

## Contents

|   |    |
|---|----|
| How to Generate Tax Slips.....              | 2  |
| Step-by-Step Instructions .....             | 3  |
| Generate 2024 Tax Forms Online .....        | 3  |
| Generating 2024 T4A .....                   | 4  |
| Generating 2024 T2202 .....                 | 6  |
| Generate Historical Tax Forms Online .....  | 9  |
| Requesting Mailed Copies of Tax Slips ..... | 16 |
| 2024 T4A .....                              | 16 |
| 2024 T2202 .....                            | 17 |
| Historical Tax Forms.....                   | 17 |

## How to Generate Tax Slips

### Overview

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

- 2023-24 Winter Term 2 (Jan to Apr)
- 2024 Summer Session (May to Aug)
- 2024-25 Winter Term 1 (Sept to Dec)

### Where Students Access Tax Slips

| Tax Year                      | System for Tax Slip Retrieval |
|-------------------------------|-------------------------------|
| Prior Year Tax Forms (<2024)* | Appian                        |
| 2024 Tax Forms                | Workday                       |

\*Appian only stores tax forms from the previous 7 years. For example, if students access Appian in tax year 2024, they may see tax forms from 2017 to 2023.

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

- T4As are available online by default. If you require your T4A to be mailed, please indicate your preference by the end of January for the preceding year and ensure your address in Workday is up to date. By default, your primary mailing address will be used, unless there is a specific Tax Purposes address entered in Workday.
- This 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.

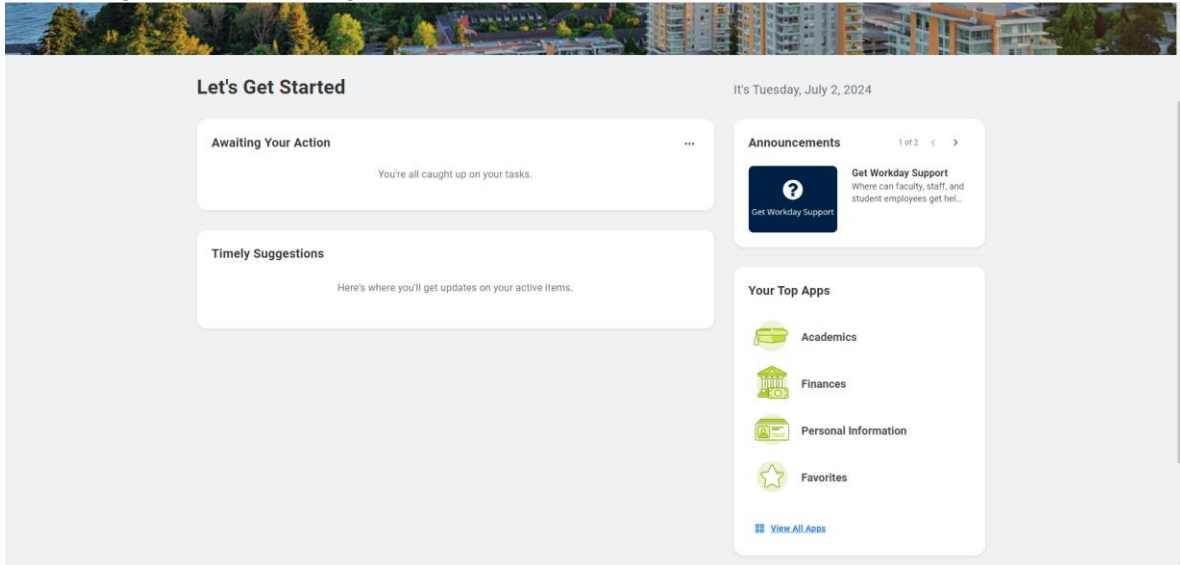
### T2202 - Tuition and Enrolment Certificate

- This is used to claim a credit for income tax deductions. Students receive a T2202 slip if they have paid tuition fees (more than \$100) for qualifying courses that they are eligible to claim on their income tax return. The T2202 also reports the months of the tax year during which the student was engaged in full-time or part-time studies.
- Exclusions apply if fees or charges are not yet paid by students, or 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.

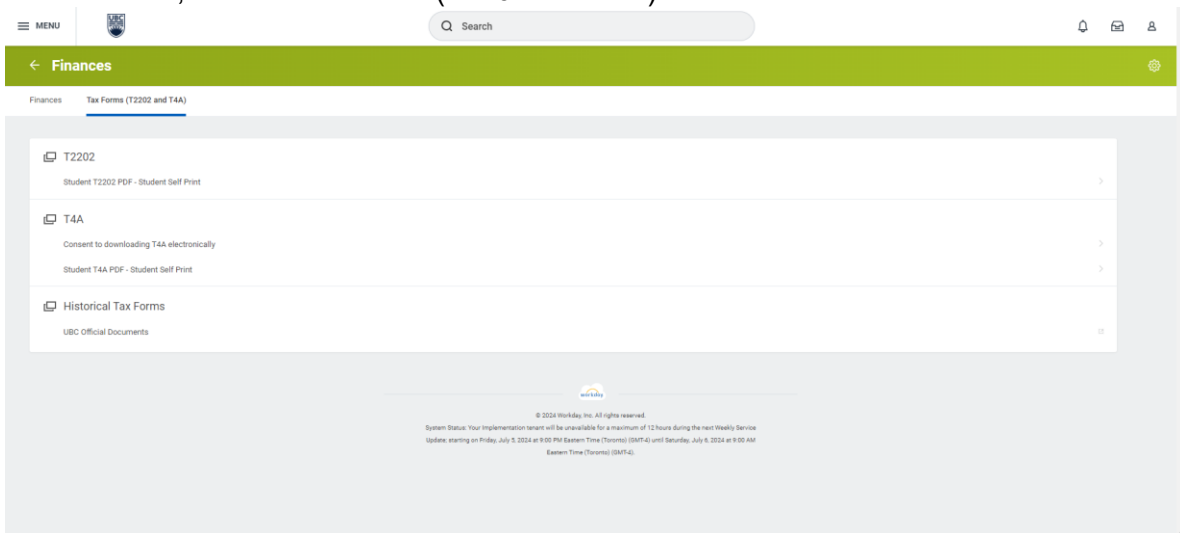
# Step-by-Step Instructions

## Generate 2024 Tax Forms Online

1. Log into your Workday account at myworkday.ubc.ca.
2. On the right side of the page, in the “Your Top Apps” menu, click the “Finances” app.

