

# HSA PAYROLL DEDUCTION FORM

## INSTRUCTIONS

1. **Submit this form** to your HR department and keep a copy.
2. **Look in your mail for information from Optum Bank.** You will receive a Welcome Kit, Debit Card, and PIN. Please read these materials carefully.
3. Once you enroll online and receive the Welcome Kit, there is nothing more you need to do. Please note that your account must be active before any funds can be accepted.

### Maximum Contribution Guidelines

- The maximum Health Savings Account (HSA) contribution for calendar year 2020 is \$3,550/single and \$7,100 family.
- Full year contributions for individuals who enroll in an HDHP mid year are permitted, provided certain conditions are satisfied.
- Employees over age 55 are permitted to contribute an additional \$1,000 per year.

NOTE: Your maximum annual contribution is the total of all contributions from your employer, if applicable, and payroll deductions.

### HSA Payroll Deduction Contributions

<input type="checkbox"/> Healthcare Savings Account	\$_____ Employee Contribution
As an eligible employee, I acknowledge that I understand the benefits, rights, and obligations available to me under the plan and that the above deductions, if any, will be made on a pre-tax basis. I certify that I am enrolled in a qualified high deductible health insurance plan and am not eligible to receive any benefits under another health plan or general purpose FSA. I also agree to acquire and retain sufficient documentation for any expenses paid with HSA funds including invoices and receipts where appropriate.	
_____ <b>Employee Signature</b>	_____ <b>Date</b>

### IMPORTANT INFORMATION

If you elect to have HSA contributions deducted from your paycheck you must have an account established at Optum bank so we are able to deposit the funds on your behalf.

If you wish to open an account at Optum, you should use this URL:

[https://enrollhsa.optumbank.com/hsaAppWeb/WelcomeAction.do?is\\_partner\\_post=Y&group\\_num=76411748](https://enrollhsa.optumbank.com/hsaAppWeb/WelcomeAction.do?is_partner_post=Y&group_num=76411748)

This customized URL pre-fills your group name and group ID within the online application. This will assist with proper enrollment under your group as well as ensure accurate reporting on your account number file.

I have established my H.S.A. account at Optum Bank:

_____ <b>Employee Signature</b>	_____ <b>Date</b>
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