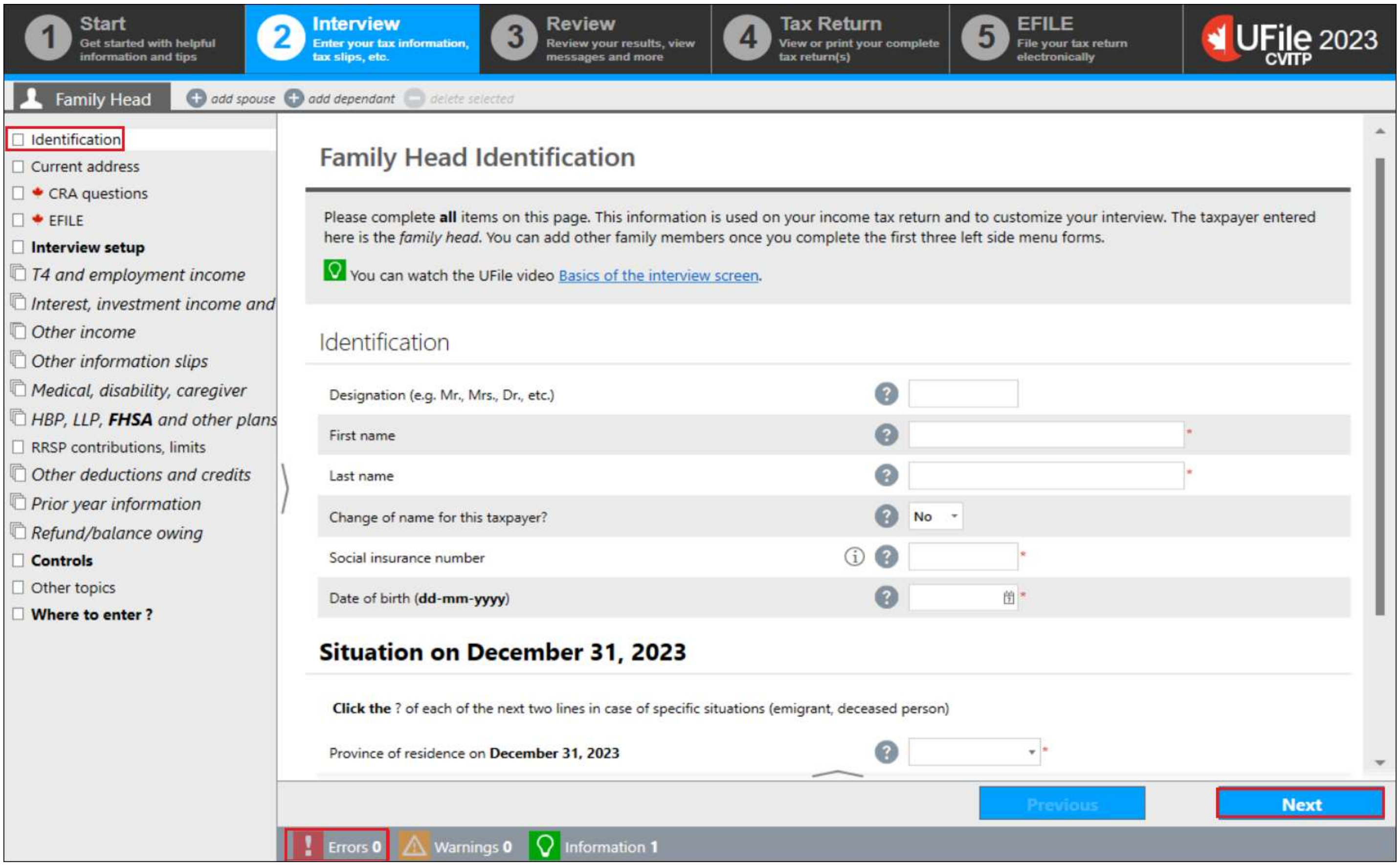
Identification sections

On this page

PDF version

Identification



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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.

