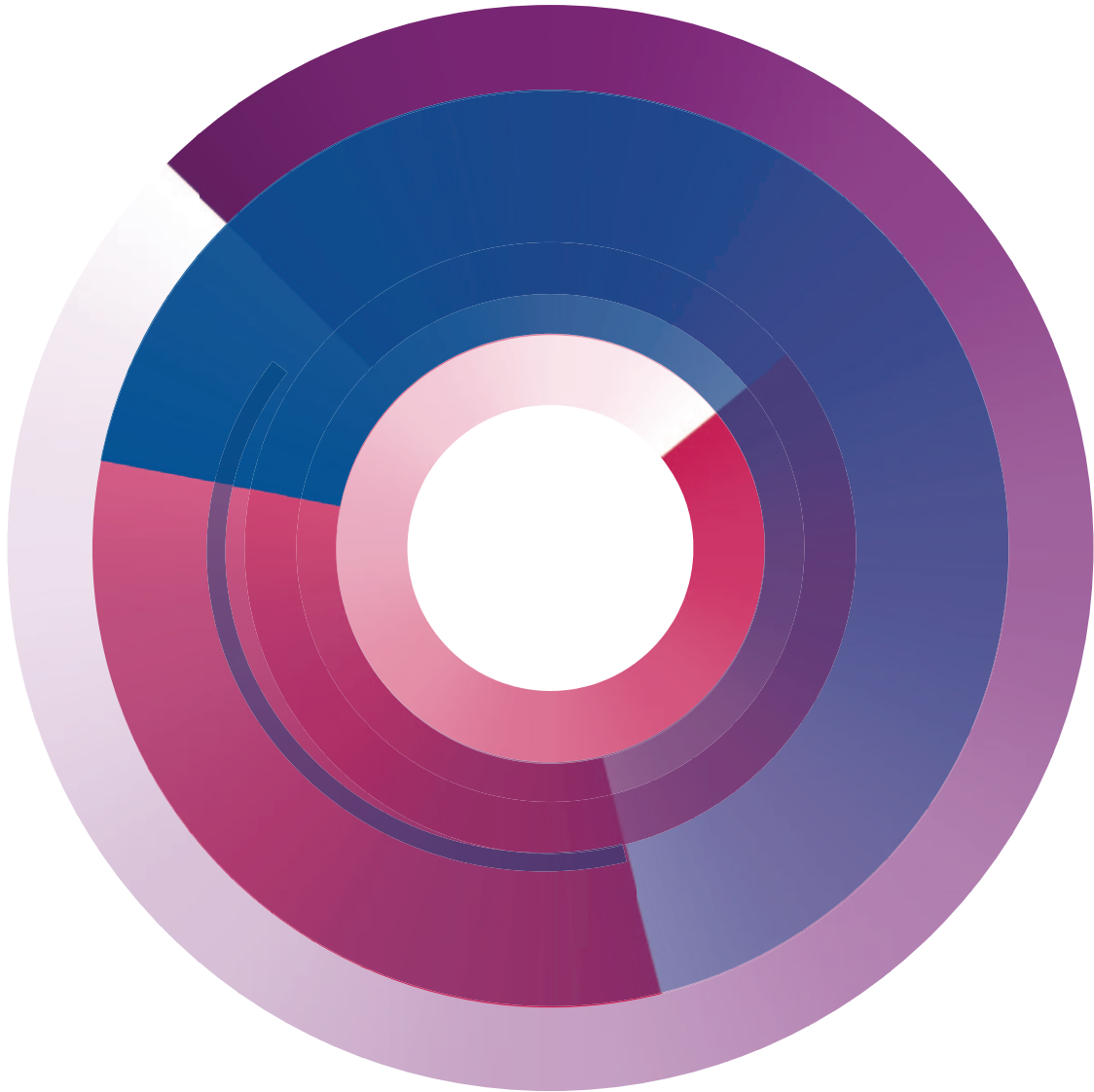


Collaboration

UNIT 2: PASSING THE PROBATIONARY PERIOD



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UNIT 2:

Passing the probationary period

Welcome to this unit on collaboration!

Collaboration is your ability to work well with others in your new workplace.

You show that you can collaborate when you work well with your team and other departments, respect the differences among co-workers and want to do more to get better results.

Research shows that collaboration is an important skill for work and life. The tasks that you complete in this unit will help you improve your ability to collaborate and pass your probationary period.

You will read about Renee and Jessica. They have started new jobs and are in the probationary period. They are both trying to collaborate, but they need strategies and tips to do it effectively.

Vocabulary

Probationary period: the first three to six months of employment. This is when you learn the job. It gives you and the employer time to decide if the job is a good fit.

Learning outcomes

After completing this unit, you will be able to:

- Identify when you need to collaborate when you start a new job
- Identify the purpose of collaborating
- Use strategies to collaborate effectively

Collaborating to pass the probationary period

Starting a new job can be exciting and challenging at the same time. It can be exciting because it's a new beginning for you. It can be challenging because you come from a different workplace or haven't worked with others for some time. There will be many situations when you will need to work with people you don't know well yet.

Below are some examples of how you can collaborate when you are in the probationary period:

Submit your documents on time

When you start a new job, your employer will ask you to submit documents as part of onboarding. You can collaborate by submitting those documents on time.

Do more than you are asked

When you start a new job, you will need to show that you can help achieve your team's goals. You can collaborate by helping a co-worker or doing something extra when you have time.

