

Boone County Employees Health Savings Account Eligibility Checklist

Employees wanting to enroll in the Health Savings Account must complete this checklist before enrolling.

- If you answer NO to all of the following questions, **you are eligible** to enroll in the Health Savings Account.
- If you CANNOT answer NO to all of the following questions, **you are NOT eligible** to participate in the Health Savings Account.
- Please contact Human Resources at awhelan@boonecountymo.org for more information.

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|--|------------------------------|-----------------------------|
| 1. I am enrolled in or covered by Medicare, Medicaid, or TRICARE benefits. | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 2. I will be covered under another health insurance plan that is not a High Deductible Health Plan, vision insurance, dental insurance, disability insurance, accident insurance or AFLAC-type specific injury insurance as of January 1, 2021. (May be a spouse's plan.) | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 3. I am a dependent on someone else's tax return. | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 4. I (or my spouse) will be enrolled in a Flexible Spending Account (like ASI) on January 1, 2021. | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 5. I am enrolled in a Flexible Spending Account (such as ASI) in 2020 and plan on having funds remaining on January 1, 2021. | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

**Even if you are not eligible for the Health Savings Account, you can still enroll in the High Deductible Health Plan (HDHP).*

By signing below, I certify I can answer "NO" to all questions and am eligible to contribute to a Health Savings Account.

Name (Print)

Date

Signature

Complete and return to Human Resources