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:

A) 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 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).

B) 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

C) For 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:
        https://acmeweb.academyoflearning.net/Forms/SINForm.aspx
    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**:
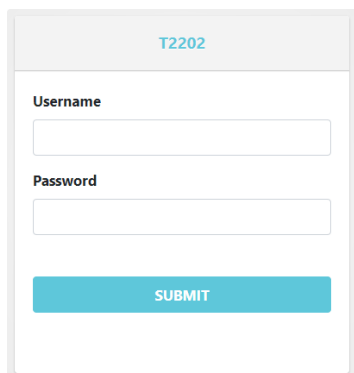
Note: *School Main* level of access is required. To update this information, go to LAUNCH>CMS>CampusManager

1. **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)
4. **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 https://launch.academyoflearning.net using your username and password. Click on the T2202 (under Tools menu), which will open a new tab with a log in screen. Note: Only those with School Main or Learning Coach Admin level and SIN Number and T2202 Form permissions enabled in LAUNCH can use this process.

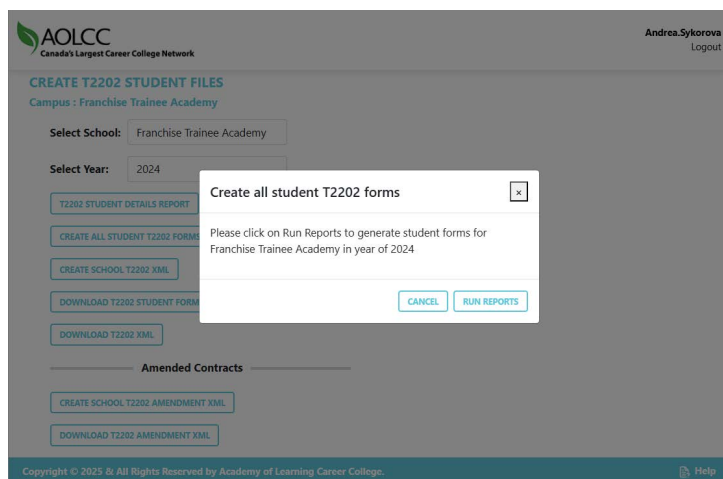Login Screen: You will need to enter your LAUNCH username and password again.

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.
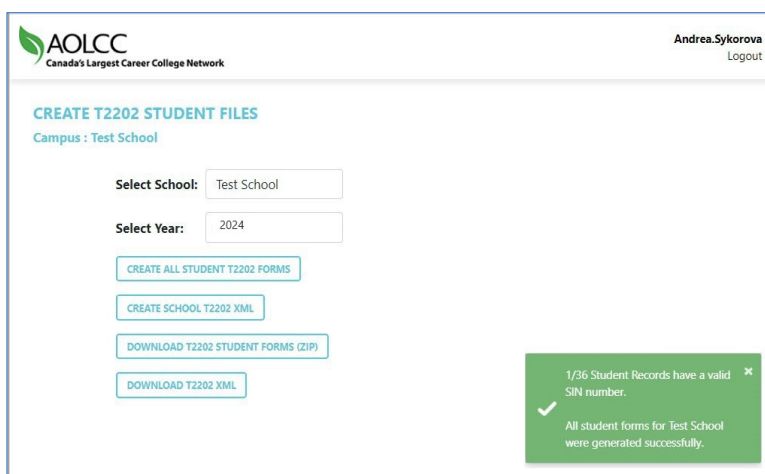
4. It will take some time to complete, there is a progress bar for you to review how much time is left.
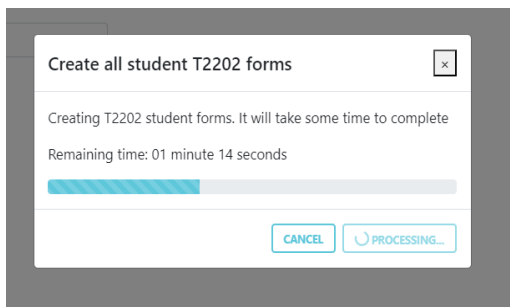
5. After completion it will display either a green message indicating that all items are complete or a red message indicating that there are items to be reviewed.