Respect differences among co-workers

When you start a new job, you will need to work with lots of new people. There will be differences among your co-workers such as backgrounds and abilities. You can collaborate by learning more about your co-workers and respecting the differences.

Set and respect boundaries

When you start a new job, you and your co-workers don't know each other well. They may do or say things that you don't like. You may do or say things that they don't like. You can collaborate by setting and respecting boundaries.

Vocabulary

Onboarding: when the employer welcomes you and introduces you to the team. This is when you learn how the company works.

Set a boundary: let others know how you would like to be treated so you feel respected and safe. This helps others know what is okay and not okay.

Self-evaluation

This self-evaluation asks you to think about your collaboration skills. Answer the questions as honestly as you can. This will help your facilitator target the tasks to your needs.

Self-evaluation is a way to reflect on your experiences, thoughts and emotions.

It helps you understand yourself better, shows your strengths and identifies areas you need to improve.

Self-evaluation 1

How well can you do these activities?

Activity	Not at all well	Not very well	Pretty well	Very well	Extremely well
1. I can understand when I need to work with other departments when I start a new job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I can read, understand and fill out forms with my personal and financial information, such as direct deposit and tax forms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I can ask for help to understand and fill out forms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I can prepare and submit documents on time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Self-evaluation 2

How well can you do these activities?

Activity	Not at all well	Not very well	Pretty well	Very well	Extremely well
1. I can do extra work without being asked, after I complete my tasks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I can understand why people set boundaries.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I can set boundaries in a nice way so I don't hurt other people's feelings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I can work with and respect people with different backgrounds and abilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Self-evaluations adapted from SRDC – OLES Measurement Tool: COMSA Survey Builder (srdc.org)

Renee's story

Renee just started a new job as a machine operator in a woodworking company. She is working with the human resources and payroll departments to submit her documents.

As part of her onboarding, Renee needs to gather and submit copies of her photo ID and health card. She also needs to fill out and submit an employee emergency contacts form, a direct deposit form and tax forms.

She has the copies of her photo ID and health card ready but she still needs the rest of the documents.



To fill out the emergency contacts form, Renee needs to give the contact information of family members or friends. She isn't sure why she needs to do this.

Renee needs help with the direct deposit and tax forms. The documents are hard to understand and fill out. Renee finds that some of them are too long and require a lot of information. She is worried that she may lose some of the documents or make mistakes when she fills them out.

The HR and payroll departments have told Renee that she needs to submit the documents as soon as possible. Renee feels shy. She isn't sure how to ask them for help and explain that she may need more time. If she doesn't submit the documents on time, the payroll department will not be able to calculate her pay and the HR department will not be able to create her employee file on time.

She is also confused about which documents to submit to the human resources department and which ones to submit to payroll.

Renee is trying hard, but she needs help preparing the documents so she can submit them on time.

Vocabulary

Direct deposit form: a form you fill out with your bank information. It allows employers to send your pay directly to your bank account.

Employee emergency contacts form: a form you fill out with the contact information of two people you know, such as family members or friends. Your employer contacts them if you are in an emergency.

When to collaborate? Identify areas

In the workplace, you are usually part of one department and work closely with your team. However, you also collaborate with other departments. For example, you may work as a mover in a storage and moving company. You work closely with the moving crew, but you may need to collaborate with the security department to get your key fob for the building.

The most common departments that you collaborate with outside your department are human resources and payroll. Here is information about what those two departments do and when you can collaborate with them.

Human resources department

The human resources department is called HR for short. The HR department hires employees and keeps track of their documents, attendance and health benefits.

When do you collaborate with HR?

You start to collaborate with the HR department when you submit your resume to apply for a job with the company. Then an HR worker invites you to an interview. Then they send you your job offer.

You continue to collaborate with the HR department when you start your new job. They ask you to submit documents such as copies of your ID and health card.

You continue to collaborate with the HR department throughout your employment. For example, you work with HR when you need to take time off or have questions about your health benefits.

Payroll department

The payroll department makes sure employees get paid.

When do you collaborate with payroll?

You begin to collaborate with the payroll department when you start your job. They ask you to submit documents such as tax forms or a direct deposit form. At the end of the year, they give you your T4.

You continue to collaborate with the payroll department throughout your employment. For example, you work with them when you have questions about your pay or taxes.

Vocabulary

T4: a document that shows the amount your employer paid you during a year. You use this when you do your taxes each year.

Collaborating with your family and friends

When you start a new job, you also collaborate with your family and friends. You need to ask two of them to be your emergency contacts. If they agree, you will fill out an employee emergency contacts form with their contact information. Your employer will contact them if you are in an emergency.

TASK 1

The human resources and payroll departments have asked Renee to submit documents. Renee isn't sure which department to talk to when she has questions about the documents. Which department should Renee collaborate with?

Answer the questions.

Write "HR" if Renee should collaborate with the HR department.

Write "Payroll" if Renee should collaborate with the payroll department.

1. Renee has questions about how to fill out a direct deposit form. _____
2. Renee wants to submit her emergency contacts form. _____
3. Renee wants to take a day off. _____
4. Renee wants to know why she got paid a different amount for this pay period _____

TASK 2

Renee is working with HR and payroll to learn more about the documents she needs to prepare and submit.

Complete the conversations. Fill in the blanks with the answers below.

