

## Client Data Enquiry

	Title of Component to Add	Trigger	EC
1	Home Buyer's Plan information	Tax payer is a Home Buyers' Plan participant and required to make a repayment for the <b>current year</b> .	726
2	Life Long Learning Plan Information	Taxpayer is a Lifelong Learning Plan participant and is required to make a repayment for the current year.	727
3	Social assistance or worker's compensation benefits	Current year T5007 on file.	731 732 733
4	Employment Insurance and other benefits	Current year T4E on file.	110 729 730
5	Working Income Tax Benefit Advance Payments	Current year RC210 on file with an amount greater than 0 in box 10.	825 826 827
6	Universal Child Care Benefits	Current year RC62 on file with an amount greater than 0 in box 10.	805 806 807
7	Reassessment information	If the CRA reassessed one or more of the taxpayer's prior-year returns within the previous 12 months.	728
8	Balance owing	Taxpayer has a debt owing to the CRA.	102 103 105
9	Current tax year return	Return has been <u>received</u> by the CRA for the current tax year.	30
10	Bankruptcy	Bankrupt code present on account	22
11	Recent page access	Client Data Enquiry page has been accessed by another representative (other than the current one) in the last 12 months	790
12	Federal tuition, education, and textbook carry forwards.	Client has an amount available for carry forward.	1001

13	Provincial tuition, education, and textbook carry forwards.	Client has an amount available for carry forward.	1002
14	Disability amount eligibility	Client qualifies for the Disability amount for the current tax year for self, or disability amount transferred from his/her spouse or dependent(s)	1003 1004 1005
15	Unfiled returns	One or more of the taxpayer's past 10 prior-year tax returns have not been filed	1006
16	Review, verification	Refund Examination code set on a client's account	<b>1007</b>
17	External Refund Set off	A refund set off is present on a client's account	See Refund Set-off doc attached
18	Internal Refund Set off	A refund set off is present on a client's account	See Refund Set-off doc attached
19	Reassessment in progress	A reassessment has been taken into inventory or a reassessment is pending but not posted to the system.	818
20	Pension, retirement, annuity and other income (T4A)	Current year T4A slip on file with an amount <b>greater than zero</b> in box 16, 18 or 22.	n/a
21	CPP payments	T4A(P)	n/a
22	Outstanding GST/HST returns	GST/HST returns are outstanding	<b>1009</b>
23	Working income tax benefit	Client record indicates they are incarcerated.	1008
24	Immigration date	Client has an immigration date on their account. If there is more than one date on the account, the most recent date will display in the display message.	20
25	Emigration date	Client has an emigration date on their account. If there is more than one date on the account, the most recent date will display in the display message.	20