



2020 TAX CHECKLIST

HOW TO USE THIS CHECKLIST

If you complete your own taxes, use this checklist to ensure you are claiming everything possible for your child. Everything below, except for the Canada Caregiver Amount and Tutoring (both of which require a letter from your doctor), requires approval of the Disability Tax Credit (DTC).

If you use an accountant or tax preparer, complete this checklist so they know what to claim on your behalf. An accountant will know better, but if you are using a tax preparer, use this checklist in conjunction with the [“Which Spouse Should Claim Expenses”](#) chart at asdfunding.com.

For detailed information on each item below, please research asdfunding.com or taxtips.ca.

PLANNING FOR TAX TIME

- ☐ Do you have approval for the Disability Tax Credit? If so, have a copy of the approval letter to show your accountant.
- ☐ Apply for access to the CRA “My Account”. This site has valuable information including the DTC eligibility period and the ability to upload requested documents.
- ☐ Obtain receipts for relevant home renovations.
- ☐ Add up all child care expenses including summer camp costs. Ensure receipts are signed and gathered.
- ☐ Obtain doctor’s letter for tutoring, private school tuition or Personalized Therapy Plan,
- ☐ Add up all medical expenses and gather receipts including:
 - ☐ Tutoring
 - ☐ Personalized Therapy Plan (Consultant costs)
 - ☐ Private School Tuition
 - ☐ Amount paid to practitioner to complete the T2201 form
 - ☐ Speech and language Pathologist (SLP)
 - ☐ Psychologist services
 - ☐ Registered Counselling services
 - ☐ Premiums paid for Private Health Services Plan
 - ☐ Attendant Care (including house cleaning services. Receipts are required)
 - ☐ Service Dog
 - ☐ Cost of obtaining service animal.
 - ☐ Travel expenses to school or institution that trains such animals.
 - ☐ Cost of maintaining service animal (including food and veterinary costs)
 - ☐ Travel Expenses

- ☐ If you travelled more than 40km one way to obtain medical treatment you may be able to claim mileage
- ☐ If you travelled more than 80km one way you may be able to claim mileage, accommodation and meals
- ☐ Other medical services, prescriptions, and dental receipts
- ☐ **Do not** claim anything that is paid for by the government or an extended health care plan
- ☐ Total amount of Medical Expenses to claim _____. Use medical expense optimizer in tax software to determine which spouse should claim the entire amount or allow accountant to make this determination.
- ☐ File a tax return every year for your child once they turn 17, even if they have no income. These returns will be used to calculate RDSP entitlements as an adult.

WHAT TO CLAIM ON 2020 TAXES

- ☐ Disability Tax Credit
 - ☐ If the DTC is to be transferred from a dependant, which parent will claim the amount?
 - ☐ Name of parent to claim _____
- ☐ Canada Caregiver Amount
 - ☐ If your child does not have DTC approval, do you have a letter from your doctor?
- ☐ Medical Expenses (see section above)
- ☐ Child Care Expenses
 - ☐ Up to \$11,000 if your child qualifies for the DTC
 - ☐ You may combine that limit with the limit for your other children
 - ☐ Total amount of Child Care expenses to claim _____
- ☐ Home Accessibility Tax Credit
 - ☐ Up to \$10,000
 - ☐ Amount to claim _____
- ☐ BC Home Renovation Tax Credit for Seniors and Persons with Disability
 - ☐ Tax Software may only show “BC Seniors Home Renovation Tax Credit”. This does apply to persons with disabilities.
 - ☐ May be claimed in addition to the Federal Home Accessibility Tax Credit.
 - ☐ Up to \$10,000 may be claimed.
 - ☐ Amount to be claimed _____
- ☐ Home Buyers Amount
 - ☐ Normally only for first time buyers, but it is applicable if you purchased the home to benefit someone who qualifies for the DTC.
 - ☐ Claim \$5,000 if you bought the home for the benefit of this person.
- ☐ One Time \$600 COVID bonus for persons who qualify for the DTC.
 - ☐ Do not claim as income. This amount is non-taxable.

WHAT TO DO AFTER FILING TAXES

- ☐ Keep a copy of your filed taxes for your own record.
- ☐ Scan all receipts and keep a digital file. When (not if) CRA asks for the receipts, you will be able to quickly upload them to the CRA “My Account”. If you do not own a scanner, your smartphone will have numerous scanning apps to choose from.

PLAN FOR 2021 TAXES

Really??? We just finished our 2020 taxes, and you want us to think about next year?

Bear with me for a moment. There are a few things to consider for the upcoming year.

- ☐ Did you get a significant tax refund this year? It feels good, but it means that you have been extending the government an interest free loan. You may wish to reduce tax withheld from your paycheque. To reduce the withholdings, consider completing a T1213 form to reduce your tax deductions at source.
- ☐ Does your child’s Disability Tax Certificate expire this year? If so, it is time to book an appointment with your practitioner to complete the T2201.
- ☐ Did you pay for someone to care for your child this year? There are several ways to categorise this service, including Child Care, Attendant Care, or tutoring. Child Care is a tax deduction so you may receive a larger tax refund than by claiming medical expenses. Use your previous year’s tax return as a guide to what may work best for your family.