Of course! It gives us your bank information so we can send your pay directly to your bank account.	Sure thing! The form tells us how much tax we should take off your pay. One is provincial, the other is federal.
For sure! You should be able to find it on your online bank account. If you have cheques, you can find it there too. You can also ask someone at your bank.	We need it so we know who to contact if you are in an emergency. You fill it out with the contact information of two people you know. They can be friends or family members.

Renee: Sorry, what is the employee emergency contacts form for?

HR worker:

Renee: Can you please tell me what the tax forms are for?

Payroll worker:

Renee: Could you let me know what the direct deposit form is for?

Payroll worker:

Renee: I'm not sure where to get the information to fill out the direct deposit form. Would you be able to tell me?

Payroll worker:

REFLECT

Think of a new job or volunteer experience you had.

- Did you collaborate with the same departments and people as Renee?
 - What did you collaborate for?
-
-
-
-
-
-

What does collaborating look like? Identify actions

What could Renee do to collaborate with HR and payroll?

TASK

Check () the four actions that show collaboration.

- Ask the HR and payroll departments for help
- Argue with the HR and payroll departments because they want too many documents
- Go to the bank to get her bank information so she can fill out the direct deposit form
- Lose some of the documents
- Not fill out the documents because she feels stressed
- Forget to fill out some parts of the documents
- Ask two people she knows to be her emergency contacts
- Ask her emergency contacts if she can write their information on the emergency contacts form

REFLECT

Think of your future job.

- What documents can you prepare beforehand so you can submit them to HR or payroll on time?
- Who can you ask to be your emergency contacts?

Practise filling out an emergency contacts form

An employee emergency contacts form is one of the many forms that you need to fill out when you start a new job.

An employee emergency contacts form usually has four parts.



Tips for filling out forms

When you fill out forms:

- Write in print. This makes it easy for others to read.
- Double check contact information: address, phone number and email.

Employee Emergency Contacts	
Name: _____ Home address: _____ Home phone: _____ Email address: _____	Part one is for your information.
Primary emergency contact Name: _____ Relationship to contact: _____ Home phone: _____ Email address: _____	
Secondary emergency contact Name: _____ Relationship to contact: _____ Home phone: _____ Email address: _____	
Employee signature: _____ Date: _____	

Part one is for your information.

Part two is for your primary emergency contact. This is who your employer will call first if there is an emergency. Your primary contact should know you well and be easy to contact. You need to write their relationship to you. For example, they may be your father, mother, cousin or friend.

Part three is for your secondary emergency contact. This is who your employer will call if they can't contact your primary emergency contact.

Part four is where you sign and date the form. When you do this, you allow your employer to call or email your contacts if you are in an emergency.

TASK

Renee talked to two of her friends. They both agreed to be her emergency contacts.

Jackie will be Renee's primary emergency contact. She is easy to contact because she always answers calls and checks her email twice a day. Jackie's last name is Fontaine. Her phone number is 431-222-1234. Her email address is jackiefon@friends.ca

Taydi will be Renee's secondary emergency contact. She doesn't miss calls either. Taydi's last name is Everett. Her phone number is 431-666-5678. She doesn't have an email address.

Renee's last name is Dubois. She lives in London, Ontario. Her address is 10 Factory Street. The postal code is R1H 0U0. Her phone number is 431-444-3535. Renee's email address is reneed@friends.ca

Fill out the form with the information for Renee, Jackie and Taydi.

Employee Emergency Contacts	
Name:	_____
Home address:	_____
Phone:	Email address:
_____	_____
Primary emergency contact	
Name:	_____
Relationship to contact:	_____
Phone:	Email address:
_____	_____
Secondary emergency contact	
Name:	_____
Relationship to contact:	_____
Phone:	Email address:
_____	_____
Employee signature:	_____
Date:	_____

Practise filling out direct deposit forms

When you start a new job, your employer may send the money you earn directly to your bank account. This is called direct deposit.

To do this, they will need your bank information.

Some employers may ask for a void cheque. It has your bank information. If you have a real cheque, write “void” across the cheque and give it to your employer. If you don’t have a real cheque, you may be able to print out a void cheque from your online bank account or go to your bank and ask them to do it.

Other employers may ask you to fill out a direct deposit form.

The payroll department may give you one or ask you to get one from your bank.

If you need to fill out a direct deposit form, you will need to write:

1. Your name, address, and employee number. If you don’t know your employee number, ask someone from HR.
2. Your bank information:
 - Address of your branch. This is the location of the bank you use.
 - Branch (transit) number
 - Bank (institution) number
 - Account number
3. Your signature. When you sign the direct deposit form, you allow payroll to use your bank information to pay you.
4. The date you fill out the form.

Vocabulary

Void cheque: a cheque with the word VOID written across it. This means it can’t be used to take money from your account. Payroll can use it to get your bank information for direct deposit.

Renee Dubois
10 Factory Street
London, Ontario R1H 0U0

Date: _____ 123

Pay to the order of: _____ \$

Canada Bank
258 Downtown Drive
London, Ontario N6A 1C5

Memo: _____ Signature: _____

⑆ 123 ⑆ ⑆ 12345⑆004⑆ 1234567

Branch (transit) number Bank (institution) number Account number

TASK

The payroll department gave Renee a direct deposit form to fill out. She asked her bank to print out a void cheque so she can fill out the direct deposit form with her bank information.

Fill out the form with Renee's information from her void cheque. Her employee number is 98765.

