

2019 Medical Expense Summary Worksheet

Name: _____

To expedite the preparation of your tax return, you may use this worksheet to summarize your medical and dental expenses.

It is important for you to keep the receipts with your tax documents as supporting evidence in the event of an IRS question or audit; however, we only need your medical expenses summarized as follows:

Prescription medications			
Fees for doctors, dentists, etc.			
Fees for hospitals, clinics, etc.			
Lab & X-ray fees			
Medical aids (eyeglasses, contact lenses, hearing aids, braces, crutches, wheelchair, etc.)			
Medical equipment and supplies			
Medical mileage expenses	Miles Driven	cents/mile	
Medical mileage expense		0.17	
Parking fees, tolls and local transportation for medical activities			
Lodging for medical purposes (up to \$50 per night per person)			
Health Insurance premiums			
Medicare B insurance premiums			
Medicare D insurance premiums			
SE health insurance not deducted as income adjustment			
Health insurance premiums paid from K1			
Other allowable health insurance premiums			
Qualified long-term care contract premiums	Filer	Spouse	
Age			
Qualified long-term care contract premiums			
Limitation (based on age)			
Amount deductible			
Total allowable health insurance prem			
Expenses to stop smoking			
Other out of pocket Medical/Dental expenses (specify)			
Less: insurance reimbursement for any expenses listed			
Total deductible medical and dental expenses*			

* Total does not include Qualified long-term care contract premiums

THE INTENT OF THIS WORKSHEET IS TO SUMMARIZE YOUR MEDICAL EXPENSES FOR THE PURPOSE OF TAX PREPARATION AND REPORTING. YOU THE TAXPAYER, ARE RESPONSIBLE FOR MAINTAINING AN ACCURATE AND COMPLETE RECORD OF YOUR MEDICAL EXPENSES. UNDER TAX REGULATIONS YOU ACKNOWLEDGE THAT YOU HAVE SUPPORTING DOCUMENTATION (I.E. RECEIPTS, BANK RECORDS) REFLECTING TRANSACTIONS FOR THE TOTALS STATED ABOVE.