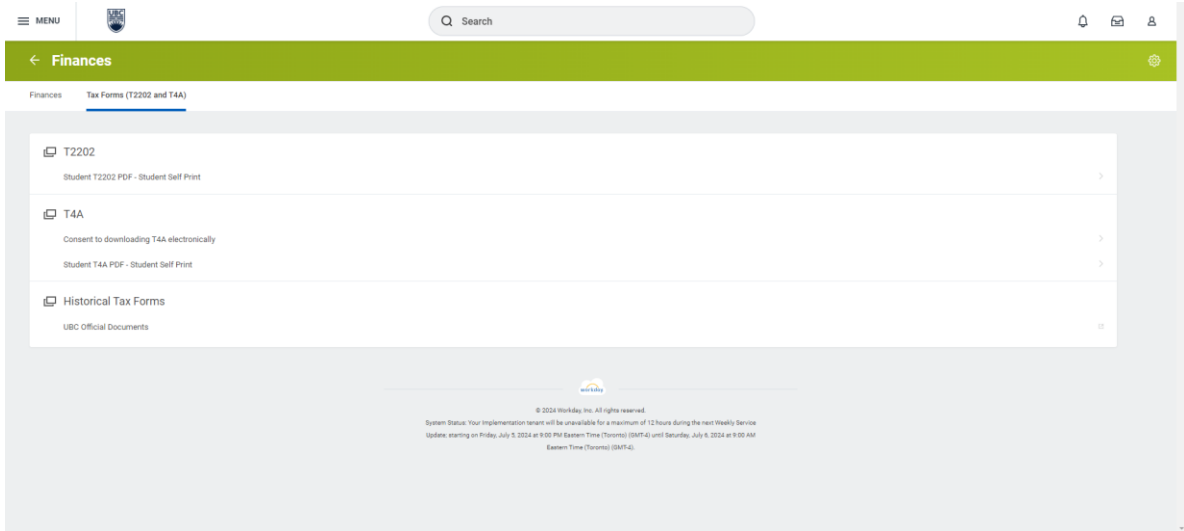


3. In the toolbar, select “Tax Forms (T2202 and T4A).”

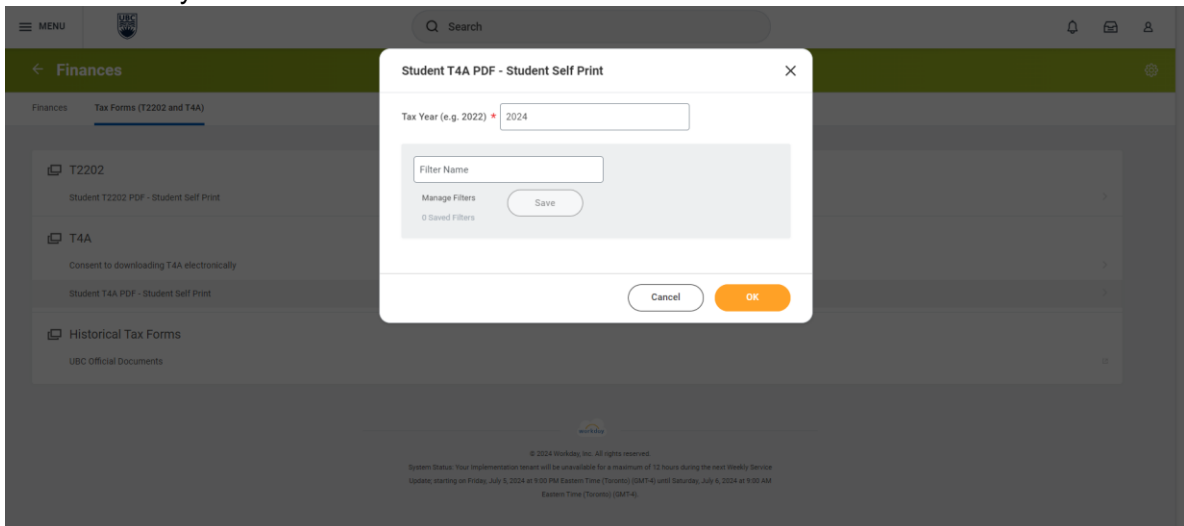


## Generating 2024 T4A

1. Click on “Student T4A PDF – Student Self Print” under T4A.



2. Enter the tax year and click “OK.”



3. A new window will appear. Click "Print."

The screenshot shows the 'Student T4A PDF - Student Self Print' page. At the top, there is a search bar and a 'MENU' icon. Below the header, the page title is 'Student T4A PDF - Student Self Print'. The main content area displays a table with the following data:

| Student               | Student ID | Consent for online T4A? | sCF - ST - SIN Number | DNU, DUP sCF - ESI - T4A Extract Maximum Version for given Tax Year that is RELEASED | RCF - LRV - T4A Tax Year | RCF - LRV - T4A Tax Type | RCF - LRV - T4A First Name | RCF - LRV - T4A Middle Initial(s) | RCF - LRV - T4A Last Name | RCF - LRV - T4A SIN | sCF - LRV - Tax Forms Consolidated Address - Formatted Address | sCF - LRV - Tax Forms Consolidated Address - Country | RCF - LRV - T4A Box 022 | RCF - LRV - T4A Box 105 | sCF - TC - Student Tax Forms Institution Name | sCF - TC - Student Tax Forms Institution Address |
|-----------------------|------------|-------------------------|-----------------------|--|--------------------------|--------------------------|----------------------------|-----------------------------------|---------------------------|---------------------|--|--|-------------------------|-------------------------|---|--|
| Celine Lee (86888888) | 86888888   | Yes                     |                       | 2023   | 2023                     | 0                        | Tax Slip                   | Middle                            | Demo                      | 123456789           | 2329 West Mall<br>Vancouver BC V6T 1Z4                         | Canada   | 50.00                   | 1,999.99                | The University of British Columbia            | 2016 - 1874 EAST MALL<br>VANCOUVER BC V6T 1Z1    |

Below the table, there is a 'Print' button.

