

## Drop Sheet Instruction Form- Community Volunteer Income Tax Program

This sheet is intended for worker/ social agency use only. If you are a family or individual looking to get your taxes done, please call the Lakehead Social Planning Council Office at (807) 624- 1720.

Please read the following sheet carefully and ensure all relevant fields are being completed with the correct information. Identify the current year, as well as any previous years, your client will be filing for at the top of the drop sheet. If they have previously filed through us, please also indicate that at the top of the page.

If you are claiming any childcare, medical, or shelter expenses, it is highly recommended you have receipts in your personal files. Canada Revenue can issue an audit on your taxes at any point within 7 years of filing, where they would need proof of these expenses. **We are not responsible for any missing documentation should you be audited at any point.**

### Client Identification and Contact Information

Each prompt in this section must be completed.

Please note that at least one (1) phone number or email address is recommended. We will use this to contact you if we encounter any issues with your return.

If you do not have a home or mailing address, please provide one of a trusted friend or family member that can receive and hold your mail for you.

### Additional Identification Information

Indicate what marital status you identified with at the end of the current tax year, as well as the date it was changed (if applicable).

**Elections Canada question:** Do you consent to the Canada Revenue Agency to share your name, date of birth, and address information with Elections Canada? This will allow Elections Canada to send you a voter information card with the information on where, when, and ways to vote.

**Note:** If you have been in prison or incarcerated for any length of time, you are required to report this on your taxes. If you have not been incarcerated in the current tax year, please identify this in the box with N/A.

### Children/ Dependents in Your Care

If you were the primary care giver for anyone under the age of 19 on December 31<sup>st</sup> of the current tax year, please fill out this section. If you need more space, add any additional dependent information in the “Additional Information” box at the end of the package.

*If you are wanting to file your taxes for any previous years, up to 10 years back, refer to the “Previous Tax Years Information” sheet on our website.*

*If you have personal business expenses you wish to file (SkipTheDishes, UberEats, DoorDash, Instacart etc.), refer to the “Personal Business Expenses” sheet on our website.*

### **Shelter Costs**

If at any point you have paid for rent, property taxes, hotels, motels, or any heating costs on a reservation (not paid direct), you can claim this on your income taxes. Provide all listed information pertaining to your shelter expenses. If you are claiming more than three (3) addresses in which you're claiming costs for, add this to the "*Additional Information*" section at the end of the package.

### **Persons Who Are New to Canada**

If you have never filed taxes in Canada and have arrived within the current tax year, please provide all necessary details outlined in this section.

### **Income, Expenses, and Ontario Benefits**

Identify any income sources you've received in the current tax year. Unless we have reached out and requested them, we do not need a copy of the income slips.

If you have paid out of pocket for any of the listed medical expenses, list the total amount spent in the respective box.

### **Additional Information**

If you have expenses or additional information to declare that has not been listed on the sheet, please identify them here.