HSA Advantage™
Tax Documents & Statements

You will receive your annual HSA tax documents electronically.

All Chard Snyder HSA account holders are automatically set up to receive annual tax documents electronically. This means that your tax documents will be made available on your Chard Snyder online account once they are ready. If you have an email address in our system, we will send you an email notification to let you know when the tax documents are available.

If you would like your HSA tax documents mailed, you must choose the Paper option in Notification Preferences by December 31. There is no fee to have your tax documents mailed to your address on file. If you change your mind, you may turn this option off at any time.

Your HSA tax documents are always available on your Chard Snyder online account under the Accounts tab/Statements. They are formatted to be easily saved to your computer or printed if necessary.

Which tax documents should you expect to receive?

Form 1099-SA for distributions and Form 5498-SA for contributions

Form 1099-SA is used to report distributions (money paid out) from your HSA during the tax year. Form 1099-SA will be created and posted in your online account in January for the previous tax year, and mailed (if requested) no later than January 31. If no distributions occurred, Form 1099-SA will not be created.

Form 5498-SA is used to report contributions (money deposited) to your HSA during the tax year. Form 5498-SA will be created and posted in your online account in January for the previous tax year, and mailed (if requested) no later than the end of February.

If you make an additional contribution to your HSA after December 31 and before the tax-filing deadline (April 15), a corrected 5498-SA will be created and made available in the your online account. If you have chosen the Paper option, you will receive an updated form in the mail. If there are no contributions for the current tax year, Form 5498-SA will not be created.

A notification will be sent to you when annual tax documents are posted to your online account.

Update Your Contact Information on Your Online Account

To view, add or update your email, mobile number, or home address, log in to your Chard Snyder online account and click on the Accounts tab, or click on your name at the top of the page to open the drop-down menu. Click on Profile Summary (in either location) and choose Update Profile to make changes to your contact information.
Set Your Delivery and Alert Preference

Log in to your Chard Snyder online account and go to the Message Center tab. Click on Update Notification Preferences.

OR go to the Tools & Support tab and click on Update Notification Preferences.

Then choose the Notification Preference.

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