

Filling the T2202 Information and Instructions

Part 1: Before starting the T2202 slip and XML file generation process described in this document, take note of the following:

- <u>A)</u> What is a T2202 slip? The T2202 slip is the tax form required to be issued to most students who paid money to the college in a given tax year. The form replaces the T2202A (filed in years prior to 2019) and is required to be mailed to each student. It is recommended that you retain a copy for your records. You are not required to mail T2202 slips to the CRA (you are required to submit the data electronically instead, such as through an XML File upload).
- <u>B)</u> What is the XML File? An XMF file is a specific file format. For the T2202, we use an XML file to export all T2202 tax form information that you may upload to the CRA directly. The file includes all of the information on each printed T2202 slip that you issue to the student as well as a summary report required by the CRA
- <u>C)</u> For the T2202 slip printing and XML File, ensure you have the following information accurately entered into LAUNCH for each student:
 - 1. Student Family Name and Given Name

2. Student SIN

To assist with the SIN collection process, we have created a web form you may send to students: <u>https://acmeweb.academyoflearning.net/Forms/SINForm.aspx</u>

(Note from CRA: Make sure the **SIN** and **name** you enter on each T2202 certificate are correct. If the student does not give you their **SIN**, you should be able to show that you made a reasonable effort to get it. For example, if you contact a student by mail to ask for their **SIN**, record the date of your request and keep a copy of any correspondence that relates to it. If you do not make a reasonable effort to get a SIN, you may be subject to a penalty of \$100 for each failure. If you cannot get a SIN from the student, file your information return, without the SIN, no later than the last day of February. If you do not, you may be subject to a **penalty**.)

- 3. Student Address
- 4. Contract Number

D) For the XML File Specifically, ensure you have the following information accurately entered into LAUNCH for each campus:

Note: School Main level of access is required. To update this information, go to LAUNCH>CMS>CampusManager

- Business Number (in the Main tab) enter 15 alphanumeric characters: your 9 digit Business Number, followed by the letters "RZ", followed by the 4 digit account number (example "123456789RZ0001"). Do not add any spaces in the business number field)
- 2. Post-secondary Educational Institution Name (In the Contact tab)
- 3. Post-secondary Educational Institution Mailing Address (In the Contact tab)
- Contact Name (in the Contact tab) the name of the person able to answer questions related to the T2202 forms
- 5. Contact Phone (in the Contact tab) the telephone number associated with the Contact Name



Part 2: Creating the T2202 Tax Slips and generating the XML file:

To Start: Log in to LAUNCH <u>https://launch.academyoflearning.net</u> using your username and password. Click on the T2202 (under Tools menu), which will open a new tab with a log in screen. Note: Those with School Main or Learning Coach Admin level and T2202 form permission enabled in LAUNCH can only use this process.

Login Screen: You will need to enter your LAUNCH username and password again.

	T2202	
Username		
Password		
	SUBMIT	

To start, you will Create All Student T2202 Forms first, and fix all errors before generating the xml file. This will avoid any further issues with downloading student forms. You can use 'T2202 student details report' button on the page to download spreadsheet file to review all student details.

If you are having issues with this process, please use the new 'T2202' category in the HelpDesk.

STEPS TO CREATE AND DOWNLOAD T2202 STUDENT FORMS:

- **1.** Select school and year to generate T2202 student forms.
- 2. Click on "Create All student T2202 Forms" button, pop-up window will open.
- **3.** Click on "Run Reports" button to start process of generating the T2202 Student forms files in PDF format.

AOLCC Canada's Largest Carer	er College Network		Andrea.Sykorova Logout
CREATE T2202	STUDENT F	ILES	
Campus : Franchise	Trainee Acade	emy	
Select School:	Franchise Tra	inee Academy	
Select Year:	2024	Create all student T2202 forms	
	DETAILS REPORT		
CREATE ALL STUD	DENT T2202 FORMS	Please click on Run Reports to generate student forms for Franchise Trainee Academy in year of 2024	
CREATE SCHOOL	T2202 XML		
DOWNLOAD T22	02 STUDENT FORM	CANCEL RUN REPORTS	
DOWNLOAD T22	02 XML		
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CREATE SCHOOL	T2202 AMENDMEN	IT XML	
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4. It will take some time to complete, there is a progress bar for you to review how much time is left.



5. After completion it will display either a green message indicating that all items are complete or a red message indicating that there are items to be reviewed.

AOLCC Canada's Largest Career College No	twork	Andrea.Sykorov Logoi
CREATE T2202 STUDE	NT FILES	
Campus : Test School		
Select School	Test School	
Select Year:	2024	
CREATE ALL ST	IDENT T2202 FORMS	
CREATE SCHOO	L T2202 XML	
DOWNLOAD T2	202 STUDENT FORMS (ZIP)	
DOWNLOAD T2	202 XML	1/36 Student Records have a valid SIN number.
		All student forms for Test School were generated successfully.

If there is a red box, it indicates that there are errors in the data that need to be fixed. Those errors will be listed in the message box. You will need to fix the data directly in the student accounts in LAUNCH and run again. The list of records in the red box message can be selected and copy/pasted if needed. You will need to run steps 1-5 again after correcting the data.



Note: We have added a status field for valid SIN numbers in the message box that will identify the number of students with a valid SIN number, e.g. '2/36 Student Records have a valid SIN number message' which means 2 students have valid SIN number, and 34 students have either empty, invalid characters, or zeros entered in SIN number field. You will need to rerun the report upon collecting SIN from students via web form to have validated all students' SINs if possible. (To assist with the SIN collection process, we have created a web form you may send to students:

https://acmeweb.academyoflearning.net/Forms/SINForm.aspx)



6. Once you receive a green box, indicating that the data is complete, then you can click on "Download T2202 Student Forms (ZIP)" button, and then click Download Reports. You will be asked to re-enter your password.



7. You will then be provided with a ZIP file which will have student forms in pdf format with a protected password. For extracting or opening the file, you will need to enter the password for the user who created the file.

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STEPS TO CREATE AND DOWNLOAD T2202 XML:

- **1.** Select school and year to generate T2202 xml.
- 2. Click on "Create School T2202 xml" to proceed.

Create School T2202 XMI	×
Please click on Run Reports to g Trainee Academy in year of 2024	enerate t2202 xml for Franchise
	CANCEL



3. Click on "Run Reports" button, which will start creating the T2202 XML and will display a green completion box if successfully completed.

AOLCC Canada's Largest Career	ollege Network	Andrea.Sykorova Lagou
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Select School:	Franchise Trainee Academy	
Select Year:	2024	
T2202 STUDENT	ETAILS REPORT	
CREATE ALL STUD	ENT T2202 FORMS	
CREATE SCHOOL	2202 XML	
DOWNLOAD T22	2 STUDENT FORMS (ZIP)	
DOWNLOAD T22	2 XML	
		✓ Generated XML file successfully. ★
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4. To download the xml file, click on "Download T2202 xml" button and then click Download Reports. You will be asked to re-enter your password.

Download School	T2202 XML	×
Please click on Downlo Franchise Trainee Acad	ad Reports to download t2202 emy in year of 2024	xml for
	CANCEL	DAD REPORTS

5. Next, you will receive a ZIP file that will have xml file protected with a password. For extracting or opening the file, need to enter the password of user who created the file. Please note that this new process means that you no longer have to edit the XML file with the header changes.

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