

## **Schedule A - Itemized Deductions**

line 40 from 1040 View>Medical and Dental Expenses or click on Deductions from Federal Section>Itemized Deductions>Medical and Dental Expenses

If itemizing deductions, select itemized deductions. If MFS and spouse itemizes, Select to enter state and taxpayer must also itemize. Standard local taxes paid during deduction can't be used. It doesn't matter the tax year in addition to which spouse files first. Select to force income tax withheld. itemized deduction. Itemized Deductions III III Use Standard or Itemized Deduction Medical and Dental Expenses Taxes You Paid Mortgage Interest and Expenses Gifts to Charity Unreimbursed Employee Business Expense Job-Related Travel Expenses Form 2106 Less Common Deductions Select to enter medical expenses.

#### Schedule A Deductible and Non Deductible Medical Expenses

#### You can include: You can't include: Bandages Medical and hospital Baby sitting and childcare Medical insurance Birth control pills prescribed by your doctor insurance premiums Nursing services Bottled water Contributions to Archer included in a car insurance policy covering all persons Body scan Braille books injured in or by your car Medicine you buy without a prescription MSAs (see Pub. 969) Oxygen equipment and Diaper service Expenses for your general health (even if following your doctor's advice) such as oxygen Part of life-care fee paid to Breast pump and supplies Capital expenses for equipment or improvements retirement home designated for medical care Nursing care for a healthy baby to your home needed for Health club dues Physical examination Prescription drugs you Household help (even if recommended by a doctor) Social activities, such as medical care (see the worksheet in Pub. 502) Prégnancy test kit Prescription medicines brought in (or ordered shipped) from another country, in most cases Nutritional supplements, vitamins, herbal Diagnostic devices (prescribed by a doctor) and Expenses of an organ donor Eye surgery—to promote the correct function of the dancing or swimming lessons —Trip for general health nsulin Psychiatric and psychological treatment Social security tax, Medicare tax, FUTA, and improvement Flexible spending account reimbursements for medical supplements, "natural medicines," etc., unless recommended by a eye Fertility enhancement, certain procedures Guide dogs or other animals state employment tax for worker providing medical expenses (if contributions were on a pre-tax basis) medical practitioner as a treatment for a specific aiding the blind, deaf, and disabled care (see Wages for nursing Funeral, burial, or cremation medical condition diagnosed by a physician Surgery for purely services below) Special items (artificial expenses Hospital services fees (lab Health savings account limbs, false teeth, eye-glasses, contact lenses, hearing aids, crutches, payments for medical cosmetic reasons Toothpaste, toiletries. work, therapy, nursing services, surgery, etc.) Lead-based paint removal expenses Operation, treatment, or cosmetics, etc. Legal abortion Legal operation to prevent wheelchair, etc.) Special education for medicine that is illegal under federal or state law Teeth whitening Weight-loss expenses not having children such as a vasectomy or tubal ligation Long-term care contracts, mentally or physically disabled persons Stop-smoking programs Life insurance or income for the treatment of obesity protection policies, or or other disease policies providing payment qualified Meals and lodging provided by a hospital during medical Transportation for needed for loss of life, limb, sight, etc. Maternity clothes medical care Treatment at a drug or alcohol center (includes meals and lodging provided treatment Medical services fees (from doctors, dentists, surgeons, specialists, and other by the center) Wages for nursing services Weight loss, certain medical practitioners) Medicare Part D premiums expenses for obesity



## **Schedule A - Itemized Deductions (Continued)**

Medical and dental insurance		\$
Note: We automatically pull over the		
* Medicare premiums paid on	your 1099SSA (Social Security).	
★ Self employed health insura		
♣ Do not include medical/dent  # Do not include medical/d	tal premiums deducted from your pay throu	gh a cafeteria plan (pre-taxed).
Amount paid to doctors/dentists		\$
Prescriptions  X-Rays, lab work, etc  Nursing help (not for healthy baby or housework)  Hospital care (including meals and lodging)  Alcohol/Drug rehabilitation		\$
		\$
		\$
		\$
		\$
Medical aids (hearing aids, crutches, wheelchairs, etc)		\$
Medical mileage driven (in miles)		
Other medical expenses	Description	Amount
		\$
Add/Edit Qualified Long-Term Care	Premiums:	Add Premiums

