

## Profile(average 5 questions)

- When you sign up, our program will automatically create one entry for you in Profile with 'Relationship with primary user' as 'Self'. Do not change this relationship entry and just add mandatory fields.
- Click on 'First Name' to expand and then enter date of birth, marital status and province of residence to try. Once you are ready to file, you can enter SIN and generate your tax file.
- You can add all your family members (Spouse, children, dependent) here. Program will prompt you to claim any relevant credit based on your family member details.

Susan 2012 MY ACCOUNT SIGN OUT

1 Profile 2 General 3 Income 4 Deduction 5 Credit 6 Result

**?** This tab is common for all members of the family. Enter details of family member in this tab (one at a time and save) and then enter income, deduction and credit data for individual members after selecting them in my account panel at the top.

Family members including self

First Name\* Susan

Last Name B TWO

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 CRA Web site or contact CRA by phone at 1-800-959-8281 prior to using NETFILE.

Date of Birth\*   
YYYY-MM-DD

Social Insurance Number   
Format 111-111-111

Marital Status\* Single

As on 31st Dec 2012

If your marital status changed in 2012, give the date of the change   
MM-DD

Enter the no. of months you were married or living with common law in 2012   
Required if your marital status changed during the year


Relationship with primary user\* Self   
Logged in user is primary user

**General** (average 6 questions)

- Answer 4 questions related to GST and Citizenship
- Answer mandatory questions in mailing address.

Susan  2012  [MY ACCOUNT](#) [SIGN OUT](#)

**1 Profile** **2 General** **3 Income** **4 Deduction** **5 Credit** **6 Result**

 This tab captures general information for tax filing for the person selected in my account panel. Review spouse credit transfer, spouse credit split and dependent credit detail, if applicable. Remember to check other information and provide any relevant information.

Are you applying for the GST/HST credit?  Yes  No

Did you own or hold property at any time in 2012 with a total cost of more than CAN\$100,000?  Yes  No  
See Foreign Income section in the guide for more info.

Are you a Canadian citizen?  Yes  No

As a Canadian citizen, do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors?  Yes  No  
Your authorization is valid until you file your next return. Your information will only be used for purposes permitted under the Canada Elections Act, which include sharing the information with provincial/territorial election agencies, members of Parliament and registered political parties, as well as candidates at election time.

Home phone number   
Format 111-111-1111

Language of correspondence

Do you have an impairment in physical or mental functions?

If you have spouse, check out 'Credit transfer from spouse' and 'Credit split with spouse'. You can use these options to decide who will claim certain credits in the family.

Credit transfer from spouse

Does CRA have an approved T2201 for your spouse in your account?    
Required if you want to transfer disability credit from your spouse

Do you want to transfer unused credit from your spouse?    
Program will allocate unused transfer to your spouse, if available

Were you separated from your spouse/common-law for a period of time during the year?    
Confirmation is required only if your marital status was married or common-law on Dec 31, 2012 and you want to claim an amount for eligible dependent instead of spousal amount

Were you not living with, supporting or being supported by a spouse or common-law at any time during the year?    
Confirmation is required only if your marital status was married or common-law on Dec 31, 2012 and you want to claim an amount for eligible dependent instead of spousal amount

Were you married or had a common-law partner during the year?    
Confirmation is required only if your marital status was other than married or common-law on Dec 31, 2012 and you would like to claim spousal amount. Provide income details of ex-spouse below.

Were you single, divorced, separated or widowed at any time during the year?    
Confirmation is required if your marital status was married or common-law on 31 Dec 2012 and you would like to claim an eligible dependent

Do you want to claim WITB or low income tax reduction (applicable for NL and NB) which involves ex-spouse?    
Select yes if your marital status was widowed and you were married or had a common-law partner during the year and provide income details of ex-spouse below

Are you living apart from your non-resident spouse or common-law partner?    
impacts ON and MB credits

Credit split with spouse

Who will claim the low income tax reduction?    
If applicable

Who will claim the children amount (Schedule 1 - 367)    
if eligible for claim

Who will claim WITB benefit    
if applicable

Enter the percentage split for homebuyers amount to be claimed on your federal return    
Leave it blank if you would like the program to allocate it automatically

Enter the percentage split for adoption expense to be claimed on your federal form    
You can split the available adoption expense with your spouse if your marital status was married or common-law on 31st Dec 2012. Leave it blank if you do not want to split and program will allocate it to spouse with higher income

Enter the percentage split for adoption expense to be claimed on your provincial return    
You can have different amount on provincial form if your province of residence is not BC.

If you supported an eligible dependent, you might be eligible for some dependent credit. Select the 'dependent' in 'My Account' panel and then check 'Dependent credit detail' for the dependent.

Dependent credit detail

Do you want to claim this dependent as eligible dependent?

if applicable on Schedule 1 - 305

Do you want to claim amount for infirm dependents for this dependent?

if applicable on Schedule 1 - 306

Do you want to claim caregiver amount for this dependent?

if applicable on Schedule 1 - 315

Do you want to transfer disability amount for this dependent?

if applicable on Schedule 1 - 318

Does this dependent stay with taxpayer?