Renee Dubois
10 Factory Street
London, Ontario R1H 0U0

Date: _____ 123

Pay to the order of: _____

Canada Bank
258 Downtown Drive
London, Ontario N6A 1C5

Memo: _____ Signature: _____

⑆ 123 ⑆ ⑆ 12345⑆004 ⑆ 1234567

VOID

Direct Deposit Application		
Your information		
First name	Last name	Employee number
Address		
City	Province	Postal code
Banking information		
Branch address		
City	Province	Postal code
Branch (transit) number	Bank (institution) number	Account number
X		
Employee signature		Date

Why collaborate? Identify the purpose

When you start a new job, collaborating can help you in many ways. It can help you prepare and submit your documents on time.

When you collaborate with your friends and family members, you will be able to provide emergency contacts to your employer.

When you collaborate with HR and payroll departments, they will be able to create your

employee file and calculate your pay so you get it on time.

It can be hard to collaborate when you are confused or overwhelmed because you have a lot of documents to submit. If you keep in mind how you could benefit from collaborating, you can stay motivated and keep going.



TASK

Why should Renee collaborate?

Complete the sentences with your ideas. You can write more than one idea.

We have done the first one as an example.

1. If Renee submits a copy of her health card:

she can get medical help if she gets hurt at work.

2. If Renee fills out and submits her emergency contacts form:

3. If Renee fills out her tax forms:

4. If Renee gets her bank information:

5. If Renee fills out and submits her direct deposit form:

REFLECT

Think of your future job.

Why will it be important to submit your documents on time?

How can you collaborate effectively? Identify and practise strategies



When you start a new job, collaboration is one of the most important skills to use. You will need to prepare and submit a lot of documents on time. You may need to ask for help if you have trouble understanding and filling out a form. You may also have to negotiate a later deadline.

It's a lot to handle, and you may feel confused or overwhelmed but there are many strategies that can help you. Why not use them and see what happens!

REFLECT

Think of the challenges that Renee is facing.

How can she collaborate better?

Do you know of any strategies she could use?

Strategies to prepare and submit documents on time

When you start a new job, you need to submit a lot of documents on time. It's important to handle the documents with care, keep them organized and learn how you need to submit them.



Renee is worried that she won't be able to prepare and submit her documents on time. She needs strategies to do it effectively.

Here are some that can help:

Make a list of documents

Make a list of the documents that you need to prepare and submit. This will help you remember all of them. Put a checkmark (✓) beside each one when they are ready to submit.

Handling documents effectively is a transferable skill. Use it in your employment program, in your job and in your daily life.

Get more than one copy

Get more than one copy of the documents if you can. You can fill out one for practice and the other as the final. This can help you avoid mistakes on important documents.

Keep documents organized

Get a folder for your documents to keep them organized. You can also keep your list in the folder. If you need to submit documents to different departments, you can use separate folders and label them. For example, you can label one "HR documents" and one "payroll documents".

Keep documents neat and clean

Keep folders and documents away from children, pets and food. Don't wrinkle them. When your documents are clean and neat, you make a good impression. It shows that you are open to collaborating.

Submit documents in the right way

Find out how you need to submit the documents. Some companies want paper copies. Some want you to email the documents. Others want you to submit the documents online. If you aren't sure how to submit your documents, ask someone from HR.

Submit documents as soon as possible

If you have some documents ready, ask if you can submit them first. You may be able to negotiate a later deadline for documents that are harder to fill out. However, this may delay your pay.

See **Collaboration: Unit 1** to learn:

- How to make a list
- How to make a good impression
- How to negotiate



TASK 1

Renee is worried that she will forget some of the documents that she needs to submit.

She wants to make a list so that she can remember all of them.

Make a list of the documents that Renee needs to submit.

Check () the ones that are ready to submit.

TASK 2

Renee got two folders to organize her documents. She labelled one “HR documents” and the other “Payroll documents”.

Which folder should she put each document in?

Write the names of the documents on the folders. Choose from Renee’s list.

HR documents

Payroll documents

REFLECT

Think of a time when you had to prepare and submit a lot of documents.

- What strategies did you use to keep them clean and organized?
- Did you submit all of them at once?
- Did you have to negotiate a later deadline? If you did, how did it affect you?
How did it affect others' work?

Think of your future job.

What strategies will you use to prepare and submit your documents on time?

