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## PERSONAL INCOME TAX RETURN GUIDE FOR CLAIMING MEDICAL EXPENSES

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 as long as they were not previously claimed.

The list of qualifying expenses is long - check the 2009 General Income Tax and Benefit Guide on the CRA web site at [http://www.cra-arc.gc.ca/E/pub/tg/5000-g/5000-g-04-09e.html#P1332\\_182433](http://www.cra-arc.gc.ca/E/pub/tg/5000-g/5000-g-04-09e.html#P1332_182433) 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>				
2009 2 22	Blue Cross	\$ 753.00	\$ 553.00	\$ 200.00
2009 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>			
2009 7 20	Iris Optical	\$ 599.00	-	\$ 599.00
	<i>Total Medical Expenses for 2009</i>			\$ 921.00

*Please see next page*

