

\* = This is a required field

## 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 **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 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

000-000-000

Date of birth (dd-mm-yyyy)

31-03-1999

NETFILE Access 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 residence on **December 31, 2024**

Ontario

Marital status on **December 31, 2024**

Single

Did your marital status change in 2024 (including separated for less than 90 days)?

No change

Gender (mandatory for Quebec residents)

\* = This is a required field

## 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



Canadian postal code

H2T 2T4  
K7L 3N6

Care of (if applicable)

Information about your residence:

---

If your province or territory of residence changed in 2024, enter the date of your move.

dd-mm-yyyy  
25-08-2024

Is your home address the same as your mailing address?

No ▼

Current province of residence if different from mailing address

Ontario ▼

## Telephone number

---

At home

At work

Cellular phone number

\* = This is a required field

## 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

---

Language of correspondence and of tax return

English

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

Yes

Middle name

Did you own foreign property in 2024 with a total cost over CAN\$100,000?

No

Did you sell a principal residence in 2024?

The sale of a principal residence must now be reported, along with any [principal residence designation](#).

No

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,

- Canada carbon rebate "CCR" (PE, NL, NS, NB, ON, MB, SK and AB residents only)

### Elections Canada

---

Do you have Canadian citizenship?

No

### 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

Registry?

No

**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 [canada.ca/child-family-benefits](https://canada.ca/child-family-benefits).

**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 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 [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**

No ▼

**Email address**

## Foreign mailing address from the CRA

---

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

No ▼



\* = This is a required field

## 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

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**?

No ▾



\* = This is a required field

## 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**.

\* = This is a required field

## CRA Express NOA

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### 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 [Represent a Client](#) 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 [My Account](#).

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

\* = This is a required field

## 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 2024
- 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 credit  
(**T224**) or your Nova Scotia innovation equity tax credit (**T225**).
-

## Self-employment

- Self-employed business income
- 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  
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, 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

\* = This is a required field

## Immigrant, emigrant or non-resident

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

### Immigrant, emigrant, non- resident or factual resident

You immigrated to Canada in 2024

You emigrated from Canada in 2024

You were a **non-resident of Canada** for all of 2024 (employment/self-employment/taxable 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





\* = This is a required field

## 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.

Date of entry (dd-mm-yyyy)

29-08-2024

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

Select canadian sourced income

Source of income  
Select an item

Income from ei

\$

\$0.00

 

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

Name of country

France

Select foreign sourced income

Source of income  
Select an item

Net employee

\$

\$0.00

 

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)?



\* = This is a required field

## 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  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 .

### 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

### CPT20

**CPT20** - CPP Election for Other employment earnings

**CPT20** - CPP Election for tax-exempt self-employment earnings of an Indian (Type N)

**T1212**

**T1212 - Statement of deferred security options 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](#).

\* = This is a required field

## 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

Ontario

Employee's CPP contributions

\$  
\$90.00

Employee's second **CPP** contributions **New**

\$

Employee's EI premiums

\$  
\$200.00

RPP contributions

\$

Pension adjustment

\$

Income tax deducted

\$  
\$1,000.00

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

\$  
\$10,000.00

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

\$

Union dues 44

\$

Employer-offered dental benefits **New** 45

▼

Charitable donations 46

\$

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

**Not exempt (m** ▼

Employment code 29

▼

Housing, board and lodging

Select an item  ▼

30  
\$

Travel in a prescribed zone 32

\$

Personal use of employer's automobile 34

\$

Interest-free and low-interest loans 36

\$

Security option benefits - Before June 25, 2024 38

\$

Security option benefits - On or after June 25, 2024 **New** 90

\$

Other taxable allowances and benefits 40

\$

Employment commissions

\$

Eligible retiring allowances

\$

\$ Portion of Box 66 transferred to a RRSP/PRPP

- Portion of Box 66 transferred to a RRSP/PRPP (Included in the unused RRSP/PRPP contributions of January/February 2024)

\$

\$ Portion of Box 66 transferred to a RPP

Non eligible retiring allowances

\$

Deduction for foreign farm workers

\$

Amount of federal tax to transfer to Quebec (*Leave this blank to transfer the normal amount of 45% of the federal tax to Quebec.*)

