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 can watch the application video Basics of the interview screen.

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 2024 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 <u>right</u> 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 2024 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
Queensu
Last name
Student
Social insurance number 000-000
000-000-000

Date of birth (dd-mm-yyyy) _{mm-yyyy}					
	31-03-1999	aa			
	NETFILE Acces	ss Code (Canada Revenue Agency)			

Situation on December 31, 2024

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

Province of reside	nce on December 31, 2024	
Ontario 🗸		
Marital status on D	December 31, 2024	
Single	~	
D' 1		
Did your marital st	atus change in 2024 (including separated f	or less than 90 days)?
No change ✓		
Gender (mandator	y 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:

Apartment number
Street No. Street name [e.g. 123 Maple Rd.
1 Tragically Hip Way
Post office box number
Rural route
City
Kingston
Province or territory
Ontario ~
Capadian postal code K7L 3N6
Care of (if applicable)

Information about your residence:

dd-n	n <u>m5</u> yyyy ₂	2024										
	ls your	home	addre	ss the sa	me as yo	our mailin	ng addre	ss?				
	No	~										
	Current Ontario		nce of	residenc	e if differe	ent from	mailing	address				
Telepl	hone r	num	ber									

At work

Cellular phone number

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

Consent to share contact information - Organ and tissue donor registry

Do you authorize the CRA to provide your name and email address to the Government of Ontario for the purpose of being contacted or sent information about organ and tissue donation and to maintain the Organ and Tissue Donor



Notes:

You are **not** consenting to organ or tissue donation when you authorize the CRA to share your contact information with the Government of Ontario. Your information will **only** be used under the Ontario Gift of Life Act. Your authorization is valid only in the tax year that you file this tax return.

Canada carbon rebate

The Government of Canada has announced its intention to **deliver the Canada carbon rebate (CCR) as a quarterly benefit**. If you are eligible, you would automatically receive your CCR payments four times a year, starting in July 2025. To receive your payments, you have to file a tax return even if you did not receive income in the year. For more information, go to <u>canada.ca/child-family-benefits</u>.

Supplement for residents of small and rural communities

For the purpose of the CCR supplement for residents of small and rural communities, you must have resided outside of a census metropolitan area (CMA) on December 31, 2024, and you expect to continue to reside outside the same CMA on April 1, 2025. To determine if you reside outside a CMA, go to Find out if you qualify for the supplement for residents of small and rural communities.

Select the principal place of residence	e of the taxpayer on December 31
CMA: Kingston	•

Email notifications from the CRA

Sign up to get email notifications when you have new mail to view in <u>My Account</u> 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 accep	t the	terms and conditions and I choose to receive email notifications from the CRA
No	~	
Email a	ddre	ee e
Linaira	uuic	

Foreign mailing address from the CRA

Do you have a foreign mailing address on file with the Canada Revenue Agency?

No

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 <u>click here</u>. For further information, including situations that make you ineligible for NetFile, <u>click here</u>.

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, <u>click here</u>.

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

NFTFILF federal

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

Yes (if eligible) ✓

CRA - Prior year returns

NETFILE now accepts the current year and up to seven 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.

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 2024 tax year data will be available for use as of **Monday February 10, 2025**.

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 **Notice of Assessment** provides an account summary with the result of the assessed return showing a refund, a zero balance, or a balance owing, tax assessment summary, explanation of changes and other information, as well as the RRSP/PRPP deduction limit statement. It may also contain the Home Buyers' Plan statement and Lifelong Learning Plan statement.

The Express NOA service is available year-round.

Use Express NOA in this file?



Yes, Use Express NOA in this file

You can download the Notice of Assessment at step 5) NETFILE after successfully filing the return electronically.

Using the Express NOA service for the first time?

Click here to view the tutorial

To use this service:

You must be signed up for **Email notifications** from the CRA.

Note: your notices of assessment will no longer be printed and mailed.

You must be registered with CRA's My Account.

If you are making a request on behalf of a family member or a friend, you need to:

Become authorized to use Express NOA on their behalf. You can get this authorization by obtaining a RepID, this identifies you with the CRA, through the <u>Represent a Client</u> portal and complete an E-authorization web submission for Authorizing or Cancelling a Representative.

