

Access HSA Tax Documents

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If this is your first time to the site, you will need to register your account. If you need assistance with your username, password or the registration process, you can contact tech support at 1-866-853-3539 option 3.

Once logged in, if you have elected to receive documentation via electronic means, from the dashboard, click on the **Gold Account Balance bar** - click here if you have not opted in to electronic statements to access tax documents



Then select the Tax Forms link



Click on the correct tax document needed. Please note – the 1099 SA form will only be available if disbursements have been made.



• If you have not registered to receive electronic documentation, follow the below steps to access Tax Documents



Click on Sample PDF File link and enter the code from the sample PDF to retrieve the PDF code

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Tax Forms

