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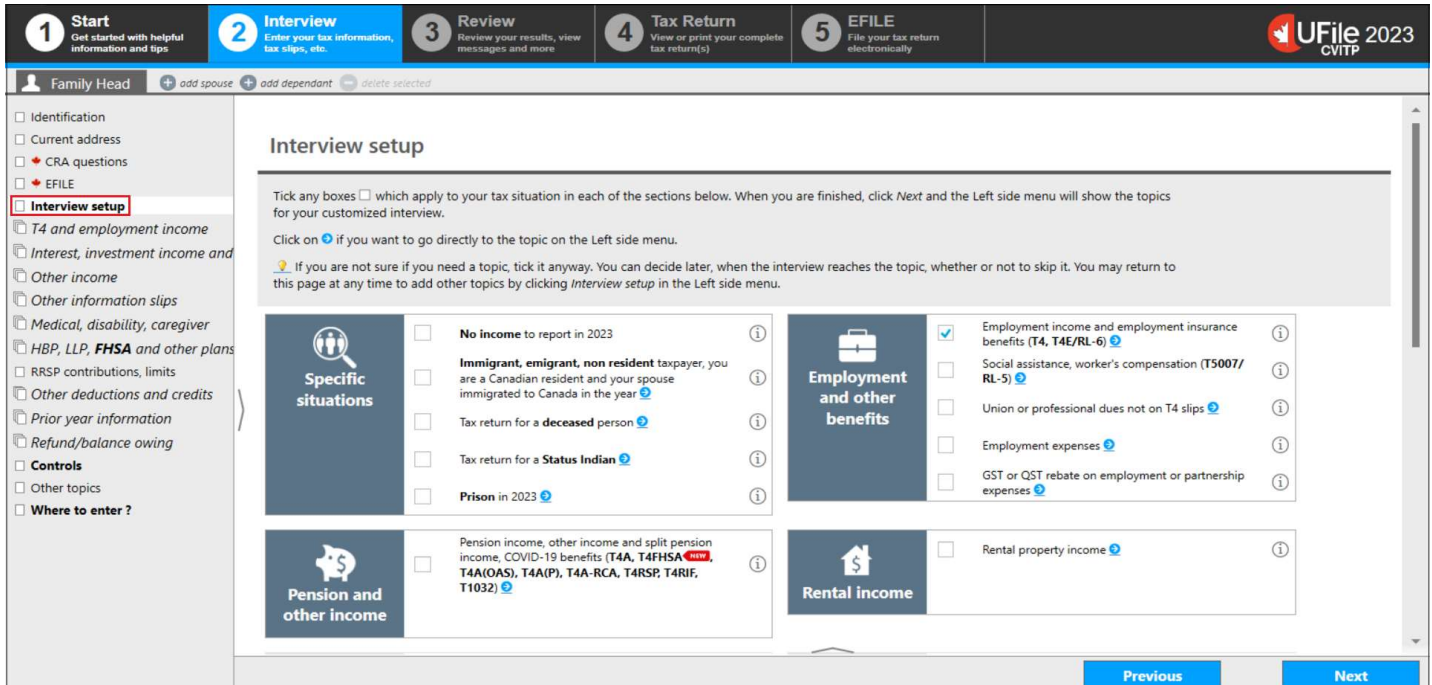
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Tax data entry sections

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Interview setup



▼ Text version of the above image

UFile screen

Under Interview tab

Family Head sub-tab

Interview setup topic is highlighted

The **Interview setup** section is where you indicate any **Specific situations** that may apply to the individual. It is also where you select the types of income, deductions or credits that you will be entering on their tax return. When you tick applicable boxes and click **Next**, the corresponding topics will be generated in the left-side menu, ready for you to complete.



UFile tip

If you forget to select a topic from this screen, you can always go back to the **Interview setup** section to tick the appropriate box. Some boxes are ticked by default, but the tax return will not be impacted if any of these boxes do not apply to the individual's situation.

Entering the tax slips

The screenshot shows the UFile 2021 CVTP interface. At the top, there are five steps: 1. Start, 2. Interview, 3. Review, 4. Tax Return, and 5. EFILE. The 'Interview' step is currently selected. Below the steps, there are tabs for 'Family Head', 'Spouse', 'add dependant', and 'delete selected'. The 'Family Head' tab is active. On the left side, there is a list of topics under the 'Interview setup' section. The 'T4 and employment income' topic is highlighted with a red box. The main content area is titled 'T4 and employment income' and contains a list of items to be entered. The first item, 'T4 income (earned in any province except Quebec)', is highlighted with a red box. To the right of this item is a red box containing a '+' sign. Below this item are three more items: 'T4 and RL-1 (Relevé 1) income earned in Quebec with QPP contributions', 'T4 and RL-1 (Relevé 1) income earned in Quebec with CPP contributions', and 'T4E - Employment insurance and other benefits'. Each of these items has a '+' sign to its right. Below these items are two more sections: 'Tips' and 'Other employment income', each with a '+' sign. At the bottom of the list are two items: 'CPT20 - CPP Election for Other employment earnings' and 'CPT20 - CPP Election for tax-exempt self-employment earnings of an Indian (Type N)', each with a '+' sign. At the bottom right of the interface are 'Previous' and 'Next' buttons.

