UFile overview

- How to set up the software and start a new file
- Identification sections
- CRA related sections
- Tax data entry sections
- How to review and submit the tax return
- Saving and printing tax returns

Saving and printing tax returns
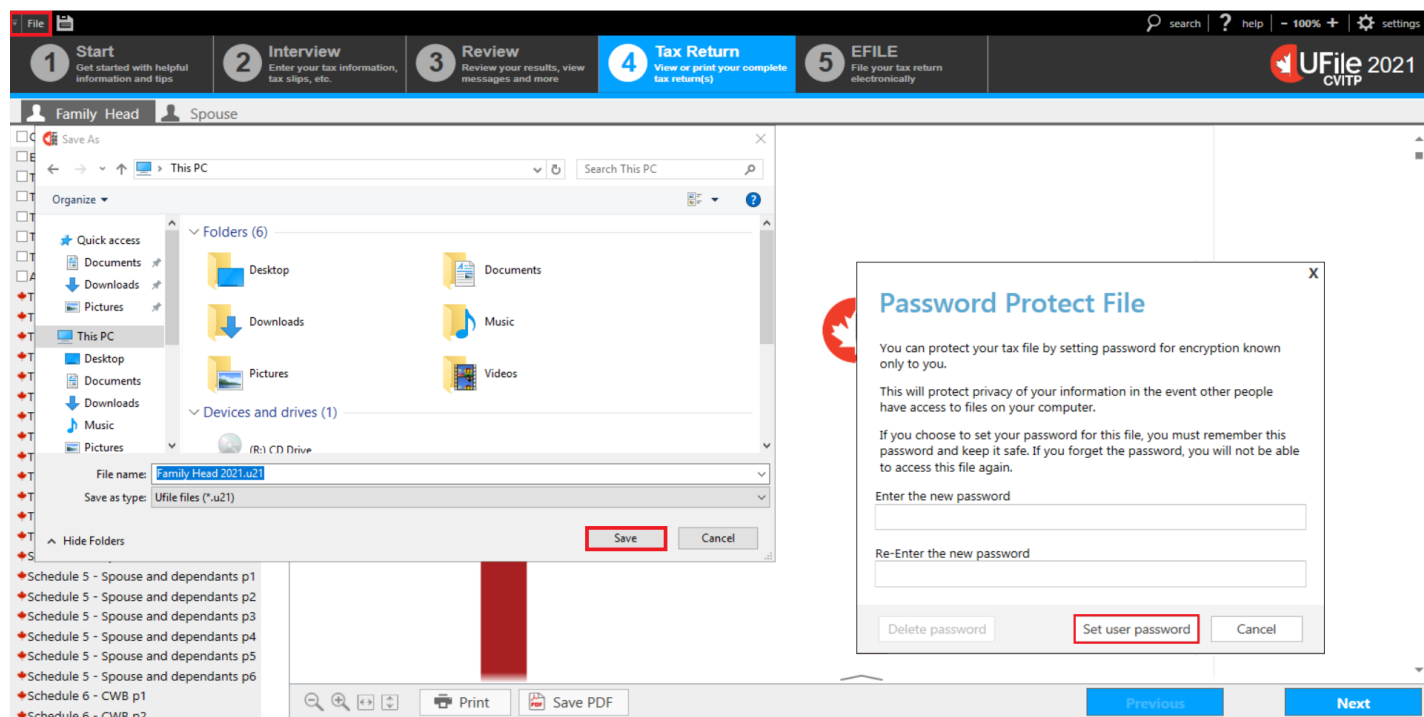
On this page

- Saving a tax return
- Printing a tax return
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[PDF] [PDF version](#)

Saving a tax return

You do not have to save the tax return in order to print it or to transmit it using EFILE. This step is only necessary in instances where you are unable to transmit a tax return immediately upon completion.

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UFile screen

Tax Return tab

File button is highlighted

A personal computer screen is displayed on the left

Save button is highlighted

Under Password Protected File pop-up window

Set user password button is highlighted

UFile CVITP software has enforced password protection to encrypt information when saved.

When saving a file using **Save as**, a pop-up window will appear. Select the location where the file will be saved (should always be on a USB flash drive, never on a hard drive). If the default location is not correct, click the file-folder icon and select the correct location that you will save the tax return to and click **Save**.

