

QuickStart Guide 2023

Thank you for choosing UFile ONLINE.

Here is your single-use voucher code to be entered in the Voucher field in place of payment.







Welcome to UFile ONLINE

UFile ONLINE users will require a computer or tablet, an Internet connection and the voucher code found on the previous page.

Let's get started



	França
Create your accou	unt
User name *	
Password *	
Make sure to use a password that you' passwords contain 8-16 characters, do lowercase letters, numbers, and syn	Internembert Your password must be a minimum of 8 characters. Strong not include common words or names, and combine uppercase letters, mbols:
Re-enter password *	
Email address *	
Re-enter email address *	
 Yes, I would like to receive the events and promotional offers. UI (Canada). You may withdraw you 	UFIe newsletter containing information on products, services, File is a product of Thomson Reuters Tax and Accounting in consent at any time. Please refer to our email and privacy only.
I agree with the Terms and Co	nditions of the Licence agreement.

Complete the Registration page and accept the Terms and Conditions of the Licence agreement to create a secure account on UFile ONLINE.



Click **Interview** to fill in the necessary tax information for all your family members. Click **NETFILE** to submit your tax return to the CRA and/or Revenu Quebec.

Enter your tax informati tax slips, etc.

You can move through the interview using the classic step-by-step method that requires you to click the button on each screen.

Interview

UFile is designed to prepare income tax returns for all family members together. The first person whose name is displayed is referred to as the "family head". You cannot add a spouse or a dependant to the family unit until the identification information for the family head is entered.



From the Left Side Menu, provide your identification information, then select and tick any items relevant to you in the Interview setup page.

👤 John Smith 👤 Joanne Gra

Identification
 Current address
 Cha questions
 Reveru Québec questions
 Quebec dup issunce plan
 Quebec dup issunce plan
 Reveru Québec Tax Data Download
 Spouse interview type
 Interview setup
 NetFile
 T4 and employment income
 Interest, investment income and carrying
 Other income

Interview setup

On the Interview setup screen, select the specific tax topics that apply to you by ticking the appropriate boxes. As you click NEXT these items will be inserted in the Left Side Menu. Do not worry about forgetting relevant items. You can always return to the Interview setup at a later time to add or remove items appearing in the Left Side Menu.

Left Side Menu

UFile gathers certain types of information together in gateways (entry points to input screens). For example, all types of employment income and T4 data are grouped in the **T4 and employment income** gateway. This enables you to enter information from your tax slips quickly and easily. The Left Side Menu's tree structure gives you access to any input screen you want. It shows all available gateways as well as the input screen currently in use.



Family members

To add a spouse or a dependant, select one of the options **Add a spouse** or **Add a dependant** located under the Interview tab, as the case may be, and go through the interview process for this person.

It is important to enter as much tax information as possible about your spouse and dependants, even if you do not intend to use UFile to prepare their returns. This will enable UFile to calculate the greatest possible tax savings by allocating transferable amounts automatically.

Bottom Panel

The Bottom Panel displays helpful information relating to tax data entry, review and filing of your tax return. This new panel identifies missing or illogical entries and provides immediate direction to fix them.



Review your results, we messages and more



Review

When you're done, click **Review** to view the outcome of the tax calculations, and examine the results carefully to see whether you need to modify anything.

The Review tab is organized in sections: **Summary, Messages, Federal, Quebec** (if the taxpayer is a resident of Quebec), and **tax saving ideas**.

John Smith
 Summary
 Messages
 Federal
 Quebec
 Tax saving ideas

Summary: UFile displays the calculated tax results for all family members. Messages: If this section contains warnings and errors, this means that some of your data needs to be reviewed, and possibly corrected. UFile performs many automatic calculations designed to save you money. Federal (and Quebec): UFile displays the lines with calculated amounts. Tax saving ideas: UFile provides you with useful tax tips.

4 Tax Return

View or print your complete tax return(s)

When you are satisfied that the results are accurate, simply click **Tax return**. You will then be able to view, save in PDF format, or print the finished tax return with all the relevant schedules, forms and work charts.



5 NETFILE

Click the **NETFILE** tab when you are ready to NETFILE your return. Note that the CRA and/or Revenu Quebec require that each taxpayer file his or her tax return. The residents of Quebec should submit both federal (CRA) and Quebec (RQ) tax returns.



UFile will run a variety of diagnostic checks to determine whether you are eligible. Review the NETFILE restrictions, answer any eligibility questions and follow the on-screen instructions.

UFile transmits your return to the CRA for you. You will receive a notification whether or not your submission was successful. If it was successful, you'll see a 6-digit confirmation code (keep this in your records).

NETFILE

When you are ready, click on Tax Return

If you have not already done so, you will be asked to pay. Enter the single-use voucher code provided on the front of this QuickStart Guide in the Voucher field in place of payment and click Apply.

Follow the instructions to select any family member and view their tax return in full. You may also NETFILE each return, in turn.

This single-use voucher code enables preparation of your family return – you, your spouse and up to 2 dependants filing tax returns. Additional dependants may be purchased within the application.

www.ufile.ca

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Technical support is available at: support@ufile.ca

