



2027 Employer HSA Strategy

Please complete and submit by Oct 15th using button below

- 1) Employer: _____
- 2) Who is your current HSA Vendor? _____
- 3) Do you currently allow employee HSA elections in bswift during Enrollments? Yes
 - a) If not, do you want that option to be added for your 2027 Open Enrollment? Yes
 - b) Please note that if you allow employee HSA elections to be included in bswift, **and** you offer an Employer HSA contribution/match, that amount will also need to be included in bswift. This is to ensure that the total annual maximum doesn't exceed the IRS limit.
- 4) Will you be offering an Employer HSA contribution for 2027? Yes
If yes, please answer the following:
 - a) Annual amount: _____
 - b) Contribution or match? _____
 - c) Formula/criteria: _____
- 5) Do you want to allow an ongoing HSA enrollment window in bswift for 2027 which will allow your employees to make HSA election changes mid-year? Yes
- 6) If your HSA payroll deductions don't follow the same frequency as the rest of your deductions, please explain below. *For example, you have a 26 pay period schedule but you only take regular deductions on a 24 pay period schedule (the remaining 2 pay periods only include HSA deductions)* _____
- 7) Completed by: _____ Date: _____

Submit Form