

MEDICAL EXPENSES

HOW TO ORGANIZE MEDICAL EXPENSES

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.

Service Date	Name of Insurance Company or Service Provider	Amount of Receipts Submitted or Actual Paid	Amount Reimbursed	Amount unpaid
<i>EXAMPLE</i>				
2016 2 22	Blue Cross	\$ 753.00	\$ 553.00	\$ 200.00
2016 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>			
2016 7 20	Iris Optical	\$ 599.00	-	\$ 599.00
	<i>Total Medical Expenses for 2010</i>			\$ 921.00

Option 2 – If you do not have Group Insurance Coverage

Payment Date	Name of Patient	Payment made to	Description of Medical Expense	Receipt Amount
<i>EXAMPLE</i>				
2016 2 22	Bob	Dr. Smith	Acupuncture	\$ 50.00
2016 3 7	Bob	Dr. Andrews	Dental	\$ 250.00
2016 3 20	Mary	Pharmasave	Prescription	\$ 43.28
2016 9 15	Bob	Dr. Andrews	Dental	\$ 653.00
	<i>Total Medical Expenses for the year</i>			\$ 996.28

You must provide all original receipts to us. We cannot process claims for any amounts unless accompanied by a valid receipt. If you are missing receipts, please contact your service provider to obtain duplicate copies.

- Medical expenses can be claimed for any 12-month period **ending** in the year on that year's return as long as they were not previously claimed.
- See the General Income Tax and Benefit Guide on the [CRA web site](#) for a list of allowable expenses
- Please organize your receipts and statements in date order.