Once you have encrypted and saved the tax return, a **Password Protect File** pop-up window will appear. It is recommended that you use the same password for all of the tax returns you complete. Once you have entered a password, click **Set user password**.

Printing a tax return

The CRA encourages electronic filing; however, it also recognizes that you may need to provide specific pages or a copy of the tax return to an individual. You can either save them as a PDF or print them for the individual.
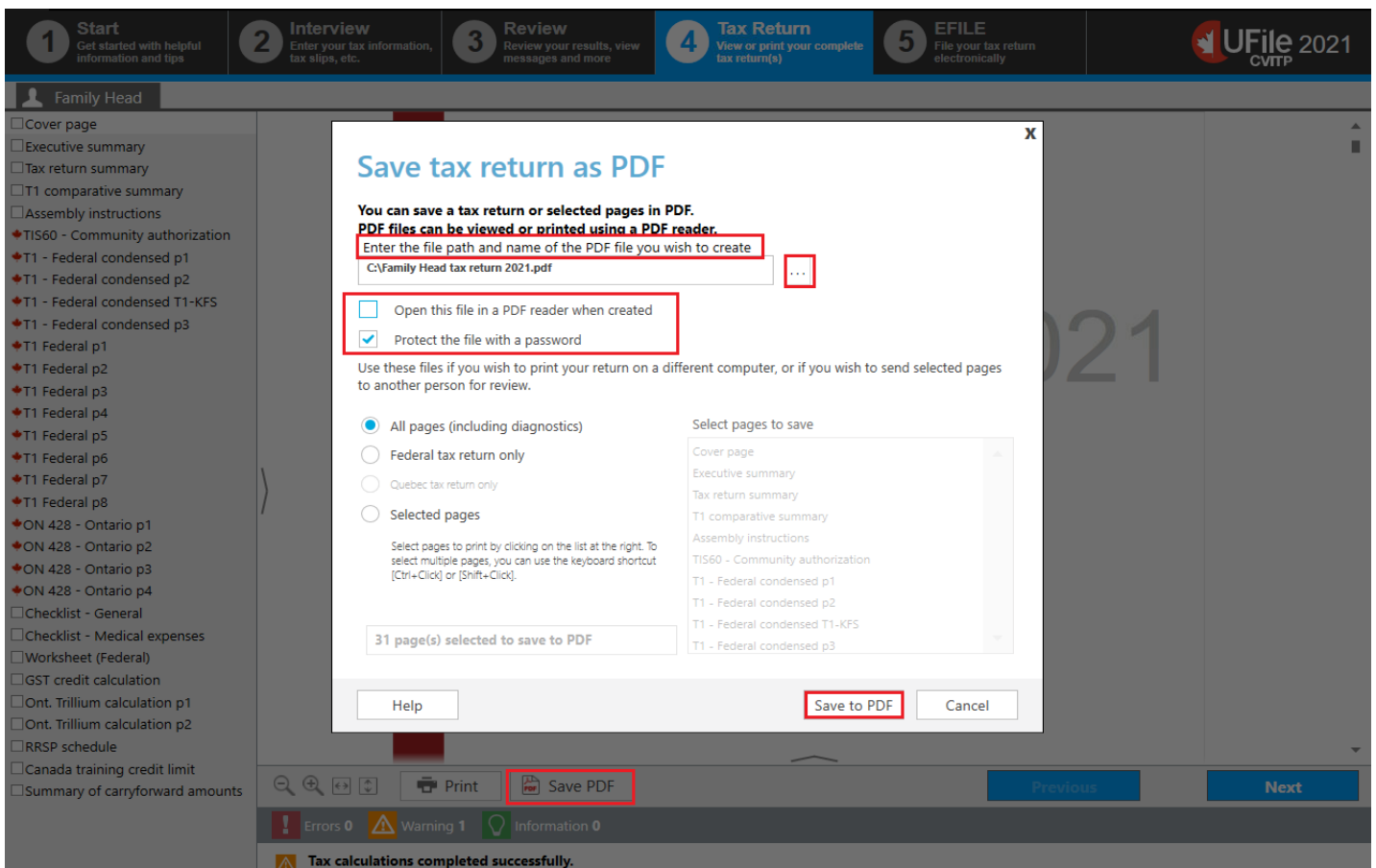
▼ Text version of the above image