Give your RepID to your family member or friend so they can authorize you as their representative, and then complete an E-authorization web submission for Authorizing or Cancelling a Representative through their <u>My Account</u>.

Once you are authorized, you can access their Notice of Assessment in the software.

Interview setup

Tick any boxes which apply to your tax situation in each of the sections below. When you are finished, click <i>Next</i> and the 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.				
	eed a topic, tick it anyway. You can decide later, when the interview reaches the topic, whether to this page at any time to add other topics by clicking <i>Interview setup</i> in the Left side menu.				
Specific situations	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 2024 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 work-space-in-the-home expenses, tradesperson's and apprentice mechanic tools expenses, etc) GST or QST rebate on employment or partnership expenses				

Pension and other income	Pension income, other income and split pension income, COVID-19 benefits (T4A, T4FHSA, 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 cred (T224) or your Nova Scotia innovation equity tax credit (T225).

Self- employment	You need to complete the immediate expensing limit agreement 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, FHSA 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	Tax paid by instalments and tax transfer
and tax transfer	
Other topics	Moving expenses Repaid amounts made to the government or to an employer Other deductions and credits (including school supply, digital news subscription 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.

	1
lmmigrant,	You immigrated to Canada in 2024
emigrant, non-	
•	You emigrated from Canada in 2024
resident or	
factual resident	Very construction of October 11 of 0004 (construction)
	You were a non-resident of Canada for all of 2024 (employment/self- employment/taxable Canadian property income)
	Cimpleyment dixable Canadian property income)
	You were a non-resident of Canada reporting ONLY a disposition of
	taxable Canadian property (section 116 of ITA)
	You were a non-resident of Canada for all or part of 2024 reporting
	ONLY rental income and you are making an election under section
	216 of ITA
	You were a non-resident of Canada for all of 2024 reporting pension
	income and you are making an election under section 217 of ITA
	You are a non-resident of Canada and you wish to file a NR6 return
	You were a factual resident
	You are a Canadian resident and your spouse immigrated to Canada
	in 2024
Residency status	Information about your residency status
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

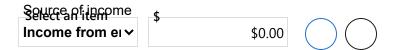
If you are claiming full federal non-refundable tax credits, attach a note to your tax return stating your net world income (in Canadian dollars) for the part of the year that you were not a resident of Canada. Show separately the net income you received from sources inside and outside Canada for that 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.



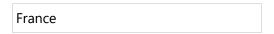
Canadian sourced income (excluding Part XIII income) earned when you were not a resident of Canada

Select canadian sourced income



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

Name of country

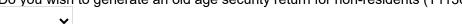


Select foreign sourced income



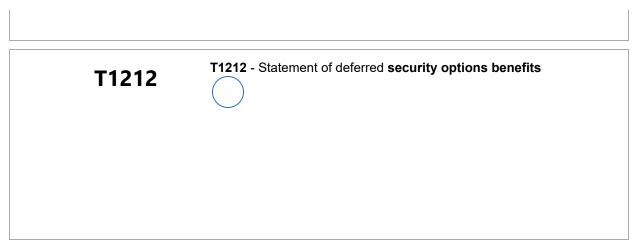
If you receive old age security pension, you have to complete the T1136 return.

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



T4 and employment income

	ome (e.g. T4 slips, tips) or received employment insurance benefits, select the ne T4, complete one then return here and select again.	appropriate item
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 <i>Next</i> . To edit a page, click t	the item added in the left side menu. To delete a page, click .	
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	
	T4E - Employment insurance and other benefits	
Other	Tips	
	Other employment income	
	Volunteer firefighters' amount and search and rescue volunteers amount	
СРТ20	CPT20 - CPP Election for Other employment earnings	
	CPT20 - CPP Election for tax-exempt self-employment earnings of an Indian (Type N)	



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, <u>click here</u>.

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.