**Income** (average 7 questions)

- T4 slip – Employment income – Enter the most common 7 answers from your T4 slips. Do not forget entries from any other box in T4, if present.
- Investment income – Select the applicable T3 slip, T5 slip or Capital gains
- Remember to check any other income, if applicable. You will find all incomes to be reported in this tab. Once you select the income, it will expand for data entry.

Sample of income available

The screenshot shows a navigation bar with six tabs: 1 Profile, 2 General, 3 Income (selected), 4 Deduction, 5 Credit, and 6 Result. Below the tabs is a help message: "Review and enter all the applicable income in this tab for the person selected in my account panel. For T Slips, enter the information as per box in the slip. Remember to check other income at the bottom and enter any income not covered earlier in other income. Inline help has been provided for questions. Mandatory questions have been marked with an \* within the group." Below the help message is a list of income categories, each with a checkbox:

- T4 - Employment Income
- T5 - Investment Income
- T3 - Trust Income
- Interest income not reported on any T slip
- Dividend income not reported on any T slip
- Capital Gains / Losses from publicly traded shares, mutual funds not reported on any T slip
- RC62 - Universal child care benefits

**T4 - Employment Income**

**Employer Name**

Box 10 - Province of Employment

Box 14 - Employment Income

Box 16 - Employee's CPP contribution

Box 18 - Employee's EI premium

Box 22 - Income Tax Deducted

Box 24 - EI insurable earnings

Box 26 - CPP/QPP pensionable earnings

**Deduction** (average 5 questions)

- RRSP
- Child Care Expense –Enter child care expense after selecting the child in ‘My Account’ panel at the top
- Other deductions – Enter any other deduction, if applicable.

Sample of deductions available

**1 Profile**   **2 General**   **3 Income**   **4 Deduction**   **5 Credit**   **6 Result**

**?** Review and enter all the applicable deduction in this tab for the person selected in my account panel. Child care expense should be entered for the children and supporting detail should be provided for taxpayer and spouse. Remember to check other deduction at the bottom and enter any deduction not covered earlier in other deduction. Inline help has been provided for questions. Mandatory questions have been marked with an \* within the group.

- RRSP deduction including HBP and LLP details
- Child Care expense
- Investment expense
- Moving Expense
- Disability support expense
- Business Investment Loss Deduction
- Employment expense

RRSP deduction including HBP and LLP details

Unused RRSP Contribution Limit	<input type="text"/>	
		amount (B) of your 2011 RRSP Deduction Limit Statement on your latest notice of assessment
RRSP Deduction limit for 2012*	<input type="text"/>	
		amount (A) of your 2011 RRSP Deduction Limit Statement on your latest notice of assessment
RRSP contribution from Mar 1, 2012 to Dec 31, 2012	<input type="text"/>	
RRSP contribution from Jan 1, 2013 to Mar 1, 2013	<input type="text"/>	
RRSP contribution to spousal plan from Mar 1, 2012 to Dec 31, 2012	<input type="text"/>	
RRSP contribution to spousal plan from Jan 1, 2013 to Mar 1, 2013	<input type="text"/>	
Repayment amount indicated on your HBP statement	<input type="text"/>	
		if you participate in HBP
RRSP contribution to be designated as repayment under HBP	<input type="text"/>	
		if you designate less than the amount on your repayment statement, difference will be reported as income on Line 129.
Repayment amount indicated on your LLP statement	<input type="text"/>	
		if you participate in LLP
RRSP contribution to be designated as repayment under LLP	<input type="text"/>	
		if you designate less than the amount on your repayment statement, difference will be reported as income on Line 129.
RRSP Contributions you want to deduct for current year*	<input type="text"/>	

**Credit** (average 10 questions)

- Common credits such as medical expense, donations, public transit, tuition credit, provincial credit
- Medical expense – You can pick any 12 month period ending in 2011 to maximize your claim for medical expense.

Sample of Credit available

**1 Profile**   **2 General**   **3 Income**   **4 Deduction**   **5 Credit**   **6 Result**

**?** Review and enter all the applicable federal and provincial credit in this tab for the person selected in my account panel. Children art credit, children fitness credit and adoption expense should be entered for the children. Similarly medical expense, tuition credit, disability tax credit should be entered for the applicable dependent. Program will consolidate the information for taxpayer and spouse and allocate to optimize the tax return for family. Inline help has been provided for questions. Mandatory questions have been marked with an \* within the group.

- Medical expense
- Donation and gifts
- Common federal credits - public transit, political contribution, firefighter, homebuyer, interest on student loan
- Gifts of depreciable property
- Tuition, Education, and Textbook Amounts
- Disability tax credit
- Rent, property tax, home energy paid for a principal residence or long term care home
- ON-BEN - Ontario Trillium Benefits and the OSHPTG application

If you have children, select the child in 'My Account' panel and enter applicable children credit in Credit tab

**-**  **Children credit**

Children fitness amount      S1 - 365

Children art credit      S1 - 370