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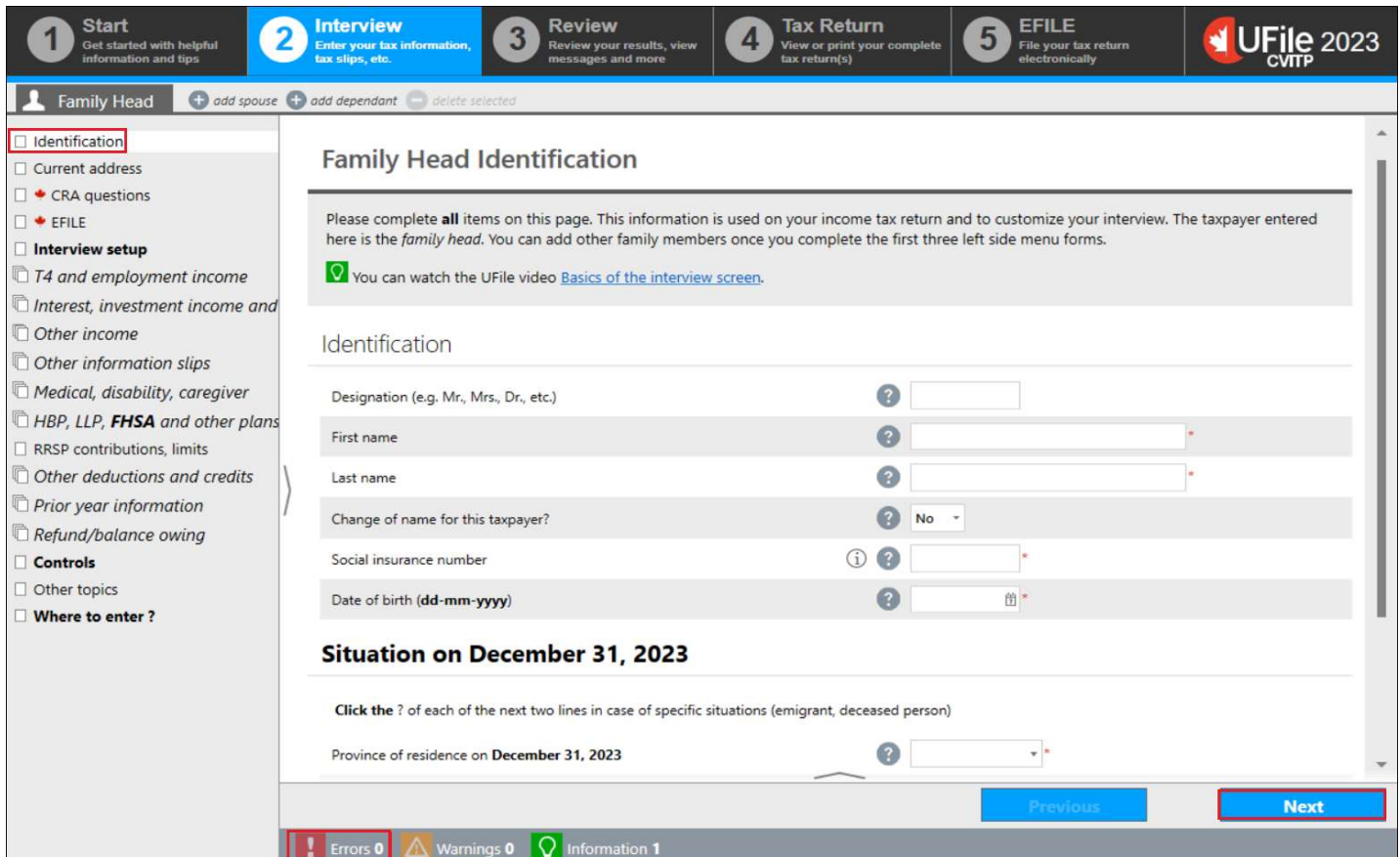
- [How to set up the software and start a new file](#)
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Identification sections

