
Family Head Identification

Please complete **all** items on this page. This information is used on your income tax return and to customize your interview. The taxpayer entered here is the *family head*. You can add other family members once you complete the first three left side menu forms.

You cannot change your name using NETFILE.

The Canada Revenue Agency (CRA) will use the name they already have on record for you. Your name will not be transmitted with your return.

For information on changing your name, please visit the Canada Web site or contact CRA by phone at 1-800-959-8281 prior to using NETFILE.

CRA - NETFILE Access Code

For the 2021 tax year, prior to filing your tax return electronically, you will be asked to enter an **Access code**. This code does not apply to you if you are filing your tax return for the first time.

Your unique Access code can be found on your Notice of Assessment (NOA) for a previous tax year. This eight-character Access code is made up of numbers and letters and is located on the **right** side of your NOA. The placement and labelling of the Access code differs slightly depending on the version of the NOA you are looking at, but will always be on the right side of the NOA.

On the paper version of your NOA as well as the PDF version in My Account, the Access code is not labelled, but can be found directly underneath the **Date issued** at the top right of the page. If you are viewing your NOA in My Account or using the Express NOA service in certified tax software, the Access code is found directly under the **Notice details** box at the top right of the page.

You will have to enter your Access code after your name, date of birth, and social insurance number. While this Access code is **not mandatory**, if you do not enter your Access code, you will not be able to use any information from your 2021 tax return when confirming your identity with the Canada Revenue Agency. You will have to rely on other information for authentication purposes.

Identification

Designation (e.g. Mr., Mrs., Dr., etc.)

First name

Last name

Social insurance number

Date of birth (dd-mm-yyyy)

NETFILE Access Code (Canada Revenue Agency)

Situation on December 31, 2021

Click the ? of each of the next two lines in case of specific situations (emigrant, deceased person)

Ontario

▼

Province of residence on **December 31, 2021**

Single

▼

Marital status on **December 31, 2021**

No change

▼

Did your marital status change in 2021 (including separated for less than 90 days)?

▼

Gender (mandatory for Quebec residents)

Mailing address and residence information

Enter your mailing address.

You cannot change your mailing address using NETFILE. Any changes to your mailing address will not be updated with your return.

The Canada Revenue Agency (CRA) will use the mailing address they already have on record for you.

To change your mailing address:

If you are fully registered with My Account, visit the Canada Web site.

Otherwise, please contact CRA by phone at 1-800-959-8281.

Your change of address must be made before filing your return.

Mailing address:

<input type="text"/>	Apartment number
<input type="text" value="1 Tragically Hip Way"/>	Street No. Street name [e.g. 123 Maple Rd.]
<input type="text"/>	Post office box number
<input type="text"/>	Rural route
<input type="text" value="Kingston"/>	City
<input type="text" value="Ontario"/>	Province or territory
<input type="text" value="K7L 3N6"/>	Canadian postal code
<input type="text"/>	Care of (if applicable)

Information about your residence:

<input type="text" value="20-08-2021"/>	<input type="checkbox"/>	If your province or territory of residence changed in 2021, enter the date of your move.
<input type="text" value="No"/>	<input checked="" type="checkbox"/>	Is your home address the same as your mailing address?
<input type="text" value="Ontario"/>	<input checked="" type="checkbox"/>	Current province of residence if different from mailing address

Telephone number

(222) 456-7890

At home

(222) 456-7890

At work

Canada Revenue Agency (CRA) questions

Please complete all items in this section. These questions must be answered for your federal income tax return.

Information about you

English ▼

Language of correspondence and of tax return

Yes ▼

Are you filing an income tax return with the CRA **for the very first time**?

No ▼

Did you own **foreign property** in 2021 with a total cost **over CAN\$100,000**?

Did you sell a **principal residence** in 2021?

No ▼

The sale of a principal residence must now be reported, along with any principal residence designation.

Are you an officer or a servant of another country, **such as a diplomat**, or a family member or an employee of such a person, who were exempt from tax at any time in the taxation year?

Answering "Yes" to this question, you will not be eligible to the following credits:

- **Canada workers benefit, Schedule 6,**

▼

- **Climate action incentive "CAI", Schedule 14 (ON, MB, SK and AB residents only)**

Elections Canada

No ▼

Do you have **Canadian citizenship**?

Climate Action Incentive

Supplement for residents of small and rural communities

For the purpose of the CAI supplement for residents of small and rural communities, you must have resided outside of a census metropolitan area (CMA) on December 31, 2021, as defined by Statistics Canada in the last census they published before 2021.

