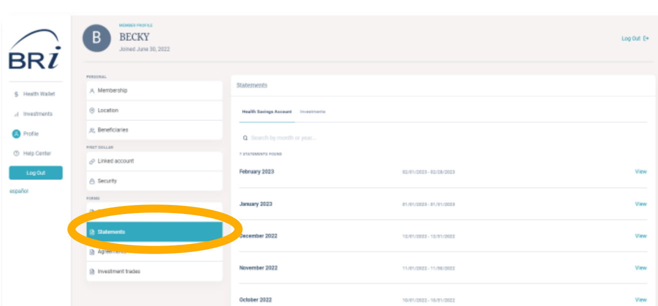
1. Log into BRIWEB at: https://participant.briweb.com/login
   If this is the first time logging in, you will need to register for a login ID.
2. Click on the Health Savings Account tab. From the *I want to…*drop down menu on the right-hand side of the page, click Manage my HSA.
3. Select Profile from the left menu.



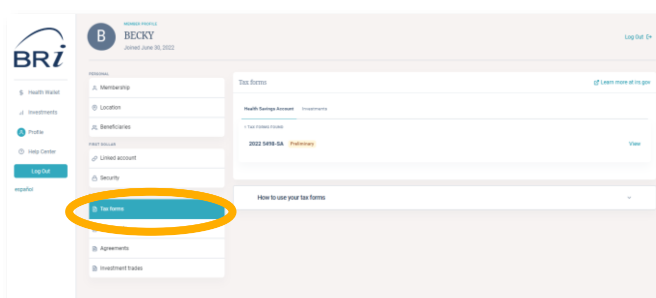


4. From the sub-menu, select either Statements or Tax Forms. All statements and tax forms are available as a PDF for download by clicking the View button to the right of the item you are interest in accessing.

Statements



Tax Forms



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