HSA Tax Forms

All distributions from your HSA plan will be reported to the IRS and you will receive a form 1099-SA showing the total amount taken from the plan within the corresponding tax year. Distributions are exempt from income taxes as long as funds are used to pay for qualified medical expenses incurred after the HSA was established.

You will be able to access your tax forms for your HSA when you Login to your online account. Once logged in, you will be able to view and download the forms found in the **Message Center** tab.

Form 1099-SA will reflect any withdrawals from the account during the corresponding plan year.

- WEX will generate the file on 01/08/2026. Electronic forms will be available on the WEX Benefits Platform as of this date for consumers to view.
- HealthcareBank will mail printed forms to the consumers who elect this option, no later than 01/31/2026.
- 1099-SA corrections will begin on 02/06/2026.

Form 5498-SA will reflect contributions and is for informational purposes only.

- WEX will generate the file on 02/04/2026. Electronic forms will be available on the WEX Benefits Platform as of this date for consumers to view.
- HealthcareBank will mail printed forms to the consumers who elect this option, no later than 02/20/2026.
- 5498-SA corrections will begin on 02/20/2026.

If you have questions about tax filing please contact your tax advisor.

**Please note there is no 1099-SA issued for Flexible Spending Accounts (FSA)