



How Qualified Status Changes Impact Employer Health Savings Account Contributions

If you are already enrolled in the HSA medical plan, and experience a Qualified Status Change (QSC) during the year, you will receive the full difference in employer HSA contributions.

Examples:

- You are enrolled in employee only coverage and already received a \$500 employer HSA contribution. You add your spouse or domestic partner due to a QSC during the year. You will receive an additional \$250 for a total of \$750.
- You are enrolled in employee + child(ren) coverage and already received a \$1,000 employer HSA contribution. You add your spouse or domestic partner due to a QSC during the year. You will receive an additional \$250 for a total of \$1,250.
- You are enrolled in employee only coverage and already received a \$500 employer HSA contribution. You add your newborn baby or child(dren) due to a QSC during the year. You will receive an additional \$500 for a total of \$1,000.
- You are enrolled in employee + spouse/domestic partner coverage and already received a \$750 employer HSA contribution. You add a child due to a QSC during the year. You will receive an additional \$500 for a total of \$1,250.

If you are already enrolled in the HSA medical plan and change coverage tiers with less covered dependents or terminate your medical coverage, there is no change to the employer HSA contribution. The employer HSA contribution provided to you belongs to you.

Examples:

- You are enrolled in employee + spouse/domestic partner coverage and already received a \$750 employer HSA contribution. You terminate your spouse/domestic partner due to a QSC during the year. There is no change to the employer HSA contribution. The \$750 employer contribution that you received belongs to you.
- You are enrolled in family coverage and already received a \$1,250 employer HSA contribution. You terminate your child(ren) due to a QSC during the year. There is no change to the employer HSA contribution. The \$1,250 employer contribution that you received belongs to you.
- You are enrolled under any medical coverage level (employee only, spouse/domestic partner, children or family) and you terminate your coverage. There is no change to the employer HSA contribution. The \$500, \$750, \$1,000 or \$1,250 employer HSA contribution that you received belongs to you.

If you waived medical coverage as a new hire or during annual enrollment and enroll in the HSA medical plan due to a QSC, the employer HSA contribution will be prorated.

Example:

- You waived medical coverage as a new hire and enroll in the HSA medical plan due to a QSC during the year. The employer contribution will be prorated according to the new hire guide, regardless of your medical coverage level.

Please refer to dfinsolutionsbenefits.com for a listing of Qualified Status Changes and the Qualified Status Change Summary Plan Description.

Every effort has been made to ensure the accuracy of this material. In the unlikely event there is a discrepancy between this document, the SPDs, SMMs, any other materials summarizing the Donnelley Financial Group Benefits Plan or Donnelley Financial Flexible Benefits Plan documents, the official plan documents for these plans will control. Donnelley Financial, LLC reserves the right to amend, change or terminate any or all of the benefit plans it sponsors, including without limitation, the Donnelley Financial Group Benefits Plan and the Donnelley Financial Flexible Benefits Plan in whole or in part, at any time.