

MEDICAL EXPENSES

Dear Tax Clients

Starting in January 2019, medical expenses must be submitted to Sauve Tax Services in the following manner:

FOR OUT OF TOWN APPOINTMENTS MORE THAN 80KM ROUND TRIP – PROVIDE:

- Date of Each Trip and Where
- The Mileage for each Trip
- Parking Receipts (if you have them)

DO NOT PROVIDE GAS RECEIPT OR MEAL RECEIPTS – THESE ARE PER DIEM – SENDING RECEIPTS FOR GAS AND MEALS creates a lot of SORTING FOR US and a fee will be added to your invoice.

If audited, you will need to provide letters of confirmation for each appointment confirming your attendance.

IF YOU DO NOT HAVE INSURANCE COVERAGE:

Prescriptions:

Provide a detailed report from your pharmacy for the year (this can be obtained at any pharmacy for your entire family) usually available on January 2 of each year. **DO NOT** also provide individual RX Slips.

Dental, Physio, Chiropractor, Massage Therapy, Chiroprody, etc.

Ask your clinic or provider for a statement for the year that shows all visits, services rendered and payments (usually available on January 2 of each year). **DO NOT** also provide individual invoices.

Eye Glasses & Exams, Dr. Notes, Lab Tests, Physician's Premiums, Hospital Parking, Footcare

Submit all receipts as they are.

IF YOU HAVE INSURANCE COVERAGE:

Do not submit any of the above receipts if they were submitted to your benefit provider.

Do not submit individual claim forms.

Submit receipts ONLY if they were NOT submitted to your insurance provider.

You can sign into your online account and print a yearly summary that shows all the medical expenses you submitted. You must select "Service Dates" and not the dates they reimbursed you (ie you had a dentist appointment on December 29th but only received the reimbursement on January 3) because medical expenses must be claimed when the service was rendered and not when your reimbursement was received. These summaries will include all of the above showing the amount you submitted and the amount you were reimbursed. The total that was submitted and the total amount reimbursed to you will be indicated at the bottom of each statement.

You should print one summary for each member of the family (especially if you have children in college or university) as you cannot claim their medical expenses on your return after they turn 19, regardless of whether they are still covered under your plan.

If you don't have a computer or a printer, you can call your insurance provider and ask them for the yearly summary as well – one for each member of your family making sure you ask for the reports to be generated by Service Date.

FAILURE to submit medical expenses in this manner after January 1, 2019 may be subject to a **\$30+** fee added to your invoice at tax time. We have to make copies of all medical expenses so when we have to make copies of 50+ Prescriptions slips and dozens of invoices, it is time consuming and costly. We want to keep our costs down so we can pass that saving on to our valued tax clients.

Thank you for your cooperation.