

Worksheet for Medical/Dental/Vision Expenses

Use this worksheet to estimate your reimbursement of “out-of-pocket” medical, dental and vision expenses for the year. Remember:

- You can include unreimbursed expenses for spouse and dependents.
 - This is only a partial list from the “List of Eligible Expenses.”
 - See IRS publication 502 “Medical and Dental Expenses” for specifics on what the IRS allows.
 - Focus on the kinds of expenses you and your family normally have or have scheduled for the upcoming year.
- Remember – you will not get a refund of unused money that remains in your account. It’s better to be slightly conservative when determining the total deduction amount.

Acupuncture	\$	_____
Chiropractic care	\$	_____
Contact lenses and solutions	\$	_____
Co-insurance	\$	_____
Co-payments for office visits	\$	_____
Co-payments for prescriptions	\$	_____
Deductibles	\$	_____
Dental care expenses (routine)	\$	_____
Dental care expenses (fillings/other services)	\$	_____
Eyeglasses and prescription sunglasses	\$	_____
Fitness club membership if necessary for medical reasons	\$	_____
Fitness equipment if necessary for medical reasons	\$	_____
Hearing Aids	\$	_____
Immunizations and inoculations	\$	_____
Infertility treatment including in-vitro fertilization	\$	_____
Laser eye surgery	\$	_____
Orthodontic expenses	\$	_____
“Over the counter” eligible items	\$	_____
Psychiatric treatment/counseling	\$	_____
Other:	\$	_____
Total expenses:		\$ _____

“Over the Counter” products for Section 125 Health Care Reimbursement Accounts

Effective January 1, 2011

Drugs & Medicines sold "over the counter" such as aspirin, cold medicine, bacitracin etc. now require a prescription from your doctor to be eligible for reimbursement through your Section 125 Plan.

Not Eligible for reimbursement (partial list)

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|------------------------|--------------|---------------------------|---------------------------|
| Baby wipes & diapers | Dental floss | Ear treatments | Toothpaste |
| Moisturizers & powders | Deodorants | Mouthwash | Vitamins (general health) |
| Shampoo | Soap | Teeth whitening/bleaching | |

Call ABS at 1-877-732-8125 with any questions.

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