\$

Employee-paid premiums for private health services plans

\$

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

Select an item  ▼

\$



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)

Select an item

\$

Address of the employer (CPT20)



\* = This is a required field

## 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 .

<b>T4A, T4FHSA and pension income</b>	<b>T4A</b> - Pension, retirement, annuity, and other income (COVID-19 benefits) <input type="radio"/>
	<b>T4FHSA</b> - First home savings account statement <input type="radio"/>
	<b>T4A(OAS)</b> - Old age security pension income <input type="radio"/>
	<b>T4A(P)</b> - Statement of Canada or Québec pension plan benefits <input type="radio"/>
	<b>T4A-RCA</b> - Statement of distributions from a retirement compensation arrangement (RCA) <input type="radio"/>
	<b>T4RIF</b> - Income from registered retirement income fund <input type="radio"/>
	<b>T4RSP</b> - Income from registered retirement savings plan <input type="radio"/>
	<b>Split pension income</b> with your spouse <input type="radio"/>
	<b>Prior years T1172</b> - amounts used to reduce the additional tax <input type="radio"/>

Enter foreign pensions under [Foreign income](#).

For tips relating to pensions, [click here](#).

You can watch the UFile video [How to enter pension income and perform the pension income split](#) **New**.



\* = This is a required field

## 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

Pension or superannuation

Select an item

\$

Lump-sum payments

Select an item

\$

Annuities

Select an item

\$

PRPP payments

\$

PRPP payments - death of spouse

\$

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

\$

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

\$

Federal income tax deducted

\$

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)

\$

**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**)

Select an item

\$

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

Select an item

\$

Patronage allocations

\$

Patronage allocations - **non taxable**

\$

RPP contributions (past service) (Include portions below.)

\$

§ Portion of Box 032 for pre-1990 (contributor)

\$

§ Portion of Box 032 for pre-1990 (non contributor)

Pension adjustment

§

RESP accumulated income payments (*Include portion contributed to RRSP below.*)

§

§ Portion of box 40 contributed to a RRSP

RESP educational assistance payments

§

Charitable donations

§

\* = This is a required field

## 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  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 .

### 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

**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)

## 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*.

\* = This is a required field

## T5 - Statement of Investment income

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

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](http://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

\$

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

\$



File saved successfully





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

\$

## Other boxes

---

**Box 13** - interest from Canadian sources 13

\$

**Box 14** - other income from Canadian sources 14

\$

**Box 15** - foreign income earned as dividends 15

\$

**Box 15** - foreign income earned as interest 15

\$

**Box 16** - foreign income tax paid on dividends income 16

\$

**Box 16** - foreign income tax paid on interest income 16

\$

Country name if you have foreign income.

**Box 17** - royalties from Canadian sources - work or invention 17

\$

**Box 17** - royalties from Canadian sources - investments 17

\$

Capital gains dividends - Period 1 - **before June 25, 2024** 34 New

\$

Capital gains dividends - Period 2 - **after June 24, 2024** 18

\$



**Box 19** - accrued income - death of spouse

\$

Equity linked notes interest

\$

## 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 had other income in 2024 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 .

<b>Other income</b>	<b>Labour adjustment</b> benefits <input type="radio"/>
	<b>Grants or training allowance</b> <input type="radio"/>
	<b>Death benefit</b> received from employer upon death of your spouse <input type="radio"/>
	<b>T1198</b> - Qualifying retroactive lump-sum payment <input type="radio"/>
	<b>Other taxable income</b> (federal line 13000) <input type="radio"/>

\* = 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 *Next*. To **edit** a page, click the item added in the left side menu. To **delete** a page, click  next to the item.

<b>Information</b>	<b>RC210</b> - Canada workers benefit advance payments statement [Federal
<b>from other T-</b>	Line 41500]
<b>slips</b>	<input type="radio"/>

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*.

\* = This is a required field

## 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  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 .

<b>Medical expenses</b>	<b>Medical expenses</b> <input type="radio"/>
	<b>Sharing of medical expenses</b> <input type="radio"/>
	<b>Last date of medical expenses</b> <input type="radio"/>

<b>Disability deductions, caregiver</b>	<b>Infirmity and Disability amounts claim for yourself* (line 31600)</b> <input type="radio"/>
	<b>Disability supports deduction</b> for attendant care, etc. you needed to be able to earn income <b>(line 21500)</b> <input type="radio"/>
	<b>Home accessibility expenses (line 31285)</b> <input type="radio"/>

\*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 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](#).