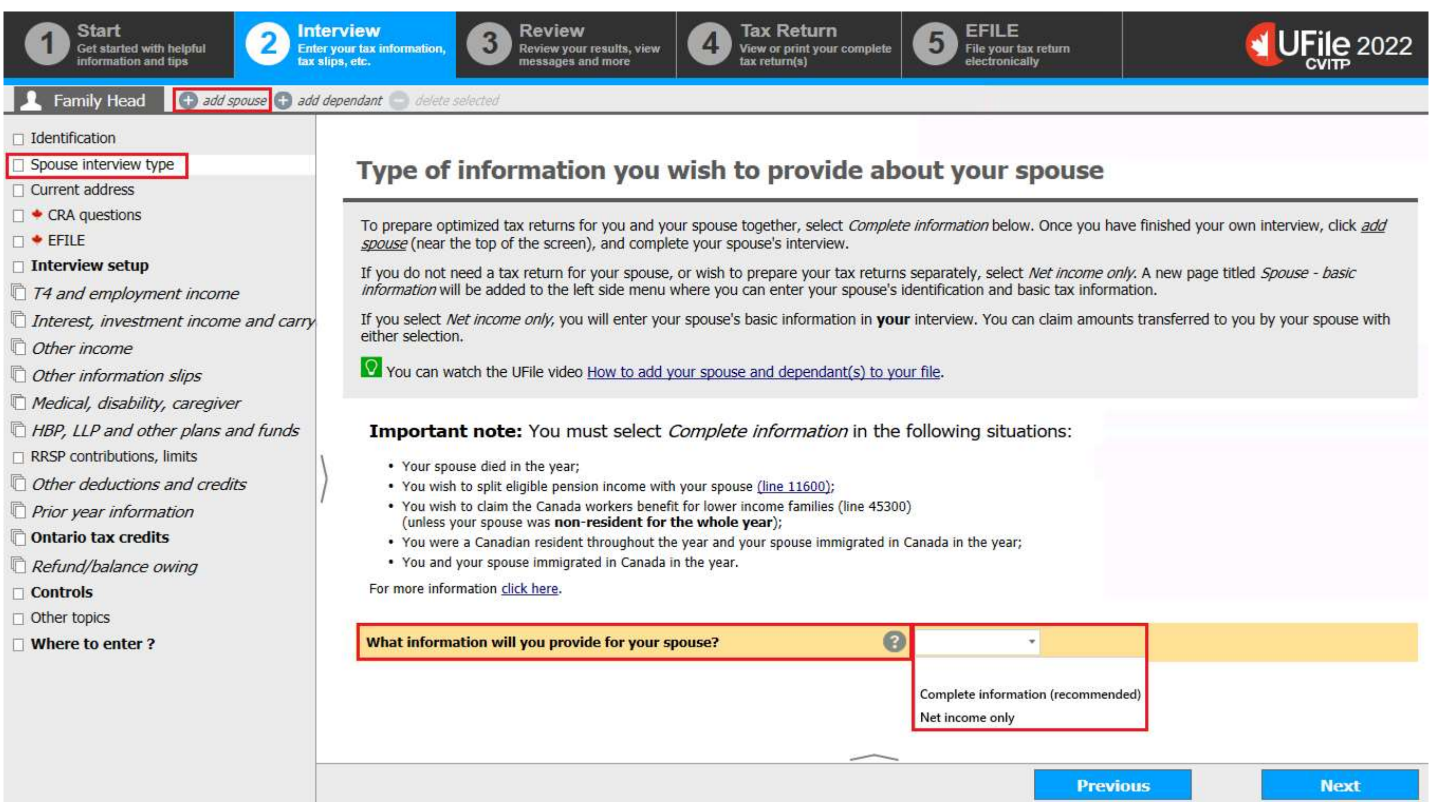
> For more information, refer to Printing a tax return and Find a CRA address.

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



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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

