HSA (Health Savings Account) Question and Answers

Did the taxpayer have a health savings account (HSA) and any of the following situations for 2023?

- Contributions to an HSA (either by the taxpayer or someone on behalf of the taxpayer)
- Receive distributions from an HSA
- Fail to maintain an eligible individual during the testing period
- Acquire an interest in an HSA as a beneficiary

Answer Yes or No.

Question Answer Did the spouse have a health savings account (HSA) and any of the following situations for 2023? • Contributions to an HSA (either by the taxpayer or someone on behalf of the taxpayer) Receive distributions from an HSA • Fail to maintain an eligible individual during the testing period

Acquire an interest in an HSA as a beneficiary

Answer Yes or No.

Question	
payer have HSA	YES



Q: Did the taxpayer have any contributions that were made (either by the taxpayer or an employer) for 2023?

A: NO

The next steps are the most important- When someone has a distribution from an HSA

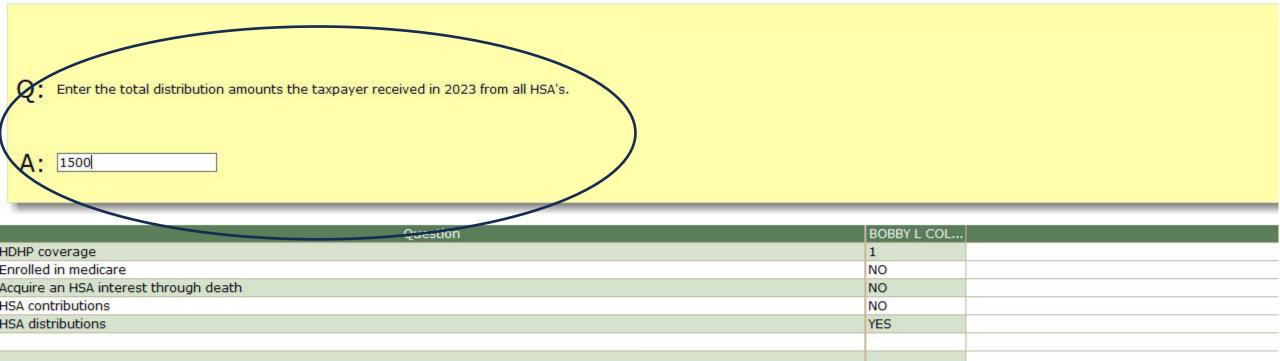
Q: Did the taxpayer receive distributions from the HSA (whether or not a Form 1099-SA was received such as a 'deemed' distribution) in 2023?

A: YES

Q: Did the taxpayer receive distributions from the HSA (whether or not a Form 1099-SA was received such as a 'deemed' distribution) in 2023?

A: YES

Question	BOBBY L COL
DHP coverage	1
nrolled in medicare	NO
cquire an HSA interest through death	NO
SA contributions	NO
Don't A set Oriver! (in the City)	



Q: Enter the total distribution amounts the taxpayer received in 2023 from all HSA's.

A: 1500

Question	BOBBY L COL
HDHP coverage	1
Enrolled in medicare	NO
Acquire an HSA interest through death	NO
HSA contributions	NO
HSA distributions	YES

Preparer - The total amount of distributions in 2023 is \$1,500.

Enter the amount of this distribution the taxpayer rolled over to another HSA. (Also include excess contributions and the earnings on the excess contributions that were withdrawn by April 15, 2024.)

A: 0

Question	BOBBY E COL
)HP coverage	1
ırolled in medicare	NO
quire an HSA interest through death	NO
SA contributions	NO
iA distributions	YES
nount of distributions	1,500

The amount used for Medical should be the same amount of the Distribution.

