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› [Volunteer at a free tax clinic](#) › [CVITP learning guide](#) › [CRA electronic services](#)

# ReFILE

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## On this page

- [Overview](#)
- [Eligibility criteria](#)
- [How to use ReFILE](#)
- [Processing time](#)
- [Troubleshooting](#)

## Overview

ReFILE is an online service that allows individuals, CVITP volunteers and other EFILE service providers to send online adjustment requests for tax returns. CVITP volunteers must use the UFile CVITP software.

Beginning with the 2023 tax year, if a tax return was submitted electronically and a change needs to be made, CVITP volunteers can use ReFILE to send the adjustment request.

To allow organizations to use ReFILE, an individual's information may be kept for up to 28 days from the date the tax return was submitted. This rule only applies to organizations and volunteers who offer the ReFILE service.

For more information on how to ensure you are keeping individuals' information safe, refer to [Saving a tax return](#); and [Safeguarding an individual's information](#).



### Important note

To use ReFILE, the individual's tax return must have been filed electronically, they must have received their notice of assessment (NOA) and you must have an electronic copy of their tax return available.

If the tax return was not initially submitted electronically and a change needs to be made, the individual can use the [Change my return](#) service online or form [T1-ADJ T1 Adjustment Request](#) can be sent to the CRA by mail.

## Eligibility criteria

ReFILE can be used through the tax software provided by the CVITP if the following conditions apply:

- the individual's tax return was filed electronically
- you have a saved copy of the tax return
- the individual received their [NOA \(Notice of assessment\)](#)
- the individual returns to the same CVITP clinic
- the individual's amended tax return is being sent by the same volunteer who filed the original tax return
- only corrections, such as adding missing slips or changing amounts, will be made

ReFILE cannot be used to make changes to personal information such as:

- marital status

- address
- direct deposit
- email address

Refer the individual to [My Account for Individuals](#) or to [Update your CRA information](#) if changes related to their personal information are required.

The individual must send the following adjustment requests by mail:

- change a return that has not been assessed
- change a return where nine reassessments have been processed for a particular tax year
- apply for [Tax credits and benefits for individuals](#)
- apply for the [disability tax credit](#)
- change a return for a tax year that has a reassessment in progress
- change a return for an international taxpayer, newcomers to Canada and individuals who left Canada during the year

## How to use ReFILE

There are a number of steps to follow in the UFile CVITP tax software to successfully send an adjustment request using ReFILE.



### Important note

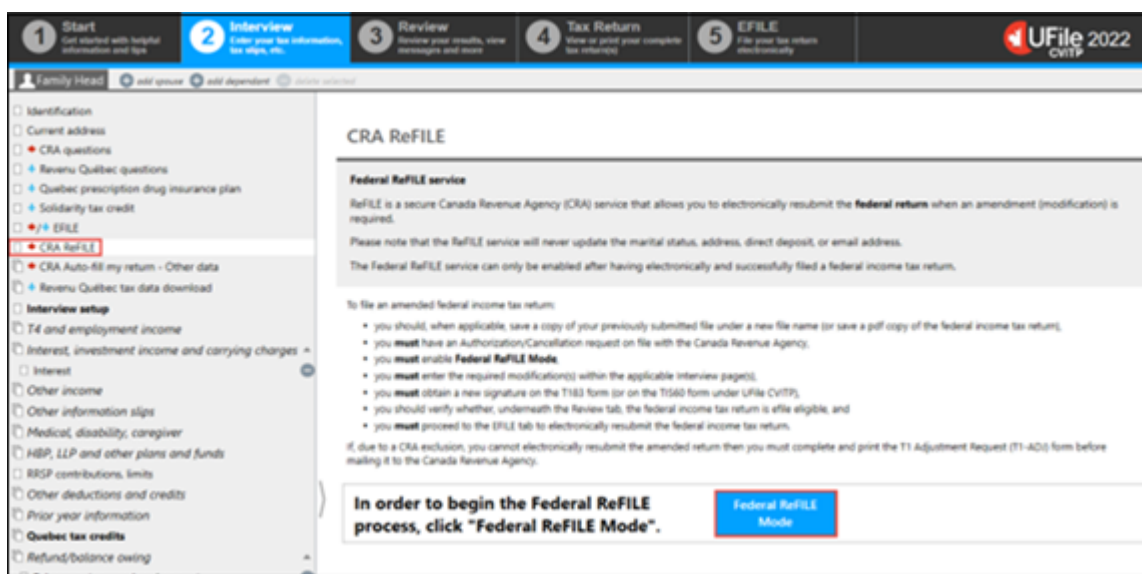
You must have the individual's authorization to change their tax return before using ReFILE.

- Follow the instructions applicable to your situation:
  - [Getting authorization to begin preparing tax returns in person](#)
  - [Getting authorization to begin preparing tax returns virtually.](#)

A T1S60 completed for a ReFILE situation will have the letter “R” populated after the tax year.

## Step 1: CRA ReFILE

To start the ReFILE process, open the individual’s saved tax return.



