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, reimbursements, 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 **Track My Expenses**
- Click **Add Expense**
- Complete expense detail fields marked with an asterisk. You will also be able to upload a copy of the receipt and add notes to your record.
- Choose **Save for Later** if you would like to add the expense to the Expense Tracker, but NOT pay out the expense or Choose **Pay Expense Now** if you would like to file the reimbursement request.
- You can 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, or remove the expense.
- You may export expenses to Excel by clicking the **Export Expenses** button for a different view of your expense tracker.

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

You may process payments/reimbursements 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 reimbursement, 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.