Strategies to communicate with HR and payroll departments

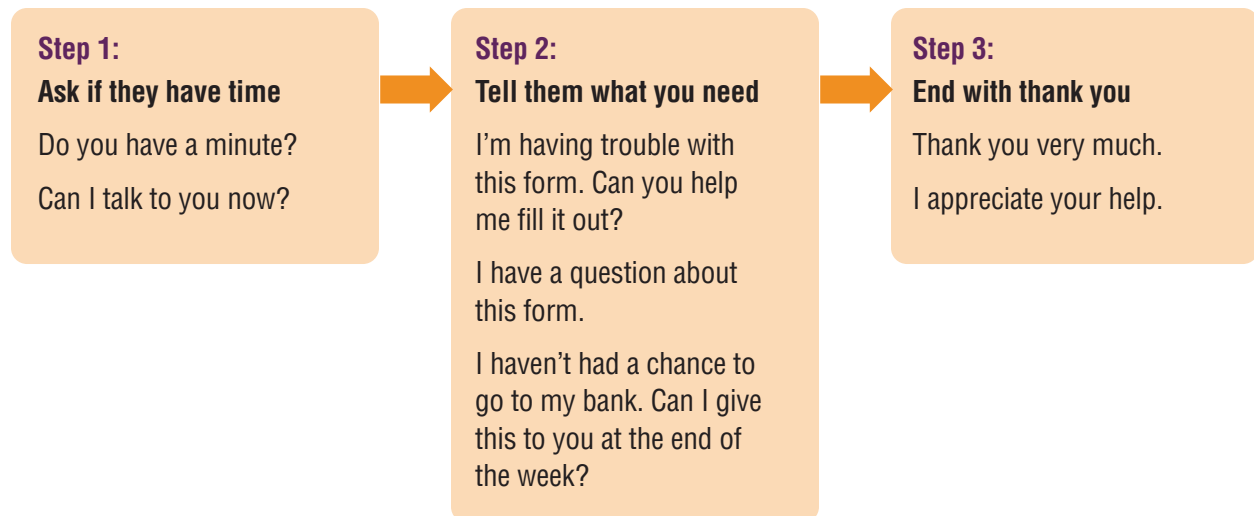
You collaborate with the HR and payroll departments through communication. You may ask them to help you or explain something to you. You may also need to negotiate a later deadline.

When you start your new job, you may feel shy or uncomfortable asking them questions. That's okay. You are still learning their work style and how they prefer to communicate.



Renee isn't sure how to talk to workers in the HR and payroll departments. She needs strategies to do it effectively.

Here are some that can help:



TASK

A payroll worker is passing by. Renee wants to ask some questions.

1. What should Renee say first?

2. Renee wants to ask how to find her account number on her cheque. What should she say?

3. Renee wants to ask for more time to submit the direct deposit form. What should she say?

4. The payroll worker has answered all of Renee's questions. What should Renee say?

REFLECT

Think of a time when you communicated with an HR or payroll department.

What strategies did you use?

Think of your future job.

Which strategies will you use to communicate with HR or payroll?

Practise filling out personal tax credits returns

When you start a new job, there are two tax forms to fill out. You complete these forms so payroll can calculate how much tax to take off your pay. One form is provincial, the other is federal. The two forms are similar. When you learn how to complete one, it'll be easier to complete the other.

This is the federal form. It has four parts.

Canada Revenue Agency		Agence du revenu du Canada		Protected B when completed	
2023 Personal Tax Credits Return				TD1	
<p>Read page 2 before filling out this form. Your employer or payer will use this form to determine the amount of your tax deductions.</p> <p>Fill out this form based on the best estimate of your circumstances.</p> <p>If you do not fill out this form, your tax deductions will only include the basic personal amount, estimated by your employer or payer based on the income they pay you.</p>					
Last name		First name and initial(s)	Date of birth (YYYY/MM/DD)	Employee number	
Address			Postal code	For non-residents only Country of permanent residence	Social insurance number
<p>1. Basic personal amount – Every resident of Canada can enter a basic personal amount of \$15,000. However, if your net income from all sources will be greater than \$165,430 and you enter \$15,000, you may have an amount owing on your income tax and benefit return at the end of the tax year. If your income from all sources will be greater than \$165,430, you have the option to calculate a partial claim. To do so, fill in the appropriate section of Form TD1-WS, Worksheet for the 2023 Personal Tax Credits Return, and enter the calculated amount here.</p> <p>2. Canada caregiver amount for infirm children under age 18 – Only one parent may claim \$2,499 for each infirm child born in 2006 or later who lives with both parents throughout the year. If the child does not live with both parents throughout the year, the parent who has the right to claim the "Amount for an eligible dependant" on line 8 may also claim the Canada caregiver amount for the child.</p> <p>3. Age amount – If you will be 65 or older on December 31, 2023, and your net income for the year from all sources will be \$42,335 or less, enter \$8,396. You may enter a partial amount if your net income for the year will be between \$42,335 and \$98,309. To calculate a partial amount, fill out the line 3 section of Form TD1-WS.</p> <p>4. Pension income amount – If you will receive regular pension payments from a pension plan or fund (not including Canada Pension Plan, Quebec Pension Plan, old age security, or guaranteed income supplement payments), enter whichever is less: \$2,000 or your estimated annual pension income.</p> <p>5. Tuition (full-time and part-time) – Fill in this section if you are a student at a university or college, or an educational institution certified by Employment and Social Development Canada, and you will pay more than \$100 per institution in tuition fees. Enter the total tuition fees that you will pay if you are a full-time or part-time student.</p> <p>6. Disability amount – If you will claim the disability amount on your income tax and benefit return by using Form T2201, Disability Tax Credit Certificate, enter \$9,428.</p> <p>7. Spouse or common-law partner amount – Enter the difference between the amount on line 1 (line 1 plus \$2,499 if your spouse or common-law partner is infirm) and your spouse's or common-law partner's estimated net income for the year if both of the following conditions apply:</p> <ul style="list-style-type: none"> You are supporting your spouse or common-law partner who lives with you Your spouse or common-law partner's net income for the year will be less than the amount on line 1 (line 1 plus \$2,499 if your spouse or common-law partner is infirm) <p>In all cases, go to line 9 if your spouse or common-law partner is infirm and has a net income for the year of \$26,782 or less.</p> <p>8. Amount for an eligible dependant – Enter the difference between the amount on line 1 (line 1 plus \$2,499 if your eligible dependant is infirm) and your eligible dependant's estimated net income for the year if all of the following conditions apply:</p> <ul style="list-style-type: none"> You do not have a spouse or common-law partner, or you have a spouse or common-law partner who does not live with you and who you are not supporting or being supported by You are supporting the dependant who is related to you and lives with you The dependant's net income for the year will be less than the amount on line 1 (line 1 plus \$2,499 if your dependant is infirm and you cannot claim the Canada caregiver amount for infirm children under 18 years of age for this dependant) <p>In all cases, go to line 9 if your dependant is 18 years or older, infirm, and has a net income for the year of \$26,782 or less.</p> <p>9. Canada caregiver amount for eligible dependant or spouse or common-law partner – Fill out this section if, at any time in the year, you support an infirm eligible dependant (aged 18 or older) or an infirm spouse or common-law partner whose net income for the year will be \$26,782 or less. To calculate the amount you may enter here, fill out the line 9 section of Form TD1-WS.</p> <p>10. Canada caregiver amount for dependant(s) age 18 or older – If, at any time in the year, you support an infirm dependant age 18 or older (other than the spouse or common-law partner or eligible dependant you claimed an amount for on line 9 or could have claimed an amount for if their net income were under \$17,499) whose net income for the year will be \$18,783 or less, enter \$7,999. You may enter a partial amount if their net income for the year will be between \$18,783 and \$26,782. To calculate a partial amount, fill out the line 10 section of Form TD1-WS. This worksheet may also be used to calculate your part of the amount if you are sharing it with another caregiver who supports the same dependant. You may claim this amount for more than one infirm dependant age 18 or older.</p> <p>11. Amounts transferred from your spouse or common-law partner – If your spouse or common-law partner will not use all of their age amount, pension income amount, tuition amount, or disability amount on their income tax and benefit return, enter the unused amount.</p> <p>12. Amounts transferred from a dependant – If your dependant will not use all of their disability amount on their income tax and benefit return, enter the unused amount. If your or your spouse's or common-law partner's dependent child or grandchild will not use all of their tuition amount on their income tax and benefit return, enter the unused amount.</p> <p>13. TOTAL CLAIM AMOUNT – Add lines 1 to 12.</p> <p>Your employer or payer will use this amount to determine the amount of your tax deductions.</p>					