On this page

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Identification



The screenshot displays the UFile 2023 CVTP interface. At the top, a navigation bar shows five steps: 1. Start, 2. Interview (highlighted in blue), 3. Review, 4. Tax Return, and 5. EFILE. Below this, a sub-header reads 'Family Head' with options to '+ add spouse', '+ add dependant', and '- delete selected'. A left sidebar lists various topics, with 'Identification' highlighted in a red box. The main content area is titled 'Family Head Identification' and contains instructions to complete all items. It includes a link to a video 'Basics of the interview screen'. Below this, the 'Identification' section contains several input fields: Designation (e.g. Mr., Mrs., Dr., etc.), First name, Last name, Change of name for this taxpayer? (set to 'No'), Social insurance number, and Date of birth (dd-mm-yyyy). The 'Situation on December 31, 2023' section includes a dropdown for 'Province of residence on December 31, 2023'. At the bottom, a status bar shows 'Errors 0' (highlighted in a red box), 'Warnings 0', and 'Information 1'. 'Previous' and 'Next' buttons are visible, with the 'Next' button highlighted in a red box.

▼ Text version of the above image

UFile screen

Under Interview tab

Family Head sub-tab

Identification topic is highlighted

Family Head Identification page

Errors is highlighted

Next button is highlighted



Important note

At the top of each page, there are important instructions. Review them before entering any information.

Once you open UFile CVITP and click **Start on a new tax file**, the **Identification** section from the **Interview tab** will be displayed.

This is where you will enter an individual's identification information.

Family Head indicates the household's first individual which you enter into UFile. The second individual you enter will be referred to as spouse or dependant, whichever is applicable.



Important note

For individuals with one name only, you may add the name in the **Last name** (family name) field within the tax software and enter an asterisk (*) in the **First name** field.

When saving a tax return, UFile uses the first and last name of the individual to name the file. In cases where the individual only has one name and therefore an asterisk is used in the **First name** field, the volunteer will be required to delete the asterisk and save the file under the one name because the asterisk prevents the tax return from being saved.

Identity information such as names and date of birth must be an exact match to the identification information issued under the individual's identification number to allow the tax return to be transmitted electronically using EFILE. If errors continue, it may be necessary to print the tax return and have the individual mail it to their applicable tax centre.

For more information, refer to [Printing a tax return](#) and [Find a CRA address](#).

Entering an individual's details may automatically add topics to the left-side menu or provide you with **Tax saving ideas** (under the **Review** tab). For example, when the date of birth is entered for a dependant under 17 years old, UFile CVITP will automatically add **Child care** to the left-side menu.

Mandatory fields will be identified by a red asterisk (*).



UFile tip

Clicking **Next** at the bottom-right of the screen will save the data entered and bring you to the next page under the **Interview** tab. If any mandatory information is missing, the software will alert you, under **Errors**, to fill in the required fields.

Spouse interview type

The screenshot displays the UFile 2022 CVITP software interface. At the top, a navigation bar shows five steps: 1. Start, 2. Interview (highlighted), 3. Review, 4. Tax Return, and 5. EFILE. Below this, a secondary bar contains 'Family Head', 'add spouse', 'add dependant', and 'delete selected'. The left sidebar lists various topics, with 'Spouse interview type' highlighted in a red box. The main content area is titled 'Type of information you wish to provide about your spouse'. It contains instructions on selecting 'Complete information' or 'Net income only'. An 'Important note' section lists specific situations where 'Complete information' is required. At the bottom, a dropdown menu is labeled 'What information will you provide for your spouse?' and is also highlighted with a red box. The dropdown shows two options: 'Complete information (recommended)' and 'Net income only'. The bottom of the screen features 'Previous' and 'Next' buttons.

1 Start
Get started with helpful information and tips

2 Interview
Enter your tax information, tax slips, etc.

3 Review
Review your results, view messages and more

4 Tax Return
View or print your complete tax return(s)

5 EFILE
File your tax return electronically

UFile 2022 CVITP

Family Head | add spouse | add dependant | delete selected

- Identification
- Spouse interview type**
- Current address
- CRA questions
- EFILE
- Interview setup
 - T4 and employment income
 - Interest, investment income and carry
 - Other income
 - Other information slips
 - Medical, disability, caregiver
 - HBP, LLP and other plans and funds
 - RRSP contributions, limits
 - Other deductions and credits
 - Prior year information
 - Ontario tax credits
 - Refund/balance owing
- Controls
- Other topics
- Where to enter ?