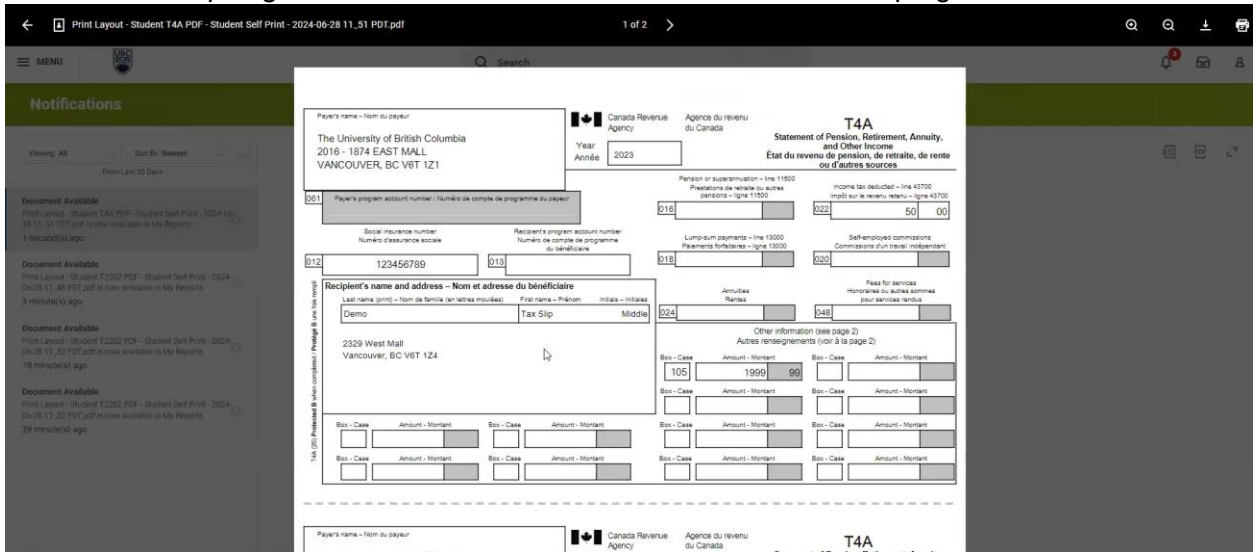
4. A pop-up window will appear.

The screenshot shows the same 'Student T4A PDF - Student Self Print' page as above, but with a pop-up window overlaid in the center. The pop-up window contains the following text:

**Your request is being processed**  
 You can continue to wait or choose to be notified later.  
 [Notify Me Later]

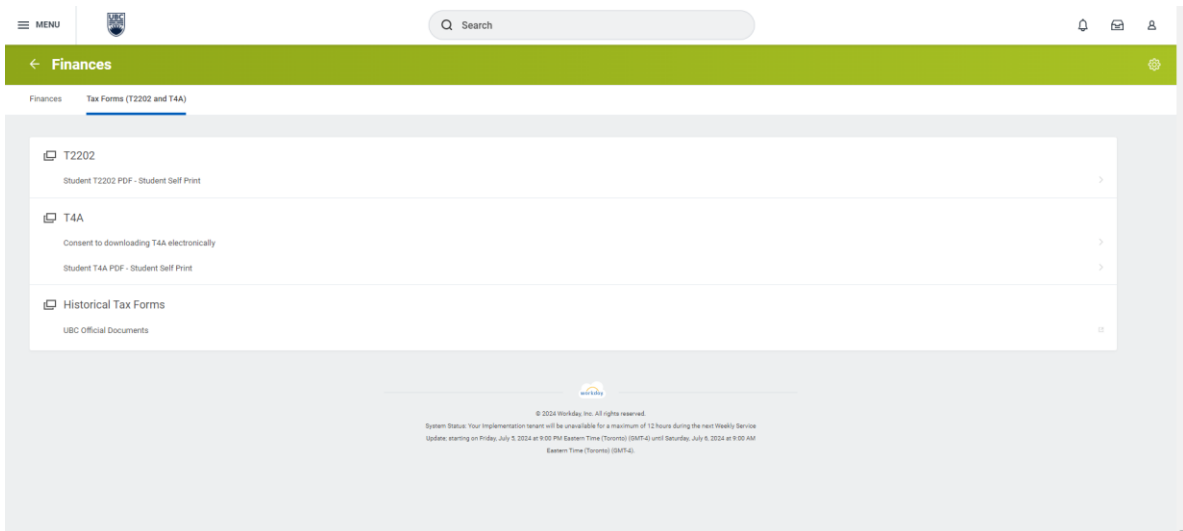
The background table and interface elements are dimmed due to the pop-up window.

- Once the tax slip is generated, click on the download button at the top right corner.

