

Personal Tax :

Document Scanning Guide



Crowe BGK Guide for Scanning Your Personal Income Tax Documents

Scanning slips and documents for personal income tax preparation is an important step in organizing your financial information. Here's a step-by-step guide prepared by our Crowe BGK Tax Professionals to help you through the process:

1. *Gather Your Documents*

Collect all relevant slips and documents that are associated with your income and deductions. Common documents include but are not limited to:

- T4 slips (employment income)
- T5 slips (investment income)
- Receipts for medical expenses
- Charitable donation receipts
- Tuition receipts
- RRSP contribution statements
- Business-related receipts (if applicable)

2. *Organize Documents*

Sort your documents by category to make it easier to scan and organize. Digital folders can be used to keep each category separate.

Combine like-items together.

Example 1: Collect all T1135 slips and scan consecutively.

Example 2: Collect all medical/donation receipts and scan consecutively.

3. *Consult the Crowe BGK Personal Tax Checklist*

The Crowe BGK Personal Tax Checklist is a great place to start. Follow the checklist and note the documents you need to scan. Tick off each item as you scan and save it. This ensures you don't miss any important paperwork.

4. Scan Documents

- Place one document at a time on the scanner bed or capture one document at a time using your smartphone.
- Scan both sides of double-sided documents if necessary.
- Save each document or folder with a clear and descriptive file name.
Example: Create a digital folder on your computer or cloud storage (e.g., Google Drive, Dropbox) for tax-related documents. Save scanned documents into relevant subfolders based on categories.

5. Digital Images of Receipts

If you have physical receipts, you may consider taking clear pictures of them using your smartphone. Ensure the images are legible and save them in the designated folder.

6. Verify Accuracy and Completeness

Double-check that all scanned or photographed documents are clear, complete, and legible. Ensure your name, SIN, or receipt total are included where applicable.

7. Share With Your Crowe BGK Professional

Share the organized digital folder with your Crowe BGK Professional securely through our Portal or via email. This ensures they will have all the necessary information for accurate tax return preparation.

By following these steps, you will have a well-organized set of digital documents ready for tax return preparation. Consult a Crowe BGK Professional if you have questions about specific documents or deductions.

