

# Downloading your tax forms

<u>About tax forms</u> <u>Download tax forms for the 2024 tax year</u> <u>Download tax forms for tax years prior to 2024</u> <u>Request mailed copies of tax forms</u>

## About tax forms

The tax year begins in January and ends in December. For example, the 2024 tax year consists of the following academic periods:

- 2023-24 Winter Term 2 (January to April)
- 2024 Summer Session (May to August)
- 2024-25 Winter Term 1 (September to December)

#### Where to access tax forms

Tax forms for 2024 are stored in <u>Workday</u> in the "Finances" app. For tax forms for the seven years prior to 2024, follow the link from the "Finances" app to "UBC Official Documents".

Alumni and individuals who don't have access to Workday can access tax forms prior to the 2024 tax year on the <u>UBC Official Documents Tool (ODMT)</u>.



#### T2202 – Tuition and Enrolment Certificate

- A T2202 is used to claim a credit for income tax deductions. Students receive a T2202 slip for paid tuition fees (more than \$100) in qualifying courses that are eligible to be claimed on an income tax return. The T2202 also reports the months of full- or part-time study the student was engaged in during the tax year.
- Exclusions apply if fees or charges are not yet paid by the student, or if they are reimbursed and therefore not included in the student's income.
- If the original tax slip has already been submitted to the CRA, and there is an adjustment to totals, then an amended tax slip is required and must be submitted to the CRA.

## T4A – Statement of Pension, Retirement, Annuity, and Other Income

- A T4A is used to report additional income. Students receive a T4A slip if they have received a bursary, scholarship, award, Teacher Certificate, Passport to Education or faculty/staff tuition fee waiver as a dependent of a UBC staff or faculty member.
- Tuition paid by a sponsor is considered taxable income. However, the sponsoring organizations issue the T4A slips for this income, not UBC.



## Download tax forms for the 2024 tax year

- 1. Log into your Workday account at <u>myworkday.ubc.ca.</u>
- 2. On the right side of the page, in the "Your Top Apps" menu, click the "Finances" app.

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Awaiting Your Action You're all caught up on your tasks.	Announcements     1 of 2 < >     O
Timely Suggestions Here's where you'll get updates on your active items.	Your Top Apps
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3. In the toolbar, select "Tax Forms (T2202 and T4A)".

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#### T2202 (tax year)

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- 3. Click OK.
- 4. A new window will appear. Click "Print".



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6. Once the tax slip PDF is generated, click the download button in the top-right corner.

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2. Enter "2024" in the Tax Year box.

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- 3. Click "OK".
- 4. A new window will appear. Click "Print".



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5. A pop-up window will appear.



6. Once the tax slip PDF is generated, click the download button in the top-right corner.

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## Download tax forms for years prior to 2024

Alumni and individuals who don't have access to Workday can access tax forms prior to the 2024 tax year on the <u>UBC Official Documents Tool (ODMT)</u>. Skip to page 10.

- 1. Log into your Workday account at <u>myworkday.ubc.ca</u>.
- 2. On the right side of the page, in the "Your Top Apps" menu, click the "Finances" app.

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3. Click on "UBC Official Documents" under "Historical Tax Forms".

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#### T2202 (prior to 2024 tax year)

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2. A pop-up window appears. Under "Historical Tax Form T2202" drop-down menu, select the tax year that you want to generate and click "Request Tax Form T2202 (PDF)".

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3. Enter and review your address under the "Tax Form T2202" Information boxes to ensure it is correct and up to date. Once done, click "Request Tax Form T2202 (PDF)".

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4. Click "Generate T2202 Tax Form (PDF)".

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5. Click "Download Letter (PDF)".

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6. Click the download button in the top right corner to download the PDF.

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#### T4A (prior to 2024 tax year)

1. Under "Order Options," click on "Tax Form T4A".

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Official Transcript     Official Transcript     Confirmation of Enrolment Letter     Program Completion Letter     Tax Form T4A     Tax Form T4A	ID	Document Type	Status	<b>Total</b> No items available	Created At	Created By
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2. Under "Historical Tax Form T4A" drop-down menu, select the tax year that you want to generate and click "Request Tax Form T4A".

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3. Enter and review your address under the Tax Form T4A Information boxes to ensure it is correct and up to date. Click "Request Tax Form T4A".

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5. Click "Download Letter (PDF)".

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### Request mailed copies of tax forms

To request mailed copies of tax forms, contact Enrolment Services