

HEALTH SAVINGS ACCOUNT (HSA) ENROLL/CHANGE FORM

2023 PLAN YEAR

IMPORTANT INFORMATION—PLEASE READ BEFORE COMPLETING THIS FORM

The contribution deducted from each 2023 pay period will be automatically calculated by the payroll system. This calculation will take into account your ANNUAL contribution request, subtract what you've already contributed (if applicable), then divide by the number of remaining pay periods (assuming twelve months of pay periods). The number of remaining pay periods is determined by when this form is received and processed (pay calculations close approximately one week before pay is issued; forms received after a pay period closing are not processed until the following pay period). You cannot reduce your annual pledge to an amount below what you have already contributed—refunds are not an option. Your annual pledge must be an amount between the minimum and maximum as described below.

The **Minimum Annual Contribution** is the greater of the plan minimum of \$300 OR your accumulated year-to-date contribution as of your last paycheck. The **IRS Maximum Annual Contribution** includes both IU's and your contributions. Maximums can be affected by your spouse's HSA contributions, Archer MSA contributions, and/or the number of months you are covered under an HDHP.

	IRS Max Annual Contribution	IU Annual Contribution	Your Max Annual Contribution	Your Max Annual Contribution if Age 55+
Employee-only	\$3,850	\$1,300	\$2,550	\$3,550
All Other Coverage Levels	\$7,750	\$2,600	\$5,150	\$6,150

SECTION 1—CHANGE REQUEST

- START HSA CONTRIBUTIONS**
Open an HSA in my name and set my 2023 ANNUAL contribution pledge at \$_____. I understand this amount will be divided equally over the remaining number of paychecks in the year. I certify that I meet the eligibility requirements for an HSA; authorize the plan administrator, Nyhart, an Acensus company, to open an HSA in my name with WEX Inc.; and agree to the [Custodial Agreement](#), [Electronic Disclosure Statement](#), [Patriot Act Requirements](#), [IU Benefit Card Terms and Conditions](#), and to [Nyhart's banking fees](#).
- CHANGE HSA CONTRIBUTIONS**
Enter your updated 2023 ANNUAL contribution pledge \$_____. I understand this amount (minus any prior YTD contributions) will be divided equally over the remaining number of paychecks in the year.
- STOP HSA CONTRIBUTIONS**
- Suspend my contributions. I certify that I have contributed at least the minimum annual contribution of \$300 or more.
- Stop my contributions. I am no longer an eligible individual to make contributions to a Health Savings Account. I understand this will transition my account to an individual account that is no longer associated with IU. I further understand that I will now be responsible for the monthly account maintenance fees associated with the account.

SECTION 2—EMPLOYEE INFORMATION

Employee Name:		University 10-Digit ID:	
Campus:	Department:	Phone:	
Email:			
Medical Coverage Level: <input type="checkbox"/> Employee Only <input type="checkbox"/> Family*		Pay Cycle: <input type="checkbox"/> Biweekly <input type="checkbox"/> Monthly	
Employee Authorization I authorize IU to withhold my contributions for this plan from my pay on a pre-tax basis. The per-pay period contribution will be determined by subtracting my year-to-date payroll deductions from the new elected annual amount and dividing over the remaining pay periods for the year. This change will take effect on the next available paycheck date, as determined by payroll's processing schedule.			
Signature:			Date:

*Family coverage includes Employee w/Spouse, Employee w/Child(ren), and Family coverage levels.

To sign and submit this form digitally you must first save it to your device.

This form may also be scanned and emailed to askhr@iu.edu; or mailed to IU Human Resources, 420 N. Walnut Street, Bloomington, IN, 47404.

HR USE ONLY

DATE RECEIVED: _____ ENTERED BY: _____ DATE ENTERED: _____