

HSA Expense Tracker

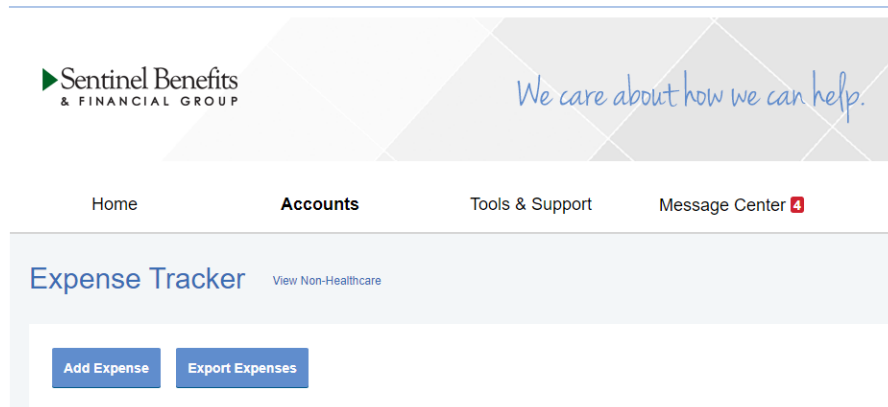
You may view and manage your expense activity all in one place by using the **Expense Tracker**.

The Expense Tracker provides you with an easy-to-use consolidated view of expenses for ongoing management of expenses, claims, and card transactions.

The Expense Tracker will serve as a "virtual shoebox" to store expense information. You can store, track, import, and export expenses and receipts for future reference. You can track your expenses only or create a payment/distribution for any unpaid expenses directly from the Expense Tracker page.

How do I add an expense to the Expense Tracker?

- From the I Want To menu of your online account, select **Expense Tracker**
- Click **Add Expense**
- Complete expense detail fields. You will also be able to upload a copy of the receipt and add notes to your record.



- **Edit** existing expenses by clicking the expense line to expand the claim details. You will be presented with options to add notes, update details of the expense, mark as paid/unpaid, or remove the expense.

The screenshot shows the 'Expense Tracker' interface with a summary table and a list of expenses. The summary table includes 'Total Expenses', 'Total Paid Expenses', and 'Total Unpaid Expenses'. Below the summary is a 'Filter By' section with a date filter 'From 1/1/2015'. The main table lists expenses with columns for DATE, EXPENSE, RECIPIENT/PATIENT, MERCHANT/PROVIDER, SUBMITTED AMOUNT, and STATUS. A detailed view for a dental expense is shown below the table.

Expense Summary	Total Expenses	Total Paid Expenses	Total Unpaid Expenses
	\$1,060.00	\$0.00	\$1,060.00
Total Eligible to Submit:	\$60.00		

Filter By Reset Filters

From 1/1/2015 X

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
7/4/2015	Dental	HSA Test	Dr. Smith	\$60.00	\$ Pay
Expense Details		Description: Dental		Date(s) of Service: 7/4/2015	
		Source: Online		Total Billed Amount: \$500.00	
		Expense Amount: \$60.00		Received Date: 7/27/2015	
		Payable Amount: \$60.00			
		Upload Receipt(s)	Add Expense Note	Mark as Paid	
		Remove Expense	Update Expense		
7/1/2015	Medical	Karen Karen	Dr. Who	\$1,000.00	\$

- **Export** expenses to Excel by clicking the Export Expenses button.

Can I request payment for an expense from the Expense Tracker?

You may process payments/distributions directly from the Expense Tracker. Simply click the Pay button to the right of the expense and you will be presented with eligible payment options. When you click Pay, the claim details from the expense will pre-populate and you can review and edit details as needed.

If you only need to request a distribution, you can also do so by selecting [Make An HSA Transaction](#)

Can I link my healthcare claims to my Expense Tracker?

Some plans will allow the option to receive claim data from your healthcare insurance carrier. If your plan allows this, click the Link Healthcare Claims button and provide required information. You will be alerted to new expenses within the message center of your online account. Once linked expenses are added to your tracker you may edit, export or request payment for any expenses.