CMA: Kingston ▼

Select the principal place of residence of the taxpayer on December 31

Email notifications from the CRA

Sign up to get email notifications when you have new mail to view in [My Account](#) and when important changes are made on your account.

Terms and conditions:

By providing your email address, you are registering for online mail and authorizing the Canada Revenue Agency (CRA) to send you email notifications when there is mail for you to view on My Account.

Any notices and correspondence delivered online on My Account will be presumed to have been sent on the date of that email notification.

You understand and agree that your **notice of assessment** and **notice of reassessment** and any future correspondence eligible for online delivery **will no longer be printed and mailed**.

Once we have processed your return, CRA will send you a registration email notification to the email address you have provided.

CRA usually processes paper returns in four to six weeks and returns filed electronically in as little as eight business days.

Please add **CRA.DoNotReply-NePasRepondre.ARC@canada.ca** to your address book, contact list, or safe senders list.

 

I accept the terms and conditions and I choose to receive email notifications from the CRA

Email address

Electronic filing - NetFile

The government's NETFILE service lets you file your tax return electronically over the Internet.

You must inform the CRA of any change in your address, name, direct deposit information, or date of birth **before** submitting your tax return using NETFILE. Your name, address and direct deposit information will not be transmitted with your federal NETFILE return. The CRA will use the information they already have on record for you.

To change your address contact CRA by phone at 1-800-959-7383 or [click here](#). For further information, including situations that make you ineligible for NetFile, [click here](#).

Your tax return is not automatically transmitted to the government when you select to use NETFILE here. After you have completed your return, you need to transmit your information to the government. For more information, [click here](#).

If you do not use NETFILE, you must print your tax return and mail it to the government.

NETFILE federal

Yes (if eligible) ▼

Will you be using NETFILE to submit your federal return electronically?

CRA - Prior year returns

NETFILE now accepts the current year and up to four prior-year returns.

If you intend to file more than one of these returns today or within the next two days select "YES" at the "prior year" question.

In order to accurately assess your returns, please file your returns in order, oldest return first.

No ▼

Will you be using NETFILE to submit a prior year federal return, **today or within the next two days**?

CRA Auto-fill my return

About *Auto-fill my return*

Auto-fill my return is a secure Canada Revenue Agency (CRA) service that allows you to automatically fill in parts of your tax return.

Take advantage of this new service to save time and access important tax information!

Auto-fill my return is not mandatory.

The CRA's Auto-fill my return service for the delivery of 2021 tax year data will be available for use as of **Monday February 21, 2022**.

CRA Express NOA

About *Express NOA*

Express NOA is a secure Canada Revenue Agency (CRA) service that allows you to request the electronic delivery of the Notice of Assessment directly into Ufile.

Take advantage of this new service to receive the Notice of Assessment **immediately after filing a return!**

Express NOA is not mandatory.

The CRA's Express NOA service will be available for use as of **Monday February 21, 2022**.

Interview setup

Tick any boxes which apply to your tax situation in each of the sections below. When you are finished, click *Next* and the Left side menu will show the topics for your customized interview.

Click on if you want to go directly to the topic on the Left side menu.

If you are not sure if you need a topic, tick it anyway. You can decide later, when the interview reaches the topic, whether or not to skip it. You may return to this page at any time to add other topics by clicking *Interview setup* in the Left side menu.

Specific situations

- ☐ **No income** to report in 2021
- ☒ **Immigrant, emigrant, non resident** taxpayer, you are a Canadian resident and your spouse immigrated to Canada in the year
- ☐ Tax return for a **deceased** person
- ☐ Tax return for a **Status Indian**
- ☐ **Prison** in 2021
- ☐ **Legal representative** or guardian

Employment and other benefits

- ☒ Employment income and employment insurance benefits (**T4, T4E/RL-6**)
- ☐ Social assistance, worker's compensation (**T5007/RL-5**)
- ☐ Union or professional dues not on T4 slips
- ☐ Employment expenses (**including T777S**)
- ☐ GST or QST rebate on employment or partnership expenses

Pension

- ☒ Pension income, other income and split pension income, COVID-19 benefits (**T4A, T4A(OAS), T4A(P), T4A-RCA, T4RSP, T4RIF, T1032**)

Rental
income

☐

Rental property income

Investment
income and
expenses

☒
☐
☐
☐
☐

Interest, investment income and carrying charges/interest expenses/CNIL (**T3, T5, T4PS, T5008, RC359**)
Partnership income, tax shelters (**T5013, T101, T5003, T5004, T1CP**)
Capital gains (or losses) and capital gain history
Foreign income or foreign property (**T1135**)
You need to calculate your Nova Scotia venture capital tax credit (**T224**) or your Nova Scotia innovation equity tax credit (**T225**).

