

## How to make an HSA prior year contribution by U.S. Mail

In order to make a prior year contribution by mail, you will need a BenefitWallet HSA deposit slip, easily downloaded from the BenefitWallet member portal. You will also need to know the status of your HSA contributions for the 2020 tax year to ensure you don't overcontribute to your HSA.

**Please see the instructions below. All HSA prior year contributions must be completed by May 17, 2021; possibly June 15, 2021 for residents of Texas, Oklahoma and Louisiana if the IRS extends to align with Tax Day.**

### Step 1

Log in to the BenefitWallet member portal at [www.mybenefitwallet.com](http://www.mybenefitwallet.com).

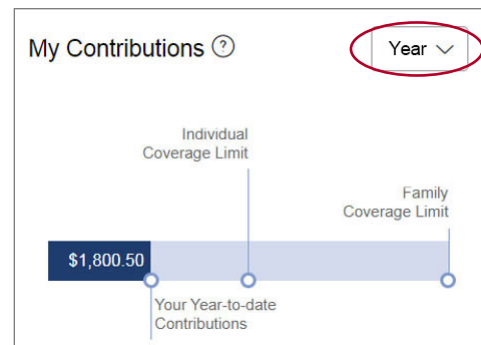
- If you need to create a User ID and Password, click **First Time User**.
- If you have forgotten your User ID, click **Forgot User ID**.

### Step 2

Check your 2020 HSA contributions on the home page; make sure to select **2020** from the drop down.

Per the IRS, the 2020 HSA contribution limits are:

- Individual: \$3,550
- Family: \$7,100



### Step 3

To download the BenefitWallet HSA deposit slip:

- Access the Resource Center and locate **Contribution and Distribution Forms** on the right-hand side of the page.
- Save the **Generic Deposit Slip** to your personal computer or print it out.



#### Contribution and Distribution Forms

[Generic Deposit Slip ?](#)

[Trustee to Trustee Transfer Form ?](#)

[Excess Contribution Form ?](#)

[Form 8889 ?](#)

[Instructions for Form 8889 ?](#)


[Request Copy of Check Form ?](#)

[Request Copy of Tax Form ?](#)

**Step  
4**

Prepare the mailing:

- Complete the deposit slip ensuring you check the box that says **Prior Year Deposit**.
- To locate your HSA account number, toggle the eye icon in the blue bar under "HSA" on the left side of the home page on the member portal.
- Write a check for the HSA contribution amount, ensuring you do not go over the 2020 IRS limit; make the check payable to **The Bank of New York Mellon**.
- Mail your check and the deposit slip to the address shown on deposit slip; all prior year contributions must be postmarked by May 17, 2021. (For residents of Texas, Oklahoma and Louisiana, possibly up until June 15, 2021 if the IRS extends the deadline to align with Tax Day.)



## Health Savings Account Generic Deposit Slip For Account Holders ONLY

Account Holder Name: \_\_\_\_\_


Address: \_\_\_\_\_

City, State and ZIP: \_\_\_\_\_

Account Number: 9 5 0 0

DATE: \_\_\_\_\_

MAIL TO: BenefitWallet  
P.O. Box 535161  
Pittsburgh, PA 15253-5161



**HSA DEPOSIT TICKET**

CHECKS			
TOTAL DEPOSIT			

Please check if this is a: ☐ Current year deposit  
☒ Prior year deposit  
☐ Roll-over deposit  
☐ Return of incorrect distribution

Indicate above if deposit is (1) current year deposit; (2) prior year deposit; (3) roll-over deposit; (4) return of incorrect distribution. You may also indicate deposit is both (a) prior year deposit; and (b) return of incorrect distribution.

Indicate below if the deposit is

☐ Remittance for negative account balance

Mail payment and deposit slip to:

**Mail**

BenefitWallet  
PO Box 535161  
Pittsburgh, PA 15253-5161

**Courier/Overnight**

HSA Operations  
500 Ross Street Suite 154-0510  
Pittsburgh, PA 15262-0001

Make checks payable to: The Bank of New York Mellon