UFile screen

Under Tax Return tab

Save PDF button is highlighted

Save tax return as PDF pop-up window is displayed

Enter the file path and name of the PDF file you wish to create is highlighted

Ellipsis (...) button is highlighted

Open this file in a PDF reader when created is unticked and highlighted
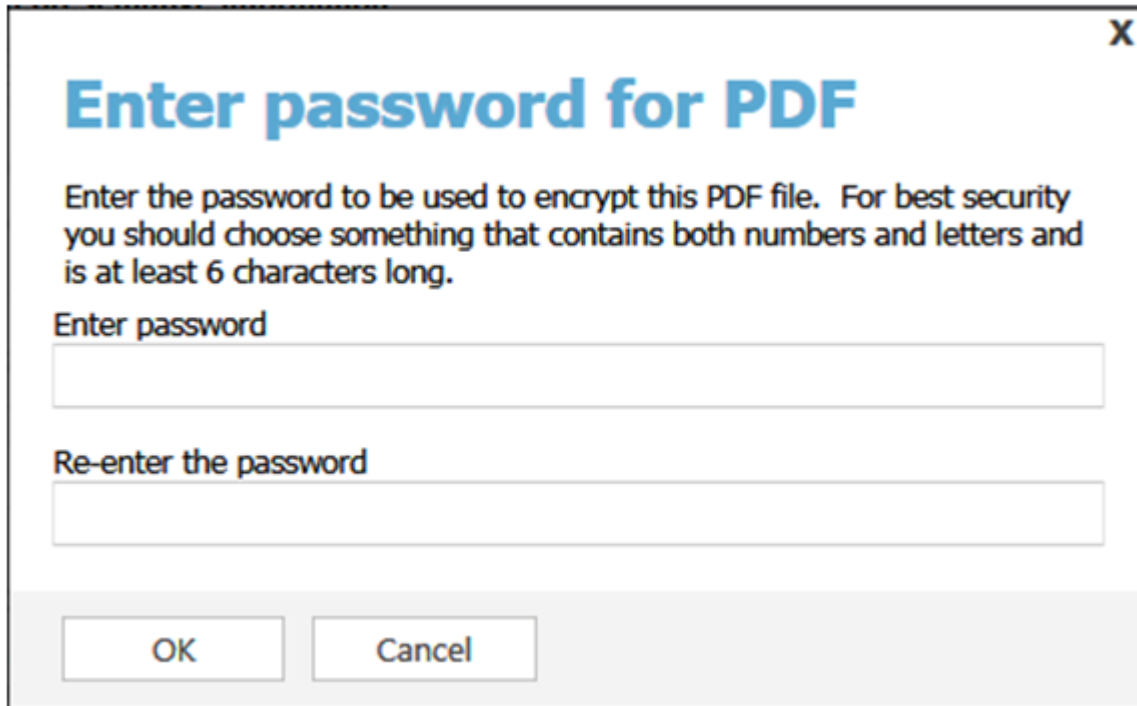
Protect the file with a password is ticked and highlighted

Save to PDF button is highlighted

To save specific pages or a copy of the tax return as a PDF:

