American Health Resources  
11 North Second Avenue  
St Charles, Illinois 60174

TO: UMC – Health Insurance Participant  
FROM: American Health Resources  
SUBJECT: HSA Eligibility for Contributions  
DATE: November 16, 2016

The LA Conference health insurance plan for clergy and laity (who are not retired or on Medicare Supplement) is a High Deductible Health Plan (HDHP). IRS rules state that in order to receive or make contributions in the Health Savings Account (HSA) associated with this plan you cannot also have coverage under any other low deductible Health Insurance Plan (LDHP) or be enrolled in Medicare. (See IRS.gov for current definitions of HDHP and LDHP).

If your spouse or dependents are covered under a non HDHP then you may still be eligible for HSA contributions IF you are not covered by that plan. Your total HSA contributions would be limited to the current IRS employee only amount instead of the family amount.

Once you enroll in Medicare you are no longer eligible for any HSA contributions by employer or employee. However, if you are still primary on our plan and not retired, you may be eligible for HRA (Health Reimbursement Account). Contact the Conference Benefits officer for more info.

Please sign below to confirm that you are eligible for HSA contributions. This form should be completed and sent in for receipt by January 1, 2017. No contributions will be made for 2017 until a form is completed and received by the Conference Benefits Office and no back payments will be made if the form is received after the payment date for any particular month.

Eligible for family HSA_____ Eligible for Employee Only HSA_____  
Not Eligible for HSA_____  

Employee name ______________________________________  
(Please Print)

Employee Signature_________________________Date________

Best Regards,  
The Staff of AHR

RETURN BY MAIL TO  
CONFERENCE BENEFITS OFFICE  
527 North Blvd  
Baton Rouge, LA 70802  
OR MY EMAIL TO  
benefits@la-umc.org