UFile QuickStart Guide **2026**

Installation

To begin, visit **ufile.ca/DOWNLOAD** from any web browser.

Locate the **"Download your 2026 version of UFile for Windows"** link. Click to download and install UFile.

Once the setup program starts running, simply follow the instructions displayed on the screen.

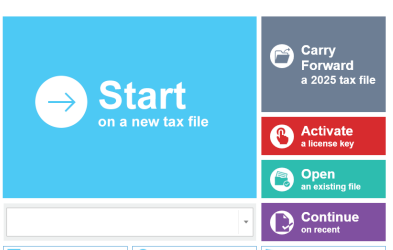
The setup program will prompt you to indicate where you want UFile to be installed (e.g. **C:\Program Files\UFile 2026** or **C:\Program Files(x86)\UFile 2026**).

1 Start

Get started with helpful information and tips

The Start page has the following options:

- **Creation of a new file**
- **Opening an existing file**
- **Carrying forward a tax file from 2025**
- **Activation and registration**
- **Program updates**
- **Important changes and tutorial**



Activation and Registration

Product activation is an anonymous, secure, and hassle-free process designed to deter unlicensed use of UFile. To proceed, you will need your **UFile 2026 activation key**, printed on the insert inside the box or your email confirmation if you purchased online.

Registration is optional but strongly recommended. Registered users qualify for free support and email notification of important UFile news. You must be registered in order to obtain free program updates.

Program updates

The initial release of UFile requires an immediate update before you can print your return. The NETFILE service becomes available in February, so it is essential that you check for program updates before finalizing your tax returns.

You can check for updates at any time by selecting **Get latest updates**.

Preparing Your Tax Return with UFile

1. Gather all the documents needed to complete your return. This includes your information slips (such as T3, T4, T4A, and T5 slips), and receipts for any deductions or credits you intend to claim.
2. Click the **UFile 2026** icon placed on your desktop.
3. On the **Start** page, you have two options:
   - If you used **UFile** to prepare your 2025 tax return, you can import the personal data and tax carryforward amounts directly into UFile 2026. Simply click on **Carry forward a 2025 tax file** and select the appropriate file.
   - Otherwise, select the option **Start a new tax file**.

2 Interview	3 Review	4 Tax return	5 NETFILE
Enter your tax information, tax slips, etc.	Review your results, view messages and more	View or print your complete tax return(s)	File your tax return electronically
Click **Interview** to fill in the necessary tax information for all your family members.	Click **Review** to view the tax results and to verify the warnings and error messages.	Click **Tax Return** to view the finished tax return with all the relevant schedules, forms and work charts.	Click **NETFILE** to submit your tax return to the CRA and/or Revenu Québec.

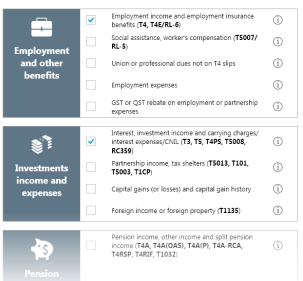
2 Interview

Enter your tax information, 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.

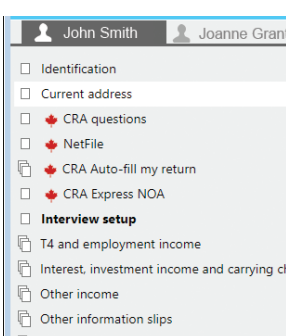
UFile is designed to prepare income tax returns for all family members together. The first person whose name is displayed is referred to as the "family head". You cannot add a spouse or a dependant to the family unit until the identification information for the family head is entered.

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



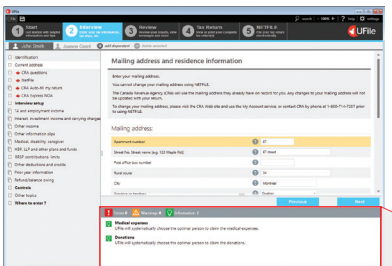
Left Side Menu

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** gives you access to all available gateways (including CRA's Auto-fill my Return) and shows the input screen currently in use.



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**.