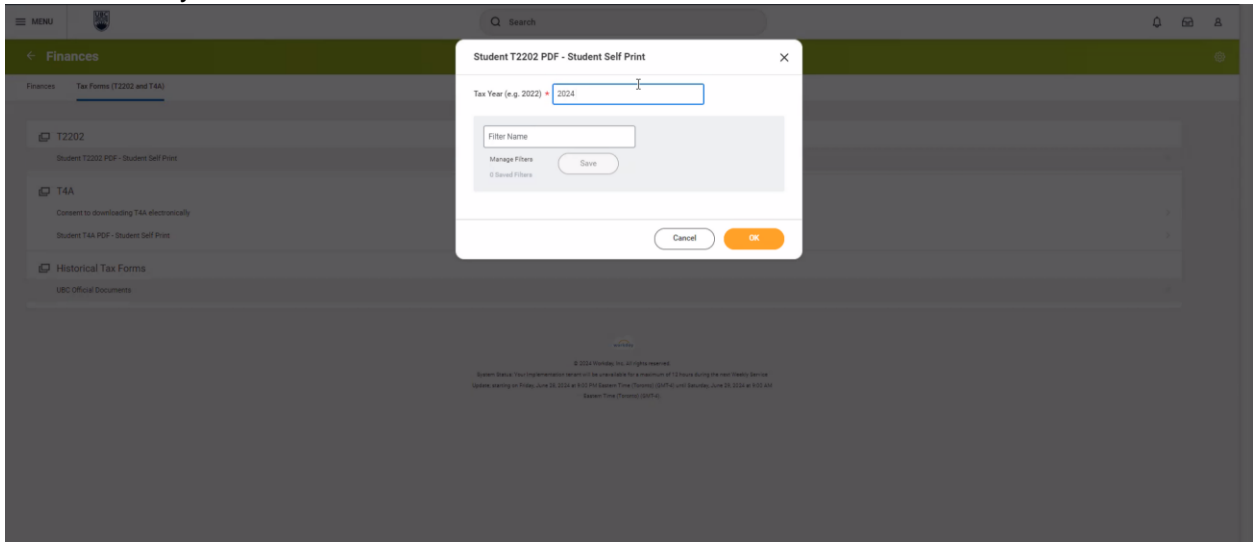


## Generating 2024 T2202

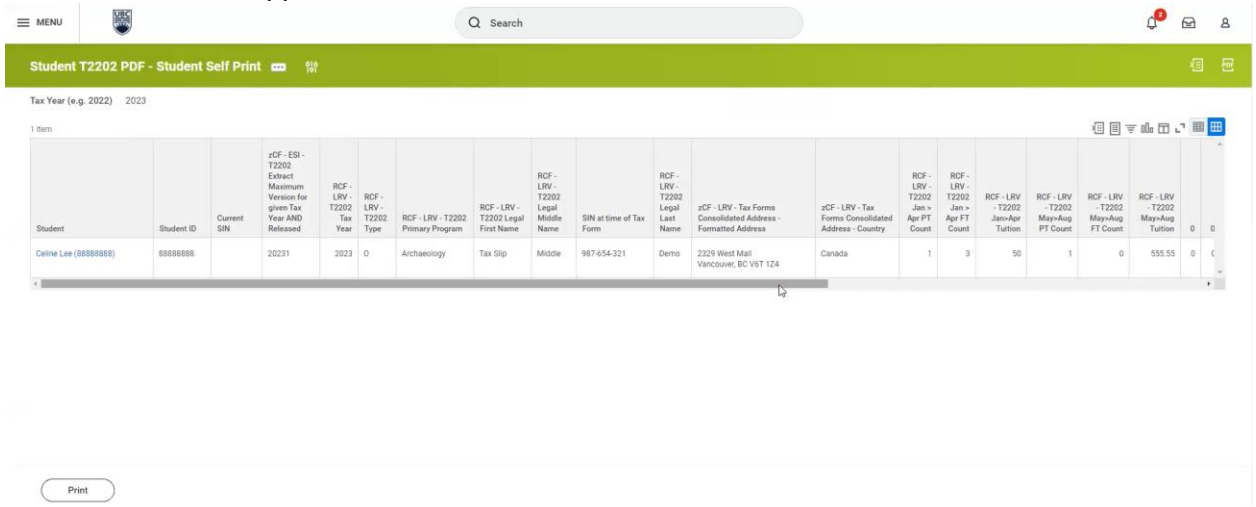
- Click on “Student T2202 PDF – Student Self Print” under T2202.



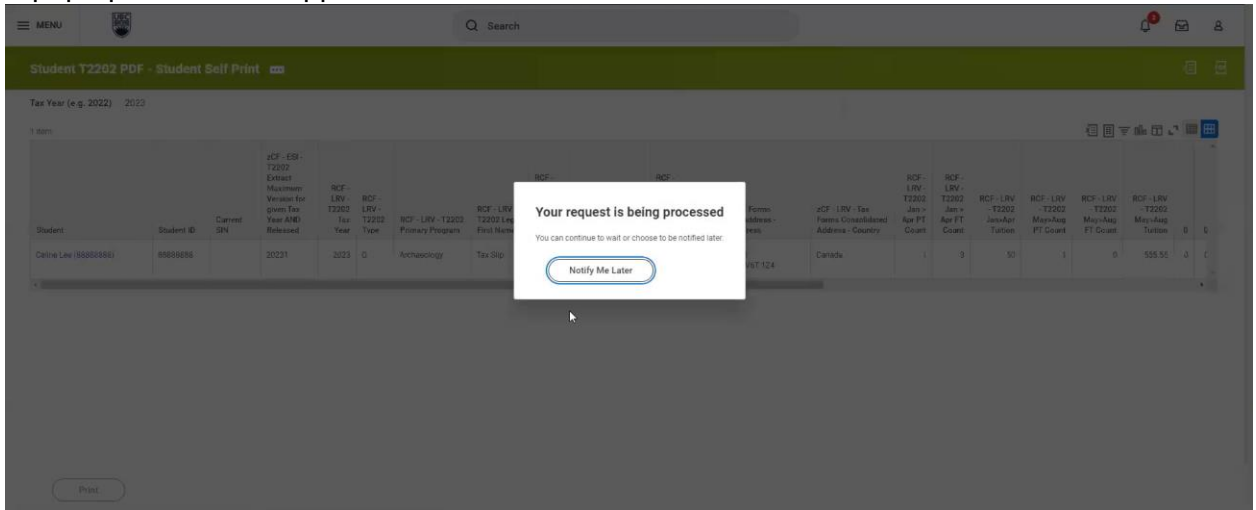
2. Enter the tax year and click “OK.”



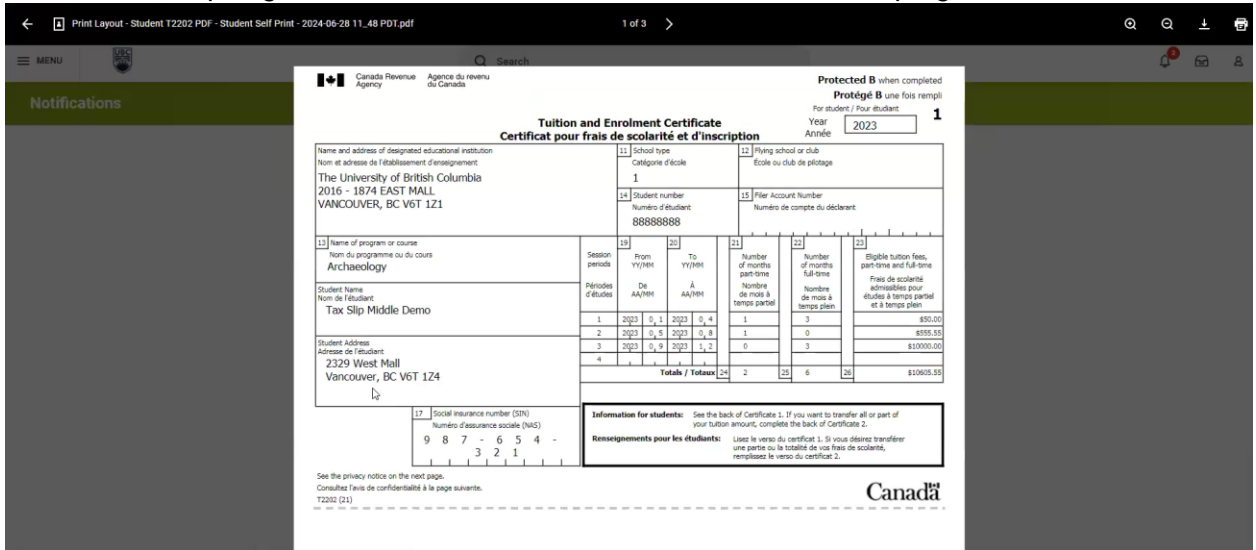
3. A new window will appear. Click “Print.”



- A pop-up window will appear.



- Once the tax slip is generated, click on the download button at the top right corner.

