

Tax Preparation Checklist

Tax season offers plenty of challenges for many people when it comes to gathering up all the documentation that needs to be available to file a clients' tax return. Managing documentation can be challenging for people who are unhoused, move often or are challenged to access documentation.

A tax preparation checklist can support people to organize their documentation. This checklist was compiled for the 2023 Tax Season as part of the GB CVITP Case Study.

Personal Information

- Name
- Mailing address, email address, phone number
- Residency status/location
- Social Insurance Number (SIN)
- Date of birth
- Spouse and/or child net income amounts
- Information about spouse/common-law partner
- Information about dependents

Income

- Employment income (T4)
- Fees for services (T4A)
- Contract payments (T5018)
- Partnership income (T5013)
- Interest and mutual funds (T3,T5008)
- Old age security (T4A-OAS)
- CPP benefits (T4A-P)
- Pension and annuity income (T4A)
- RRSP and RIF income (T4RSP, T4RIF)
- Employment insurance benefits (T4E)
- COVID-19 benefits received (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- Other income not reported on tax slip

If You Own Personal Residence

- Receipts for mortgage interest
- Payment Insurance premium
- Property tax
- Energy efficient upgrade
- Sale or purchase of primary house

Other Information

- Last year's Notice of Assessment or Notice of Re-assessment
- The amount of tuition carried over from prior years
- Tax installment paid
- Any balance owing amount to CRA
- Access information to My CRA Account

Receipts

- Receipts for RRSP contributions
- Tuition receipts (T2202A)
- Union dues and professional membership
- Support payments paid or received
- Employment costs (T2200)
- COVID-19 home-work expenses (T2200S)
- Childcare expenses
- Support payments
- Disability tax credit for self or dependents
- Medical expenses
- Home accessibility expenses
- Moving expenses for study/job
- Student loan interest amounts
- Vehicle expenses/mileage for self-employment

If You Rent

- Rental Receipts dated and signed by landlord
- Landlord's name and contact information
- The address rented at, dates lived at the address
- Date of rent paid, Total amount of rent paid