

How to view your Bank of America™ HSA tax forms

1099-SA and 5498-SA

There are two tax forms that are distributed to HSA account holders each year, the 1099-SA and the 5498-SA.

The 1099-SA provides a summary of distributions from your HSA. This form is mailed around the end of January and covers the previous calendar year.

The 5498-SA provides contribution details and is not mailed until May, because you have until the federal tax deadline (generally April 15) to make prior year contributions.

You can view and print a copy of these forms at ibxpress.com. More information about these forms is available at irs.gov.

1. Log in at ibxpress.com, and choose *Spending Account Summary* from the *Claims & Spending* tab.

The screenshot shows the Independence ibxpress website. The navigation bar includes Home, Benefits, Claims & Spending, My Care, and Health & Wellness. The Claims & Spending menu is open, showing options: My Claims Overview, Spending Account Summary (highlighted with a red box and a '1' in a purple circle), Other Insurance/Medicare Eligibility, and I want to... (View/Print Tax Year Report, Submit a Reimbursement). A search bar and social media icons are also visible.

2. Under *Related Links* in the left-hand navigation, choose *Access your Account Statements*. A new window will open to the *Account Summary* page.

The screenshot shows the RELATED LINKS section. The 'Access your Account Statements' link is highlighted with a red box and a '2' in a purple circle. Below it is a table with two rows of data:

DATE	TYPE	DESCRIPTION	STATUS
03/28/2016	HCRA	Distribution	Debit Card
03/25/2016	HCRA	Distribution	Debit Card

3. Choose *View Prior Year Tax Forms*.

The screenshot shows the SPENDING ACCOUNTS page. The left-hand navigation menu has 'View Prior Year Tax Forms' highlighted with a red box and a '3' in a purple circle. The main content area shows the HEALTH SAVINGS ACCOUNT summary with various options like 'View Account Activity', 'View HSA Account Number', and 'View Investment Statements'.



Need assistance?

Call the customer service number on the back of your member ID card. When you call, enter or say your ID number to be connected to a representative who can assist you.


Tip

Clicking *Access your Account Statements* is a quick way to get to your HSA Summary Page for performing many detailed activities.

4. To see or print a copy, click *View*.

TAX FORMS FOR HEALTH SAVINGS ACCOUNT-2015 TAX YEAR	
2015 Tax Year 1099-SA	View
2015 Tax Year 5498-SA	4 View
TAX FORMS FOR HEALTH SAVINGS ACCOUNT-2014 TAX YEAR	
2014 Tax Year 1099-SA	View
2014 Tax Year 5498-SA	View

A new window will open with a PDF that you can view, save, or print.

Bank of America  **COMBINED TAX STATEMENT**

BANK OF AMERICA, N.A.
PO BOX 25165
LEHIGH VALLEY PA 18002-5165

E.I.N. [REDACTED]

[REDACTED]

For Calendar Year
2015

Taxpayers Identification Number
[REDACTED]

ORIGINAL TAX FORM

2015 - 1099-SA, DISTRIBUTIONS FROM AN HSA, ARCHER MSA,
OR MEDICARE ADVANTAGE MSA

HSA ACCOUNT	ACCOUNT NUMBER	
BOX 1	GROSS DISTRIBUTION	[REDACTED]
BOX 3	DISTRIBUTION CODE	1
BOX 5	HSA	X

[REDACTED]

Important tax information

Download IRS Publication 969 at irs.gov for more information about the tax status of contributions and distributions. Please consult your tax advisor if you have questions.



Independence Blue Cross offers products through its subsidiaries Independence Hospital Indemnity Plan, Keystone Health Plan East and QCC Insurance Company, and with Highmark Blue Shield — independent licensees of the Blue Cross and Blue Shield Association.

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Independence Blue Cross does not offer banking, investment or financial services. HSA funds are maintained in accounts under the custody of Bank of America, a separate company that does not offer Blue Cross and/or Blue Shield products or services. Bank of America is not affiliated with Independence.