Self-
employment

☐
☐

Self-employed business income
Investment tax credits

Student

☒

Tuition, education, textbooks, student loans, and Canada training credit

Common
tax deductions

☒
☐
☐

Medical expenses, disability, caregiver
Donations and federal political contributions
RRSP, HBP, LLP, other plans and funds (**T5006**)

**Parents
and children**

- ☐ Alimony or support payments
- ☐ Universal child care benefits (**RC62**)
- ☐ Child care (special cases)
- ☐ Adoption expenses and treatment of infertility

**Instalments and
tax transfer**

- ☐ Tax paid by instalments and tax transfer

**Other
topics**

- ☒ Moving expenses
- ☐ Repaid amounts made to the government or to an employer
- ☐ Other deductions and credits (including school supply and home buyers' amount)
- ☐ Adjustment request for a tax return that has been filed

**Carryforward
amounts and
prior year
information**

- ☐ Losses of prior years, carrybacks
- ☐ Alternative minimum tax carryforwards
- ☐ Prior year information

Immigrant, emigrant or non-resident

Select the relevant option. If none is relevant, click *Next*.

Immigrant, emigrant or non-resident

You **immigrated to Canada** in 2021

You **emigrated from Canada** in 2021

You were a **non-resident of Canada** for all of 2021.

You were a non-resident of Canada for all or part of 2021 and you are making an **election under s. 216** of the Income Tax Act.

You were a non-resident of Canada for all of 2021 and you are making an **election under s. 217** of the Income Tax Act.

You are a non-resident of Canada and you wish to file a **NR6 return**.

You are a Canadian resident and your **spouse immigrated to Canada** in 2021

Information about your residency status.

Immigration to Canada

If the Canadian-source income you are reporting for the part of the year you were not a resident of Canada **is at least 90%** of your net world income for that part of the year (or if you had no income from sources inside and outside Canada for that part of the year), you are **eligible to claim the full value** of deductions and credits on your tax return.

Otherwise your deductions and credits must be prorated by the time you resided in Canada. The program will decide if you are eligible for the 90% rule based on the information you enter here.

Note

If you are claiming full federal non-refundable tax credits, **attach a note to your tax return** stating your net world income (in Canadian dollars) for the part of the year that you were not a resident of Canada. Show separately the net income you received from sources inside and outside Canada for that part of the year. The CRA cannot allow full federal non-refundable tax credits without this note.

You have to enter the following two income, the **Canadian sourced income (excluding Part XIII income) earned when you were not a resident of Canada** and the **Canadian source Part XIII income PLUS foreign sourced income earned when you were not a resident of Canada**. If you have no income, select one option in each section and enter 0.

20-08-2021 Date of entry (dd-mm-yyyy)

Canadian sourced income (excluding Part XIII income) earned when you were not a resident of Canada

Select canadian sourced income

Income from Source of income
\$0.00

Canadian source Part XIII income PLUS foreign sourced income earned when you were not a resident of Canada

Name of country

Select foreign sourced income

Source of income
 *

If you receive old age security pension, you have to complete the T1136 return.

Do you wish to generate an old age security return for non-residents (T1136)?

T4 and employment income

If you earned employment income (e.g. T4 slips, tips) or received employment insurance benefits, select the appropriate item below. If you have more than one T4, complete one then return here and select again.

Click [Add](#) next to the item below to **add** a new page, then enter your information. If you do not need to add any (more) items, click *Next*. To **edit** a page, click the item added in the left side menu. To **delete** a page, click [Delete](#).

T4 and T4E	T4 income (earned in any province except Quebec) T4 and RL-1 (Relevé 1) income earned in Quebec with QPP contributions T4 and RL-1 (Relevé 1) income earned in Quebec with CPP contributions
Other	T4E - Employment insurance and other benefits Tips Other employment income Volunteer firefighters' amount and search and rescue volunteers amount
CPT20	CPT20 - CPP Election for Other employment earnings CPT20 - CPP Election for tax-exempt self-employment earnings of an Indian (Type N)
T1212	T1212 - Deferred employee stock option benefits

The information slips above (T4, T4E) are for employment income. You can enter other information slips by stepping through the interview topics or by selecting the corresponding sections from the left side menu. For a list of all information slips and where to enter them, [click here](#).

