

Tax returns checklist for 2023

Name: _____

Date of birth: _____ Age: _____

SIN: _____

IDENTIFICATION

New tax spouse DD-MM-YYYY

Taxpayer separated during the year DD-MM-YYYY

Taxpayer became widowed DD-MM-YYYY

Date of death DD-MM-YYYY

Immigrant – Date of entry in Canada DD-MM-YYYY

Emigrant – Date of departure from Canada DD-MM-YYYY

– List of properties by an emigrant of Canada (T1161)

– Deemed disposition of property (T1243)

– Election to defer the payment of tax (T1244)

– Election to report deemed dispositions (T2061A)

World income

Non-Resident

Date of bankruptcy DD-MM-YYYY

Date of moving in 2023 DD-MM-YYYY

New address

– Eligible for home buyers' amount (first-time home buyers)

– Disposition of a principal residence

Telephone or cell number

Email address

Elections Canada

Indian – Income exempt under the Indian Act (T90)

Foreign property was more than CAN\$100,000 (T1135)

Prison

Enrolled in direct deposit

INCOME

Employment income (T4)

– Wage-loss replacement contributions

– Retiring allowances

– Deferred security options benefits (T1212)

Old age security pension (T4A/OAS)

CPP/QPP benefits (T4A(P))

Other pension and superannuation (T4A)

Income from RRIF (T4RIF)

Income from RRSP (T4RSP)

Amounts from a spousal RRSP, RRIF or SPP (T2205)

Elected split-pension amount (T1032)

– Election to remove pension income splitting for GIS (decease of spouse)

Employment insurance and other benefits (COVID-19 income support) (T4E)

Dividends, interest, foreign income (T5)

– Transfer all taxable dividends received by the spouse

Investment income (without slip), interest on refund, etc.

Rental income and expenses

– Election of change in use of the property (sub. 45(2) ITA)

– Cost incurred for work on an immovable

– Automobile expenses (log book)

Capital gains (T5008, etc)

– Election of change in use of the property (sub. 45(3) ITA)

Capital losses (T5008, etc)

– Request for loss carryback

Support payments received

Distributions from a trust (T3)

Partnership (T5013)

Income subject to the split income rules (T1206)

Business income and expenses

– Internet business activities

– Acquisition of depreciable property (acquisition dates)

– Automobile expenses (log book)

– Business-use-of-home

Farming income and expenses

– Internet business activities

– Acquisition of depreciable property (acquisition dates)

– Main source of income

Fishing income and expenses

– Internet business activities

– Acquisition of depreciable property (acquisition dates)

– Main source of income

Workers' compensation benefits (T5007)

Social assistance payments (T5007)

Other income (scholarships, research grants, COVID-19 support, etc.)

Retroactive lump-sum payment (T1198)

DEDUCTIONS

RRSP contribution receipt (rest of year 2023)

RRSP contribution receipt (first 60 days of 2024)

Unused RRSP contributions (as shown on latest notice of assessment)

RRSP excess contributions (T1-OVP)

HBP

LLP

Pension adjustment reversal (PAR) (T10)

Deduction for elected split-pension amount (T1032)

Annual union, professional, or like dues

Child care expenses (Receipts)

ABIL

Moving expenses (T1-M)

Support payments made and arrears

Carrying charges and interest expenses (investment income summary)

Employment expenses

– Declaration of conditions of employment (T2200, T2200S)

– Automobile expenses (log book)

– Business-use-of-home

Northern residents deductions (T2222)

Other deductions

Additional deductions

TAX CREDITS

Home accessibility expenses

Disability amount (for the taxpayer)

Disability amount transferred from a dependant

Spouse with an impairment in physical or mental functions (Schedule 5)

Dependants with an impairment in physical or mental functions (Schedule 5)

Amounts transferred from spouse or common-law partner (Schedule 2)

Certificate for volunteer firefighters

Certificate for search and rescue volunteers'

Interest paid on your student loans

Tuition expenses (T2202, TL11A, TL11C)

– Canada training credit

Tuition amount transferred from a child

Medical expenses

Donations and gifts

Logging tax credit

Adoption expenses

Digital news subscription expenses

Federal political contribution

Eligible educator school supply tax credit

Labour-sponsored funds tax credit

Multigenerational home renovation tax credit

Employee and partner GST/HST and QST rebate

Climate action incentive - Reside outside a CMA

ONTARIO TAX CREDITS

Caregiver amount

Disability amount transferred from a dependant

Amounts transferred from spouse or common-law partner (Schedule ON(S2))

Community food program donation tax credit for farmers

Seniors' public transit tax credit

Seniors care at home tax credit

Political contribution tax credit

Focused flow-through share tax credit (T1221)

ONBEN - Energy and property tax credit (OEPTC)

ONBEN - Northern Ontario energy credit (NOEC)

ONBEN - Senior homeowners' property tax grant (OSHPTG)

Tax credits for self-employed individuals

Co-operative education tax credit

Advance payments

Canada workers benefit (RC210)

Instalments

Federal instalments

Medical expenses checklist for 2023

Name: SIN: - -

Specific medical expenses

(Box will automatically be ticked if appropriate entry is made in the software)

