

This information sheet should help provide the basic info you need to file your own taxes. If you need help through this process, you can contact the Tax Clinic Coordinator by emailing [cgray@actoronto.org](mailto:cgray@actoronto.org).

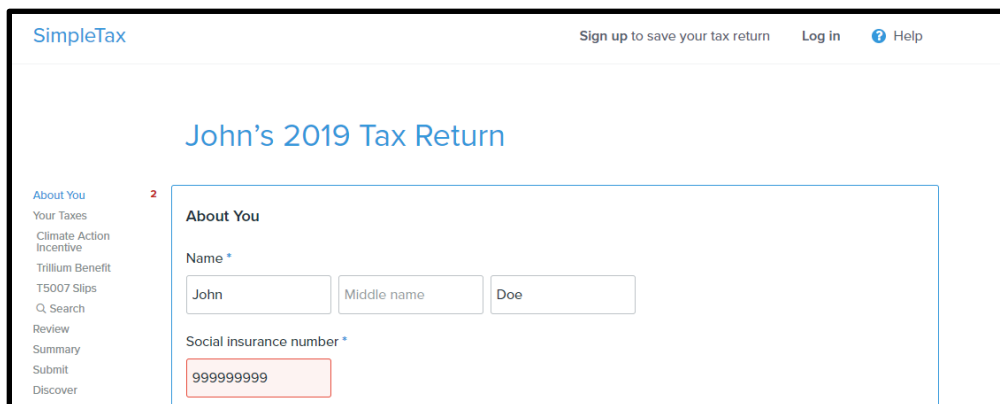
**ACT is only able to help on a best-effort basis, and will try to provide assistance as much as possible. ACT can only guide clients through the process, we cannot prepare or submit taxes to the CRA. Clients are fully responsible for accurately preparing and filing their own taxes as well as keeping accurate records and receipts.**

**For full assistance please contact the CRA Hotline: 1-800-959-8281**

There are many tax programs available to use in Canada. SimpleTax<sup>®</sup> is, convenient, easy to use, and **free** (with an option to make a donation if you choose).

If you are receiving social assistance, the instructions below provide an overview of how to file for the various payments and benefits to which you are entitled.

1. In a web browser, go to <https://simpletax.ca> and click **Start your 2020 Tax Return**.
2. Next, provide your personal information by completing each field that is **marked with an asterisks (\*)** next to it, as you proceed down the page. [see below]



The screenshot shows the SimpleTax website interface for "John's 2019 Tax Return". The page has a navigation bar with "Sign up to save your tax return", "Log in", and "Help". A sidebar on the left lists menu items: "About You", "Your Taxes", "Climate Action Incentive", "Trillium Benefit", "T5007 Slips", "Q Search", "Review", "Summary", "Submit", and "Discover". The main content area is titled "About You" and contains two sections. The first section is "Name \*" with three input fields: "John", "Middle name", and "Doe". The second section is "Social insurance number \*" with a single input field containing "99999999".

3. **IMPORTANT** - Scroll down to the section marked Climate Action Incentive, and answer “**YES**” to both the Climate Action Incentive, and the Ontario Trillium Benefit. [see below]

The screenshot shows two sections. The first is titled "Climate Action Incentive" and asks "Will you claim the climate action incentive (carbon tax credit)?". Below the question is a dropdown menu with "Yes" selected and a question mark icon. The second section is titled "Ontario Trillium Benefit" and asks "Will you apply for the Ontario Trillium Benefit?". Below this question is also a dropdown menu with "Yes" selected and a question mark icon. Red arrows point to the "Yes" options in both dropdowns.

4. Scroll past the option to Sign up, Save or Login. Under the section marked “Your Taxes” type in “**Social Assistance**” and select the T5007. [see below]

The screenshot shows the "Your Taxes" section with a search bar containing the text "social". Below the search bar, a list of results is displayed. The first result is highlighted in blue and is titled "Statement Of Benefits — T5007" with the description "You received workers' compensation and/or social assistance payments". A red arrow points to this highlighted result. Other visible results include "Foreign Pension Income" and "Employee Contributions to a Foreign Pension or Retirement Plan".

