



Truong Tax and Accounting Services Ltd.

(780) 999-9054 • terry@truongaccounting.ca • www.truongaccounting.ca

MEDICAL EXPENSES WORKSHEET

Taxpayer name _____ Tax year _____

Medical expenses for the taxpayer, spouse and dependants in excess of the lesser of \$2,635 for 2023 or 3% of the net income can be claimed. Generally, you must keep your records for six years from the end of the taxation year to which they relate (S 230 ITA) in the event of a review or an audit by the Canada Revenue Agency (CRA).

Medical Expenses

| | |
|--|-------|
| Prescriptions (Obtain annual printouts from your pharmacies or drugstores) | _____ |
| Dental | _____ |
| Optical | _____ |
| Chiropractor | _____ |
| Private Health Care Premiums | _____ |
| Other | _____ |
| Other | _____ |
| Other | _____ |
| Other | _____ |
| Travel, if applicable (Refer below) | _____ |
| Total | ===== |

Generally, you must travel at least 40 kilometres (one way) from your home to get medical services to claim as a medical expense. As well, you must travel at least 80 kilometres (one way) to claim meal and accommodation as a medical expense.

Travel

| | |
|---|-------|
| Travel (Km * \$0.55/km (AB 2022, simplified method)) | _____ |
| Meals (\$23.00/meal to max of \$69.00/day, simplified method) | _____ |
| Accommodations (Total from receipts) | _____ |
| Total travel | _____ |



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Medical Travel Worksheet

| Date of Trip | Patient Name | Doctor Name | Destination | Round Trip KM | # of People | Length of Stay | # of Meals | Hotel Costs |
|--------------|--------------|-------------|-------------|---------------|-------------|----------------|------------|-------------|
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