- click the **Save PDF** button at the bottom of the **Tax Return** page
- a pop-up window, **Save tax return as PDF**, will appear
- enter the file path and the name of the PDF file you wish to create
- untick the box **Open this file in a PDF reader when created**
- tick the box **Protect the file with a password**
- tick either **All pages (including diagnostics)**, **Federal tax return only** or **Selected pages** depending on what you need to provide to the individual
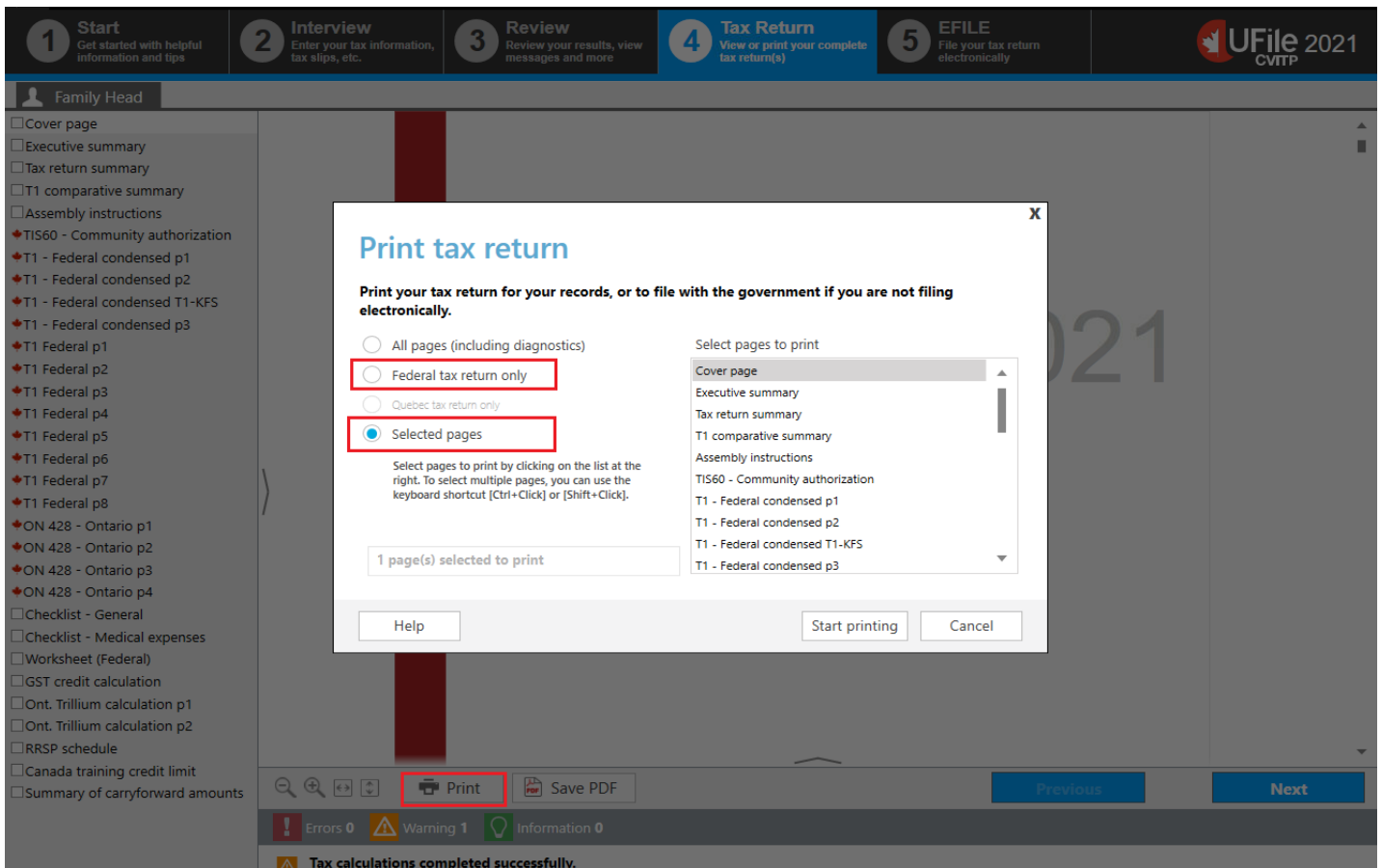- click **Save to PDF**

The pop-up window, **Enter password for PDF**, will appear.

- ▼ Text version of the above image

Enter password for PDF pop-up window

Enter the password you and the individual decided on into both fields and click **OK**.

▼ Text version of the above image

UFile screen

Under Tax Return tab

Family Head sub-tab

Cover page topic

Print button is highlighted

Print tax return pop-up window is displayed

Federal tax return only option is highlighted

Selected pages option is ticked and highlighted

To print specific pages or a copy of the tax return:

- click the **Print** button at the bottom of the **Tax Return** page
- a pop-up window, **Print tax return**, will appear

- tick either **All pages (including diagnostics)**, **Federal tax return only** or **Selected pages** depending on what you need to print for the individual

When **All pages** or **Federal tax return only** are ticked, there is no further action required. Simply click **Start printing**.

