

# Optum Financial®



P.O. Box 622337 | Orlando, FL 32862-2337

KARAN BALKRISHN ADAP  
12217 131ST PL NE APT B022  
KIRKLAND WA 98034-8054

## Important IRS Tax Form 1099-SA

Dear KARAN BALKRISHN:

This enclosed IRS tax form 1099-SA shows your 2022 distributions from your HSA. Please use this information to fill out IRS tax form 8889 which is what you'll need to submit your taxes. To access IRS tax form 8889 sign in at [irs.gov](https://irs.gov) and navigate to Forms and Publications.

### Here's what you need to know:

- Box 1 includes your total distributions for 2022.
- Box 2 shows any earnings on the excess while it was in the account.
- Box 3 shows the distribution code. Different codes will display depending on the situation. Code 1 summarizes all reportable distributions made in 2022. This does not include fees or investment losses as these are not reportable. Code 2 reports any excess contribution corrected that were processed against your account. For all other code descriptions please contact a tax professional.
- Any corrections processed before 1/1/2023 are reflected on this form. However, any corrections processed in 2023 will cause a corrected tax document to be generated shortly.
- If you had any contributions that apply to 2022, you'll also get tax form 5498-SA.

**Ready to say goodbye to printed forms?** Sign in to your account, navigate to "Settings and Preferences" and select "Communication Preferences". From there, click the "HSA Communication and Notification" link and select the "email" option to update your communication preferences.

CORRECTED (if checked)

TRUSTEE'S/PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number  Connect YourCare P.O. Box 622337 Orlando FL 32862-2337		OMB No. 1545-1517  <b>2022</b>  Form <b>1099-SA</b>		<b>Distributions From an HSA, Archer MSA, or Medicare Advantage MSA</b>
PAYER'S federal identification number 261274092	RECIPIENT'S identification number *****5354	<b>1 Gross distribution</b> \$ 373.99	<b>2 Earnings on excess cont.</b> \$ 0	
RECIPIENT'S name KARAN BALKRISHN ADAP  Street address (including apt. no.) 12217 131ST PLACE NE B022  City or town, state or province, country, and ZIP or foreign postal code KIRKLAND WA 98034		<b>3 Distribution code</b>  1	<b>4 FMV on date of death</b>  \$ 0	
Account number (see instructions) 016503773545		<b>5 HSA</b> <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA MSA <input type="checkbox"/>		

Form 1099-SA

(keep for your records)

[www.irs.gov/form1099sa](https://www.irs.gov/form1099sa)

Department of the Treasury - Internal Revenue Service