▼ Text version of the above image

UFile screen

Under Interview tab

Family Head sub-tab

T4 and employment income topic is highlighted

+ sign beside T4 income (earned in any province except Quebec) is highlighted

Each topic can be accessed from the left-side menu.

Once you have clicked on a topic, applicable tax slips, deductions and credits can be added by clicking on the + sign next to each item. This will generate pages where income amounts, or other required information, are entered.

For example, if you click the + sign next to **T4 income (earned in any province except Quebec)**, T4 income will generate as a topic under **T4 and employment income** in the left-side menu.

Example of entering information from a T4 slip on the T4-Statement of Remuneration Paid screen

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 2024 CVTP

Family Head + Add Spouse + Add Dependent - Delete Selected

- Identification
- Spouse interview type
- Current address
- CRA questions
- EFILE
- Interview setup
- T4 and employment income**
 - T4 income**
 - T4A, T4FHSA and pension income
 - Other income

T4 - Statement of Remuneration Paid

Copy the amounts from your T4 employment income slip to the corresponding box numbers here. If a box is blank on your slip do not enter zero here - leave it blank.
Boxes 57 to 60, Employment income by period, are entered as OTHER INFORMATION.

Employer's name ? []

Employment income ? **14** []

T4 Statement of Remuneration Paid
État de la rémunération payée

Canada Revenue Agency / Agence du revenu du Canada

Year / Année []

Employer-offered dental benefits / Prestations dentaires offertes par l'employeur 45 **1**

Province of employment / Province d'emploi 10 []

Employment code / Code d'emploi 29 []

Employment income / Revenus d'emploi 14 **11,000.00**

Employee's CPP contributions - see over / Cotisations de l'employé au RPC - voir au verso 16 **375.36**

Employee's second CPP contributions - see over / Deuxièmes cotisations de l'employé au RPC - voir au verso 16A []

EI insurable earnings / Gains assurables d'AE 24 **11,000.00**

Employee's EI premiums / Cotisations de l'employé à l'AE 18 **191.94**

Income tax deducted / Impôt sur le revenu retenu 22 []

Employee's QPP contributions - see over / Cotisations de l'employé au RRQ - voir au verso 17 []

Employee's second QPP contributions - see over / Deuxièmes cotisations de l'employé au RRQ - voir au verso 17A []

CPP/QPP pensionable earnings / Gains ouvrant droit à pension - RPC/RRQ 26 **11,000.00**

Union dues / Cotisations syndicales 44 []

Previous Next

▼ Text version of the above image

UFile screen

Under Interview tab

Family Head sub-tab

T4 income topic is highlighted

T4 – Statement of Remuneration Paid page

Box 14 is highlighted

T4 – Statement of Remuneration Paid slip

Box 14: Employment income: 11,000.00 is highlighted

If you click the **T4 income** topic, the **T4 – Statement of Remuneration Paid** page will open, listing fields that match with the boxes found on the T4 slip. If an individual has multiple tax slips, you will need to enter each separately.

If the individual's tax slip has a box that is not accounted for in UFile CVITP, scroll down to **OTHER INFORMATION** to select additional options.

As you add the issuer or employer's names, they will populate in the left-side menu, making it easy to identify and review the information from a particular tax slip.

Enter any remaining tax slips that you may have and click **Next** to bring you to the next section.

If you need to correct any information for a particular tax slip, you can return to the page by clicking on the tax slip's name in the left-side menu.

If you need to delete a tax slip, you can do this by clicking the minus - sign to the right of that specific tax slip.

If an individual has several of the same type of tax slip, such as multiple T4 slips, the software will add these up and report the total amount of employment income on the tax return.

Other income and information slips

The screenshot shows the UFile 2021 CVTP interface. At the top, there are five steps: 1 Start, 2 Interview, 3 Review, 4 Tax Return, and 5 EFILE. The 'Interview' step is currently active. Below the steps, there are tabs for 'Family Head' and 'Spouse', with 'Family Head' selected. On the left side, there is a menu with various categories. The 'Other income' and 'Other information slips' items are highlighted with red boxes. The main area displays the 'Other income' section, which includes a list of income types with plus and question mark icons next to them. The list includes: Labour adjustment benefits, Grants or training allowance, Death benefit received from employer upon death of your spouse, T1198 - Qualifying retroactive lump-sum payment, and Other taxable income (federal line 13000). At the bottom right, there are '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 2021
CVTP

Family Head Spouse + add dependant - delete selected

- ☐ Identification
- ☐ Spouse interview type
- ☐ Current address
- ☐ CRA questions
- ☐ EFILE
- ☐ Interview setup
 - ☐ T4 and employment income
 - ☐ T4 income
 - ☐ Interest, investment income and carrying charges
 - ☐ 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
 - ☐ Refund/balance owing
- ☐ Controls
 - ☐ Other topics
 - ☐ Where to enter ?

