

Health Savings Account Expenses Worksheet



	Actual Expenses Last Year	Estimated Expenses New Year
High Deductible Health Plans		
Expenses toward plan deductible		
Prescriptions	\$ _____	\$ _____
Physician visits	\$ _____	\$ _____
Hospital	\$ _____	\$ _____
Laboratory/testing	\$ _____	\$ _____
Miscellaneous Health expenses not covered by insurance		
Over-the-counter medications	\$ _____	\$ _____
Dental		
Copays / expenses		
Dental visits	\$ _____	\$ _____
Fillings	\$ _____	\$ _____
Major work (root canals, crowns, dentures, etc.)	\$ _____	\$ _____
Orthodontia (braces)	\$ _____	\$ _____
Vision		
Eye examination	\$ _____	\$ _____
Eyeglasses	\$ _____	\$ _____
Contact lenses and solution	\$ _____	\$ _____
LASIK surgery	\$ _____	\$ _____
Other expenses	\$ _____	\$ _____
Hearing		
Hearing examination	\$ _____	\$ _____
Hearing aid	\$ _____	\$ _____
Miscellaneous Dental, Vision and Hearing expenses not covered by insurance		
Over-the-counter medications	\$ _____	\$ _____
Additional contribution to maximize annual savings	\$ _____	\$ _____
Total annual amounts	\$ _____	\$ _____

Health Savings Account Eligible Expenses

Use your HSA funds to pay for a variety of expenses for you, your spouse, and your dependents. Keep in mind **the IRS has specific rules about expenses that are eligible.**

What else is considered an eligible expense?

A **full list of HSA-eligible items** is available when you are logged in to your Chard Snyder online account. Go to the *Tools & Support* tab. Under *Quick Links*, click on the *Healthcare Eligible Expenses Table*.

OR go to

www.hsastore.com

Go to [Eligibility List](#) under *Resources*. Items are listed alphabetically and there is a search feature.

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