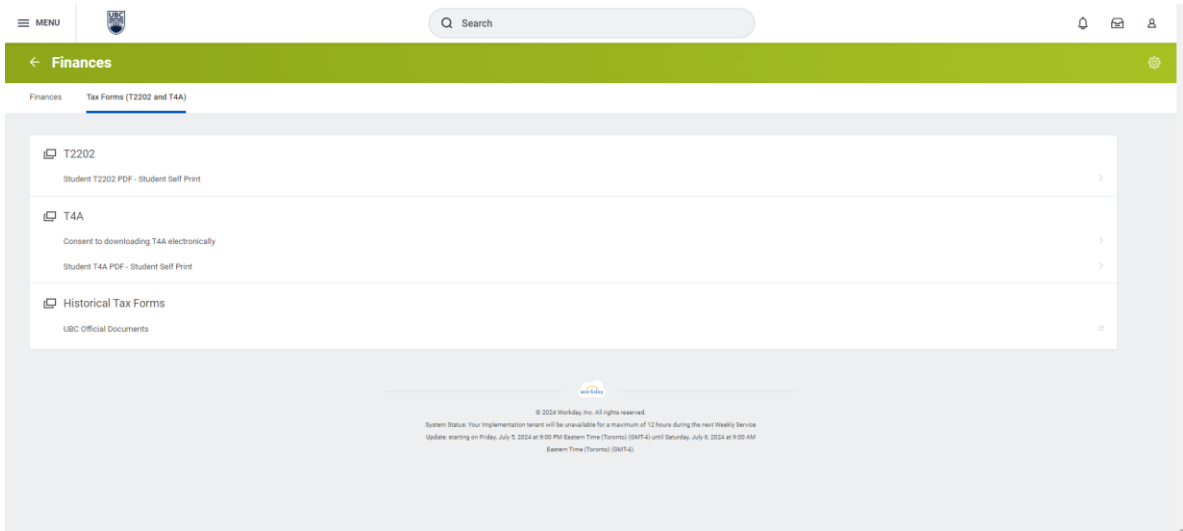




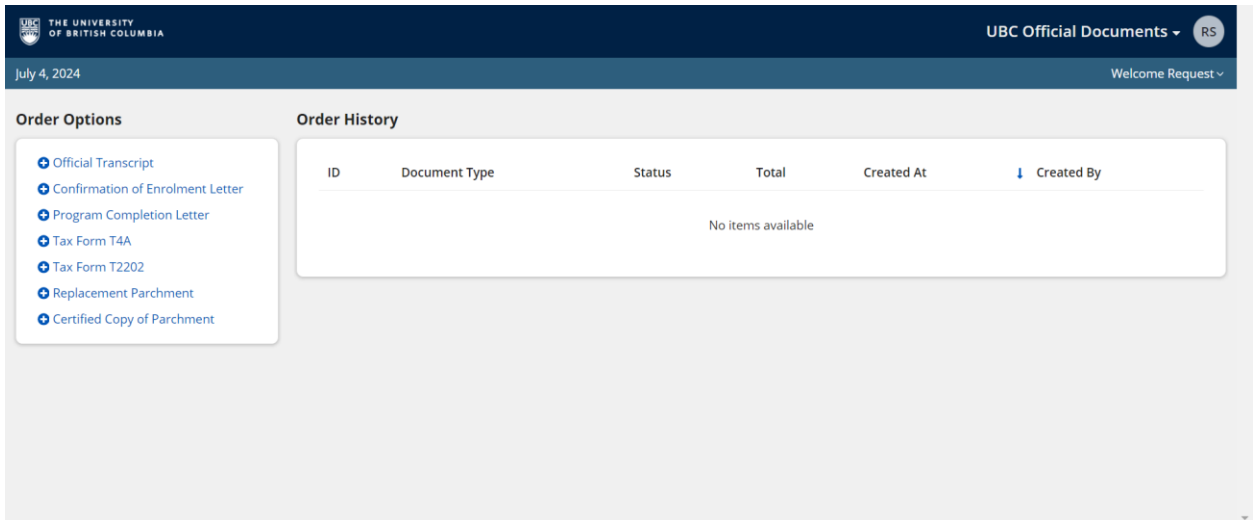
## Generate Historical Tax Forms Online

### T4A

1. Under the Tax Forms (T2202 and T4A) page in the Finances app, click on “UBC Official Documents” under Historical Tax Forms.



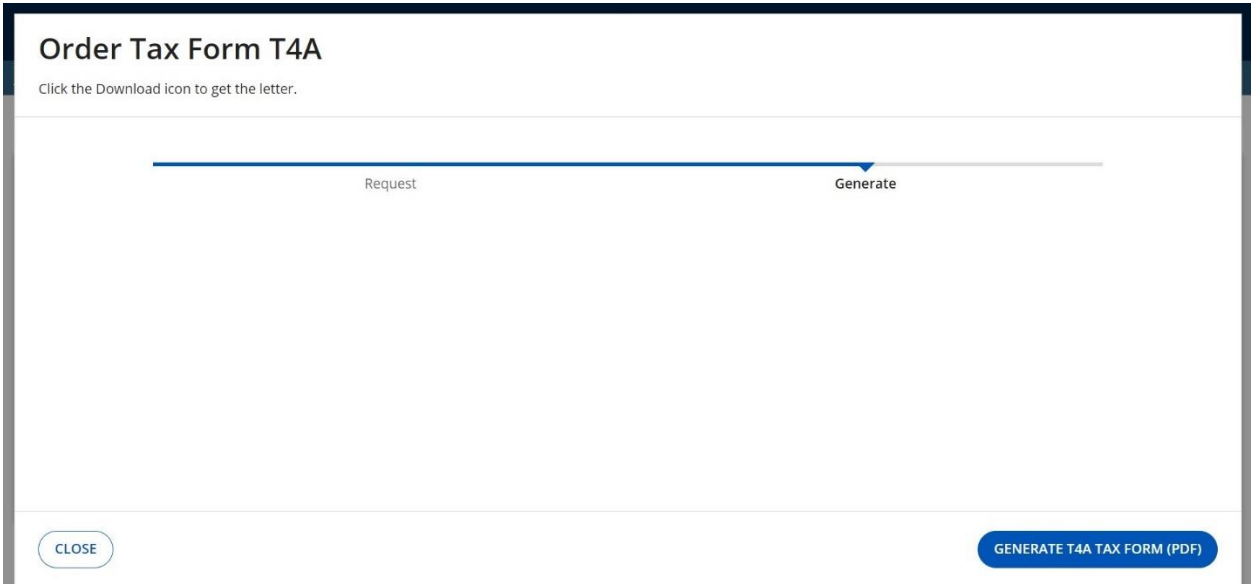
2. You will be directed to the UBC Official Documents application. Under “Order Options,” click on “Tax Form T4A.”



