

The Quarterly Celiac Spending Audit Worksheet

A simple spreadsheet system that turns “I should track this” into “I’m tracking this”

By Gluten Hero

What this is

A pre-built spreadsheet template for tracking your celiac-related expenses by quarter. It is designed to be the **lightest possible system** that still produces audit-defensible records.

Use it if you are not ready for the Gluten Hero app but you want to stop losing money on uncaptured deductions.

What’s included

You are getting two files:

1. `gluten_hero_quarterly_audit.xlsx` — the actual spreadsheet, ready to open in Excel, Google Sheets, or Numbers
 2. **This guide** — how to use it
-

How to use the spreadsheet

Step 1. Open the file

Google Sheets:

1. Open Google Sheets, click File → Import → Upload
2. Select `gluten_hero_quarterly_audit.xlsx`
3. Choose “Replace spreadsheet” or “Create new spreadsheet”
4. Click Import data

Excel or Numbers:

1. Double-click the `.xlsx` file — it opens directly
2. Save a working copy labeled with the year (e.g., `gluten_hero_audit_2026.xlsx`)

Step 2. Fill in your expenses as they happen

The first sheet is **Transactions**. Add a row for every celiac-related expense, in real time or at end of week. Use the Category dropdown:

Category	What it covers	Deductible Amount logic
Food	GF groceries with a conventional equivalent	GF Price – Conventional Price
Specialty	Items with no conventional equivalent (xanthan gum, GF flour blends, certified GF oats, etc.)	Full GF Price
Medical	Visits, tests, supplements	Full cost
Mileage	Trips to specialty stores or medical appointments	Miles × \$0.21 (IRS 2025 rate) — log in Mileage Log sheet
Travel	Medical-purpose travel only	Full cost
HSA/FSA	Already-reimbursed expenses	Flagged; subtracted from Schedule A claim

Step 3. Run the quarterly audit

At the end of each quarter (March 31, June 30, September 30, December 31):

1. Open the **Quarterly Summary** sheet
2. Totals auto-calculate from your Transactions

3. Review for missing receipts, missing price comparisons, missing notes
 4. Save a copy labeled with the quarter (e.g., `gluten_hero_audit_2026_Q1.xlsx`)
-

Step 4. Year-end roll-up

At year-end, the **Annual Summary** sheet shows:

- Total food premium (deductible portion)
- Total specialty items (potentially fully deductible)
- Total medical expenses
- Total mileage (in dollars)
- Total HSA/FSA reimbursed (subtracted from Schedule A claim)
- **Net deductible amount for Schedule A**

Hand this to your tax preparer alongside your Doctor's Tax-Deduction Letter and you are done.

Spreadsheet structure

Sheet 1: Transactions

Column	Description
Date	YYYY-MM-DD
Vendor	Where you bought it
Category	Food / Specialty / Medical / Mileage / Travel / HSA/FSA
Item Description	Brief description (e.g., "GF bread, 24 oz loaf")
GF Price (\$)	What you paid
Conventional Price (\$)	What the conventional equivalent costs (leave blank for Specialty)
Deductible Amount (\$)	Auto-calculated: (GF – Conventional) for Food; full GF Price for Specialty/Medical/Travel
HSA/FSA Reimbursed	Yes / No
Notes	Where the receipt is saved; any context for the IRS

Sheet 2: Quarterly Summary

Auto-calculated quarterly totals by category, with transaction counts and net deductible per quarter.

Sheet 3: Annual Summary

Auto-calculated annual totals plus the **Net Schedule A claim** (deductible total minus HSA/FSA reimbursed), broken out by quarter and category.

Sheet 4: Mileage Log

Column	Description
Date	YYYY-MM-DD
Destination	Name and address of destination
Purpose	Medical reason (e.g., “Celiac follow-up appointment”)
Round-Trip Miles	Total miles for the trip
Mileage Cost (\$)	Auto-calculated at \$0.21/mile
Quarter	Q1 / Q2 / Q3 / Q4
Notes	Optional context

Pro tips

Set a weekly reminder. Friday at lunch, 10 minutes. Add the week’s receipts. That is the whole job.

Use the Notes column. Write where the receipt is saved (e.g., `Receipts/Q1/2026-03-14_wholeFoods.pdf`). Future you will thank present you.

For Specialty items, leave Conventional Price blank. The Deductible Amount formula uses GF Price for Specialty automatically.

For mileage, log purpose every time. “Whole Foods, GF specialty groceries” beats “Whole Foods.” The IRS wants the medical purpose documented.

Do not double-count HSA/FSA. The HSA/FSA Reimbursed column flags these so they do not get claimed on Schedule A too. The Annual Summary subtracts them automatically.

When to upgrade to Gluten Hero

This spreadsheet works. It is a real upgrade from no system. But it does require manual entry, manual price-comparison capture, and manual mileage logging.

Gluten Hero captures all of this passively: snap a receipt, the app auto-categorizes, runs the price comparison against a national database, logs your mileage via location services, separates HSA/FSA from Schedule A, and produces your year-end report in one click.

If you find yourself dreading the weekly spreadsheet review, that is the signal.

Sources

- [IRS Publication 502, Medical and Dental Expenses](#)
 - [IRS Standard Mileage Rates \(2025: 21 cents/mile medical\)](#)
 - [IRS Private Letter Ruling 202311001 \(quoting Rev. Rul. 55-261\)](#)
 - [Celiac Disease Foundation Tax Deduction Worksheet](#)
 - [Beyond Celiac Tax Deduction Guide](#)
 - [Gluten Intolerance Group, "Is Your Gluten Free Food Tax Deductible?"](#)
-

This template is general educational information, not personalized tax advice. Always consult a CPA or tax professional for your specific situation.