Other income

Make a selection below if you had other income in 2021 that you have not yet reported in this interview.

Click + next to the item below to **add** a new page, then enter your information. If you do not need to add any (more) items, click **Next**. To **edit** a page, click the item added in the left side menu. To **delete** a page, click -.

Other income

- Labour adjustment benefits + ?
- Grants or training allowance + ?
- Death benefit received from employer upon death of your spouse + ?
- T1198 - Qualifying retroactive lump-sum payment +
- Other taxable income (federal line 13000) + ?

Previous Next

▼ Text version of the above image

UFile screen

Under Interview tab

Family Head sub-tab

Other income topic is highlighted

Other information slips topic is highlighted

Situations that are not found in the **Interview setup** may be found under **Other income** or **Other information slips** in the left-side menu.

Review these topics to see if any other situations apply to the individual.

Other deductions and credits

The screenshot displays the UFile 2023 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 sub-header reads 'Family Head' with options to '+ add spouse', '+ add dependant', and '- delete selected'. The left sidebar contains a list of topics, with 'Other deductions and credits' highlighted in red. The main content area is titled 'Other deductions and credits' and includes a yellow lightbulb icon with the text: 'Use the items below to claim miscellaneous deductions that you have not already claimed elsewhere.' Below this, a blue box with a magnifying glass icon and the text 'Other deductions' lists four items: 'Federal line 23200 - Other deductions', 'Federal line 25500 - T2222 - Northern residents deduction', 'Federal line 25600 - Additional deductions', and 'Federal lines 23100, 25600 - Member of the clergy or of a religious order'. Another blue box with a magnifying glass icon and the text 'Other credits' lists four items: 'Federal line 31270 - Home buyers' amount for the purchase of a qualifying home', 'Federal line 31350 - Digital news subscription expenses', 'Federal line 45355 - Schedule 12 - Multigenerational home renovation tax credit' (marked with a red 'NEW' tag), and 'Federal line 46900 - Eligible educator school supply tax credit'. At the bottom right, there are 'Previous' and 'Next' buttons.

▼ Text version of the above image

UFile screen

Under Interview tab

Family Head sub-tab

Other deductions and credits topic is highlighted

The **Other deductions and credits** topic will only be listed in the left-side menu if the box next to **Other deductions and credits (including school supply, digital news subscription and home buyers amount)** is ticked in **Interview setup**, in the **Other topics** section. This is where additional topics such as the **Northern residents deduction** are located.

For more information, refer to [Types of deductions](#), [Types of non-refundable tax credits](#) and [Types of refundable tax credits and other items](#) in the tax guide for volunteers along with the [Tax considerations for specific situations](#) section.

Provincial tax and credits

The screenshot displays the UFile 2021 CVITP software interface. At the top, a navigation bar includes five steps: 1. Start, 2. Interview (highlighted), 3. Review, 4. Tax Return, and 5. EFILE. Below this, a sub-navigation bar shows 'Family Head' and 'Spouse' tabs, with 'Family Head' selected. The left sidebar contains a list of topics, with 'Ontario tax credits' highlighted in red. The main content area is titled 'Ontario tax credits' and contains a message: 'The program automatically calculates your Ontario provincial forms and lines 42800 and 47900 based on information you enter in the interview. You can control whether you or your spouse receives certain Ontario tax credits using the second item below. For more information on Ontario tax and credits, [click here](#).' Below this message are three sections: 'Ontario tax credits' (with a sub-section 'Assigning Ontario credits to one spouse or the other'), 'ON-BEN Application' (for the 2022 Ontario Trillium Benefit), and 'ON-BEN Declaration(s)' (with sub-sections for rent paid, property tax paid, student in a designated residence, home energy costs, and amount paid for public or non-profit). At the bottom right of the main content area are 'Previous' and 'Next' buttons.

▼ Text version of the above image

UFile screen

Under Interview tab

Family Head sub-tab

Ontario tax credits topic is highlighted

Additional topics, such as provincial or territorial tax and credits, populate in the left-side menu based on the information provided under the **Identification** topic. In this example, Ontario is the province of residence so the **Ontario tax credits** topic was generated.

For more information on Provincial and territorial benefits and credits, refer to [Provincial and territorial benefits and credits](#).

How to review and submit the tax return →

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