Language Access Services

If you, or someone you're helping, has questions about Independence Blue Cross, you have the right to get help and information in your language at no cost. To talk to an interpreter, call 1-800-275-2583 TTY 711.

Si usted, o alguien a quien usted está ayudando, tiene preguntas acerca de Independence Blue Cross, tiene derecho a obtener ayuda e información en su idioma sin costo alguno. Para hablar con un intérprete, llame al 1-800-275-2583 TTY 711.

如對 Independence Blue Cross 有任何問題，請您或您所幫助的人聯系我們提供的免費多語言信息服務。翻譯服務請撥打 1-800-275-2583。

Nếu quý vị hoặc người mà quý vị đang trợ giúp có câu hỏi về Independence Blue Cross, quý vị có quyền nhận được trợ giúp và thông tin bằng ngôn ngữ của quý vị hoàn toàn miễn phí. Để yêu cầu thông dịch viên, hãy gọi số 1-800-275-2583.

Если у вас или лица, которому вы помогаете, имеются вопросы по поводу программы Independence Blue Cross, то вы имеете право на бесплатное получение помощи и информации на вашем языке. Для разговора с переводчиком позвоните по телефону 1-800-275-2583.

Wann du hoscht en Froog, odder ebber, wu du helpscht, hot en Froog baut Independence Blue Cross, hoscht du es Recht fer Hilf un Information in deinre eegne Schprooch griege, un die Hilf koschtet nix. Wann du mit me Interpreter schwetze witt, kannscht du 1-800-275-2583 uffrufe.

Independence Blue Cross 와 관련하여 궁금한 사항이 있으신 경우, 귀하 또는 귀하의 지원을 받는 사람은 관련 정보 및 지원을 해당 언어로 무료로 받으실 수 있습니다. 통역사와 상담하시려면 1-800-275-2583 로 전화해 주십시오.

Se tu o qualcuno che stai aiutando avete domande su Independence Blue Cross, hai il diritto di ottenere gratuitamente aiuto e informazioni nella tua lingua. Per parlare con un interprete, puoi chiamare il numero 1-800-275-2583.

إذا كان لديك أو لدى شخص تساعد أسئلة بخصوص Independence Blue Cross، فلديك الحق في الحصول على المعلومات الضرورية بلغتك دون أي تكلفة. للتحدث مع مترجم اتصل بـ 1-800-275-2583.

Si vous, ou quelqu'un que vous aidez, a des questions à propos d'Independence Blue Cross, vous avez le droit d'obtenir gratuitement de l'aide et l'information dans votre langue. Pour parler à un interprète, appelez 1-800-275-2583.

Wenn Sie selbst oder eine Person, der Sie helfen, Fragen über Independence Blue Cross haben, so haben Sie das Recht, kostenlos Hilfe und Informationen in Ihrer Sprache anzufordern. Um mit einem Dolmetscher zu sprechen, rufen Sie bitte die Nummer 1-800-275-2583 an.

જો તમને અથવા તમે કોઈને મદદ કરી રહ્યા તેમાંથી કોઈને Independence Blue Cross વિશે પ્રશ્નો હોય, તો તમને મદદ અને માહિતી તમારી ભાષામાં કોઈપણ ખર્ચ વિના મેળવવાનો અધિકાર છે. દુભાષિયા સાથે વાત કરવા માટે, આ 1-800-275-2583 પર કોલ કરો

Jeśli Ty lub osoba, której pomagasz macie pytania odnośnie do programu Independence Blue Cross, mogą Państwo uzyskać bezpłatną informację i pomoc w Waszym języku. Aby porozmawiać z tłumaczem, proszę zadzwonić pod numer 1-800-275-2583.

Si ou menm, oswa yon moun w ap ede, gen kesyon konsènan Independence Blue Cross, ou gen dwa pou resewva èd ak enfòmasyon nan lang ou gratis. Pou pale ak yon entèprèt, rele 1-800-275-2583.