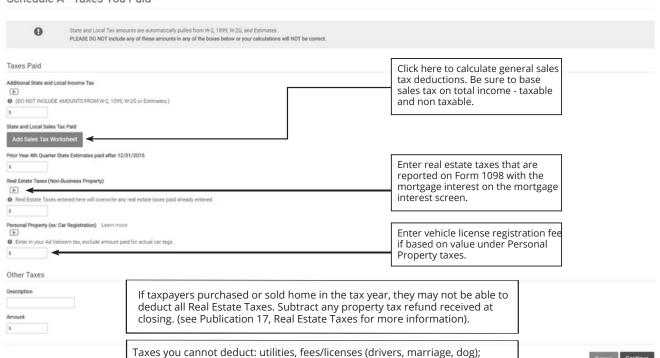
**Note:** Medical and dental floor percentage is 10%. *Some senior residences have an amount in the monthly cost which is a medical expense.* 

## Schedule A - Taxes You Paid

\* State and Local Tax amounts are automatically pulled from W-2, 1099, W-2G, and Estimates.

PLEASE DO NOT include any of these amounts in any of the boxes below or your calculations will NOT be correct.

### Schedule A - Taxes You Paid



assessments for improvements that increase property value; assessments for

services to the property (sewer, trash collection, etc.).



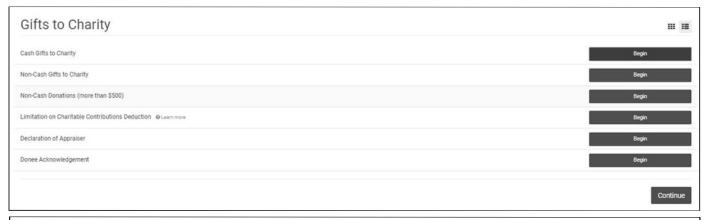
# **Schedule A - Itemized Deductions (Continued)**



Select for mortgage interest reported on Form 1098. Enter amount from Form 1098, box 1 (and box 2, if applicable).



If there are multiple mortgages, make additional Schedule A Interest entries. Points from refinancing must be spread over the life of the mortgage unless used to remodel (see Publication 17, Points). Enter loan origination fee from closing statement as Points not reported on Form 1098 if not included as points on Form 1098

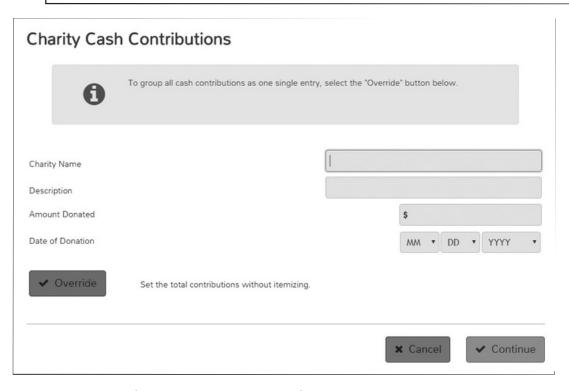


**These types of donations are not deductible:** political; country club/fraternal lodge; chambers of commerce; raff e, bingo, or lottery tickets; tuition; value of time/services; gifts to lobby groups; civic leagues, social clubs; labor unions, homeowners association dues.



# **Schedule A - Itemized Deductions (Continued)**

The cost of charitable raffles, bingos etc are not deductible as charitable donations but can be deducted as gambling losses to the extent of winnings.



Note: Enter amounts given by cash or check under Cash Gifts to Charity. The 30% & 50% refer to the percentage of your AGI that can be deducted this year. See Publication 17 for definitions. Enter the value of noncash items (including miles driven in service to a charity) donated under Non-Cash Gifts to Charity. Be careful to list them separately. If noncash contributions are greater than \$500 Form 8283 must be completed and this form is out-of-scope.

## Schedule A - Miscellaneous Deductions