31-12-2024 Description 01-09-2024, UHIP - International Health Insurance	\$ 756.00	<input type="radio"/>
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31-12-2024 Description 01-09-2024, AMS (SGPS) health and Dental Plan	\$ 300.00	<input type="radio"/>
---	-----------	-----------------------

31-12-2024 Description 15-10-2024, Dental	\$ 60.00	<input type="radio"/>
--	----------	-----------------------

31-12-2024 Description 20-12-2024, Medication	\$ 12.00	<input type="radio"/>
--	----------	-----------------------

## Specified medical expenses (not claimed elsewhere)

Select an item	\$	<input type="radio"/>
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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.

\* = This is a required field

## Tuition, education, textbooks and interest on student loans

---

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 claim the Canada Training Credit \(CTC\)](#).

You can watch the UFile video [How to enter scholarship income and the scholarship exemption](#) **New**.

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 .

<b>Tuition, education and textbook</b>	<input type="radio"/> <b>T2202</b> Tuition and enrolment certificate* (TL11A/TL11C/TL11D) (line 32300)
	<input type="radio"/> Interest paid on your <b>student loans</b> (line 31900)
	<input type="radio"/> Tuition amount <b>transferred from a child whose return is not processed</b> with yours (line 32400)
	<input type="radio"/> Part-time program details if you received scholarship, fellowship, and bursary income to be included at line 13010
	<input type="radio"/> 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*.



\* = This is a required field

## 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](#) **New**.

**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

Queen's University

26

\$

\$30,000.00

description

St. Lawrence College

26

\$

\$10,000.00

**TL11A, TL11C** Eligible tuition fees paid to foreign educational institutions for 2024

(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)

#

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

(if you were suffering from a [major functional deficiency](#).)

(or TL11A/TL11C Column B)

#

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

(or TL11A/TL11C Column C)

#

Charitable donations on T2202

## Unused tuition and education amounts from prior years

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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 *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)

## Bursaries

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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.



\* = This is a required field

## T1M - Moving expenses

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If you moved at least 40 kilometres closer to your work or school, select the appropriate item below. If you moved in 2023 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  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 .

### 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

\* = This is a required field

## Prior year information

---

If you need to make instalment payment, select the appropriate item below.

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 .

### **Prior year information**

**Prior year information** (Used for instalment)

**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 and contributions payable by instalments in 2023

\$

Federal net income in 2023

\$

\* = This is a required field

## 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 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.

### 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*.



\* = This is a required field

## 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 OEPTC? (ON-BEN, line 61020)

Yes ▼

You selected "**Yes**". Make sure you consult the **Declaration** box below.  
Continue with your data entry.

#### Application for the Northern Ontario energy credit (NOEC)

Do you want to apply for the 2025 NOEC? (ON-BEN, line 61040)

▼

#### Choice 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 want to apply for the 2025 OSHPTG? (ON-BEN, line 61070)

▼

\$ Amount received 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, accommodation 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 v

\* = This is a required field

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

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

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

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Street

City

Postal code

Number of months you occupied this residence in 2024

Amount of rent paid for 2024

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 2024.

\* = This is a required field

## ON-BEN - Declaration - Designated student residence

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

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

Queen's University

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 2024.

\* = This is a required field

## Refund or balance owing

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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  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 .

<b>Refund or balance owing</b>	<b>Amount enclosed</b> <input type="radio"/>
	<b>Start direct deposit</b> or change banking information <input type="radio"/>
	<b>Ontario opportunities fund</b> (Ontario residents only) <input type="radio"/>

\* = This is a required field

## MaxBack controls

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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

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Are you in an exception situation which prevents you from claiming the Canada workers benefit (CWB, line 45300)?

No ▼

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)

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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

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

Yes ▼

## Schedule of marginal tax rate calculation

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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

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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?

**Yes - Generate the checklists** v

General checklist?

**Yes** v

Medical expenses checklist?

**Yes** v

## Other

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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

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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 . . . ?

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[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](#)