T4 - Statement of Remuneration Paid

Copy the amounts from your T4 employment income slip to the corresponding box numbers here. If a box is blank on your slip do not enter zero here - leave it blank.

Boxes 57 to 60, Employment income by period, are entered as **OTHER INFORMATION**.

Queen's University

Employer's name

\$10,000.00

Employment income 14

Ontario

Province of employment 10

\$90.00

Employee's CPP contributions 16

\$200.00

Employee's EI premiums 18

RPP contributions 20

Pension adjustment 52

\$1,000.00

Income tax deducted 22

\$10,000.00

EI insurable earnings (Warning: if 0, see help.) 24

\$10,000.00

CPP pensionable earnings (Warning: if 0, see help.) 26

Union dues 44

Charitable donations 46

Not exempt (1

Exempt (CPP/QPP, EI, PPIP) (Warning: If exempt, see help.) 28

Employment code 29

Housing, board and lodging

30

<input type="text"/>	Travel in a prescribed zone <input type="text" value="32"/>
<input type="text"/>	Personal use of employer's automobile <input type="text" value="34"/>
<input type="text"/>	Interest-free and low-interest loans <input type="text" value="36"/>
<input type="text"/>	Stock option benefits <input type="text" value="38"/>
<input type="text"/>	Other taxable allowances and benefits <input type="text" value="40"/>
<input type="text"/>	Employment commissions <input type="text" value="42"/>

<input type="text"/>	Eligible retiring allowances <input type="text" value="66"/>
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<input type="text"/>	- Portion of Box 66 transferred to a RRSP/PRPP
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<input type="text"/>	- Portion of Box 66 transferred to a RRSP/PRPP (Included in the unused RRSP/PRPP contributions of January/February 2021)
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<input type="text"/>	- Portion of Box 66 transferred to a RPP
----------------------	--

<input type="text"/>	Non eligible retiring allowances <input type="text" value="67"/>
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<input type="text"/>	Deduction for foreign farm workers
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<input type="text"/>	Amount of federal tax to transfer to Quebec (<i>Leave this blank to transfer the normal amount of 45% of the federal tax to Quebec.</i>)
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<input type="text"/>	Employee-paid premiums for private health services plans <input type="text" value="85"/>
----------------------	--

OTHER INFORMATION (click on the triangle to see the list of choices)

<input type="text" value="▼"/>	<input type="text"/>
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Complete this section if you elect to pay Canada Pension Plan (CPP) contributions.

Select the type of employment on which you elect to pay CPP contributions (CPT20)

<input type="text" value="▼"/>	<input type="text"/>
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<input type="text"/>	Address of the employer (CPT20)
----------------------	---------------------------------

Pension and retirement income

If you earned income reported on a T4A slip or received other pension or retirement income, select the appropriate item below. Do not enter foreign pensions here. Enter any foreign pensions (such as U.S. social security) under Foreign income. For tips relating to pensions, click here.

Click [Add](#) next to the item below to **add** a new page, then enter your information. If you do not need to add any (more) items, click *Next*. To **edit** a page, click the item added in the left side menu. To **delete** a page, click [Delete](#).

Pension income	T4A - Pension, retirement, annuity, and other income (COVID-19 benefits)
	T4A(OAS) - Old age security pension income
	T4A(P) - Statement of Canada or Québec pension plan benefits
	T4A-RCA - Statement of distributions from a retirement compensation arrangement (RCA)
	T4RIF - Income from registered retirement income fund
	T4RSP - Income from registered retirement savings plan
	Split pension income with your spouse

Enter foreign pensions under Foreign income. For **Priority year 1172** - amounts used to reduce the additional tax on registered pension income, click here.

T4A - Pension, retirement, annuity and other income

Copy the amounts from your T4A slip to the boxes below. For some of the boxes, you will need to choose the type of income that the amount represents. This additional information is needed to properly report the income on your tax return, and to claim any tax credits and deductions to which you may be entitled.

COVID Benefits, boxes 197 to 204, are entered as **OTHER INFORMATION**.

Queen's University

This T4A slip was issued by

Pension or superannuation

▼

016

Lump-sum payments

▼

018

Annuities

▼

024

PRPP payments

194

PRPP payments - death of spouse

194

Self-employed commissions (report also this amount as a T2125 - Commission income)

020

Fees for services (report also this amount as a T2125 - Business or Professional income)

048

Federal income tax deducted

022

The following entry applies only if the issuer of this slip deducted Quebec income tax on this income.

