

## Why is the TD1 Form Important?

The TD1 form determines how much federal and provincial is deducted from your pay. Completing it accurately ensures the correct amount of tax is withheld, helping you avoid an underpayment or overpayment at tax time.

## Things to Remember When Completing the TD1 Forms.

### ☒ Read Each Section Carefully

Each Section of the TD1 form comes with specific instructions. Take the time to read the instructions carefully to ensure you understand what is required.

### ☒ Claim Personal Tax Credits with One Employer

- You must submit a TD1 for each employer.
- Important: if you have more than one employer, only claim the basic personal amount and other credits with your primary employer.
- For additional employers, check the box that says: “*More than one employer or payer at the same time*”. This prevents you from claiming tax credits multiple times which would result in underpaying taxes and taxes owing at the end of the year.

### ☒ Avoid Overclaiming Tax Credits

- There are separate TD1 forms for Federal and Provincial credits
- Only claim amounts you are eligible for (e.g. tuition, dependants, disability credit).
- Claim tax credits and the basic personal amount with only one employer.
- Claiming too many credits reduces your tax withheld, which can result in owing at tax time.

### ☒ Use the “Additional Tax to be Deducted” Option

- If you anticipate owing taxes, you can request extra tax be withheld from each paycheck.
- This option is located near the bottom of both the Federal and Provincial TD1 forms.
- Enter the additional amount of taxes you want deducted each pay period.

### ☒ Update Your TD1 When Your Situation Changes:

## TD1 – Personal Tax Credits Form

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- You're must submit a new TD1 form within 7 days if your personal situation changes, such as:
  - Gaining or losing a dependent
  - Moving to another province
  - Starting a second job
  - Getting married or divorced

Tip: Review your TD1 annually to ensure your tax deductions stay accurate.

### **How To Review and Update your TD1 information in UKG:**

1. Go to “Myself – Pay – Income Tax” in UKG.
2. Review your current Federal and Provincial TD1 forms for accuracy
3. If your circumstances have changed or you want to adjust your tax credits:
  - Select “Add/Change Personal Tax Information” from the “Things I Can Do” menu
4. For more detailed instructions, refer to the LMS:
  - Resources - HOW TO Resources (for UKG specifically) - Module 1. UKG Functions for All Employees
  - See pages 63-65: *Review Personal Tax Credits Each Year*