



# Your guide to the Medicare benefit tax statement

Information about medical services and expenses

medicare



## What is the Medicare benefit tax statement?

Your Medicare benefit tax statement contains information about medical services and expenses. This information is based on claims processed by Medicare within the financial year—not necessarily services performed within the financial year.

For example, if the medical service was performed in 2008–09 and not processed by Medicare until 2009–10, the medical service will appear on the 2009–10 Medicare benefit tax statement.

Your Medicare benefit tax statement may help you when claiming the net medical expenses tax offset.

### What is the net medical expenses tax offset?

If your net medical expenses are over the Tax Office's threshold, you can claim an offset in your tax return.

To claim the medical expenses tax offset in your tax return, you will need to know the total medical expenses you incurred for yourself and your dependants. You then deduct any refunds from Medicare, your health fund or any other reimbursements that relate to those expenses received during the financial year.

Your Medicare benefit tax statement:

- includes details about presented and un-presented receipts
- does not include details about bulk billing services as there is no charge to you
- does not include details about in-hospital claims made via the Simplified Billing claiming channel. Billing agents and health funds issue separate statements reporting financial details of in-hospital care.

**Service type:** indicates the type of service that the patient has claimed a Medicare benefit for during the financial year. The type of service can be:

- **medical**—includes services processed by Medicare from all doctors, including radiologists, pathologists and other specialists
- **optical**—includes services processed by Medicare for optometrists
- **dental**—indicates services processed by Medicare for approved dental practitioners.

### Your Medicare benefit tax statement shows

Patient's name	Service type	Charge	Benefit paid	Receipts presented	Receipts un-presented
John L Citizen	Medical	120.00	85.55	34.45	–
Jane M Citizen	Medical	250.30	190.20	54.00	6.10
	Optical	51.70	43.95	7.75	–
Robert P Citizen	Medical	45.00	38.25	6.75	–
	Optical	130.30	110.80	–	19.50
Mary T Citizen	Medical	105.00	95.00	–	10.00

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**Charge:** indicates the total amount you were charged for each service type processed by Medicare during the financial year.

**Benefit paid:** indicates the total Medicare benefit paid to you for services processed during the financial year.

**Receipts presented:** indicates that the account presented to Medicare for processing was paid in full. This amount is the difference between the charge for the service and the Medicare benefit paid—also called the out-of-pocket costs.

**Receipts unrepresented:** indicates that the account presented to Medicare for processing was not paid in full when you claimed from Medicare. This is the amount that Medicare can not confirm that you have incurred. Add this amount to the receipts presented amount and this will give you the difference between the charge and the Medicare benefit paid for the service.

The following scenarios are for the financial year 2006–07 and are examples only:

- if you visited the doctor on 26 June 2007 and claimed the Medicare benefit before 30 June 2007, the service will appear on the Medicare benefit tax statement for the financial year 2006–07
- if you visited the doctor on 26 June 2007 and claimed the Medicare benefit after 1 July 2007, the service will appear on the Medicare benefit tax statement for 2007–08.

These scenarios should be considered when using your Medicare benefit tax statement. You should check the services listed on your Medicare benefit tax statement against the receipts received from Medicare to ensure the services listed were claimed within the correct financial year.

More information about the net medical expenses tax offset is available:

- in the Tax Pack
- by calling the Tax Office on **132 861\***
- online at **www.ato.gov.au**

**Please note:** You must keep your Medicare benefit tax statement to prove your claim if the Tax Office asks you to.

### How to get a copy of your Medicare benefit tax statement

- Online—visit **www.medicareaustralia.gov.au/online**. If you're registered for Online Services you can download a copy instantly. If you're not registered, why not register now? You can register through our website or at your local Medicare office.

- Online—visit the Tax Office's website **www.ato.gov.au/etax** and download a copy directly into your e-tax application, or save and print a copy to use later.
- Call—**132 011\*** and speak with a Medicare Service Officer.
- Write—Release of Information Officer  
GPO Box 9822  
in your capital city.

**Note:** for privacy reasons you can only request a tax statement for yourself and your children under the age of 18 who are listed on your Medicare card. You can request statements for others listed on your card by calling **132 011\*** or submitting an online request form through the Medicare Australia website.

The Medicare benefit tax statement will then be mailed to each person over 18 years of age at their Medicare address.

### For more information

Online **www.medicareaustralia.gov.au**

Email **medicare@medicareaustralia.gov.au**

Write **Medicare Australia**  
**GPO Box 9822**  
in your capital city

Call **132 011\***

TTY **1800 552 152\*\*** (hearing and speech impaired)

TIS **131 450\*** (Translating and Interpreting Service)

If you need help translating this information call the TIS on **131 450\***

Arabic - إذا احتجت لمساعدة في ترجمة هذه المعلومات، يمكنك الإتصال بخدمة الترجمة التحريرية والشفهية على الرقم\*131 450

Korean - 본 정보의 이해를 위해 번역사의 도움이 필요하시면, 131 450\*번으로 TIS에 전화하십시오

Serbian - Ако вам је потребна помоћ да преведете информације, назовите TIS на 131 450\*

Spanish - Si necesita ayuda para traducir esta información, llame al TIS al 131 450\*

Turkish - Bu bilgiyi tercüme etmek için yardıma ihtiyacınız varsa 131 450\* numaradan TIS'i arayınız

Vietnamese - Nếu quý vị cần nhờ dịch thông tin này xin gọi cho TIS số 131 450\*

\* Call charges apply.

\*\* Call charges apply from mobile or pay phones only.