



## Summary Worksheet

This worksheet supports the structured tabulation of information, such as medical expenses, donations, invoices, or receipts.

Your client's situation:

- Your client has incurred medical expenses for their family
  - They received insurance rebates on some amounts paid
  - Some expenses were paid in USD
  - The client has a dependent aged 18 or over, subject to their own net income limitations
- Nature of expenses
  - Mr. A has routine expenses covered by insurance, and massages paid personally
  - Mrs. A has routine expenses covered by insurance, and medical expenses in USD
  - A Jr. has uninsured prescription expenses paid by Mr. A. which are eligible for transfer
  - For the purposes of this example
    - Tax year ended Dec 31, 2015
    - Insurance reimburses 50%
    - Value of each expense 100

Determine the amount eligible to be claimed as a medical tax credit (before net income thresholds), and support this amount in the event of a review

Prepared	Andrew	May 1, 2016
Reviewed		
Approved		

Tax year ended	Dec 31, 2015
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Totals		Ref
1 - Summary of Medical Expenses - Mr. A	450.00	
2 - Summary of Medical Expenses - Mrs. A	533.61	
3 - Summary of Medical Expenses - A Jr.	300.00	
4 - Summary	-	
5 - Summary	-	
6 - Summary	-	
<b>Total</b>	<b>1,283.61</b>	

1 - Summary of Medical Expenses - Mr. A		Ref
Massages	300.00	
Prescriptions 2	-	
Medical services	-	
Dental services	-	
Attendant care	-	
Health plan		
Gross expense	300.00	
(Reimbursement)	(150.00)	
<b>Net cost</b>	<b>150.00</b>	<b>150.00</b>
<b>Total</b>	<b>450.00</b>	

2 - Summary of Medical Expenses - Mrs. A		Ref
USD Medical	383.61	
Prescriptions 2	-	
Medical services	-	
Dental services	-	
Attendant care	-	
Health plan		
Gross expense	300.00	
(Reimbursement)	(150.00)	
<b>Net cost</b>	<b>150.00</b>	<b>150.00</b>
<b>Total</b>	<b>533.61</b>	

3 - Summary of Medical Expenses - A Jr.		Ref
Prescriptions 1	300.00	
Prescriptions 2	-	
Medical services	-	
Dental services	-	
Attendant care	-	
Health plan		
Gross expense	-	
(Reimbursement)	-	
<b>Net cost</b>	<b>-</b>	<b>-</b>
<b>Total</b>	<b>300.00</b>	

4 - Summary		Ref
Column 1	-	
Column 2	-	
Column 3	-	
Column 4	-	
Column 5	-	
Column 6	-	
Gross	-	
Adjustments	-	
Net	-	
<b>Total</b>	<b>-</b>	

5 - Summary		Ref
Column 1	-	
Column 2	-	
Column 3	-	
Column 4	-	
Column 5	-	
Column 6	-	
Gross	-	
Adjustments	-	
Net	-	
<b>Total</b>	<b>-</b>	

6 - Summary		Ref
Column 1	-	
Column 2	-	
Column 3	-	
Column 4	-	
Column 5	-	
Column 6	-	
Gross	-	
Adjustments	-	
Net	-	
<b>Total</b>	<b>-</b>	

Notes

Notes

Mr. A  
 Summary of Medical Expenses  
 Tax year ended Dec 31, 2015

∞ - YouTube example  
 ∞ - PDF example  
 ∞ - Worksheet support  
 Updated April 2016

Prepared	Andrew	May 1, 2016
Reviewed		
Approved		

Tax year ended	Dec 31, 2015
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Summary of Medical Expenses - Mr. A		Ref
Massages	300.00	
Prescriptions 2	-	
Medical services	-	
Dental services	-	
Attendant care	-	
Health plan		
Gross expense	300.00	
(Reimbursement)	(150.00)	
<b>Net cost</b>	<b>150.00</b>	<b>150.00</b>
<b>Total</b>	<b>450.00</b>	

2015 Annual forex rates	
AUD	0.960434
EUR	1.418163
GBP	1.953984
HKD	0.164940
JPY	0.010564
USD	1.278711

Massages	Prescriptions 2	Medical services	Dental services	Attendant care
Ref	Ref	Ref	Ref	Ref
300.00	-	-	-	-

Health plan		
Gross expense	(Reimbursement)	Net cost
Ref	Ref	Ref
300.00	(150.00)	150.00

Notes and calcs