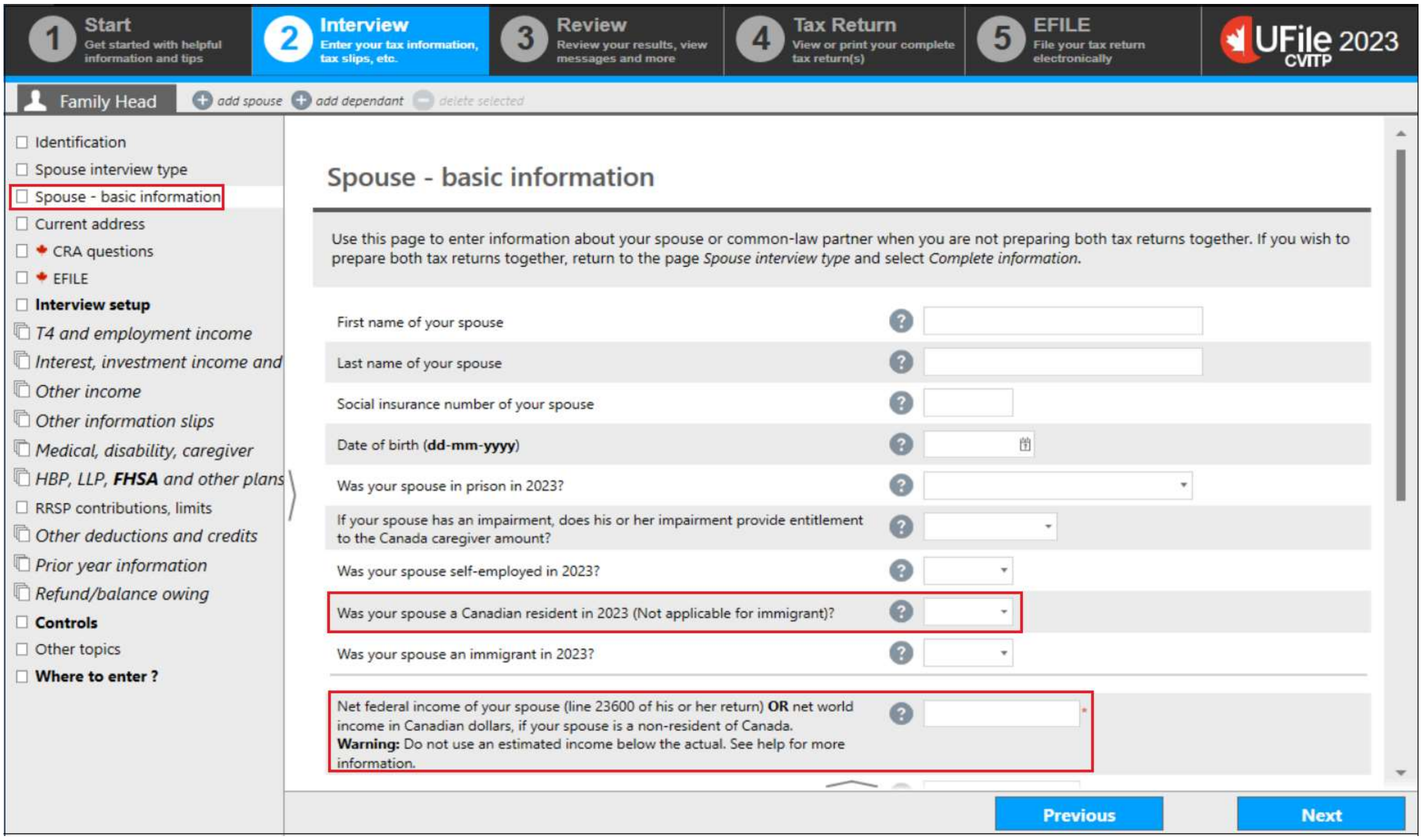
If you select **married** or **common-law** spouse in the **Identification** section, UFile will generate the **Spouse interview type** topic in the left-side menu. Navigate to it when you click **Next**. For more information on marital statuses, refer to Identification and marital status.

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



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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.

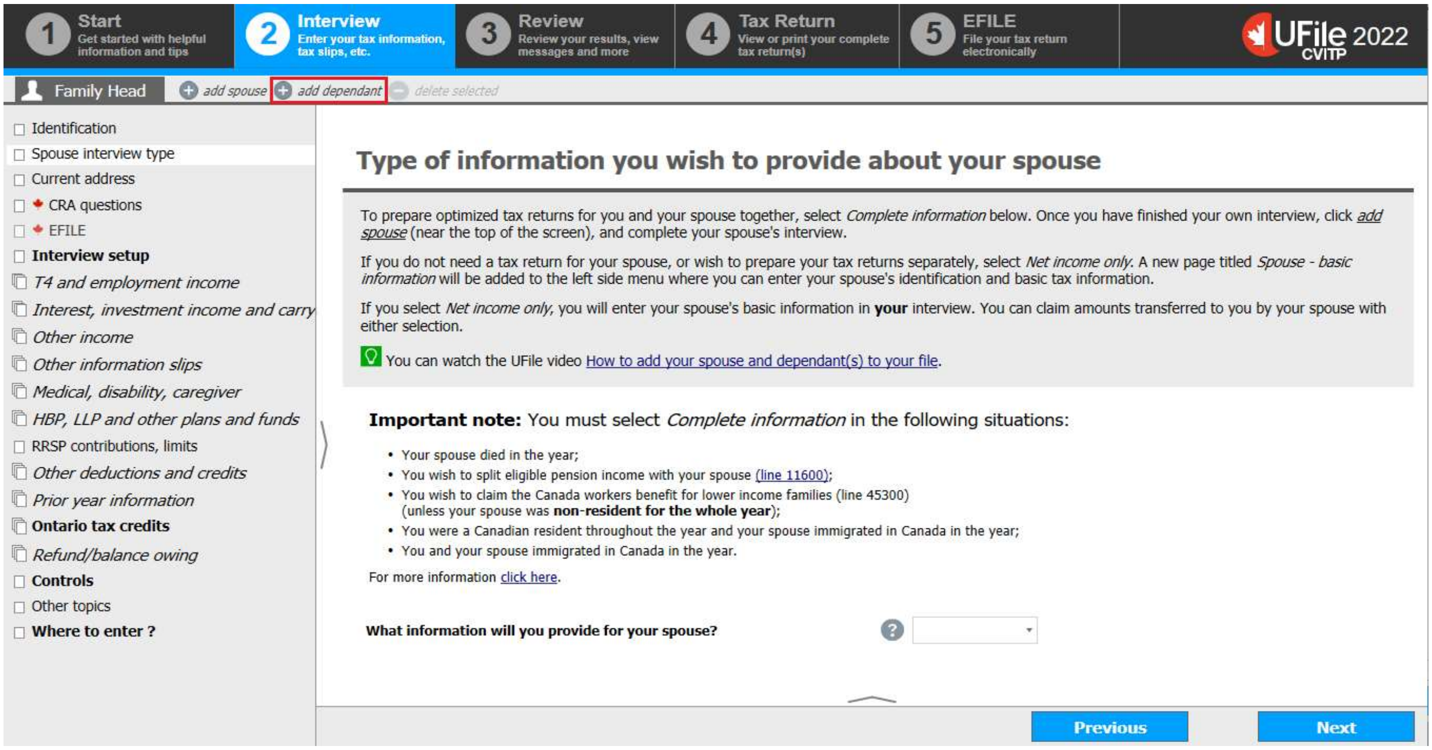
In the field, **Net federal income of your spouse (line 23600 of his or her return) OR net world income in Canadian dollars, if your spouse is a non-resident of Canada**, enter the amount:

