



Via Benefits  
 PO Box 25101  
 Lehigh Valley, PA 18002-5101  
 Electronic Service Requested

# 2023 HSA Forms 1099-SA and 5498-SA



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 PREETI YADAV  
 24543 CARLTON SPRINGS LN  
 KATY, TX 77494-3189  
 USA

## Account Information:

**Taxpayer ID Number:** 9770  
**Account Number:** 363231893912757  
**Employer Identification Number:** 90-0234962  
**Payer Name:** Acclaris Inc.  
**Payer Address:** PO BOX 25101  
 LEHIGH VALLEY, PA 180025101

01/11/2024

Use this statement to help you prepare tax Form 8889 for your Health Savings Account (HSA) at tax time. It consolidates all the information you need for your HSA tax purposes.

Access this and all of your account tax statements online at [www.viabenefitsaccounts.com](http://www.viabenefitsaccounts.com).

### What is Form 1099-SA?

The 1099-SA section details all distributions made from your HSA in 2023.

### What is Form 5498-SA?

The 5498-SA section summarizes your contributions for 2023 and your balance on December 31.

<b>1099-SA:</b> Distributions From an HSA, Archer Medical Savings Account (MSA), or Medicare Advantage MSA		Corrected <input type="checkbox"/>
<b>Box 1</b>	<b>Gross Distribution</b>	\$3,133.47
<b>Box 2</b>	<b>Earnings on Excess Contributions</b>	
<b>Box 3</b>	<b>Distribution Code</b>	1
<b>Box 4</b>	<b>Fair Market Value on Date of Death</b>	
<b>Box 5</b>	<b>HSA</b>	X

<b>5498-SA:</b> Contributions to an HSA, Archer Medical Savings Account (MSA), or Medicare Advantage MSA		Corrected <input type="checkbox"/>
<b>Box 2</b>	<b>Total Contributions Made in 2023</b>	\$7,730.76
<b>Box 3</b>	<b>Total Contributions Made in 2024 for 2023</b>	
<b>Box 4</b>	<b>Rollover Contributions</b>	
<b>Box 5</b>	<b>Fair Market Value of Account</b>	\$27,535.98
<b>Box 6</b>	<b>HSA</b>	X

### **We're here to assist you**

If you have questions, please call Accounts Customer Care at 1-800-953-5395 (TTY: 711), Monday through Friday 8:00 a.m. to 7:00 p.m. Eastern Time.

Acclaris, Inc. offers all account services and is the HSA custodian.