RL-1 box E or RL-2 box J - Quebec income tax deducted (Applies only if the issuer of this slip deducted Quebec income tax)

J

OTHER INFORMATION (COVID-19 benefits) (click on the triangle to see the list of choices)

(A payment of fees for services under **code 028** should be entered in **Box 048**)

[105] Scholarships, bursaries, fellowship

▼

\$3,000.00

Footnotes relating to specific T-slip entries **and Box 135**

▼

- Patronage allocations 030
- Patronage allocations - **non taxable** 030
- RPP contributions (past service) (*Include portions below.*) 032
- Portion of Box 032 for pre-1990 (contributor)
- Portion of Box 032 for pre-1990 (non contributor)
- Pension adjustment 034
- RESP accumulated income payments (*Include portion contributed to RRSP below.*) 040
- Portion of box 40 contributed to a RRSP
- RESP educational assistance payments 042
- Charitable donations 046

Investment and interest income and expenses

If you received interest from banks, earned interest on your income tax refund, or received income from investments, select the corresponding item below. If you incurred investment expenses, claim them using the last item below.

Click [Add](#) next to the item below to **add** a new page, then enter your information. If you do not need to add any (more) items, click *Next*. To **edit** a page, click the item added in the left side menu. To **delete** a page, click [Delete](#).

Income from a T-Slip	T3 - Trust income
	T4PS - Employee profit-sharing plan allocations and payments (including RC359)
	T5 - Investment income

Income not from a T-Slip	T5008 - Statement of securities transactions Interest income not on information slips
	Dividends from taxable Canadian corporations not on information slips
	Other Canadian investment income

Expenses	Carrying charges or interest expenses (line 22100)
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Other schedules	T936 - CNIL (cumulative net investment loss) balance
	T1206 - Tax on split income

If you have **Legal fees paid to collect salary or wages**, go to the section Employment expenses, and select *Legal fees paid to collect salary or wages*.

T5 - Investment income

Copy the amounts from your T5 - *Investment income* information slip to the boxes below. Enter all amounts in Canadian dollars.

TD Bank

This T5 slip was issued by

When the income relates to a **JOINT** account,
enter your percentage share in the account,

otherwise leave **blank**.

Enter an exchange rate **ONLY** when your slip shows a currency code in Box 27. The average exchange rate for \$US was 1.3415 in 2020. See the Bank of Canada's website (www.bankofcanada.ca) for other exchange rates.

Exchange rate applying to **ALL** currency amounts recorded on this slip

Important Note regarding dividends You need to enter the actual amounts of dividends received, as shown on the T5 slip.

Box 24 - actual amount of eligible dividends 24

Box 10 - actual amount of dividends other than eligible dividends 10

Boxes 25, 26, 11 and 12 of the T5 slip are optional.

Box 25 - taxable amount of eligible dividends 25

Box 26 - dividend tax credit for eligible dividends 26

Box 11 - taxable amount of dividends other than eligible dividends 11

Box 12 - federal dividend tax credit for dividends other than eligible dividends 12

Other boxes

\$50.00 **Box 13** - interest from Canadian sources 13

Box 14 - other income from Canadian sources 14

Box 15 - foreign income earned as dividends 15

<input type="text"/>	Box 15 - foreign income earned as interest <input type="text" value="15"/>
<input type="text"/>	Box 16 - foreign income tax paid on dividends income <input type="text" value="16"/>
<input type="text"/>	Box 16 - foreign income tax paid on interest income <input type="text" value="16"/>
<input type="text" value="▼"/>	Country name if you have foreign income.
<input type="text"/>	Box 17 - royalties from Canadian sources - work or invention <input type="text" value="17"/>
<input type="text"/>	Box 17 - royalties from Canadian sources - investments <input type="text" value="17"/>
<input type="text"/>	Box 18 - capital gains dividends <input type="text" value="18"/>
<input type="text"/>	Box 19 - accrued income - annuities <input type="text" value="19"/>
<input type="text"/>	Box 19 - accrued income - death of spouse <input type="text" value="19"/>
<input type="text"/>	Equity linked notes interest <input type="text" value="30"/>

Income derived from a "related business"

Answer the question below if an income reported on this slip derives from a "related business".

<input type="text" value="▼"/>	Does the tax on split income rules apply for this T5 slip?
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Other income

Make a selection below if you had other income in 2021 that you have not yet reported in this interview.

Click next to the item below to **add** a new page, then enter your information. If you do not need to add any (more) items, click *Next*. To **edit** a page, click the item added in the left side menu. To **delete** a page, click .