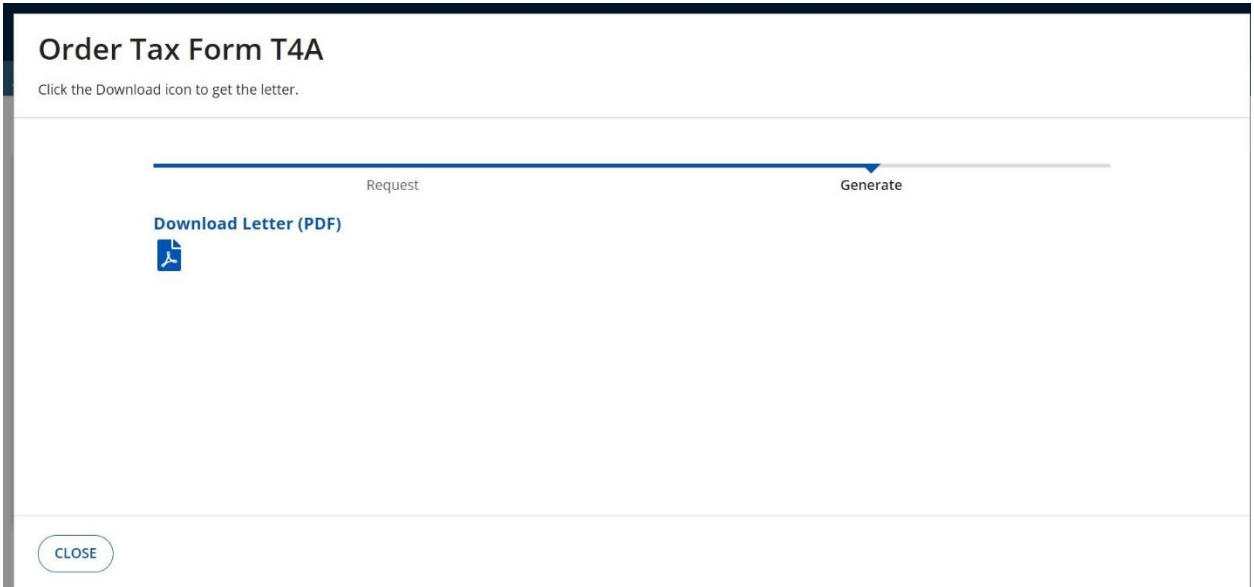
3. A pop-up window will appear. Under Historical Tax Form T4A drop-down menu, select the tax year that you want to generate and click "Request Tax Form T4A."

4. Enter and review your information under the Tax Form T2202 Information boxes to ensure it is correct and up to date.

- 5. The tax form is ready to be generated. Click “Generate T4A Tax Form (PDF).”



- 6. Click “Download Letter (PDF).”



- Your tax form PDF is ready to be downloaded using the Download button at the top right corner.

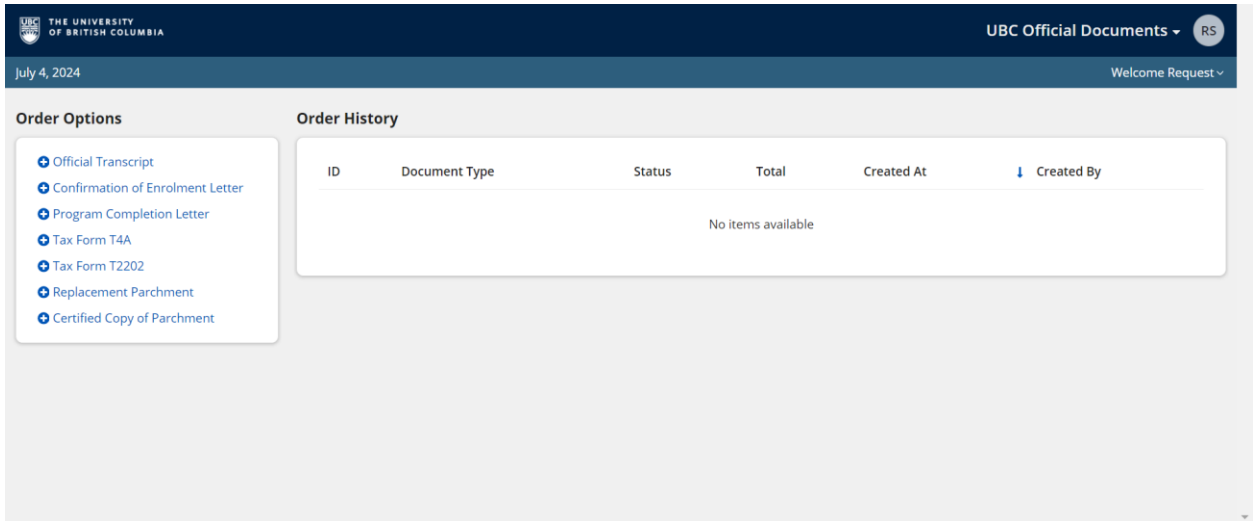
The screenshot shows a digital PDF viewer of a T4A tax form. At the top, there are navigation controls: '1 / 2', zoom in (+), zoom out (-), 100% zoom, and refresh/undo icons. On the right, there are icons for download, print, and a menu. The form itself is titled 'T4A STATEMENT OF PENSION, RETIREMENT, ANNUITY, AND OTHER INCOME' and is issued by the Canada Revenue Agency. The payer is the University of British Columbia. The year is 2019. The form includes various sections for reporting income and deductions, such as 'Pension or superannuation', 'Income tax deducted', 'Lump-sum payments', and 'Self-employed commissions'. There are also sections for 'Other information' and a table for 'Box - Case' amounts. The form is presented in a clean, professional layout with clear labels and input fields.

## T2202

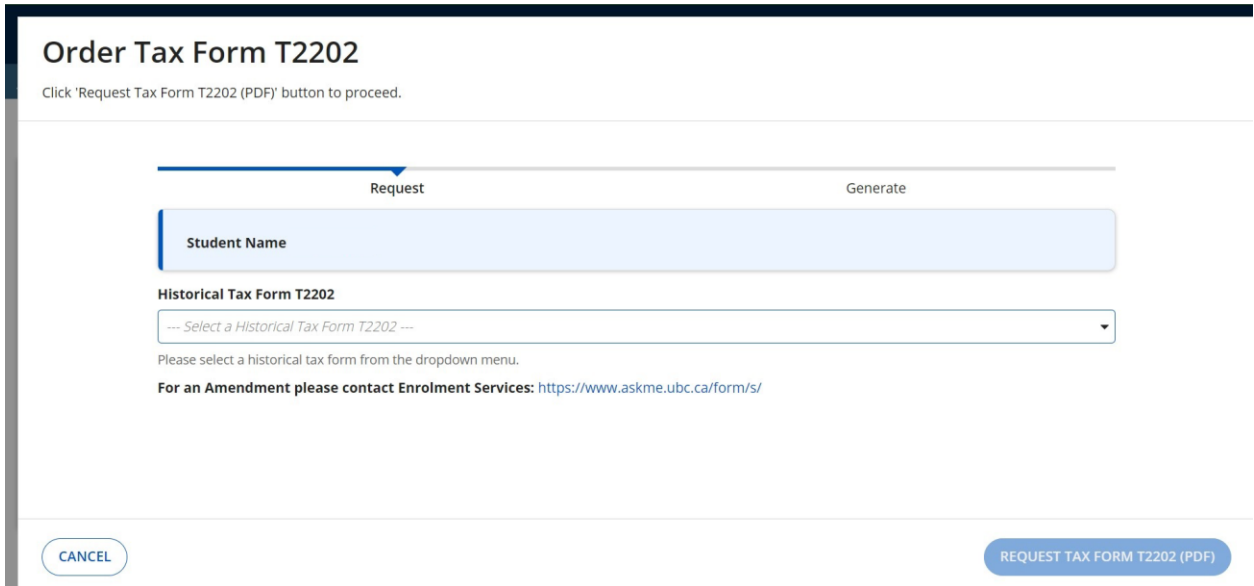
- Under the Tax Forms (T2202 and T4A) page in the Finances app, click on “UBC Official Documents” under Historical Tax Forms.