Employer's name		
Queen's University		
Employment income \$10,000.00		
Province of employment 10		
Ontario 🕶		
Employee's CPP contributions 16 \$90.00		
Employee's second CPP contributions	New	16A
T		
Employee's El premiums 18 \$200.00		
RPP contributions 20		
Pension adjustment 52		
Income tax deducted 22		
\$1,000.00		
El insurable earnings (Warning: if 0, see \$10,000.00	help.)	24

	0.00			
Union dues 44				
Employer-offered	dental benefits New			
Charitable donatio	ons 46			
Exempt (CPP/QPI	P, EI, PPIP) (Warning	g: If exempt, see he	elp.) 28	
Employment code	29			
g, board and lodgi t an item	ng			
			~	\$
Travel in a process	bed zone 32			
Travel in a prescri				
\$	mployer's automobile	· 34		
\$		34		
Personal use of ers		6		
Personal use of ensembles Interest-free and less Security option be	ow-interest loans 3	25, 2024 38	90	

Employ \$	ment commis	sions 42						
Eligible \$	retiring allow	ances 66						
\$Portion of B	ox 66 transfer	red to a RR	≀SP/PRPP					
- Portion of B		red to a RR	RSP/PRPP (Incli	uded in the unu	sed RRSP/P	RPP contribu	itions of	
§Portion of B	ox 66 transfer	red to a RP	P					
Non eli	gible retiring a	allowances	67					
Peduct	ion for foreign	farm worke	ers					
Amount of fed		ansfer to Qu	uebec (<i>Leave th</i>	is blank to trans	sfer the norm	al amount of	45% of the fed	eral
Employ \$	ee-paid prem	iums for priv	vate health serv	vices plans 85	5			
OTHER INFOR		k on the tria	angle to see the	list of choices)	•	_ \$		
						Ť		
`omplota +	hic coctio	n if vou	alact to no	ov Canada	Dancien	Dlan (CD	D)	

Complete this section if you elect to pay Canada Pension Plan (CPP) contributions.

elect an item		
	~	\$
Address of the employer (CPT20)		

T4A, T4FHSA, pension and retirement income

If you earned income reported on a T4A slip, received a T4FHSA 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 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 **T4A** - Pension, retirement, annuity, and other income (COVID-19 **T4A**, benefits) T4FHSA and **T4FHSA** - First home savings account statement pension income 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 **Prior years T1172** - amounts used to reduce the additional tax

Enter foreign pensions under Foreign income.

For tips relating to pensions, <u>click here</u>.

You can watch the UFile video <u>How to enter pension income and perform the pension income split</u>

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.

You can watch the UFile video How to enter T4A boxes 020 and 048.

You can watch the UFile video How to enter scholarship income and the scholarship exemption New.

COVID Benefits, boxes 197 to 204 and 211, are entered as OTHER INFORMATION.

This T4A slip was issued by		
Queen's University		
Payer-offered dental benefits 015		
Pension or superannuation		
Select an item	v 016 \$	
Lump-sum payments Select an item		
Select an Item	v 018	
Annuities Select an item		
Select all Item	v 024	
PRPP payments 194		
PRPP payments - death of spouse 194		027

Self-employed commissions (report also this amount as a T2125 - C	commission income) 020
Fees for services (report also this amount as a T2125 - Business of	r Professional income) 048
Federal income tax deducted 022	
The following entry applies only if the issuer of this slip deducted Quebec income tax o	n this income.
RL-1 box E or RL-2 box J - Quebec income tax deducted (Applies only if the income tax)	e issuer of this slip deducted Quebec
OTHER INFORMATION (COVID-19 benefits) (click on the triangle to see the lis (A payment of fees for services under code 028 should be entered in Box 048 Select an item [105] Elementary and secondary school scholarships	
[105] Elementary and secondary school scholarships	\$ \$3,000.00
Footnotes relating to specific T-slip entries and Box 135 Select an item	
~	\$
Patronage allocations 030	
Patronage allocations - non taxable 030	
RPP contributions (past service) (<i>Include portions below.</i>) 032	
Portion of Box 032 for pre-1990 (contributor)	

\$Portion of Box 032 fo	or pre-1990 (non contributor)	
Pension adjustment \$	034	
RESP accumulated in \$	ncome payments (Include portion contributed to RRSP below.)	040
Portion of box 40 co	ntributed to a RRSP	
RESP educational ass \$	sistance payments 042	
Charitable donations	046	

