HSA

Contribution & Reimbursement Tracking Log

An HSA requires enrollment in a qualifying High-Deductible Health Plan (HDHP). This log substantiates contributions stay within annual limits and that withdrawals were for qualified medical expenses.

Payroll through HeyDrew: contributions are captured automatically — use this log to reconcile.
External payroll: collect records from your payroll provider or document direct contributions here.

Account Holder Information

Account Holder Name:

Company Name:

HSA Custodian / Provider:

Account Number (last 4):

Tax Year:

Coverage Type: ☐ Self-only ☐ Family

HDHP Enrollment Confirmed: ☐ Yes

Date confirmed:

Contribution Limit Reference

Confirm the current year's IRS contribution limit for your coverage type before contributing. Self-only and family limits differ, with an additional catch-up amount allowed at age 55+.

Applicable Annual Limit (this year): $

Contribution Log

#	Date	Source	Amount ($)	Running Total ($)	Notes
1					
2					
3					
4					
5					

6					
7					
8					
9					
10					
11					
12					
	Total Contributed: $				

Remaining Room vs. Limit: $

Qualified Withdrawal / Expense Log

#	Date	Provider / Vendor	Expense Description	Amount ($)	Receipt (Y/N)
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
	Total Withdrawn: $				

Certification

I certify that the contributions logged above are within the applicable annual limit for my coverage type, that I was enrolled in a qualifying HDHP for the periods contributed, and that the withdrawals logged were for qualified medical expenses. Supporting receipts are retained and available upon request.

Account Holder Signature:

Date:

Disclaimer: The information in this document is for compliance recordkeeping purposes only and does not constitute tax, legal, or financial advice. Contribution limits and HDHP requirements change annually and depend on individual circumstances. Clients should consult with their own tax advisors. This is not a promise of qualification or a guarantee of specific outcomes.