Type of information you wish to provide about your spouse

To prepare optimized tax returns for you and your spouse together, select *Complete information* below. Once you have finished your own interview, click [add spouse](#) (near the top of the screen), and complete your spouse's interview.

If you do not need a tax return for your spouse, or wish to prepare your tax returns separately, select *Net income only*. A new page titled *Spouse - basic information* will be added to the left side menu where you can enter your spouse's identification and basic tax information.

If you select *Net income only*, you will enter your spouse's basic information in **your** interview. You can claim amounts transferred to you by your spouse with either selection.

You can watch the UFile video [How to add your spouse and dependant\(s\) to your file](#).

Important note: You must select *Complete information* in the following situations:

- Your spouse died in the year;
- You wish to split eligible pension income with your spouse ([line 11600](#));
- You wish to claim the Canada workers benefit for lower income families (line 45300) (unless your spouse was **non-resident for the whole year**);
- You were a Canadian resident throughout the year and your spouse immigrated in Canada in the year;
- You and your spouse immigrated in Canada in the year.

For more information [click here](#).

What information will you provide for your spouse?

- Complete information (recommended)
- Net income only

Previous Next

▼ Text version of the above image

UFile screen

Under Interview tab

Family Head sub-tab

Add spouse sub-tab is highlighted

Spouse interview type topic is highlighted

Type of information you wish to provide about your spouse page

What information will you provide for your spouse? is highlighted with the following drop-down options:

Complete information (recommended)

Net income only

If you select **married** or **common-law** spouse in the **Identification** section, UFile will generate the **Spouse interview type** topic in the left-side menu. Navigate to it when you click **Next**. For more information on marital statuses, refer to Identification and marital status.

On the **Type of information you wish to provide about your spouse** page, you will find the question **What information will you provide for your spouse?** If you select **Complete information (recommended)** as a response to the question, you need to prepare tax returns for both spouses.

To add a spouse, click **add spouse** found next to the **Family Head** sub-tab or next to the family head's name.

If you selected **Net income only**, UFile adds the **Spouse – basic information** topic in the left-side menu. In the CVITP, you would only select this option when the spouse or common-law partner is a non-resident of Canada for tax purposes.

Enter basic spousal information

1 Start Get started with helpful information and tips

2 Interview Enter your tax information, tax slips, etc.

3 Review Review your results, view messages and more

4 Tax Return View or print your complete tax return(s)

5 EFILE File your tax return electronically

UFile 2023 CVTP

Family Head + add spouse + add dependant - delete selected

- ☐ Identification
- ☐ Spouse interview type
- ☒ **Spouse - basic information**
- ☐ Current address
- ☐ CRA questions
- ☐ EFILE
- ☐ **Interview setup**
- ☐ T4 and employment income
- ☐ Interest, investment income and
- ☐ Other income
- ☐ Other information slips
- ☐ Medical, disability, caregiver
- ☐ HBP, LLP, **FHSA** and other plans
- ☐ RRSP contributions, limits
- ☐ Other deductions and credits
- ☐ Prior year information
- ☐ Refund/balance owing
- ☐ **Controls**
- ☐ Other topics
- ☐ Where to enter ?

Spouse - basic information

Use this page to enter information about your spouse or common-law partner when you are not preparing both tax returns together. If you wish to prepare both tax returns together, return to the page *Spouse interview type* and select *Complete information*.

First name of your spouse ?

Last name of your spouse ?

Social insurance number of your spouse ?

Date of birth (dd-mm-yyyy) ?

Was your spouse in prison in 2023? ?

If your spouse has an impairment, does his or her impairment provide entitlement to the Canada caregiver amount? ?

Was your spouse self-employed in 2023? ?

Was your spouse a Canadian resident in 2023 (Not applicable for immigrant)? ?

Was your spouse an immigrant in 2023? ?

Net federal income of your spouse (line 23600 of his or her return) OR net world income in Canadian dollars, if your spouse is a non-resident of Canada. ?

Warning: Do not use an estimated income below the actual. See help for more information.