Investment and interest income and expenses

-	nks, earned interest on your income tax refund, or received income from inve u incurred investment expenses, claim them using the last item below.	estments, select the		
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 <i>Next</i> . To edit a page, click t	he item added in the left side menu. To delete a page, click .			
Income from a T-Slip	T3 - Trust income T4PS - Employee profit-sharing plan allocations and payments (including RC359) T5 - Investment income T5008 - Statement of securities transactions			
Income not from a T-Slip	Dividends from taxable Canadian corporations not on information slips Other Canadian investment income			
Expenses	Carrying charges or interest expenses (line 22100)			

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 - Statement of Investment income

You may not receive a T5 slip if the investment income is less than \$50, but you must still report the income. You also have to report the interest on any tax refund that you received in 2024 as shown on your notice of assessment or reassessment. This T5 slip was issued by **TD Canada Trust** 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 1.3497 in 2023, 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 **Box 10** - actual amount of dividends other than eligible dividends Boxes 25, 26, 11 and 12 of the T5 slip are optional. **Box 25** - taxable amount of eligible dividends **Box 26 -** dividend tax credit for eligible dividends

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



×

12 **Box 12** - federal dividend tax credit for dividends other than eligible dividends Other boxes **Box 13** - interest from Canadian sources \$50.00 **Box 14** - other income from Canadian sources 15 **Box 15** - foreign income earned as dividends **Box 15** - foreign income earned as interest 16 **Box 16** - foreign income tax paid on dividends income **Box 16** - foreign income tax paid on interest income Country name if you have foreign income. **Box 17** - royalties from Canadian sources - work or invention **Box 17** - royalties from Canadian sources - investments Capital gains dividends - Period 1 - before June 25, 2024 Capital gains dividends - Period 2 - after June 24, 2024 File saved successfully

Box 19 - accrued income - annuities

Box 19 - accrued income - death of spouse

S

Equity linked notes interest

30

Income derived from a "related business"

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

Does the tax on split income rules apply for this T5 slip?



* = This is a required field

Other income

	Make a selection below if you h	nad other income in 2024 that you have not yet reported in this interview.
(Click next to the item bel	low to add a new page, then enter your information. If you do not need to add any (more) items
(click <i>Next</i> . To edit a page, click t	the item added in the left side menu. To delete a page, click .
	Other	Labour adjustment benefits
	income	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)

* = This is a required field

Information from other T-slips

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 <i>Next</i> . To edit a page, click the item added in the left side menu. To delete a page, click next to the item.	
Information RC210 - Canada workers benefit advance payments statement [Federal Line 41500] 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 <u>HBP, LLP and other plans and funds</u>, and select *T10 - Pension adjustment reversal*.

Medical expenses, disability deductions

If you incurred medical expens item below. For tips relating to	es or are disabled, or if you housed an elderly relative whom you supported, medical expenses, <u>click here</u> .	select the relevant
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 <i>Next</i> . To edit a page, click	the item added in the left side menu. To delete a page, click .	
Medical	Medical expenses	
expenses	Sharing of medical expenses	
	Last date of medical expenses	
Disability	Infirmity and Disability amounts claim for yourself* (line 31600)	
deductions, caregiver	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.

* = This is a required field

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 incomalready have a separate list of medical expenses, enter <i>See list</i> in the description sec you are filing electronically, keep your list and receipts in case the government should attach a copy of the list and your receipts to your tax return.	tion below and indicate the total amount. If		
For more information, <u>click here</u> .			
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, <u>click here</u> .			
Medical expenses			
Dates (dd-mm-yyyy), descriptions of medical expenses, amounts in the \$ field. <u>clic</u>	k here.		
31-12-2024 Description 01-09-2024, UHIP - International Health Insurance	\$ \$756.00		
31-12-2024 Description 01-09-2024, AMS (SGPS) health and Dental Plan	\$ \$300.00		
31-12-2024 Description 15-10-2024, Dental	\$ \$60.00		
31-12-2024 Description	\$ \$12.00		
20-12-2024, Medication	\$12.00		
Specified medical expenses (not claimed elsewhere)			
Select an item	\$		

There are special rules when claiming the disability amount and attendant care as medical expenses. If you entered an amount for the cost of attendant care, use the Infirmity and disability amounts claim for yourself (line 31600) page if you need to adjust

how to claim the cost of attendant care and the disability amount.

