

# Sample email: Booking confirmation

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This sample text is used by WoodGreen Community Services. Their supported self-file tax clinic uses the Teams application to book video appointments. If you are using a different application for your self-file tax clinic, substitute this within the text below.

Hello,

This is a confirmation of your upcoming self-file tax appointment with [Name of community agency]. At your appointment time, you will need to click on the link at the top of this email that says “Join Teams Meeting”.

**Before your appointment, you will need to create an online account with Intuit to use the free TurboTax software.**

Follow the steps below or [watch this quick how-to video](#) to learn how to create an account and get started today!

1. Open your internet browser (e.g. Chrome, Safari etc.) on **your phone** or **your computer**. Type [www.turbotax.ca/taxclinic](http://www.turbotax.ca/taxclinic) in the address bar at the top of your internet browser page
2. A ‘Create your account’ page will load
3. Create an account by filling in your information in the spaces provided
4. Enter your email address and use it for your User ID as well
5. Write down your User ID and password in a safe place because you will need it for next year
6. Once you have entered all of your information, click the orange button that says, ‘Create Account’. You have created an Intuit account!

**If you already have an Intuit account**, you can scroll down to the bottom of the page and click on the blue button that says, ‘Sign In’. Click on ‘I forgot my user ID or password’ if you need help with resetting your password.

**Want to learn more about doing your own taxes with TurboTax? Check out these videos!**

- [Navigating in TurboTax for Tax Clinics](#)
- [Preparing your taxes in TurboTax for Tax Clinics](#)
- [Completing your tax return in TurboTax for Tax Clinics](#)

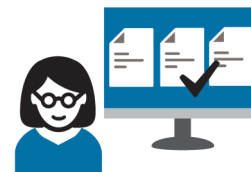


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**Please gather all of the relevant tax documents for yourself and spouse/common-law partner (if applicable) in preparation for your tax appointment.**

- **Social Insurance Number (SIN)**
- **Photo ID**
  - If photo ID is not available, you will need to show (2) government letters/bank statements/utility bills with your full name and address
- **Your income tax slips from all your income sources** (e.g. T4 slip for employment, T5007 slip for OW or ODSP, T4A(OAS) and T4A(P) for pensions)
  - If you do not have your tax slips, please call the Canada Revenue Agency (1-800-959-8281) to request them to be mailed
- **Rent receipt or final property tax bill**
- **If you were new to Canada in 2019:**
  - Exact date of arrival in Canada
  - The total amount of money that you earned in 2019 before you arrived in Canada
- **If you have children in your custody:**
  - Names and dates of birth for any children under age 19
  - Receipts for childcare expenses (e.g.: daycare or camp)
- **If you are a Student (post-secondary):**
  - Receipt for tuition fees (T2202 form – available through your online student account)
  - Receipt for Interest Paid on Student Loans
- **If you have any deductions to claim:**
  - Union dues
  - Medical expense receipts
  - Charitable or political donation receipt
  - Transit costs for individuals 65+ (proof of purchase or PRESTO usage report)



If you need to cancel, reschedule or have questions about your appointment you can contact the tax clinic at [phone number] or [email address].

Thank you,

**[Name of community agency]**