បើអ្នក ឬក៏នរណាម្នាក់ដែលអ្នកកំពុងជួយ មានសំណួរអំពី Independence Blue Cross អ្នកមានសិទ្ធិក្នុងការទទួលជំនួយនិង ព័ត៌មានជាភាសារបស់អ្នក ដោយឥតគិតថ្លៃ។ ដើម្បីជជែកជាមួយអ្នកបកប្រែ សូមហៅទូរសព្ទទៅលេខ 1-800-275-2583។

Se você, ou alguém a quem você está ajudando, tem perguntas sobre o Independence Blue Cross, você tem o direito de obter ajuda e informação em seu idioma e sem custos. Para falar com um intérprete, ligue para 1-800-275-2583.

Dii kwe'é atah nilínigíí Independence Blue Cross haada yit'éego bína ídílkidgo éi doodago háida bíká anilyeedígíí t'áadoo le'é yína'ídílkidgo bee ná ahóót'i'díí t'áá hazaadk'ehjí háká a'doowołgo bee haz'á doo bááh ílínigóó. Ata' halne'ígíí kojí' bich'í' hodíílnih 1-800-275-2583.

Kung ikaw, o ang taong iyong tinutulungan, ay may mga katanungan tungkol sa Independence Blue Cross, may karapatan kang makakuha ng tulong at impormasyon sa iyong wika nang walang gastos. Upang makausap ang isang interpreter, tumawag sa 1-800-275-2583.

ご本人やお客様の周りの人が、Independence Blue Cross についてご質問などがある場合、無料でご希望の言語でのサポートや情報を入手することができます。インタプリタをご利用の方は、1-800-275-2583 までお電話ください。

اگر شما یا شخصی که به وی کمک می کنید، در رابطه با Independence Blue Cross سوالی دارید، این حق برای شما محفوظ است که بدون نیاز به پرداخت هر نوع هزینه، اطلاعات مربوطه را به زبان خود دریافت نمایید. جهت گفتگو با یک مترجم، با شماره 1-800-275-2583 تماس حاصل فرمایید.

Nondiscrimination Notice & Notice of Availability of Auxiliary Aids & Services

Independence Blue Cross complies with applicable Federal civil rights laws and does not discriminate on the basis of race, color, national origin, age, disability, or sex. Independence Blue Cross does not exclude people or treat them differently because of race, color, national origin, age, disability, or sex.

Independence Blue Cross:

- Provides free aids and services to people with disabilities to communicate effectively with us, such as: qualified sign language interpreters; and written information in other formats (large print, audio, accessible electronic formats, other formats)
- Provides free language services to people whose primary language is not English, such as: qualified interpreters, and information written in other languages

If you need these services, contact our Civil Rights Coordinator.

If you believe that Independence Blue Cross has failed to provide these services or discriminated in another way on the basis of race, color, national origin, age, disability, or sex, you can file a grievance with our Civil Rights Coordinator. You have five ways to file a grievance directly with Independence Blue Cross: in person or by mail: Independence Blue Cross, ATTN: Civil Rights Coordinator, 1901 Market Street, Philadelphia, PA 19103; by phone: 888-377-3933 (TTY 711), by fax: 215-761-0245, or by email: civilrightscoordinator@ibx.com. If you need help filing a grievance, our Civil Rights Coordinator is available to help you.

You can also file a civil rights complaint with the U.S. Department of Health and Human Services, Office for Civil Rights electronically through the Office for Civil Rights Complaint Portal, available at <https://ocrportal.hhs.gov/ocr/portal/lobby.jsf> or by mail or phone at: U.S. Department of Health and Human Services, 200 Independence Avenue SW, Room 509F, HHH Building, Washington, DC 20201, 1-800-368-1019, 800- 537-7697 (TDD). Complaint forms are available at <http://www.hhs.gov/ocr/office/file/index.html>.

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