### ▼ Text version of the above image

UFile screen

Under Interview tab

Family Head sub-tab


CRA ReFILE topic is highlighted

CRA ReFILE page

Federal ReFILE Mode is highlighted

- from the **Interview** tab, select **CRA ReFILE** from the left-side menu
- click **Federal ReFILE Mode** to start amending the tax return

## Step 2: Amendments



Interview setup  
T4 and employment income  
Interest, investment income and carrying charges  
Interest  
Other income

Bond interest

Interest income from bonds:

Description \$ 25000.00

### ▼ Text version of the above image

Interview setup topic

Interest topic

Bond interest page

Interest income from bonds is highlighted

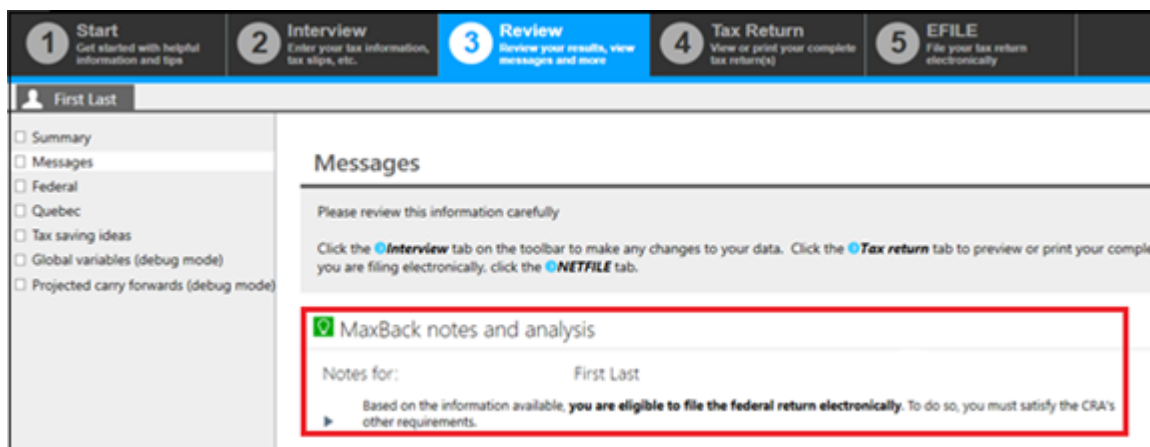
- enter the required changes in the applicable interview pages(s) and click **Next** for each modified page.



### CVITP tip

If you are using Auto-fill my return to automatically fill in missing information follow the instructions in [How to use Auto-fill my return](#).

## Step 3: EFILE eligibility



1 Start  
Get started with helpful information and tips

2 Interview  
Enter your tax information, tax slips, etc.

3 Review  
Review your results, view messages and more

4 Tax Return  
View or print your complete tax return(s)

5 EFILE  
File your tax return electronically

First Last

Summary  
Messages  
Federal  
Quebec  
Tax saving ideas  
Global variables (debug mode)  
Projected carry forwards (debug mode)

Messages

Please review this information carefully

Click the **Interview** tab on the toolbar to make any changes to your data. Click the **Tax return** tab to preview or print your complete return. If you are filing electronically, click the **EFILE** tab.

**MaxBack notes and analysis**

Notes for: First Last

Based on the information available, **you are eligible to file the federal return electronically**. To do so, you must satisfy the CRA's other requirements.

### ▼ Text version of the above image

UFile screen  
Under Review tab  
First Last sub-tab  
Messages topic  
Message page  
MaxBack notes and analysis is highlighted

- once all the modifications are entered, verify that the tax return is EFILE eligible under the **Review** tab.
- refer to [Troubleshooting](#) if you are not eligible to use ReFILE to submit the adjustment request.

## Step 4: ReFILE the tax return

The screenshot displays the UFile interface with five steps: 1. Start, 2. Interview, 3. Review, 4. Tax Return, and 5. EFILE. The 'EFILE' step is highlighted in blue. Below the steps, the user's name 'First Last' is shown. A sidebar on the left lists filing options: Filing status, Federal submission, Federal Authorization submission, Quebec submission, and Acknowledgment report. The main content area shows 'Federal EFILE submission for: First Last' and a note for Canadian residents. A red box highlights a callout that says: 'When you are ready to ReFILE, click "ReFILE my return now!"'. Below this callout is a blue button labeled 'ReFILE my return now!' with a right-pointing arrow icon. A small text block below the button reads: 'Please wait a few seconds for the file to be accepted and to receive a confirmation number. Should the file not be accepted, then please review, and rectify the error(s) listed and resubmit when ready.'

### ▼ Text version of the above image

UFile screen  
Under EFILE tab  
First Last sub-tab  
Federal submission topic

Federal EFILE submission for: First last page

When you are ready to ReFILE, click “ReFILE my return now!” section is highlighted

- proceed to the **EFILE** tab and click “**ReFILE my return now!**”.



#### Tax tip

After changes to the tax return have been requested using ReFILE, remind the individual to keep all of their receipts and supporting documentation in case the CRA asks to see them.

## Processing time

The time required to complete an adjustment varies depending on the type of adjustment requested and the circumstances involved.

When the review is done, the CRA will send the individual one of the following:

- a notice of reassessment showing any changes to their tax return
- a letter explaining why the CRA did not make the changes that were requested or why no changes were needed

For more information about processing times refer to the [Check CRA processing times tool](#) on Canada.ca.

## Troubleshooting

The most common situations that prevent a tax return from being amended electronically are:

- the individual's first or last name is incorrect

- the individual's date of birth is incorrect
- a mandatory field has not been filled out
- the tax return has already been submitted

When you attempt to re-submit a tax return after you correct an error, ensure that you have received either a green Accepted status, or a red Rejected status in the Federal EFILE Report generated by the tax software.



### **Important reminder**

If you cannot use ReFILE due to a CRA exclusion, refer the individual to [My Account for Individuals](#) or to [Update your CRA information](#) on Canada.ca. [Form T1-ADJ, T1 Adjustment Request](#) , can also be completed and sent to the CRA by mail.

#### **Date modified:**

2024-02-12