

2022

# MEDICAL WORKSHEET

DO YOU ITEMIZE? YES/NO

MUST BE OVER 7.5% OF YOUR AGI: \_\_\_\_\_

DO YOU THINK YOUR MEDICAL EXPENSES ARE MORE THAN THIS AMOUNT? YES/NO

\*IF YOU HAVE A HEALTH SAVINGS ACCOUNT OR MEDICAL SAVINGS ACCOUNT, YOU CANNOT USE COSTS THAT WERE PAID WITH THESE FUNDS, YOU ALREADY RECEIVED A TAX BREAK

a.) INSURANCE PREMIUMS: Medicare supplements, Out of Pocket Health Insurance, Dental or Vision Insurance:

\$ \_\_\_\_\_

\*note: if you have insurance at work, the premiums you pay may be pre-tax and cannot be used as a deduction

\*\*Do not add Medicare PART B here, this is entered separately

b.) MEDICATIONS: Prescription out of pocket cost: \$ \_\_\_\_\_

c.) VISION: office visits, glasses, contacts cost out of pocket: \$ \_\_\_\_\_

d.) DENTAL: office visits, procedures, dentures, implants, braces: \$ \_\_\_\_\_

e.) MILEAGE: to and from appointments, picking up prescriptions: \_\_\_\_\_ miles

f.) SUPPLIES: Cost to modify home, grab bars, ramps, etc./crutches/walker/wheelchair/modify car/wigs: \$ \_\_\_\_\_

g.) LONG TERM CARE INSURANCE PREMIUMS YOU PAID: \$ \_\_\_\_\_

h.) NURSING HOME/IN HOME CARE: \$ \_\_\_\_\_

TAXPAYER SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_