5. In the newly added form, enter the amount of social assistance you received in “**BOX 11**”. [see below]

The screenshot shows the "Statement of Benefits" form. At the top, it says "Statement of Benefits" with a trash icon. Below that, it says "T5007: Statement of Benefits" with another trash icon. There is a table with columns for "Payer's name", "10", "11", "12,000.00", and "14". A red arrow points to the "11" column. Below the table is a button that says "+ Add another T5007".

6. Scroll back up to the Climate Action Incentive section and select “**YES, THIS IS CORRECT**”, and select “**NO**” next to rural community. [see below]

**Climate Action Incentive**

Great news! You're eligible for the Climate Action Incentive.

Based on the information entered:

- you have **0** qualified dependant(s)

Please confirm this is correct before filing your return \*

Yes, this is correct ?

**Additional amount for residents of small and rural communities**

There is an additional 10% credit for residents of small and rural communities.

You live in a small or rural community if you **do not live in** these census metropolitan areas: [Ottawa](#), [Kingston](#), [Belleville](#), [Peterborough](#), [Oshawa](#), [Toronto](#), [Hamilton](#), [St. Catharines-Niagara](#), [Kitchener-Cambridge-Waterloo](#), [Brantford](#), [Guelph](#), [London](#), [Windsor](#), [Barrie](#), [Sudbury](#), or [Thunder Bay](#).

Do you live in a [small or rural community](#)?

No ?

In the next section titled Ontario Trillium Benefit, select “**YES**” to apply for the Ontario energy and property tax credit and enter the total amount of “**RENT**” in the appropriate box. [see below]

**Ontario Trillium Benefit: Property and Energy Tax Grants and Credits**

Apply for the:

Ontario energy and property tax credit Yes ?

Northern Ontario energy credit No ?

**Part A – Amount paid for a principal residence for 2019**

If you don't have any of the following amounts please remove this section from your return.

Total [rent](#) paid for your [principal residence](#) 2,172.00 ?

Total [property tax](#) paid for your [principal residence](#)

[Home energy costs](#) paid for your [principal residence](#) [on a reserve](#)

Amount paid for accommodation in a [public or not-for-profit long-term care home](#)

Did you reside in a [student residence](#)?

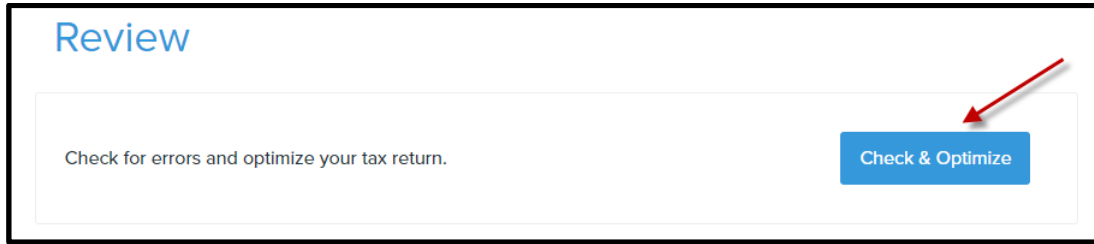
Would you like to receive your benefit in **June 2021** instead of receiving it monthly starting in July 2020? No ?

