For Merion Residential/MainLine Investment Partners/Merion Realty Partners Employees

Rel. June 2026

Health Equity H.S.A. Payroll Deduction Form Guide

*** For July 1, 2026 H.S.A. Entry ***

Instructions: This document provides general assistance for completing the Health Equity H.S.A. Payroll Deduction Form.

"Return Completed Forms To" section:

- You do not need to fill out this section.
- **You will return your completed form to Merion HR at mlaw@merionresidential.com.**

"Annual Employer Contribution Information" section:

Level of Coverage	H.S.A. - Company Provided Funding
Employee only	$750 / annual ($62.50 per month)
Employee + Dependent(s)	$1,500 / annual ($125 per month)

- The H.S.A. is calendar year based.
- The employer will make H.S.A. contributions monthly.
- Employee-only enrollees: $750 per year / 12 months = $62.50 per month.
- Employee + dependents enrollees: $1,500 per year / 12 months = $125.00 per month.

"H.S.A. Contribution Limits & Contribution Calculator" section:

- The H.S.A. is calendar year based.
- There are 26 payroll dates in 2026.
- There are 13 payroll dates between pay date 7/10/26 and 12/31/26.

Example #1/Employee A –

Employee A will enroll in the H.S.A. at the self-only (or employee only) level of coverage and they want to contribute the maximum amount in 2026 ($4,400).

- $4,400 maximum H.S.A. contribution (2026)
- $375 employer contributions (Period: 7/1/26 – 12/31/26; $62.50 per month x 6 months = $375)

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= $4,025.

- There are 13 payroll dates between pay date 7/10/26 and 12/31/26.
- $4,025 / 13 payroll dates = $309.62 biweekly.
- **Employee A will contribute $309.62 biweekly to their H.S.A.**

Example #2/Employee B –

Employee B will enroll in the H.S.A. at the family (or employee + dependents) level of coverage and they want to contribute the maximum amount in 2026 ($8,750).

- $8,750 maximum H.S.A. contribution (2026)
- $750 employer contributions (Period: 7/1/26 – 12/31/26; $125.00 per month x 6 months = $750

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= $8,000.

- There are 13 payroll dates between pay date 7/10/26 and 12/31/26.
- $8,000 / 13 payroll dates = $615.38 biweekly.
- **Employee B will contribute $615.38 biweekly to their H.S.A.**

"Employee Information & Authorization" section:

- Add your name, the last 4 digits of your social security number, and then sign and date the form.
- In the "*Please withhold $* _____" section of the form, list your biweekly contribution amount to your H.S.A.

****** Return your completed Employee H.S.A. Payroll Deduction form to Merion HR at mlaw@merionresidential.com. ******