		Prescription needed?	Certification in written needed?	Form T2201 needed?
<input type="checkbox"/>	1 Premiums paid by the employee to private health insurance plans (T4 box 85)	No	No	No
<input type="checkbox"/>	2 Quebec prescription drug insurance plan premium paid for 2022	No	No	No
<input type="checkbox"/>	3 Attendant care expenses	No	T2201 or written certification	T2201 or written certification
<input type="checkbox"/>	4 Fees for a residential and long-term care centre	No	T2201 or written certification	T2201 or written certification
<input type="checkbox"/>	5 Fertility-related procedures	No	No	No
<input type="checkbox"/>	6 Moving expenses (more functional dwelling)	No	No	No
<input type="checkbox"/>	7 Renovation expenses of an eligible dwelling (home accessibility)	No	No	No
<input type="checkbox"/>	8 Travel expenses (at least 40 km from home to get medical services not available near home)	No	No	No
<input type="checkbox"/>	9 Van adapted for wheelchairs	No	No	No

Other eligible medical expenses

(Tick manually if desired. This list is not exhaustive.)

<input type="checkbox"/>	21 Prescribed drugs, medications, and other substances	Yes	No	No
<input type="checkbox"/>	22 Dental care (dentist, dental hygienist)	No	No	No
<input type="checkbox"/>	23 Vision care (optometrist, eyeglasses, contact lenses, other devices)	Yes, for vision devices	No	No
<input type="checkbox"/>	24 Premiums paid by the employee to private health insurance plans (no box 85 on T4) - see last pay slip for 2023 or other documents	No	No	No
<input type="checkbox"/>	25 Ambulance transportation costs	No	No	No
<input type="checkbox"/>	26 Dentures, dental implants, denturist, dental mechanic, denturologist	No	No	No
<input type="checkbox"/>	27 Fees for filling out Form T2201 or other certificates	No	No	No
<input type="checkbox"/>	28 Gluten-free food products (celiac disease)	No	Yes	No
<input type="checkbox"/>	29 Guide dogs, other service animals (cost, care and maintenance)	No	No	No
<input type="checkbox"/>	30 Hospital services	No	No	No
<input type="checkbox"/>	31 Laboratory procedures or services	Yes	No	No
<input type="checkbox"/>	32 Medical tests	Yes	No	No
<input type="checkbox"/>	33 Vaccines	Yes	No	No

Reference: <https://www.canada.ca/en/revenue-agency/services/tax/individuals/topics/about-your-tax-return/tax-return/completing-a-tax-return/deductions-credits-expenses/lines-33099-33199-eligible-medical-expenses-you-claim-on-your-tax-return.html>

Authorized medical practitioners

(Tick manually if desired. This list is not exhaustive.)

		AB	BC	MB	NB	NL	NS	NT	NU	ON	PE	QC	SK	YT
<input type="checkbox"/>	51 Acupuncturist	✓	✓			✓	✓			✓		✓		
<input type="checkbox"/>	52 Audiologist	✓	✓	✓	✓	✓	✓			✓		✓	✓	
<input type="checkbox"/>	53 Chiropodist			✓	✓					✓				
<input type="checkbox"/>	54 Chiropractor	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓
<input type="checkbox"/>	55 Criminologist (psychotherapy)											✓	✓	
<input type="checkbox"/>	56 Dietician	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	
<input type="checkbox"/>	57 Hearing aid practitioner	✓	✓	✓		✓						✓		
<input type="checkbox"/>	58 Homeopath									✓				
<input type="checkbox"/>	59 Kinesiologist									✓				
<input type="checkbox"/>	60 Marriage and family therapist											✓		
<input type="checkbox"/>	61 Midwife	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓
<input type="checkbox"/>	62 Naturopath	✓	✓	✓	✓	✓	✓			✓		✓	✓	✓
<input type="checkbox"/>	63 Nurse	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/>	64 Occupational therapist	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓
<input type="checkbox"/>	65 Optician	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	
<input type="checkbox"/>	66 Osteopath													
<input type="checkbox"/>	67 Pharmacist	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/>	68 Physician	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/>	69 Physiotherapist or physical therapist	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓
<input type="checkbox"/>	70 Phytotherapist													
<input type="checkbox"/>	71 Podiatrist	✓	✓	✓	✓					✓		✓	✓	
<input type="checkbox"/>	72 Professional technologist in orthoses/prostheses											✓		
<input type="checkbox"/>	73 Psychoeducator											✓		
<input type="checkbox"/>	74 Psychologist	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
<input type="checkbox"/>	75 Registered massage therapist		✓		✓	✓				✓	✓			
<input type="checkbox"/>	76 Registered nutritionist	✓			✓		✓					✓		
<input type="checkbox"/>	77 Registered psychotherapist									✓				
<input type="checkbox"/>	78 Legally qualified psychotherapist											✓		
<input type="checkbox"/>	79 Respiratory therapist	✓		✓	✓	✓	✓			✓		✓	✓	
<input type="checkbox"/>	80 Sexologist											✓		
<input type="checkbox"/>	81 Social worker	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	
<input type="checkbox"/>	82 Speech language pathologist	✓	✓	✓	✓	✓	✓			✓		✓	✓	
<input type="checkbox"/>	83 Surgeon	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/>	84 Traditional chinese medicine practitioner		✓							✓				
<input type="checkbox"/>	85 Vocational guidance counsellor (psychotherapy)											✓		

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