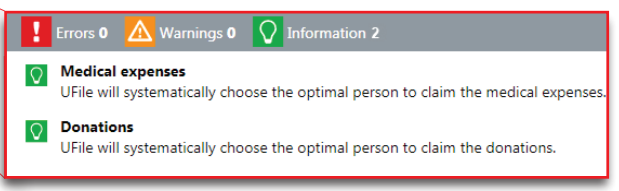
Family members

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 panel identifies missing or illogical entries and provides immediate direction to fix them.



Getting Help

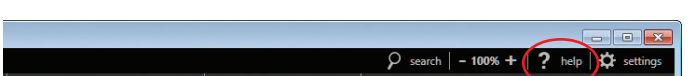
Help is always just a mouse-click away.

Click the ? icon on the top banner for an index to all the help available.

In the interview, click the ? icon next to any data entry field to get a more detailed description of this field. The 💡 symbol indicates that help for this field also includes a tax tip.

In the summary of the tax return, on the **Review** page, click any line number to obtain information about which amounts relate to that line.

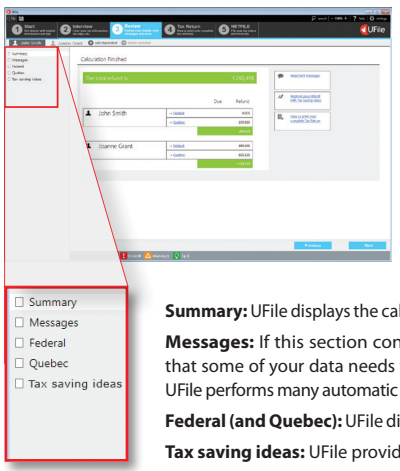
If you cannot figure out where to enter certain tax information, use the **Search** feature found on the top right hand corner of the screen, to perform a search.



A **Support assistant** is available from the **Help** menu to **help** answer your questions.

3 Review

Review your results, view messages and more



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**.

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.

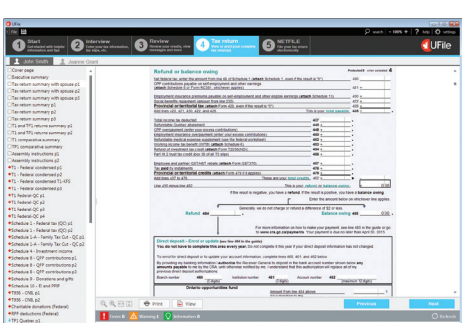
Federal (and Quebec): UFile displays the lines with calculated amounts.

Tax saving ideas: UFile provides you with useful tax tips.

4 Tax Return

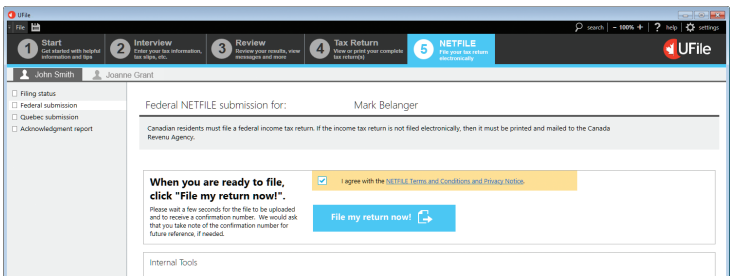
View or print your complete tax return(s)

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

File your tax return electronically



Click the **NETFILE** tab when you are ready to NETFILE your return. Note that the CRA and/or Revenu Québec 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.

Transmit your return to the CRA and/or Revenu Québec with UFile. You will receive a notification after each transmission, whether or not your submission was successful. If it was successful, you'll see a confirmation code (keep this in your records).

NETFILE

Preparing Additional Returns

With UFile, you can easily prepare additional returns. Visit our Web site at **www.ufile.ca** for information on pricing and how to obtain additional returns. When purchasing additional returns, please keep in mind that **CRA** has set a **limit of 20 returns** that can be prepared.

Do you prepare over 20 tax returns? Learn about **UFile PRO** at **www.ufile.ca/PRO**

UFile.ca

2400 Lucerne Road, Box 545
Montreal, Quebec, H3R 2J8

Technical support is available at:
support@ufile.ca