

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.chard-snyder.com

Go to [Benefits/Health Savings Account](#) and click on [HSA Eligible Expenses](#)

www.hsastore.com

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

 www.chard-snyder.com