

ABLE Qualified Disability Expenses (QDEs) Tracking Form

Generally, the money in an ABLE account can be distributed to pay for expenses that may help improve or maintain health, independence and/or quality of life. ABLE accounts are subject to IRS or SSI audits, so the account holder should keep a record of how money has been used. Use this form to track your loved one’s [Qualified Disability Expenses \(QDEs\)](#) and attach proof of payment for your home files. Reprint the second side of this form as needed to maintain your records.

Instructions

1. Fill in the **date** of payment in the format of MM/DD/YYYY.
2. Provide the **cost** of the expense, including taxes, shipping and handling, and any other expenses included in the payment.
3. State the name of the person or entity receiving the payment, or the **payee**, as listed on the proof of payment.
4. Briefly state the **purpose or cause of the payment**.
5. Check the appropriate boxes to indicate whether the expense will **maintain and/or improve health, independence, and/or quality of life**.
6. Provide an **explanation** of how the expense contributes to the account holder’s health, independence, and quality of life.

The following is an example of how to track an expense using the form on the reverse side.

DATE	COST	<input type="checkbox"/> MAINTAINS	EXPLANATION
MM/DD/YYYY	\$15,486.29	<input checked="" type="checkbox"/> IMPROVES	This car will allow me to independently get to and from doctor appointments and my job. I can also use it to meet-up with my friends. Until now, I have had to arrange appointments and social interactions around the bus schedule. This car will give me greater quality of life and independence through transportation.
PAYEE	Bremerton Toyota, Inc.	<input type="checkbox"/> HEALTH	
PURPOSE OR CAUSE OF THE EXPENSE	2006 Toyota Echo	<input checked="" type="checkbox"/> INDEPENDENCE <input checked="" type="checkbox"/> QUALITY OF LIFE	

[Learn more about ABLE: An Account to Overcome the SSI Resource Limit for Adults with Disabilities.](#)

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- IMPROVES
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