

2011	1040	US	Health Savings Accounts (8889)				32.1		
<b>HSA GENERAL INFORMATION</b>		Taxpayer		ST	Src	Spouse		ST	Src
NOTE: Contributions to an HSA are only eligible to persons covered under a high deductible health plan. For tax year 2011, a high deductible health plan is one with an annual deductible that is not less than \$1,200 for self-only coverage or \$2,400 for family coverage, and the annual out-of-pocket expenses (deductibles, co-payments, and other amounts, but not premiums) do not exceed \$5,950 for self-only coverage or \$11,900 for family coverage.									
Type of coverage: 1=self-only, 2=family	3				53				
Last month rule: 1=self-only, 2=family, 3=none [O]	45				95				
<b>HSA CONTRIBUTIONS &amp; DEDUCTIONS</b>									
Employer contributions to your HSA [O]	4				54				
HSA contributions that you made (1=maximum)	5				55				
HSA contributions made after you became eligible for medicare included above	32				82				
Contributions made (letter use only)	39				89				
Self-only coverage: Number of months eligible or considered eligible if not 12	35				85				
Family coverage: Number of months eligible or considered eligible, if not 12	26				76				
Limitation ( -1 if eligible for medicare benefits for the entire year ) [O]	7				57				
Allocable share of limitation (8889, line 6) [O]	37				87				
Additional contribution amount (8889, line 7) [O]	38				88				
HSA deduction [O]	36				86				
<b>HSA EXCESS CONTRIBUTIONS (5329)</b>									
Total 2011 excess contributions (-1 if none) [O]	9				59				
Excess contributions withdrawn by due date of return	10				60				
Income earned on the excess contributions withdrawn (1099-SA, box 2)	11				61				
Excess contributions from prior year	22				72				
Maximum allowable contributions less contributions made	23				73				
2011 taxable HSA distributions	24				74				
Prior year excess contributions withdrawal	25				75				
Value of HSA on 12/31/11 (5498-SA, box 5)	12				62				
1=report excess employer contributions as other income	13				63				
1=reduce distributions by excess contributions withdrawn	14				64				
<b>HSA DISTRIBUTIONS</b>									
Total HSA distributions received (1099-SA, box 1)	15				65				
Distributions entered above rolled over to another HSA	16				66				
Total unreimbursed qualified medical expenses	17				67				
Amount to exclude from 20% tax (1=exclude all)	18				68				
<b>HSA AFTER DEATH OF ACCOUNT HOLDER</b>									
1=acquired interest in HSA after death of account holder	19				69				
Fair market value of HSA at date of death (1099-SA, box 4)	20				70				
Qualified medical expenses of account holder paid by you	21				71				
<b>FAILURE TO MAINTAIN HDHP COVERAGE</b>									
Qualified HSA distribution	42				92				
Last-month rule	43				93				
Qualified HSA funding distribution	44				94				
							<b>Hash Total</b>	<b>32.1</b>	