



November 2021 - Gearing Up for OE - Expense Tracker

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- Audience: FSA and HSA participants
- Topic: Gearing up for OE - Expense Tracker
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Preview:



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Planning Tools for Open Enrollment

Are you heading into your organization's open enrollment period? Are you simply looking for a way to help keep track of your FSA and HSA spending? Sentinel offers a tool for you to do both: Expense Tracker.

Expense Tracker allows you to look at your historical spending in your FSA and/or HSA.

To access Expense Tracker, **log into your online account**, hover over Accounts, and select the Expense Tracker option. Once you're on the Expense Tracker page, you have access to the following:

- View your spending and create a custom date range
- Apply additional filters and sorting
- Use the Export Expenses option at the top of the page to pull your expenses into Excel

Pro Tip! Do you currently have an HSA, but are trying to save your account for the future? You'll want to create a virtual shoebox of qualified expenses that you can apply for reimbursement against your HSA in future years. Use the Expense Tracker to add expenses and save receipt images. This will allow you to maintain a bank of expenses should you have to validate an HSA distribution in future years! You can also store your expenses via your [Sentinel mobile app](#).

Understanding your expense history will be a key component to saving the appropriate amount in your Sentinel account. Check out this tool as a way to plan more accurately for your spending future.

[VIEW EXPENSE TRACKER](#)