

# HSA

## GET ORGANIZED WITH YOUR HEALTH SAVINGS ACCOUNT (HSA)

You are responsible for tracking how your health savings account (HSA) funds are spent. You need to keep these records:

- Receipts from your medical bills
- The periodic statements you receive from your HSA provider
- Any claims information from your insurance company

Keep HSA documentation for as long as your income tax return is considered “open” or as long as you have the HSA account. If the IRS conducts an audit, you will have the documentation to prove that you used the account for medically qualified expenses.

