

HSA Frontline Fundamentals

HSA Frontline Fundamentals is a half-day workshop that gives attendees a basic foundation of HSA knowledge. Exercises are included to help participants apply information to real-world scenarios. Attendees will leave this session able to confidently process basic HSA transactions. This is a beginner's session; no previous HSA knowledge is assumed.

Course topics may include

Introduction to HSAs

- Explain the benefits of an HSA
- Define high deductible health plan requirements
- Recognize the HSA eligibility requirements

Establishing an HSA Fundamentals

- Summarize the process for establishing an HSA
- Examine the required documents to establish an HSA

HSA Funding Fundamentals

- Define the contribution limits and the deadline
- Describe the last month rule and the testing period rules
- Ensure accurate regular contribution reporting

HSA Distributions Fundamentals


- Summarize the tax consequences of qualified and nonqualified distributions
- Describe a mistaken distribution
- Ensure accurate distribution reporting

HSA Portability Fundamentals

- Distinguish the rules for transfers and rollovers
- Ensure accurate rollover reporting

Who should attend?

You should attend this seminar if you need to learn the basics of HSAs.

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