Other income	Labour adjustment benefits
	Grants or training allowance
	Death benefit received from employer upon death of your spouse
	T1198 - Qualifying retroactive lump-sum payment
	Other taxable income (federal line 13000)

Information from other T-slips

Click [Add](#) next to the item below to **add** a new page, then enter your information. If you do not need to add any (more) items, click *Next*. To **edit** a page, click the item added in the left side menu. To **delete** a page, click [Delete](#) next to the item.

RC210 - Canada workers benefit advance payments statement
[Federal Line 41500]

**Information
from other T-
slips**

For a list of all information slips and where to enter them, click [here](#).

If you have **T10 - Pension Adjustment Reversal (PAR)**, go to the section HBP, LLP and other plans and funds, and select *T10 - Pension adjustment reversal*.

Medical expenses, disability deductions

If you incurred medical expenses or are disabled, or if you housed an elderly relative whom you supported, select the relevant item below. For tips relating to medical expenses, click [here](#).

Click [Add](#) next to the item below to **add** a new page, then enter your information. If you do not need to add any (more) items, click [Next](#). To **edit** a page, click the item added in the left side menu. To **delete** a page, click [Delete](#).

Medical expenses	Medical expenses
	Sharing of medical expenses
	Last date of medical expenses

Disability deductions, caregiver	Infirmity and Disability amounts claim for yourself* (line 31600)
	Disability supports deduction for attendant care, etc. you needed to be able to earn income (line 21500)
	Home accessibility expenses (line 31285)

*To claim the disability amount transferred from a dependant or your spouse, first make the claim in the file of your dependant or spouse. The program will automatically transfer their unused disability amount to your tax return.

Medical expenses

Please enter medical expenses in the file of the family member for whom they were incurred. This will enable MaxBack to properly optimize the medical expenses deductions. To enter additional amounts, click below. Note that your total medical expenses must exceed the lesser of the threshold amount and 3% of your net income in order to reduce your taxes. If you already have a separate list of medical expenses, enter *See list* in the description section below and indicate the total amount. If you are filing electronically, keep your list and receipts in case the government should ask to see them. If filing a paper return, attach a copy of the list and your receipts to your tax return.

For more information, click here.

Do not enter here an amount which you already entered in **Box 85 of a T4 slip or in Box 135 of a T4A slip.**

For tips relating to medical expenses, click here.

Medical expenses

Dates (**dd-mm-yyyy**), descriptions of medical expenses, amounts in the \$ field. click here.

01-09-2021, UHIP - International Health Insurance	\$756.00
AMS health and dental plan	\$300.00
SGPS plan	\$300.00

Expenses for medical services not available in your area

Expenses for medical services not available in your area. click here.

Description	
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Specified medical expenses (not claimed elsewhere)

	Cost of attendant care
	Van adapted for wheelchairs (20% of payments)
	Moving expenses (more functional dwelling)
	Fees for a residential and long-term care centre

Tuition, education, textbooks and interest on student loans

If you attended post-secondary school in 2021, paid tuition fees, or have unused tuition and education amounts from prior years, select the 1st item below. If you paid student loan interest that you have not previously claimed, select the 2nd item. To transfer tuition, education and textbook amounts from a dependant, see the 3rd item.

You can watch the UFile video [How to claim the Canada Training Credit \(CTC\)](#).

Click [Add](#) next to the item below to **add** a new page, then enter your information. If you do not need to add any (more) items, click [Next](#). To **edit** a page, click the item added in the left side menu. To **delete** a page, click [Delete](#).

**Tuition,
education and
textbook**

T2202 Tuition and enrolment certificate* (TL11A and TL11C) (line 32300)

Interest paid on your **student loans** (line 31900)

Tuition amount **transferred from a child whose return is not processed** with yours (line 32400)

Part-time program details if you received scholarship, fellowship, and bursary income to be included at line 13010

[Canada training credit \(CTC\)](#)

*To claim tuition amount transferred by your spouse (line 36000 of Schedule 2), enter them in your spouse's file if you are preparing both returns together. If you are preparing separate returns, click [Spouse - basic information](#) in the left side menu, select *Yes* for the question *Do you wish to claim Schedule 2 transfers*, then see the page titled *Spouse - Schedule 2 transfers*.

Tuition, education and textbook amounts (T2202, TL11A, TL11C)

Use this page to enter information about your tuition and education expenses.

For useful tax tips for students, click [here](#).

As of January 1, 2017, the federal education and textbook amounts have been eliminated. In addition, some provinces have eliminated tuition and/or education and textbook amounts. The program will calculate according to the rules in your province of residence at the end of the year.

