**Need a refresher on how taxes work for HSAs?**

You do not pay federal income tax on funds contributed to your HSA for that tax year. Because medical expenses paid from an HSA are not taxed, you cannot claim them as tax deductions. In your taxes, you will report money coming in and going out of your HSA.

**Forms You Receive**

In mid-January, Further mailed the following tax statements:

* 1099-SA (Total HSA Distributions): Reports on withdrawals you made from your HSA throughout the tax year. If you did not make any withdrawals, you will not have this form.
* 5498-SA (Total HSA Contributions): Reports the contributions to your HSA throughout the tax year.

You will also need your W-2 (Wage and Tax Statement).

**Forms You Submit**

These forms are due by the IRS tax deadline (at the time of this message, that deadline is 4/15/21 for the 2020 tax year):

* IRS form 8889 (HSA Form): This form reports all of your HSA contributions and withdrawals to ensure you receive your appropriate tax benefits. You will use the forms you received from Further and your W-2 form to fill it out.
* IRS form 1040 (Individual Income Tax Return): You will attach form 8889 to this form. You must use the long form; not the 1040 EZ form.

**If you need to find your tax statements**

You can find your tax statements by logging in or registering on Further's website at <https://member.hellofurther.com>. Note: If your organization has single sign-on set up between your health plan’s portal and the Further site, replace this with your health plan’s URL and include steps for getting to their spending accounts.

1. Select **View Account** next to your HSA.
2. In the white menu bar at the top, select **Tax Forms**.
3. Under the form you want, select the tax year (2020).
4. Select the **Get Form** button to download your tax statement. You can print this PDF for your tax documentation.

**Your Other Spending Accounts** Note: Remove this section if your organization does not offer other Further products

While you may have other Further spending accounts that feature tax benefits, such as FSA plans, there are not any forms or information you will need for those accounts to file your taxes.

**If you need to find your account statement for the tax year**

You can find your tax statements by logging in or registering on Further's website at <https://member.hellofurther.com>. Note: If your organization has single sign-on set up between your health plan’s portal and the Further site, replace this with your health plan’s URL and include steps for getting to their spending accounts.

1. Select **View Account** next to your HSA.
2. In the white menu bar at the top, select **Statements**.
3. In the Report Period field, choose **Tax Year.**
4. In the **Tax Year** field, choose **2020.**

If you have questions about how to file your taxes, please consult a tax advisor.