Part 1

Part 2

Filling out Form TD1

Fill out this form **only** if any of the following apply:

- you have a new employer or payer, and you will receive salary, wages, commissions, pensions, employment insurance benefits, or any other remuneration
 - you want to change the amounts you previously claimed (for example, the number of your eligible dependants has changed)
 - you want to claim the deduction for living in a prescribed zone
 - you want to increase the amount of tax deducted at source
- Sign and date it, and give it to your employer or payer.

More than one employer or payer at the same time

If you have more than one employer or payer at the same time and you have already claimed personal tax credit amounts on another Form TD1 for 2023, you **cannot** claim them again. If your total income from all sources will be more than the personal tax credits you claimed on another Form TD1, check this box, enter "0" on Line 13 and do not fill in Lines 2 to 12.

Total income is less than the total claim amount

Tick this box if your total income for the year from **all** employers and payers will be **less** than your total claim amount on line 13. Your employer or payer will not deduct tax from your earnings.

For non-resident only (Tick the box that applies to you.)

As a non-resident, will 90% or more of your world income be included in determining your taxable income earned in Canada in 2023?

- Yes (Fill out the previous page.)
- No (Enter "0" on line 13, and do not fill in lines 2 to 12 as you are not entitled to the personal tax credits.)

Call the international tax and non-resident enquiries line at **1-800-959-8281** if you are unsure of your residency status.

Provincial or territorial personal tax credits return

You also have to fill out a provincial or territorial TD1 form if your claim amount on line 13 is more than \$15,000. Use the Form TD1 for your province or territory of **employment** if you are an employee. Use the Form TD1 for your province or territory of **residence** if you are a pensioner. Your employer or payer will use both this federal form and your most recent provincial or territorial Form TD1 to determine the amount of your tax deductions.

Your employer or payer will deduct provincial or territorial taxes after allowing the provincial or territorial basic personal amount if you are claiming the basic personal amount **only**.

Note: You may be able to claim the child amount on Form TD1SK, 2023 Saskatchewan Personal Tax Credits Return if you are a Saskatchewan resident supporting children under 18 at any time during 2023. Therefore, you may want to fill out Form TD1SK even if you are **only** claiming the basic personal amount on this form.

Deduction for living in a prescribed zone

You may claim **any** of the following amounts if you live in the Northwest Territories, Nunavut, Yukon, or another prescribed **northern** zone for more than six months in a row beginning or ending in 2023:

- \$11.00 for each day that you live in the prescribed northern zone
- \$22.00 for each day that you live in the prescribed northern zone if, during that time, you live in a dwelling that you maintain, and you are the only person living in that dwelling who is claiming this deduction

\$

Employees living in a prescribed **intermediate** zone may claim 50% of the total of the above amounts.

For more information, go to canada.ca/taxes-northern-residents.

Additional tax to be deducted

You may want to have more tax deducted from each payment if you receive other income such as non-employment income from CPP or QPP benefits, or old age security pension. You may have less tax to pay when you file your income tax and benefit return by doing this. Enter the additional tax amount you want deducted from each payment to choose this option. You may fill out a new Form TD1 to change this deduction later.