Note: You cannot claim the Canada workers benefit (CWB) if in 2021 if you were enrolled as a full-time student at a designated educational institution for more than 13 weeks in the year (3 months = 13 weeks), unless you had an eligible dependant at the end of the year.

Current year tuition amount

T2202, TL11A, TL11C

T2202 Eligible tuition fees paid to Canadian educational institutions for 2021

(Enter description in first field, amount in the \$ field.)

Queen's University

\$30,000.00

26

TL11A, TL11C Eligible tuition fees paid to foreign educational institutions for 2021

(Enter description in first field, amount in the \$ field.)

description

T2202 Number of months of **part-time** post-secondary studies

(or **TL11A/TL11C** Column B) 24

T2202 Number of months of **part-time** post-secondary studies

(if you were suffering from a major functional deficiency)

(or **TL11A/TL11C** Column B) 24

T2202 Number of months of **full-time** post-secondary studies

12

(or **TL11A/TL11C** Column C) 25

Charitable donations on T2202

Unused tuition and education amounts from prior years

Unused tuition and education amounts from prior years - **federal**

Unused tuition and education amounts from prior years - **provincial**

Transfer of current year unused amounts

Schedule 11: If your income is low, you may have unused current year tuition, education and textbook amounts. You can transfer these unused amounts to your spouse or to a parent to reduce their federal and provincial taxes. Unused amounts from prior years cannot be transferred to another person. Unused amounts that are not transferred will be carried forward for you to use in a future year.

Let MaxBack ▼

Treatment of current year unused tuition amount - federal

If you selected *Transfer ...* as an option above, and you wish to transfer the **maximum** of your current year unused amounts, leave the fields below blank. The program will then transfer your federal and provincial unused amounts (up to the maximum allowed for each). Different amounts can be transferred federally and provincially. If you wish to transfer only a **portion** of your unused amounts, enter the federal and provincial amounts in the corresponding fields below. For example, to transfer only provincially, enter «0» in the federal field and enter the amount to transfer in the provincial field. The maximum transfer is the lesser of the unused amounts or \$5,000. Note that the program will automatically limit the transfer to the unused amounts available.

Note: Since 2017, some provinces have eliminated the tuition and education amounts. If this credit is discontinued in your province, you will not see the provincial field below as no provincial amount can be transferred.

Portion of unused amount to transfer federally (max. \$5,000)

T1M - Moving expenses

If you moved at least 40 kilometres closer to your work or school, select the appropriate item below. If you moved in 2020 but could not claim all your expenses on your return for that year, select the last item below. For tips relating to moving expenses, click [here](#).

Click [Add](#) next to the item below to **add** a new page, then enter your information. If you do not need to add any (more) items, click [Next](#). To **edit** a page, click the item added in the left side menu. To **delete** a page, click [Delete](#).

Moving expenses

T1M - Moving expenses deduction
(you moved **closer to your workplace**).

T1M - Moving expenses deduction
(you moved **closer to your workplace** (simplified method)).

T1M - Moving expenses deduction
(you moved **closer to your school**).

T1M - Moving expenses deduction
(you moved **closer to your school** (simplified method)).

Unused moving expenses from a prior year

Ontario tax credits

The program automatically calculates your Ontario provincial forms and lines 42800 and 47900 based on information you enter in the interview. You can control whether you or your spouse receives certain Ontario tax credits using the second item below. For more information on Ontario tax and credits, [click here](#).

**Ontario
tax credits**

ON479 line 63110 - Ontario **political contributions** tax credit

Assigning Ontario credits to one **spouse** or the other

Separate residences: On December 31, you and your spouse were occupying separate residences for medical reasons.

Unused labour-sponsored funds tax credit

**ON-BEN
Application**

ON-BEN - Application for the 2022 Ontario Trillium Benefit
(Ontario sales tax credit, Ontario energy and property tax credit, Northern Ontario energy credit) and the Ontario Senior Homeowners' Property Tax Grant.

**ON-BEN
Declaration(s)**

Declaration for **rent paid** (tenants), including a **private** long-term care home

Declaration for **property tax paid** (owners)

Declaration for **student in a designated residence**

Declaration for **home energy costs** for residence on a reserve

Declaration for **amount paid** for **public** or **non-profit** long-term care home

To claim tax credits for self-employed individuals, see Credits for self-employed in the left side menu.

If you have **federal political contributions**, go to the section Donations/political contributions, and select *Federal political contributions*.

If you have **Ontario seniors' public transit** tax credit, go to the section Other deductions and credits and select *ON479 line 63100 - Ontario seniors' public transit tax credit*.