**Part B – Declaration of principal residence(s)**

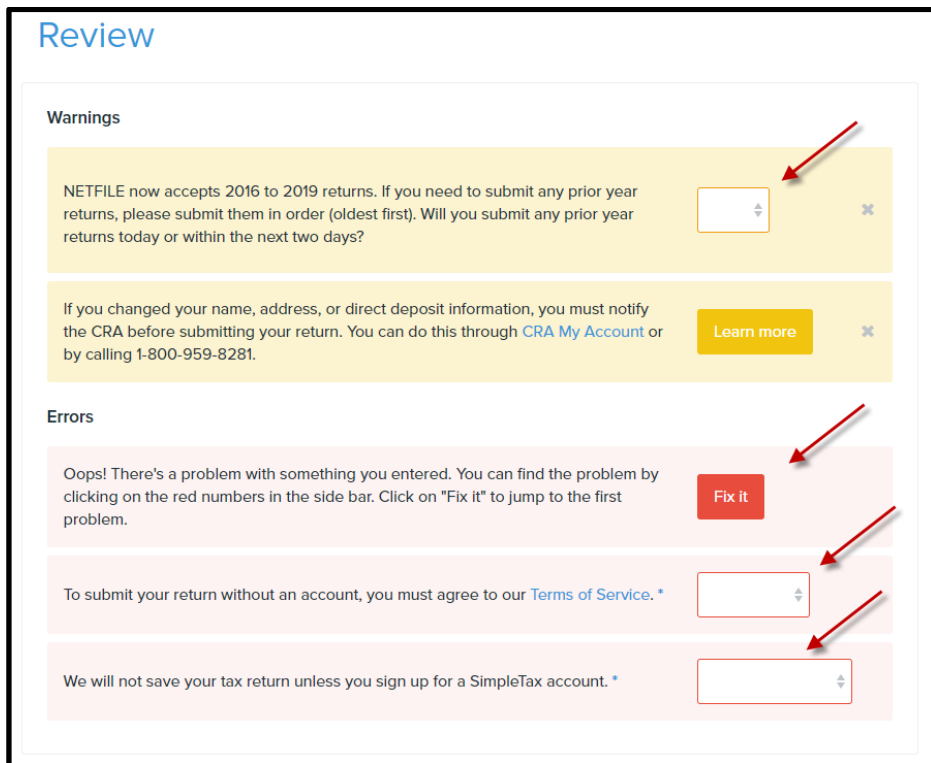
Address	Postal code	Number of months resident in 2019	Long-term care home	Amount paid for 2019 ?	Landlord or municipality
			<input type="checkbox"/>		

+ Add another address      ✕ Remove empty rows

7. Scroll down to the section called “Review” and click on the “**CHECK & OPTIMIZE**” button. [see below]



8. Follow the steps to work through any warnings or errors. Answer “**NO**” to the question on filing previous returns. Fix any issues that exist. Enter “**I AGREE**”, to the question to proceed without an account. Enter “**I UNDERSTAND**”, to the question on not saving your return. [see below]



9. Once the errors have been resolved, note the amount of your REFUND, GST and TRILLIUM benefits and then click the green “**LET’S GO**” button. [see below]

**Review**

Warnings

NETFILE now accepts 2016 to 2019 returns. If you need to submit any prior year returns, please submit them in order (oldest first). Will you submit any prior year returns today or within the next two days?

If you changed your name, address, or direct deposit information, you must notify the CRA before submitting your return. You can do this through [CRA My Account](#) or by calling 1-800-959-8281. [Learn more](#)

Your return is ready! Once you've reviewed everything, go to the next section to submit. [Let's go!](#)

**Summary**

Amounts

Here's a breakdown of your tax return.

	John
> Refund	\$224.00
Summary spreadsheet	
GST/HST quarterly amount	\$81.61 ?
Ontario Trillium Benefit (sales tax credit) monthly amount	\$26.08 ?
Ontario Trillium Benefit (OEPTC and NOEC) monthly amount	\$25.37 ?

10. Click “**SAVE PDF**” file to save a copy of your return, then click “**SUBMIT TAX RETURN**” to submit your return to CRA via NetFile. [see below]

**Submit**

**Submit Tax Return**

Submit your return to the CRA with NETFILE.

Save a PDF copy of your return for your records.

[Submit tax return](#)

[Save PDF](#)

11. If you do not receive a confirmation message that your return was filed successfully, scroll down to the section titled “Submit Tax Return” to read the CRA error message that was returned.

## Need Further Assistance?

If you have questions about your return, or are unable to successfully file it, please contact the Tax Clinic Coordinator by email – [cgray@actoronto.org](mailto:cgray@actoronto.org). Please allow 2 business days for a response.