The screenshot shows the 'Finances' app interface. At the top, there is a 'MENU' button, a search bar, and notification icons. The main header is 'Finances' with a sub-header 'Tax Forms (T2202 and T4A)'. Below this, there is a list of tax forms: 'T2202 Student T2202 PDF - Student Self Print', 'T4A Consent to downloading T4A electronically Student T4A PDF - Student Self Print', and 'Historical Tax Forms UBC Official Documents'. The 'Historical Tax Forms' section is expanded, showing the 'UBC Official Documents' option. At the bottom, there is a system status message: '© 2024 Workday, Inc. All rights reserved. System Status: Your implementation tenant will be unavailable for a maximum of 12 hours during the next Weekly Service Update, starting on Friday, July 5, 2024 at 9:00 PM Eastern Time (Toronto) (GMT-4) until Saturday, July 6, 2024 at 9:00 AM Eastern Time (Toronto) (GMT-4).'.

- You are directed to the UBC Official Documents application. Under “Order Options,” click on “Tax Form T2202.”



- 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).”



4. Enter and review your information under the Tax Form T2202 Information boxes to ensure it is correct and up to date. Once done, click “Request Tax Form T2202 (PDF).”

### Order Tax Form T2202

Click 'Request Tax Form T2202 (PDF)' button to proceed.

Student Number:  - Year: 2019 - Type: O

Please select a historical tax form from the dropdown menu.

**Tax Form T2202 Information**

|                      |                      |                               |
|----------------------|----------------------|-------------------------------|
| Name                 | Last Name            | Social Insurance Number (SIN) |
| <input type="text"/> | <input type="text"/> | <input type="text"/>          |
| Address Line 1       | Address Line 2       | City                          |
| <input type="text"/> | <input type="text"/> | <input type="text"/>          |
| Province             | Postal Code          | Country                       |
| <input type="text"/> | <input type="text"/> | Canada                        |

For an Amendment please contact Enrolment Services: <https://www.askme.ubc.ca/form/s/>

CANCEL
REQUEST TAX FORM T2202 (PDF)

5. The tax form is ready to be generated. Click “Generate T2202 Tax Form (PDF).”

### Order Tax Form T2202

Click the Download icon to get the form.

Request
→
Generate

CLOSE
GENERATE T2202 TAX FORM (PDF)

- Click "Download Letter (PDF)."

## Order Tax Form T2202

Click the Download icon to get the form.

Request
Generate

**Download Letter (PDF)**

[CLOSE](#)

- Your tax form PDF is ready to be downloaded using the Download button on the top right corner.

1 / 2 | - 100% + | 🗉 ↺
↓ 🖨 ⋮

**Protected B** when completed  
**Protégé B** une fois rempli

For student / Pour étudiant **1**

Year / Année **2019**

[Clear Data](#)

### Tuition and Enrolment Certificate Certificat pour frais de scolarité et d'inscription

|   |  |  |  |   |   |  |   |  |
|---|--|--|--|---|---|--|---|--|
| Name and address of designated educational institution<br>Nom et adresse de l'établissement d'enseignement<br><b>UNIVERSITY OF BRITISH COLUMBIA<br/>2016 - 1874 EAST MALL<br/>VANCOUVER, BC V6T 1Z1</b> |  |  |  | 11 School type<br>Catégorie d'école<br><input type="text" value="1"/> | 12 Flying school or club<br>École ou club de pilotage<br><input type="text"/> |  |   |  |
| 13 Name of program or course<br>Nom du programme ou du cours<br><b>Bachelor of Applied Science</b>  |  |  |  | 14 Student number<br>Numéro d'étudiant<br><input type="text"/>        |   | 15 Filer Account Number<br>Numéro de compte du déclarant<br><input type="text" value="0,0,0,0,0,0,0,0,0,0,0,0,R,Z,0,0,0,0"/> |   |  |
| Student Name<br>Nom de l'étudiant<br><input type="text"/>   |  |  |  | 19 From<br>De<br>YY/MM<br>AA/MM                                       | 20 To<br>À<br>YY/MM<br>AA/MM  | 21 Number of months part-time<br>Nombre de mois à temps partiel  | 22 Number of months full-time<br>Nombre de mois à temps plein | 23 Eligible tuition fees, part-time and full-time<br>Frais de scolarité admissibles pour études à temps partiel et à temps plein |
| Student address<br>Adresse de l'étudiant<br><input type="text"/>  |  |  |  | 1 1, 9, 0, 1<br>Périodes d'études De AA/MM À AA/MM                    | 1 1, 9, 0, 4<br>  | 0<br>  | 4<br>   | \$3,352.55<br>   |
|   |  |  |  | 2 1, 9, 0, 5<br>  | 2 1, 9, 0, 6<br>  | 0<br>  | 0<br>   | \$0.00<br>   |
|   |  |  |  | 3 1, 9, 0, 7<br>  | 3 1, 9, 0, 8<br>  | 0<br>  | 0<br>   | \$0.00<br>   |
|   |  |  |  | 4 1, 9, 0, 9<br>  | 4 1, 9, 1, 2<br>  | 0<br>  | 4<br>   | \$3,962.19<br>   |
|   |  |  |  | <b>Totals / Totaux</b>  |   | 24 0<br>   | 25 8<br>  | 26 \$7,314.74<br>  |

**Information for students:** See the back of Certificate 1. If you want to transfer all or part of your tuition amount, complete the back of Certificate 2.

