Get Ready to File Your Taxes at the Group Supported Self-File Tax Clinic

Use this checklist to prepare for your Group Supported Self-File Tax Clinic session.

Part A: Gather Tax Documents

You will need to bring tax documents for yourself and your spouse/common law partner (if applicable) to the session. Gather the below items and put them in a folder to take to the session. If you are unsure about what to bring, contact us for help.

Items to Gather:

☐ 1. Social Insurance Number(s) (SIN): ____

☐ 2. Last year's Notice of Assessment (NOA) and/or Income Tax Return document(s).

☐ 3. Income tax slips from all income sources. Examples: T4 slip for employment, T5007 slip for OW or ODSP, T4A for OAS and T4A(P) for pensions.

☐ 4. Your home address(es) and:
- The amount of rent you paid last year and the name of your landlord(s).
- Last year's final property tax bill.

☐ 5. Void cheque or letter from your bank/credit union with your bank information for direct deposit. This is required if you don't already have direct deposit set up with the government.

There are other items you should bring to the session depending on your situation. Answer the questions below to determine what else you need to put into your folder for the session.

Are you 65 years old (or older) and living in Ontario?

☐ If yes, collect any transit receipts that you have and add copies to your folder.

Do you have any of the below documents? Mark the ones that you have and add copies to your folder.

☐ Union dues receipt (if not included on your T4 slip).
☐ Medical expenses receipts.
☐ Charitable or political donation receipts.
☐ Disability Tax Credit Certificate (T2201).
☐ Registered Retirement Savings Plans (RRSP) contribution receipts.

Are you a student attending post-secondary school? If yes, print off and add the following to your folder:

☐ Tuition fees receipt/T2202 form (check your online student account).
☐ Receipt for interest paid on student loans.

Did you immigrate to Canada within the last year?

☐ If yes, record the exact date of your arrival in Canada and add it to your folder:

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If you arrived in Canada within the last year, you may need to know the total amount of income earned in your home country before you arrived in Canada (in Canadian dollars).

Are you a parent or guardian of child(ren) and/or dependent(s)? If yes, collect and add the following to your folder:

☐ Receipts for childcare expenses, if applicable.
☐ The total amount of child support paid/received in the last year, if applicable.

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☐ The net income(s) of the child(ren) dependent(s), if applicable.

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☐ The name(s) and birth date(s) of the child(ren)/dependent(s).

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Please add any other documents you feel you will need to your folder. Note: you are required to keep all receipts from filing your taxes for 7 years in case you are audited by the Canada Revenue Agency (CRA).

Part B: Register for a My Account with the CRA

Consider registering for a My Account if you do not have one. You must have filed your taxes last year to register. My Account lets you view your income tax and benefit information and manage your tax affairs online. It also lets you to take advantage of the CRA's Auto-Fill My Return service—a service that can automatically fill in parts of your tax return.

Click to Register for a My Account with the Canada Revenue Agency. (http://tinyurl.com/m98nbh8t) You will be asked to pick one of two options for signing in to your account:

1. **Register using a Sign-In Partner:** Register with the same user ID and password you use for other online service providers (e.g., online banking). The CRA calls these providers "Sign-In Partners". View the list of Sign-In Partners on the webpage to see if there is a provider you already use online. Select the provider and log-in.

2. **Register using a CRA user ID and password –** create a CRA user ID and password and use this information to register for My Account. To create a user ID and password, select "CRA register" on the webpage. Fill out the online form. You will need to provide information like your SIN, postal code, date of birth, and tax details. Next, you will set-up your user ID, password, security questions and answers. A CRA security code will be issued to you. Once you get it, visit the CRA My Account for Individuals to log in (http://tinyurl.com/m98nbh8t) and select the "My Account" button. Enter your user ID, password, and the CRA security code. After this you will have full access to My Account.

Watch a video overview of My Account to learn more (http://tinyurl.com/e57urwmb).