Tuition, education, textbooks and interest on student loans

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

If you attended post-secondary school in 2024, 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 enter scholarship income and the scholarship exemption New	N.
Click next to the item below to add a new page, then enter your information. If you do not need to add a	any (more) items,
click <i>Next</i> . To edit a page, click the item added in the left side menu. To delete a page, click .	

Tuition,	T2202 Tuition and enrolment certificate* (TL11A/TL11C/TL11D) (line 32300)	
education and		
textbook	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.

You can watch the UFile video How to enter scholarship income and the scholarship exemption News

Note: You cannot claim the Canada workers benefit (CWB) if in 2024 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 2024			
(Enter description in first field, amount in the \$ field.)			
description	26		
Queen's University	26 \$		
		\$30,000.00	
description			
St. Lawrence College	26 \$		
	\$	\$10,000.00	
		ψ . σγσσσισσ	
TL11A, TL11C Eligible tuition fees paid to foreign educational institutions for 20.	24		
(Enter description in first field, amount in the \$ field.)			
description			
	\$		
T2202 Number of months of next time next accordant studies			
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 <u>major functional deficiency)</u>		04	1 1

(or TL11A/TL11C Column B) 24
T2202 Number of months of full-time post-secondary studies (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.
Treatment of current year unused tuition amount - federal Let MaxBack d ✓
If you selected <i>Transfer</i> 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 you 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)
Bursaries

Bursaries are not taxable if the taxpayer can deduct in the calculation of the tax payable for the program of studies a tuition, education and textbook amount for the immediately preceding taxation year or for the following taxation year.

T1M - Moving expenses

-	netres closer to your work or school, select the appropriate item below. If you moved in 2023 bu ses on your return for that year, select the last item below. For tips relating to moving expenses,
Click next to the item be	elow to add a new page, then enter your information. If you do not need to add any (more) item
click <i>Next</i> . To edit a page, click	the item added in the left side menu. To delete a page, click .
Marina	T1M - Moving expenses deduction
Moving	(you moved closer to your workplace).
expenses	
	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

Prior year information

If you need to make instalment	payment, select the appropriate item below.	
Click next to the item bel	ow to add a new page, then enter your information. If you do not need to a	add any (more) items
click <i>Next</i> . To edit a page, click t	he item added in the left side menu. To delete a page, click .	
Prior year	Prior year information (Used for instalment)	
information	Line by line prior year comparative information (Used for comparative summary)	

* = This is a required field

Prior year information

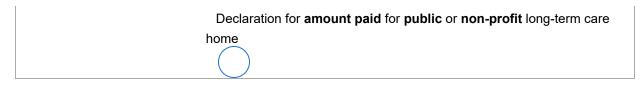
Complete this page if you have to pay instalments. We calculate the amount of your instalments for March 15 and June 15, 2024, on tax information from your assessed income tax and benefit return for 2023. Each of these two instalments is equal to one-quarter of your federal income tax and contributions payable by instalments in 2023.

Federal income tax ar	nd contributions payable by instalments in 2023
Ψ	
Federal net income in	2023
Ψ	

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, <u>click here</u>.

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	ON-BEN - Application for the 2025 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.	
Application		
ON-BEN	Declaration for rent paid (tenants), including a private long-term care home	
Declaration(s)	Declaration for property tax paid (owners) Declaration for student in a designated residence	
	Declaration for home energy costs for residence on a reserve	



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

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

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

Application for the 2025 Ontario Trillium Benefit and the Ontario Senior Homeowners' Property Tax Grant (ON-BEN)

Complete this page if you want to make an application for the 2025 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.

For more information, click here.

Ontario trillium benefit (OTB)

Ontario sales tax credit (OSTC)

You do not need to apply for the OSTC when you file your tax return. The Canada Revenue Agency will determine your eligibility and tell you if you are entitled to receive the credit. For families, the OSTC is paid to the person whose return is assessed first.

Application for the Ontario energy and property tax credit (OEPTC)

	Do you want to apply for the 2025 GEPTC? (ON-BEN, line 61020)		
	Yes	•	
		". Make sure you consult the Declaration box below. ur data entry.	
App	icatio	for the Northern Ontario energy credit (NOEC)	
	Do you	ant to apply for the 2025 NOEC? (ON-BEN, line 61040)	
Choi	ce for	delayed single OTB payment	

Do you choose to **wait until June 2026** to get your 2025 OTB entitlement? (ON-BEN, line 61060) If you select **Yes**, you will get your OTB in **one payment** in **June 2026**.

