

2024 School Employee Authorization for Payroll Deduction to Health Savings Account



Use this form to have your employer withhold money from your paychecks and deposit it into your health savings account (HSA) on a pretax basis.

You must be enrolled in Uniform Medical Plan High Deductible Health Plan (HDHP) with an HSA before you can start a payroll deduction (go to [learn.healthequity.com](https://www.healthequity.com) for eligibility and other information).

Type or print clearly in dark ink and use all capital lettering in the spaces provided. Example: **J O H N**

I want to:

- Begin a deduction
- Change my deduction
- Stop my deduction

Effective date: _____ (Your payroll or benefits office can confirm the effective date.)

1 Subscriber information

Social Security number _____ Work phone number _____

Last name _____

First name _____ Middle initial _____ Suffix _____

Mailing address _____

Mailing address line 2 _____

City _____ State _____

ZIP/Postal code _____

Employer _____

Payroll or benefits office use

Employee's annual contribution _____ Number of paychecks remaining for 2024 _____ Employee's contribution per paycheck _____

(Continued on next page.)

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Maximum HSA contribution

Complete this section to calculate how much you can put in your individual or family HSA in 2024.

Individual HSA


- A. Maximum HSA contribution allowed for 2024: \$
- B. Are you age 55 or older?
If **no**, write \$0.
If **yes**, write \$1,000. \$
- C. Amount your employer will put in your HSA in 2024: \$
- D. Will you qualify for the SmartHealth wellness incentive in January 2024?
If **no**, write \$0.
If **yes**, write \$125. \$
- E. **A + B - C - D =** \$

This is the most you can contribute in 2024.

Family HSA

- A. Maximum HSA contribution allowed for 2024: \$
- B. Are you age 55 or older?
If **no**, write \$0.
If **yes**, write \$1,000. \$
- C. Amount your employer will put in your HSA in 2024: \$
- D. Will you qualify for the SmartHealth wellness incentive in January 2024?
If **no**, write \$0.
If **yes**, write \$125. \$
- E. **A + B - C - D =** \$

This is the most you can contribute in 2024.

 If your contributions are more than the amount in E, you risk paying IRS tax penalties. If you are making a mid-year change to increase your contribution amount, be sure to include any amounts you have already contributed in 2024.

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HSA contribution per paycheck

Complete this section to calculate how much you will put in your individual or family HSA per paycheck.

Individual HSA

- Total from E (above): \$
- F. Number of paychecks you will get in 2024
- G. **E ÷ F =** \$
This is the most you can contribute per paycheck.

Amount you elect to contribute to your HSA per paycheck (any amount less than or equal to the amount in G): \$

Family HSA

- Total from E (above): \$
- F. Number of paychecks you will get in 2024
- G. **E ÷ F =** \$
This is the most you can contribute per paycheck.

Amount you elect to contribute to your HSA per paycheck (any amount less than or equal to the amount in G): \$

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Employee signature

By signing this form, I am requesting that payroll deductions start or change as shown in Section 3 and agree to the preceding terms. I understand there are maximum limits for how much I can contribute to my HSA per IRS rules, and I may be liable for tax penalties if I exceed this amount.

This request replaces any previous payroll deduction requests for my HSA.

Employee signature

Date

HCA is committed to providing equal access to our services. If you need an accommodation, or require documents in another format, please contact the following. **Employees:** Your payroll or benefits office. **Continuation coverage members:** Call us at 1-800-200-1004 (TRS: 711).

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