If you have **Ontario Seniors' Home Safety Tax Credit ON(S12)**
31285).

, go to the section Medical, disability, caregiver and select *Home Accessibility Expenses (line*

ON-BEN - Declaration - Rent paid for your principal residence (including a private long-term care home)

For more information, [click here](#).

Address of your principal residence (if different from current address):

Street

City

Postal code

Number of months you occupied this residence in 2021

Amount of rent paid for 2021

No ▼

 Is this residence a **private** long-term care home?

Name of landlord

If you have other declaration(s) to enter [Click here](#) to select whichever Declaration(s) applied to your situation in 2021.

ON-BEN - Declaration - Designated student residence

For more information, [click here](#).

Queen's University

Name of the designated university, college or private school residence.

For a list of Ontario designated residences, please [Click here](#).

If you have other declaration(s) to enter [Click here](#) to select whichever Declaration(s) applied to your situation in 2021.

Refund or balance owing

If you need to report a change in your direct deposit information, or you want to enclose less than the full amount due with your tax return, select the appropriate item below.

Click [Add](#) next to the item below to **add** a new page, then enter your information. If you do not need to add any (more) items, click [Next](#). To **edit** a page, click the item added in the left side menu. To **delete** a page, click [Delete](#).

Refund or balance owing	Amount enclosed
	Start direct deposit or change banking information
	Ontario opportunities fund (Ontario residents only)

MaxBack controls

MaxBack will automatically make decisions to lower taxes payable and maximize your refund. These options allow you to control how MaxBack works.

Schedule 6 - Canada workers benefit

No ▼ Are you in an exception situation which prevents you from claiming the Canada workers benefit (CWB, line 45300)?

Starting in 2019, the tax-exempt part of working income earned on a reserve or an allowance received as an emergency volunteer is excluded from the calculation of "working income" and "adjusted family net income" for the purposes of Schedule 6. It is up to the taxpayer to choose, pursuant to subsection 122.7 (1.1) of the ITA, to include the tax-exempt portion in the calculation of "working income" and "adjusted family net income".

Let Max ▼ Election to include tax-exempt income for purposes of Schedule 6

Schedule 14 - Climate action incentive

Claim ▼ Do you wish to claim the Climate action incentive (line 45110)?

Estimated calculations

Yes ▼ Do you wish to have the estimated **GST/HST** tax credit (including any related provincial credit)?

Schedule of marginal tax rate calculation

The marginal tax rate is the rate at which the next dollar of your income will be taxed.

▼ Do you wish to have the marginal tax rate calculation?

Tax checklists

Given the variety of deductions and tax credits that can be claimed when filing a tax return, many individuals do not know what amounts they could be eligible for. **To help people avoid potential oversights** in tax returns, starting in 2020, the program will generate the following two checklists that can be used as reminders: General checklist, and Medical expenses checklist.

By default, these two checklists will be automatically generated in the file of each individual for whom a return is calculated in the software. Use this section to control the display of these lists.

☐

Do you want to have the tax checklists?

Other

As per CRA NETFILE's specifications, the program must require the taxpayer to answer one or several of the three questions below. If applicable, UFile will prompt you to do so in the NETFILE section when you calculate and access the **Review** page.

☐

If applicable (click ? for details), please select Yes to confirm that your spouse's adjusted taxable income is NIL. (see your Schedule 2, line 36100)

If applicable (click ? for details), please select Yes to confirm that your spouse's provincial/territorial adjusted taxable income is NIL. (see your Provincial/Territorial

☐

Schedule (S2), line 59120)

If applicable (click ? for details), please select Yes to confirm that your eligible dependant's net income is NIL. (see your Schedule 5, section 30400, line 51106)

☐

Free for Students special offer

UFile.ca, together with the Canadian Federation of Students (CFS), is pleased to offer a special promotion that lets students prepare and file their 2021 tax returns free of charge. To take advantage of this special offer, get your UFile/CFS code from the Canadian Federation of Students Web site and copy it below.

Enter the Canadian Federation of Students *Free for Students* special offer code (7 characters).

End of interview

Well done! To review your results, view messages and more, click on the [Review](#) section.

Did the interview miss something?

Check the *Interview setup* selections for other topics that apply to you.

Do you have a spouse or dependants?

To produce an accurate tax return it is important to include the data for your whole family. Click on *add spouse* or *add dependant*, and then click on the *Next* buttons to work through the interview process for that person.

How do I . . . ?

- Review or change my information
- View the tax results summary and diagnostics
- View or print the tax return
- Netfile the tax return
- Switch to another family member
- Remove a family member