



PERSONAL INCOME TAX RETURN GUIDE FOR CLAIMING MEDICAL EXPENSES

It can be very time consuming for us to organize and input your medical receipts. By choosing to utilize the Medical Expense worksheet you will expedite our processing of your medical expenses and **hence reduce the cost for preparing your income tax return.**

Keep in mind that you can claim your expenses for any 12-month period **ending** in the year on that year's return as long as they were not previously claimed.

The list of qualifying expenses is long - check the General Income Tax and Benefit Guide on the CRA web site at <http://www.cra-arc.gc.ca/E/pub/tg/5000-g/> or call Canada Revenue Agency at 1-800-959-8281 to request a copy.

HOW TO ORGANIZE MEDICAL EXPENSES

There are 2 approaches to collating your medical expenses, depending on whether or not you have group insurance coverage.

Option 1 – If you have Group Insurance Coverage

- Your medical expense equals **only** that portion of the medical receipts that you did not get reimbursed for and any receipts not submitted to your group insurance company.
- See Example:

Service Date			Name of Insurance Company or Service Provider	Amount of Receipts Submitted or Actual Paid	Amount Reimbursed	Amount unpaid
<i>EXAMPLE</i>						
2010	2	22	Blue Cross	\$ 753.00	\$ 553.00	\$ 200.00
2010	3	7	Blue Cross	\$ 226.00	\$ 104.00	\$ 122.00
			<i>Total Submitted Medical Expense</i>			\$ 322.00
			<i>Expenses not submitted to Insurance Co.</i>			
2010	7	20	Iris Optical	\$ 599.00	\$ -	\$ 599.00
			<i>Total Medical Expenses for 2010</i>			\$ 921.00

Please see other side