Previous **Next**

▼ Text version of the above image

UFile screen

Under Interview tab

Family Head sub-tab

Spouse – basic information topic is highlighted

Spouse – basic information page

Was your spouse a Canadian resident in 2023 (Not applicable for immigrant)? is highlighted

Net federal income of your spouse (line 23600 of his or her return) OR net world income in Canadian dollars, if your spouse is a non-resident of Canada. Warning: Do not use an estimated income below the actual. See help for more information section is highlighted.

Enter the spouse or common-law partner's personal information, such as name and date of birth.

Indicate whether the spouse or common-law partner was a Canadian resident in 2024.

If the spouse is a non-resident, their net world income is their net federal income.

In the field, **Net federal income of your spouse (line 23600 of his or her return) OR net world income in Canadian dollars, if your spouse is a non-resident of Canada**, enter the amount:

- in Canadian dollars
- from all sources both inside and outside Canada
- even if it is zero

The CRA uses this information to calculate certain credits and benefits.



UFile tip

Fill in all of the fields to the best of your ability.

If the spouse is a non-resident and does not have a social insurance number (SIN) or an identification number, UFile will allow you to move to the next screen by leaving the SIN field for the spouse blank or by adding all zeros.

Add a dependant

The screenshot shows the UFile 2022 CVITP interface. At the top, there are five numbered steps: 1. Start (Get started with helpful information and tips), 2. Interview (Enter your tax information, tax slips, etc.), 3. Review (Review your results, view messages and more), 4. Tax Return (View or print your complete tax return(s)), and 5. EFILE (File your tax return electronically). The 'Interview' tab is currently selected. Below the steps, there is a navigation bar with three options: 'Family Head', '+ add spouse', and '+ add dependant' (which is highlighted with a red box). To the right of these options is a 'delete selected' link. On the left side of the main content area, there is a list of categories with checkboxes: Identification, Spouse interview type, Current address, CRA questions, EFILE, Interview setup, T4 and employment income, Interest, investment income and carry, Other income, Other information slips, Medical, disability, caregiver, HBP, LLP and other plans and funds, RRSP contributions, limits, Other deductions and credits, Prior year information, Ontario tax credits, Refund/balance owing, Controls, Other topics, and Where to enter?. The main content area is titled 'Type of information you wish to provide about your spouse'. It contains instructions on how to prepare optimized tax returns for you and your spouse together, and how to select 'Complete information' or 'Net income only'. It also includes an 'Important note' section with a list of situations where 'Complete information' must be selected. At the bottom of the main content area, there is a question 'What information will you provide for your spouse?' with a dropdown menu. At the bottom right of the interface, there are 'Previous' and 'Next' buttons.

▼ Text version of the above image

UFile screen

Under Interview tab

Family Head sub-tab

Add dependant sub-tab is highlighted

To add a dependant, click **add dependant** found next to **add spouse** or next to the spouse's name.

Current address

The screenshot shows the UFile CVITP 2022 software interface. At the top, there are five numbered tabs: 1 Start, 2 Interview (selected), 3 Review, 4 Tax Return, and 5 EFILE. The 'Interview' tab is active, and the 'Family Head' sub-tab is selected. In the left sidebar, the 'Current address' option is highlighted with a red box. The main content area is titled 'Mailing address and residence information'. It contains a section for 'Enter your mailing address.' followed by a 'Mailing address:' section with input fields for Apartment number, Street No. Street name (e.g. 123 Maple Rd.), Post office box number, Rural route, City, Province or territory (a dropdown menu), Canadian postal code, and Care of (if applicable). Below this is a section for 'Information about your residence:' with a field for 'If your province or territory of residence changed in 2022, enter the date of your move.' At the bottom right, there are 'Previous' and 'Next' buttons.

▼ Text version of the above image

UFile CVITP screen

Under Interview tab

Family Head sub-tab

Current address topic is highlighted

Under the **Current address** topic, enter the individual's:

- mailing address at the time that the tax return was prepared and submitted
- home address
- telephone number



Important note

The address entered into the software is what the CRA uses to update the individual's file.

If the individual has changed province, they must contact the CRA to provide the date of the change to ensure they receive the benefits for which they are eligible.

[CRA related sections ➔](#)

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