GIVENS LLP
CHARTERED PROFESSIONAL ACCOUNTANTS

## Medical Summary

Do not include estimate or any amounts for which you have been reimbursed fo
Ensure you retain all receipts showing the amount paid, patient name, and details of the expense with your tax records for 7 year
If required, fill out mulitple copies of the form, ensure your total on last page is total of all page

**Name:** **Tax Year:**

| Name on Expense | Date | Description<br>**For Prescriptions, obtain printout from pharamcy for the year, alternatively fill out second schedule below** | Vision | Dental | Other | Medical Travel<br>**Confirm Current tax year KM and Meal Flat Rates on CRA's Site** | | | | Medical Meals | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | Parking | KM-One Way | Rate/km | $ | # Meals | Rate/meal | $ |
| | | | | | | | | 0.53 | - | | 23.00 | - |
| | | | | | | | | 0.53 | - | | 23.00 | - |
| | | | | | | | | 0.53 | - | | 23.00 | - |
| | | | | | | | | 0.53 | - | | 23.00 | - |
| | | | | | | | | 0.53 | - | | 23.00 | - |
| | | | | | | | | 0.53 | - | | 23.00 | - |
| | | | | | | | | 0.53 | - | | 23.00 | - |
| | | | | | | | | 0.53 | - | | 23.00 | - |
| | | | | | | | | 0.53 | - | | 23.00 | - |
| | | | | | | | | 0.53 | - | | 23.00 | - |
| | | | | | | | | 0.53 | - | | 23.00 | - |
| | | | | | | | | 0.53 | - | | 23.00 | |
| | | | | | | | | 0.53 | - | | 23.00 | |
| | | | | | | | | 0.53 | - | | 23.00 | |
| | | | | | | | | 0.53 | - | | 23.00 | |
| | | | | | | | | 0.53 | - | | 23.00 | |
| | | | | | | | | 0.53 | - | | 23.00 | |
| | | | | | | | | 0.53 | - | | 23.00 | |
| | | | | | | | | 0.53 | - | | 23.00 | |
| | | Total | | | | | | | | | | |

***Prescriptions - Please obtain a summary for full year from pharmacy. If this is not available, you may fill out the below for eligible prescriptions***

| Name on Expense | Date | Pharmacy | Amount |
|---|---|---|---|
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| | | | |
| | | Total | |

| TRAVEL AND MEALS FOR MEDICAL APPOINTMENTS |
|---|
| **Travel Expenses (less than 40 km) -** travel expenses cannot be claimed as a medical expense if you traveled less than 40 km's (one way) from your home to get medical services |
| **Travel Expenses(at least 40 km)** - the cost of public transportation expenses are elgible (ie; taxis, buses, trains) or vehicle expenses when a person needs to travel at least 40 km one way, but less than 80km, from their home to get medical services if services are within reason and not available closer |
| **Travel Expenses (at least 80 km)** - the cost of the travel expenses, including accomodations, meals, and parking, are eligible when a person needs to travel at least 80 km one way from their home to get medical services if services are within reason and not available closer |

**For more information on expenses that can be claimed, visit:**

https://www.canada.ca/en/services/taxes/income-tax/personal-income-tax.html

**For current meal and travel rates please visit:**

https://www.canada.ca/en/revenue-agency/services/tax/individuals/topics/about-your-tax-return/tax-return/completing-a-tax-return/deductions-credits-expenses/line-25500-northern-residents-deductions/meal-vehicle-rates-used-calculate-travel-expenses.html