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How to access your HSA tax documents

This article outlines how to access your health savings account (HSA) tax documents in your online account as well as your mobile app.

To retrieve your 1099-SA and 5498-SA in your online account, complete the following steps:

1. Log in to your [online account](#).
2. Navigate to the Message Center tab and then click "View Statements."
3. Click on the link for the HSA tax statement you want to view.

To retrieve your 1099-SA and 5498-SA in your mobile app, complete the following steps:

1. Log in to your [mobile app](#).
2. Navigate to the "Profile" section and tap "documents."
3. Tap on the HSA Tax Statements option.
4. Tap on the HSA tax statement you want to view.

Additional notes

- The 1099-SA shows distributions, and the 5498-SA shows contributions. Both documents will be available in your online account by mid-February.
- You can save and print the documents when you view them in your online account.
- Your tax documents are also available under Forms on the Videos & Forms tab in your online account.

Scenario	Resolution
You made contributions for the current tax year after the end of the calendar year.	You may need tax documents from both years to file your taxes. Consult your tax advisor for additional questions.
You did not make any contributions for the current tax year.	No 5498-SA will be generated.

You did not request any distributions during the current tax year.	No 1099-SA will be generated.
You received a refund that was greater than the total distributions for the current tax year.	
You made a contribution to correct a mistaken distribution, and the contribution was greater than the total distributions for the current tax year.	
You or a provider sent in a check to correct a mistaken distribution before the tax deadline for the previous tax year.	A corrected 1099-SA will be generated.
You are enrolled in a flexible spending account (FSA), not an HSA.	See Tax information for your Flexible Spending Account (FSA) for more information.