\$

Reduction in tax deductions

You may ask to have less tax deducted at source if you are eligible for deductions or non-refundable tax credits that are not listed on this form (for example, periodic contributions to a registered retirement savings plan (RRSP), child care or employment expenses, charitable donations, and tuition and education amounts carried forward from the previous year). To make this request, fill out Form T1213, Request to Reduce Tax Deductions at Source, to get a letter of authority from your tax services office. Give the letter of authority to your employer or payer. You do not need a letter of authority if your employer deducts RRSP contributions from your salary.

Forms and publications

To get our forms and publications, go to canada.ca/cra-forms-publications or call 1-800-959-5525.

Personal information (including the SIN) is collected for the purposes of the administration or enforcement of the Income Tax Act and related programs and activities including administering tax, benefits, audit, compliance, and collection. The information collected may be used or disclosed for purposes of other federal acts that provide for the imposition and collection of a tax or duty. It may also be disclosed to other federal, provincial, territorial, or foreign government institutions to the extent authorized by law. Failure to provide this information may result in interest payable, penalties, or other actions. Under the Privacy Act, individuals have a right of protection, access to and correction of their personal information, or to file a complaint with the Privacy Commissioner of Canada regarding the handling of their personal information. Refer to Personal Information Bank CRA PPU 120 on Info Source at canada.ca/cra-information-about-programs.

Certification

I certify that the information given on this form is correct and complete.

Signature _____

It is a serious offence to make a false return.

Date _____

Part 3

Part 4

Part one

Look at the form on page 29. Find part one.

This part asks for your personal information.

Be careful how you write:

- There is not much space for your last name, first name, initials and address. Write small.
- For your date of birth, follow the format on the form: YYYY / MM / DD
- For postal code and social insurance number, there is a separate space for each number.

Write one number or letter in each space.

Examples:

Postal code:

R	0	R	0	R	0
---	---	---	---	---	---

Social insurance number:

1	2	3	4	5	6	7	8	9
---	---	---	---	---	---	---	---	---

TASK 1

Fill out part one with Renee's information.

Renee's full name is Renee Dubois. She lives at 10 Factory Street, London, Ontario. Her postal code is R1H 0U0.

She was born on January 3, 1986. Her employee number is 98765. Her social insurance number is 123 456 789.

Vocabulary

Initials: the first letters of your first and last names

Resident: someone who lives in Canada

Non-resident: someone who doesn't live in Canada

How to write dates on forms



Follow the format on the form.

It tells you what to write first: day, month, or year. It also tells you how many numbers to write.

To follow this format:

- **YYYY/MM/DD**

First write the year (four numbers), then the month (two numbers) and then the day (two numbers).

For example, for May 27, 2023 write: **2023/05/27**

- **DD/MM/YYYY**

First write the day (two numbers), then the month (two numbers) and then the year (four numbers).

For example, for May 27, 2023 write: **27/05/2023**

Part two

Look at the form on page 29. Find part two.

This part has 13 sections. The sections have numbers from 1 to 13.

Everyone must fill out sections 1 and 13.

Sections 2 to 12 may or may not apply to you.

The sections start with words **in bold**. Use these words to ask yourself questions. This will help you decide if the section applies to you. For example, for section 4, you can ask:

Do I get pension income?

If your answer is “yes”, read the whole section carefully to see what you need to write. Write on the lines beside each section.

If your answer is “no”, then the section doesn’t apply to you.

You can leave that section blank, or you can write “0” or “N/A”.

Vocabulary

N/A: doesn’t apply, not applicable

Amount: how much money

Infirm: with disability

Tuition: money you pay for college or other education

Eligible dependant (or dependent): for taxes, this is a family member such as a child or grandparent that you need to support financially

TASK 2

Fill out part two with Renee’s information.

Renee is single. She doesn’t have dependants. She isn’t going to school.

Part three

Look at the form on page 30. Find part three.

This part has subheadings **in bold**. Use them to ask yourself questions.

This will help you decide if the section applies to you. For example, you can ask: Do I have more than one employer or payer at the same time?

If your answer is “yes”, read the whole section carefully and follow the instructions.

It will tell you if you need to check the boxes.

Vocabulary

Additional: extra

Deduct: take out of your income

TASK 3

Fill out part three with Renee’s information.

Renee has one employer. She hasn’t lived in a prescribed zone (the Northwest Territories, Nunavut or Yukon) for more than six months. She doesn’t want any extra tax to be taken out of her income.

Part four

Look at the form on page 30. Find part four.

This part asks you to confirm that you have given the right information.

Sign on the line beside “Signature” to confirm.

Put the date you fill out the form on the line beside “Date”.

TASK 4

Sign the form for Renee.

Put today’s date on it.



2023 Personal Tax Credits Return

Read page 2 before filling out this form. Your employer or payer will use this form to determine the amount of your tax deductions.

Fill out this form based on the best estimate of your circumstances.

If you do not fill out this form, your tax deductions will only include the basic personal amount, estimated by your employer or payer based on the income they pay you.

Last name	First name and initial(s)	Date of birth (YYYY/MM/DD)	Employee number
Address	Postal code	For non-residents only Country of permanent residence	Social insurance number

1. Basic personal amount – Every resident of Canada can enter a basic personal amount of \$15,000. However, if your net income from all sources will be greater than \$165,430 and you enter \$15,000, you may have an amount owing on your income tax and benefit return at the end of the tax year. If your income from all sources will be greater than \$165,430, you have the option to calculate a partial claim. To do so, fill in the appropriate section of Form TD1-WS, Worksheet for the 2023 Personal Tax Credits Return, and enter the calculated amount here.