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.
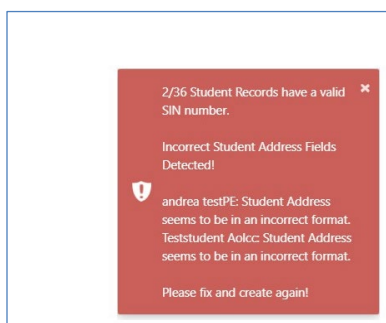

Note: We have added a status field for valid SIN numbers in the message box that will identify the number of students with a valid SIN number, e.g. '2/36 Student Records have a valid SIN number message' which means 2 students have valid SIN number, and 34 students have either empty, invalid characters, 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.
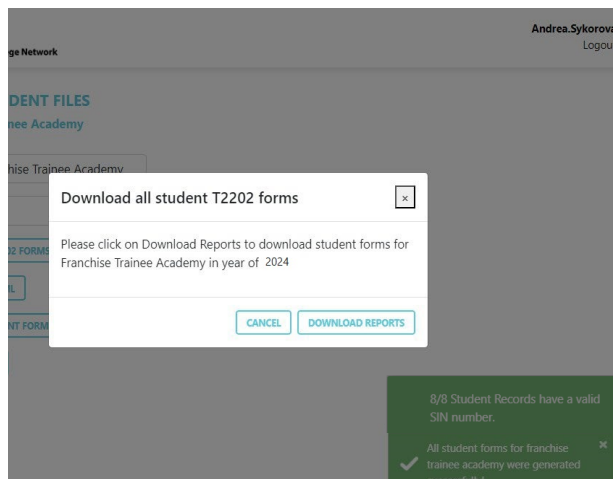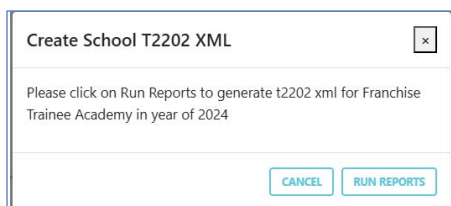

7. You will then be provided with a ZIP file which will have student forms in pdf format with a protected password. For extracting or opening the file, you will need to enter the password for the user who created the file.
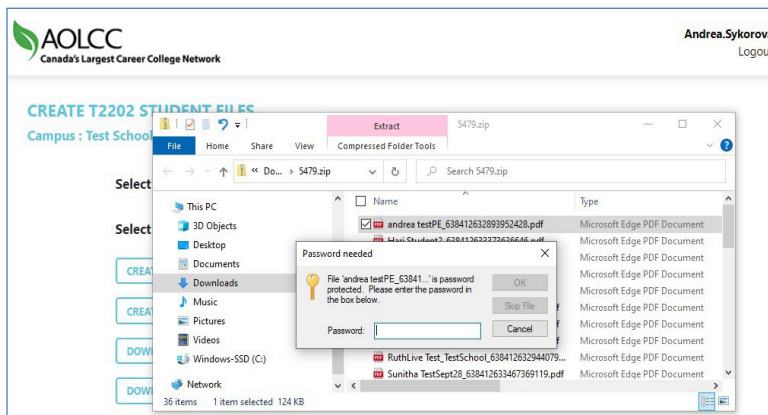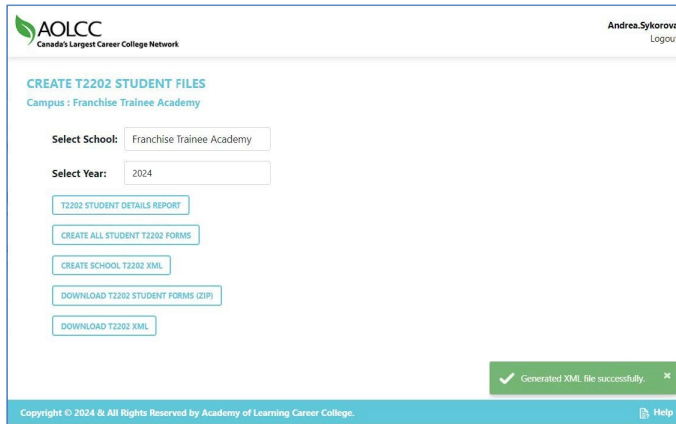

STEPS TO CREATE AND DOWNLOAD T2202 XML:

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

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

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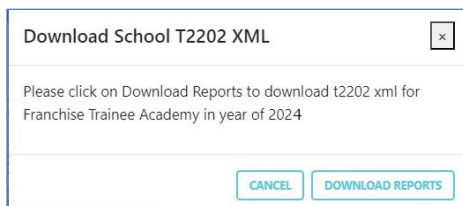
5. Next, you will receive a ZIP file that will have xml file protected with a password. For extracting or opening the file, need to enter the password of user who created the file. Please note that this new process means that you no longer have to edit the XML file with the header changes.

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