

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- **1099-SA**: You may receive one or more forms if funds were withdrawn from your HSA.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: <u>https://participant.briweb.com/login</u> If this is the first time logging in, you will need to register for a login ID.				5	Dashboard Health Savings Account	I want to			
				HSA DEMOACCT	~	This health savings account will save you money on qualified health expenses.			Manage my HSA	
				(DASHBOARD					Make a Deposit	
2.	Click on the Health Savings Account tab. From the <i>I want to</i> drop down menu on the right-hand side of the			MEDICAL FSA/HRA						
				DEPENDENT CARE FSA	٨					
	page, click Manage my HSA.				COMMUTER BENEFIT PLANS	A.	Account Summary	PLAN YEAR	AMOUNT PAID	BALANCE
3.	Select Pro	ofile fro	m the left menu.		HEALTH SAVINGS ACCOUNT		Health Savings Account	01/01/2023 - 12/31/2023	\$0.00	\$87.47
	BRI		Good evening, BECKY.		+ Deposit \$ Reinburse al Invest \$	\$ Transfer				
	6 Health Wallet		Add a recovery email	covery email		lád email				
	A Profile		Health Savings Account \rightarrow							
	Help Center Log Out		() HEATOTAL \$500.05	\$0.00	(B) TOTAL SAVINOS \$500.05					
	español		3500.05 available to spand 🛞		HSA + Investments					
			Transactions Monthly Statements							

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			
BRI	B BECKY Joined June 30, 2022	B BECKY American IN THE				B BECKY and she R. NEE		
	PERSONAL	Reductoreda				PERSONAL	Tax forms	gf Learn more at irs.gov
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J. Investments	O Location	Wealth Savings Account Investments			al investments	Eccation	Health Savings Account Investments	
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LogOut		February 2023	02/01/2023 - 02/20/2023	View	Legiox	Security		
español	PORMS				español		How to use your tax forms	~
		anary etc.				Tax forms		
	2 Statements	December 2022	12/01/0002-12/01/0002	View				
	Aprenews					Agreements		
	Investment trades	November 2022	11/01/08EE-11/06/08EE	Vew		Investment trades		
		October 2022	10/01/0822 - 10/01/0822	View				

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