If you select No, you will receive your OTB monthly from July 2025 to June 2026.

Yes	~

Application for the Ontario senior homeowners' property tax grant (OSHPTG)

Do you wan	t to apply for the 2025 OSHPTG? (ON-BEN, line 61070)
~	
∯mount rec	eived for your 2024 OSHPTG (if applicable)

Involuntary separation

If you had a spouse or common-law partner on December 31, 2024 and you occupied separate principal residences for medical reasons, you can apply for the OEPTC, the NOEC, or the OSHPTG (if eligible) either individually or as a couple. When you apply individually, each person must enter their own ON-BEN related information.

Do you want to apply individually?

✓

Declaration of information about the principal residence

You have made at least one application in the ON-BEN section above.

You must now declare:

any amounts paid in 2024 for rent, property tax, home energy costs on a reserve, accomodation in a public or a non-profit long-term care home, and

whether you were a student in a designated residence.

Click here and complete the Declaration(s) that applied to your situation in 2024.

Who should receive?

If you had a spouse or common-law partner on December 31, 2024, the same spouse or common-law partner has to apply for the Ontario energy and property tax credit, the Northern Ontario energy credit, and the Ontario senior homeowners' property tax grant for both of you.

If only one of you is 64 years of age or older on December 31, 2024, that spouse or common-law partner has to apply for these credits and the grant for both of you.

By default, MaxBack will optimize the assignment of this amount for your family. If you wish to modify the program's decision, indicate it here.

Who should receive the Ontario Trillium Benefit and the Ontario Senior Homeowners' Property Tax Grant?

Let MaxBack d ✓

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

Street				
City				
Postal-Goo	;			
"	months you occi	upied this reside	nce in 2024	
Ψ	rent paid for 202 510,000.00	4		

If you have other declaration(s) to enter <u>Click here</u> to select whichever Declaration(s) applied to your situation in 2024.

Kingston property management

ON-BEN - Declaration - Designated student residence

For more information, click here.

Name of the designated university, c	ollege or private school residence.
Queen's University	

For a list of Ontario designated residences, please <u>Click here</u>.

If you have other declaration(s) to enter <u>Click here</u> to select whichever Declaration(s) applied to your situation in 2024.

Refund or balance owing

If you need to report a change if your tax return, select the appropriate the appropriate and the select the select the select the appropriate and the select the sele	n your direct deposit information, or you want to enclose less than the full a oriate item below.	mount due with
Click next to the item belo	ow to add a new page, then enter your information. If you do not need to a	dd any (more) items
click <i>Next</i> . To edit a page, click tl	ne item added in the left side menu. To delete a page, click .	
Refund or	Amount enclosed	
balance owing	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

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".

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

Let MaxE ✓

Canada carbon rebate (CCR)

Use this section to control the display of the estimated Canada carbon rebate amounts.

Supplement for residents of small and rural communities

The CCR includes a base amount and a 20% supplement for residents of rural areas and small communities. Required only if you wish to claim the supplement. To qualify for the supplement, you must reside outside a census metropolitan area (CMA). If you have a spouse or common-law partner, only one of you can get the credit for the family. No matter which one of you receives the credit, the amount will be the same.

Estimated CCR amounts (base amount and supplement)

An in-house form is implemented to calculate the estimated amounts.

If you are eligible for the supplement, by default, the estimated CCR calculations will be generated. If you are not eligible for the supplement, by default, the estimated CCR calculations will be generated in the file of the family head.

For couples that are eligible for the supplement: Would you like to complete the Canada carbon rebate payment of the Federal tax return?

For other taxpayers: Would you like to have the estimated Canada carbon rebate?

Let MaxBack d ✓

Estimated calculations

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.

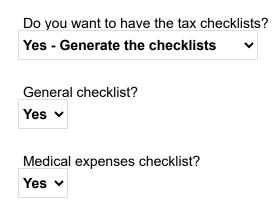
Do you wish to have the marginal tax rate calculation?

✓

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.



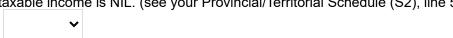
Other

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)



* = This is a required field

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