

1. Employment conditions and records

Employment expenses

Client legal name

Complete this form if you paid employment costs personally. Use one copy per employer. Attach a signed T2200, or explain if unavailable. Complete only the expense, home, vehicle and occupation sections that apply.

Attach bookkeeping reports and T slips. Do not re-enter any figures already shown on them. Enter only missing figures and other details. Select Yes / No / Unsure; use N/A as needed.

Employer legal name / address

Job title / duties

Employment dates

Pay arrangement

☐ Salary ☐ Commission ☐ Both ☐ Other

Employment income / commission (only if absent from slips)

T4 / RL-1 supplied

Employer required you to pay these expenses?

☐ Yes ☐ No ☐ Unsure

Signed T2200 available?

☐ Yes ☐ No ☐ Unsure

If unavailable: requested date / employer contact / explanation

Required to work away from employer premises or at different locations?

☐ Yes ☐ No ☐ Unsure

Entitled to allowances or reimbursement, even if not claimed?

☐ Yes ☐ No ☐ Unsure

Allowances: type, amount, km rate and taxable/slip treatment; expenses reimbursed

Do you own shares in, or have a family relationship with, the employer?

☐ Yes ☐ No ☐ Unsure

Employment agreement / T2200 conditions; employer GST/HST registration details

Attach

☐

Signed T2200 or explanation

☐

Employment agreement / expense policy

☐

T4 / RL-1 and allowance statements

☐

Receipts, expense summaries and reimbursement records

2. Employment expense breakdown

Employment expenses

Complete for employment costs, or attach a summary with the same details.

If an employer expense summary already provides the requested amounts, attach it and identify the relevant rows. Complete only missing figures. Give actual costs; Arsen Accounting calculates allowable amounts.

Expenses		
Expense type	Full amount paid	Reimbursed / notes
Advertising / promotion (commission)		
Meals / entertainment		
Lodging / travel		
Parking		
Supplies consumed at work		
Phone / internet use		
Assistant wages / office rent		
Accounting / legal fees		
Other required employment costs		

Meal/travel dates, destination, purpose, hours away and participants; amounts on T2200

Costs included on slips, paid by another person or already claimed elsewhere

Home workspace costs? Complete section 3.

☐ Yes ☐ No ☐ Unsure

Vehicle costs? Complete section 4.

☐ Yes ☐ No ☐ Unsure

Special occupation, tools, clergy, artist, transport or temporary relocation? Complete section 5.

☐ Yes ☐ No ☐ Unsure

3. Employment workspace at home

Employment expenses

Complete only if you used a workspace at home for this employment.

Home/workspace address

Home tenure

☐ Owned ☐ Rented ☐ Other

Period working from home

Total hours worked / hours at home

Worked mainly from home for at least four consecutive weeks?

☐ Yes ☐ No ☐ Unsure

Space used only for employment and regularly to meet people for work?

☐ Yes ☐ No ☐ Unsure

Total finished home area / units

Workspace area / same units

Shared-space work hours / days

Other household workers sharing costs

Home costs for the work period

Category	Household total	Dates / paid by / reimbursement
Heat / electricity / water	<div></div>	<div></div>
Internet access	<div></div>	<div></div>
Rent	<div></div>	<div></div>
Maintenance / repairs / cleaning	<div></div>	<div></div>
Home insurance	<div></div>	<div></div>
Property taxes	<div></div>	<div></div>
Other costs - describe	<div></div>	<div></div>

Insurance and property tax eligibility differs for commission employees. List them separately for review. Mortgage principal, mortgage interest and home CCA are not employment workspace deductions.

Workspace-only repairs; prior unused workspace expenses; any duplicate costs

4. Employment vehicle

Employment expenses

Complete for each vehicle used, or attach the same details. State full annual costs before allocation. Attach logs and purchase/lease/loan records. Skip this section if it does not apply.

Make / model / year / power type

Owner / lessee / co-owners and shares

Vehicle is

☐ Owned ☐ Leased ☐ Other

Opening / closing odometer (km)

Total annual km

Employment km

Other business / rental / employment km

Logbook/estimates; trips/dates/purpose; reimbursements, GST/HST recovery, prior CCA, grants and costs recorded elsewhere

Vehicle costs

Category	Full cost / currency	Included in report?
Fuel / oil	<div></div>	<div></div>
Electricity / charging	<div></div>	<div></div>
Insurance	<div></div>	<div></div>
Licence / registration	<div></div>	<div></div>
Maintenance / repairs	<div></div>	<div></div>
Financing interest (no principal)	<div></div>	<div></div>
Lease payments	<div></div>	<div></div>
Business parking / tolls	<div></div>	<div></div>
Other - explain	<div></div>	<div></div>

Purchase / lease start date

Price before tax / taxes

Loan amount / lender / term

Interest rate / annual interest

Lease payments / tax / deposit / days leased

Buyout / sale / trade-in date and proceeds

5. Special occupations and completion

Employment expenses

Complete the occupation details only if relevant. Everyone completes the final review.

Select any applicable occupation

- ☐ Transport worker / railway
- ☐ Artist / musician
- ☐ Eligible educator
- ☐ Tradesperson / apprentice mechanic
- ☐ Clergy
- ☐ Volunteer firefighter / search and rescue

Occupation-specific forms (TL2/T1223 etc.), eligible hours, employer certification

Tools / instruments / eligible school supplies

Item / date / supplier	Cost / tax / reimbursements	Work use / certification

Tradesperson temporary relocation: worksite, dates, home/work distances, lodging/meals/transport and income

GST/HST rebate claimed previously; current request; previous carryforwards or asset dispositions

Final review

Have you attached the requested records or listed what is missing? ☐ Yes ☐ No ☐ Unsure

Missing documents, estimates, unclear answers or additional facts

Completed by Date (YYYY-MM-DD)

This worksheet gathers facts for Canadian tax preparation. Arsen Accounting will review eligibility, calculations and any required elections. Filing authorization is obtained separately.