

# Chase Health Savings Account (HSA)



## MEDICAL EXPENSE WORKSHEET

Use this worksheet to keep track of your medical expenses throughout the year, and refer to it when preparing your taxes. Always keep receipts for any medical expenses\* incurred.

	Date	Expense	Person	Amount	Source of Payment (e.g. HSA, Cash, Credit)	HSA Qualified Expense?*	Notes
Sample 1	02/05/08	X-ray, Dr. Sample	Daughter	\$110.00	Chase HSA	Yes	Paid from my HSA. Saved receipt.
Sample 2	05/16/08	Aspirin, Cold Medicine (Drugstore)	Mother	\$25.00	Cash	Yes	Paid from my checking account. Saved receipt. I can reimburse myself from the HSA for this expense anytime in the future.
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\* You alone are responsible for determining if expenses are "qualified" medical expenses. You should maintain records of your medical expenses (including receipts) sufficient to demonstrate that distributions from your HSA have been made for qualified medical expenses. For a list of qualified medical expenses, please visit [http://www.irs.ustreas.gov/forms\\_pubs/pubs/p50205.htm](http://www.irs.ustreas.gov/forms_pubs/pubs/p50205.htm)