When **Selected pages** is ticked, you can select individual forms, schedules and other pages by holding down the Ctrl or Shift key on your keyboard and using your mouse to click the pages you wish to print. Once you have clicked all of the pages you require, click **Start printing**.
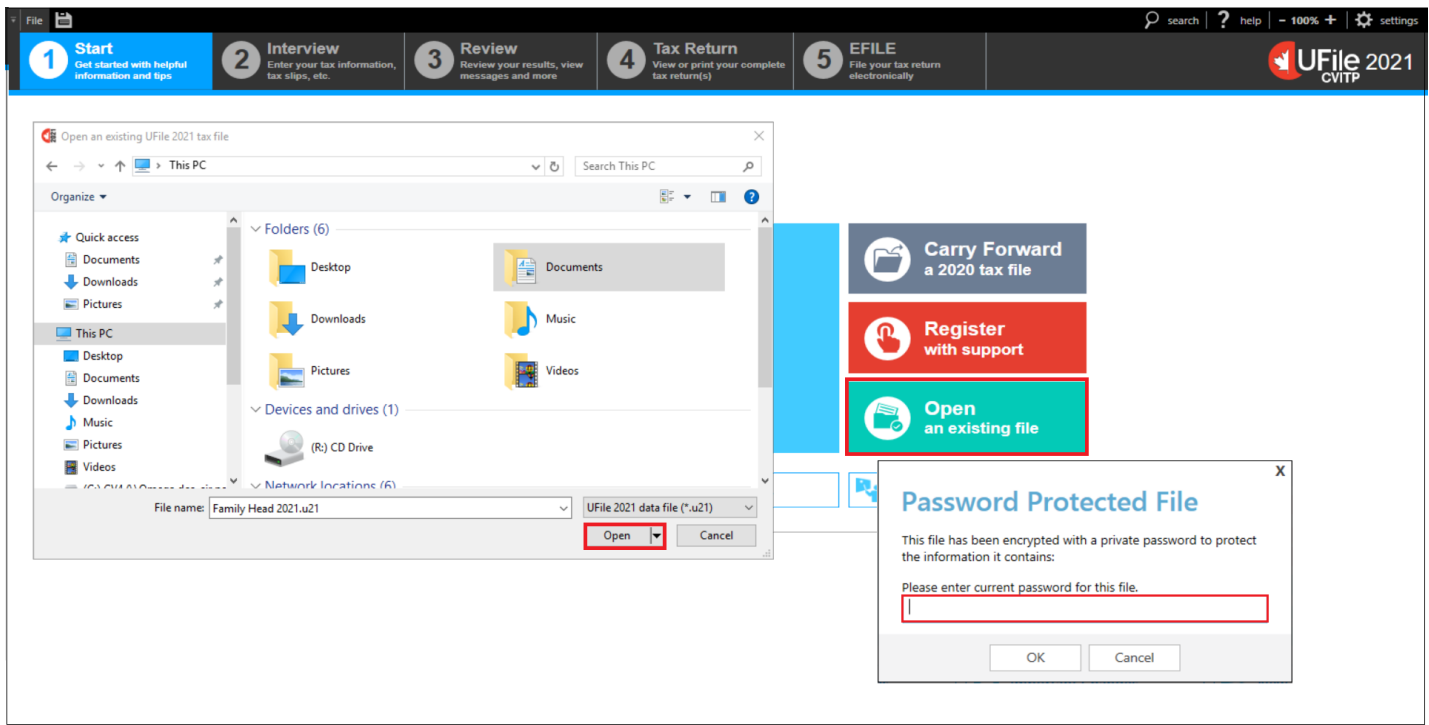
> **Note**
>
> To minimize the number of pages you are printing, you can choose **Federal tax return only** or **Selected pages** rather than **All pages**.
>
> If you are printing the tax return to send to the CRA for processing, choose **Federal tax return only** which will include only the main pages of the tax return.

Opening a saved tax return

▼ Text version of the above image

UFile screen

Under Start tab

Open an existing file is highlighted

A personal computer screen is displayed on the left

Open button is highlighted

Under Password Protected File pop-up window

Please enter current password for this file is highlighted

To open a file that you have previously encrypted and saved, click **Open an existing file** under the **Start** tab.

A pop-up window will ask you to find the location of the file that you want to open. Click the folder icon to select the location. Then click **Open**.

A new pop-up window will ask for the encryption password. Enter the password, click **OK** and the file will open.

Date modified:

2023-12-19