- 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



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UFile screen

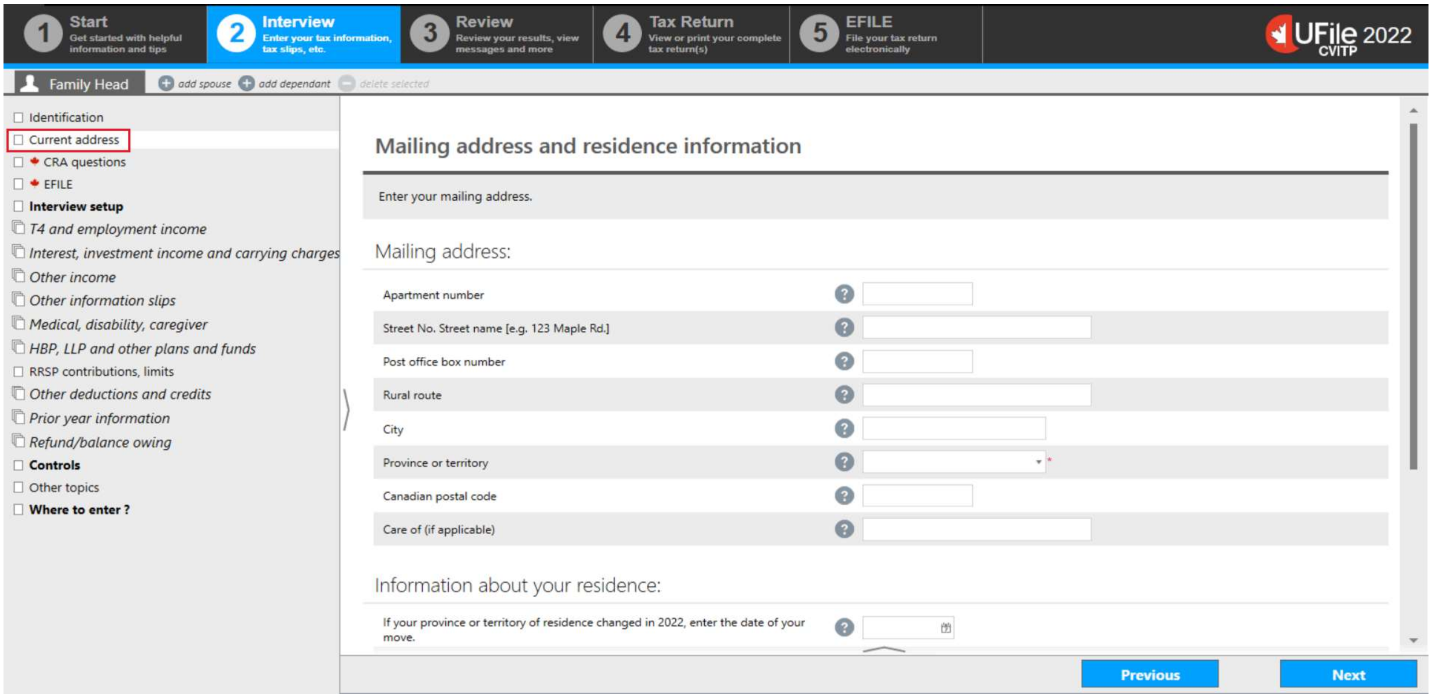
Under Interview tab

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



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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 ➜

Date modified:
2025-01-30