

Guide to Finding Total HSA Contributions by Employee

SUMMING IT UP

The following instructions will assist you in finding an individual participant's Health Savings Account (HSA) contribution amounts, including adjustments, for the current or prior plan years.

Step 1: Log in to Your Online Account

Log in to LEAP and click on Benefits Administration.

Step 2: Navigate to the Contributions Tab

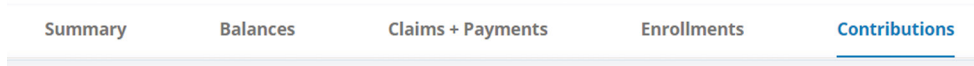
From the Employees tab, either search by employee name or employee number, or click View All Employees.

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Step 3: Select the Contributions Tab

Once you have located the employee, you will see several tabs below the employee information: Profile, Dependents, Enrollments, Contributions and Status. Select the Contributions tab.

● Status: Active >



Note: You may notice the Enrollments tab also shows information regarding the accounts the employee is enrolled in, as well as employer and employee contributions. This is not an accurate reflection of the true total contributions made to an account, as the total does not include any adjustments that may have been made during the plan year.

Step 4: Export Account Contributions

Click the "Export" button on the right-hand side of the screen, under the search options. This will export all of the contributions and adjustments that have been made on the account as a .CSV file.

A screenshot of a "FILTERS" section in a web application. It contains five dropdown menus, each with a label and a value: "Account type" set to "HSA", "Tax year" set to "All", "Account" set to "All", "Contribution type" set to "All", and "Contribution status" set to "All".

The .CSV file will download from the portal for you to view. Column F of the spreadsheet will list out all of the contributions and adjustments by date.