**Renseignements pour les étudiants :** Lisez le verso du certificat 1. Si vous désirez transférer une partie ou la totalité de vos frais de scolarité, remplissez le verso du certificat 2.

See the privacy notice on the next page.  
Consultez l'avis de confidentialité à la page suivante.

T2202 (22)

**Protected B** when completed  
**Protégé B** une fois rempli

For student / Pour étudiant **2**

Year / Année **2019**

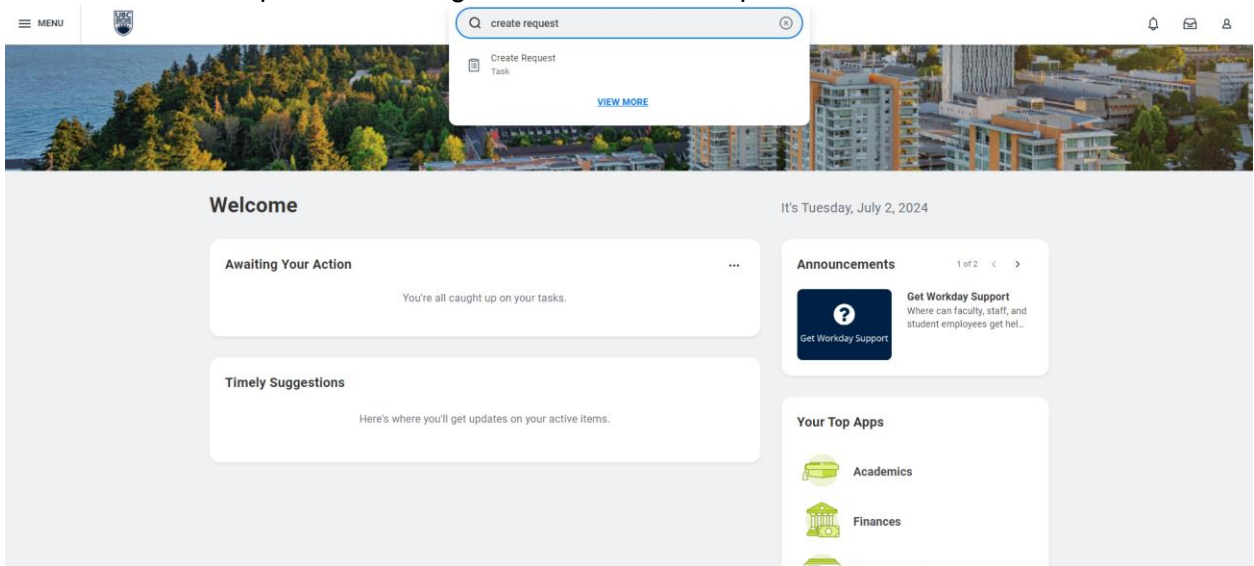
### Tuition and Enrolment Certificate Certificat pour frais de scolarité et d'inscription



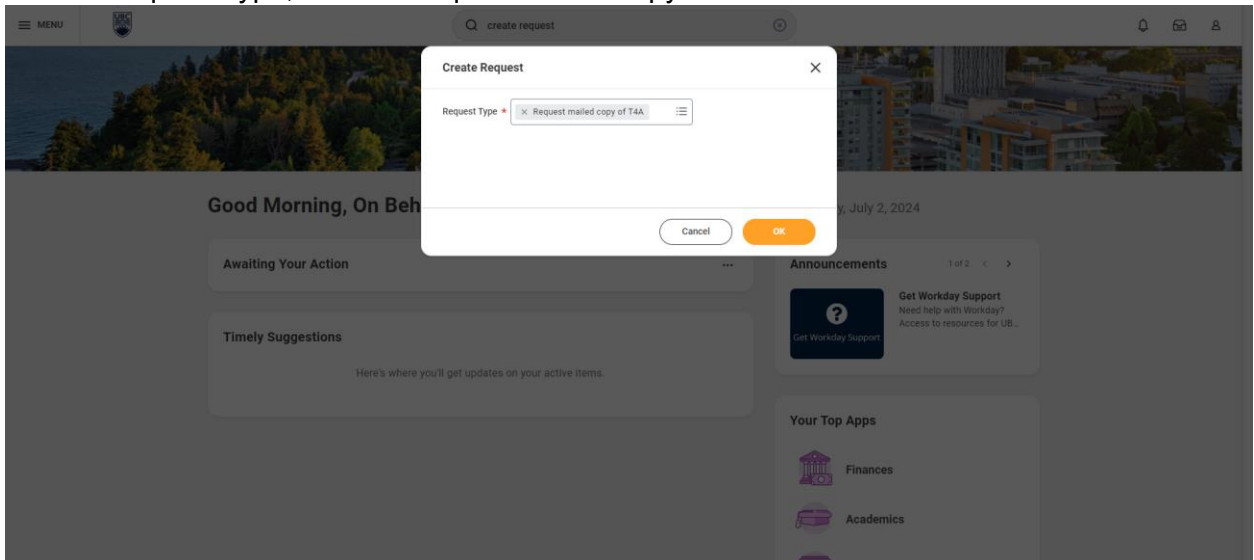
## Requesting Mailed Copies of Tax Slips

### 2024 T4A

1. Search “Create Request” and navigate to the Create Request task.



2. Under “Request Type,” select “Request mailed copy of T4A.”



3. A new pop-up window will appear. Under “Please indicate your preference for receiving T4A,” select “I want my T4A mailed to the address I have entered in Workday.”



### Click "Submit."

The screenshot shows a web browser window with the title 'Request mailed copy of T4A'. The browser's address bar shows 'create request'. The page content includes a purple header bar with the title. Below the header, there is a paragraph of text: 'T4As are available online by default. If you want to have your T4A mailed, please indicate your preference by the end of January for the preceding year. If you require a T4A mailed for a prior year after the end of January, please contact your Enrolment Services Advisor (in Vancouver) or Student Records & Financial Services (in Okanagan).' Below this text is a form area with the heading 'Please indicate your preference for receiving T4A:'. It contains two radio button options: 'I will access my tax slips online.' (unselected) and 'I want my T4A mailed to the address I have entered in Workday.' (selected). Below the radio buttons is a text input field with the placeholder 'enter your comment' and a blue arrow icon to its left. At the bottom of the form, there are three buttons: 'Submit' (orange), 'Save for Later' (grey), and 'Cancel' (grey).

### 2024 T2202

If you require your 2024 T2202 to be mailed, please contact your Enrolment Services Advisor (in Vancouver) or Student Records & Financial Services (in Okanagan).

### Historical Tax Forms

If you require a T4A or T2202 of a prior year to be mailed, please contact your Enrolment Services Advisor (in Vancouver) or Student Records & Financial Services (in Okanagan).