2. Canada caregiver amount for infirm children under age 18 – Only one parent may claim \$2,499 for each infirm child born in 2006 or later who lives with both parents throughout the year. If the child does not live with both parents throughout the year, the parent who has the right to claim the "Amount for an eligible dependant" on line 8 may also claim the Canada caregiver amount for the child.

3. Age amount – If you will be 65 or older on December 31, 2023, and your net income for the year from all sources will be \$42,335 or less, enter \$8,396. You may enter a partial amount if your net income for the year will be between \$42,335 and \$98,309. To calculate a partial amount, fill out the line 3 section of Form TD1-WS.

4. Pension income amount – If you will receive regular pension payments from a pension plan or fund (not including Canada Pension Plan, Quebec Pension Plan, old age security, or guaranteed income supplement payments), enter **whichever is less:** \$2,000 or your estimated annual pension income.

5. Tuition (full-time and part-time) – Fill in this section if you are a student at a university or college, or an educational institution certified by Employment and Social Development Canada, and you will pay more than \$100 per institution in tuition fees. Enter the total tuition fees that you will pay if you are a full-time or part-time student.

6. Disability amount – If you will claim the disability amount on your income tax and benefit return by using Form T2201, Disability Tax Credit Certificate, enter \$9,428.

7. Spouse or common-law partner amount – Enter the difference between the amount on line 1 (line 1 plus \$2,499 if your spouse or common-law partner is **infirm**) and your spouse's or common-law partner's estimated net income for the year if **both** of the following conditions apply:

- You are supporting your spouse or common-law partner who lives with you
- Your spouse or common-law partner's net income for the year will be less than the amount on line 1 (line 1 plus \$2,499 if your spouse or common-law partner is **infirm**)

In all cases, go to line 9 if your spouse or common-law partner is **infirm** and has a net income for the year of \$26,782 or less.

8. Amount for an eligible dependant – Enter the difference between the amount on line 1 (line 1 plus \$2,499 if your eligible dependant is **infirm**) and your eligible dependant's estimated net income for the year if **all** of the following conditions apply:

- You do **not** have a spouse or common-law partner, or you **have** a spouse or common-law partner who does not live with you and who you are not supporting or being supported by
- You are supporting the dependant who is related to you and lives with you
- The dependant's net income for the year will be less than the amount on line 1 (line 1 plus \$2,499 if your dependant is **infirm** and you **cannot** claim the **Canada caregiver amount for infirm children under 18 years of age** for this dependant)

In all cases, go to line 9 if your dependant is **18 years or older, infirm**, and has a net income for the year of \$26,782 or less.

9. Canada caregiver amount for eligible dependant or spouse or common-law partner – Fill out this section if, at any time in the year, you support an **infirm** eligible dependant (aged 18 or older) or an **infirm** spouse or common-law partner whose net income for the year will be \$26,782 or less. To calculate the amount you may enter here, fill out the line 9 section of Form TD1-WS.

10. Canada caregiver amount for dependant(s) age 18 or older – If, at any time in the year, you support an **infirm** dependant age 18 or older (**other than** the spouse or common-law partner or eligible dependant you claimed an amount for on line 9 or could have claimed an amount for if their net income were under \$17,499) whose net income for the year will be \$18,783 or less, enter \$7,999. You may enter a partial amount if their net income for the year will be between \$18,783 and \$26,782. To calculate a partial amount, fill out the line 10 section of Form TD1-WS. This worksheet may also be used to calculate your part of the amount if you are sharing it with another caregiver who supports the same dependant. You may claim this amount for more than one infirm dependant age 18 or older.

11. Amounts transferred from your spouse or common-law partner – If your spouse or common-law partner will not use all of their age amount, pension income amount, tuition amount, or disability amount on their income tax and benefit return, enter the unused amount.

12. Amounts transferred from a dependant – If your dependant will not use all of their disability amount on their income tax and benefit return, enter the unused amount. If your or your spouse's or common-law partner's dependent child or grandchild will not use all of their tuition amount on their income tax and benefit return, enter the unused amount.

13. TOTAL CLAIM AMOUNT – Add lines 1 to 12.

Your employer or payer will use this amount to determine the amount of your tax deductions.

--

Filling out Form TD1

Fill out this form **only** if any of the following apply:

- you have a new employer or payer, and you will receive salary, wages, commissions, pensions, employment insurance benefits, or any other remuneration
- you want to change the amounts you previously claimed (for example, the number of your eligible dependants has changed)
- you want to claim the deduction for living in a prescribed zone
- you want to increase the amount of tax deducted at source

Sign and date it, and give it to your employer or payer.

More than one employer or payer at the same time

If you have more than one employer or payer at the same time and you have already claimed personal tax credit amounts on another Form TD1 for 2023, you **cannot** claim them again. If your total income from all sources will be more than the personal tax credits you claimed on another Form TD1, check this box, enter "0" on Line 13 and do not fill in Lines 2 to 12.

Total income is less than the total claim amount

Tick this box if your total income for the year from **all** employers and payers will be **less** than your total claim amount on line 13. Your employer or payer will not deduct tax from your earnings.

For non-resident only (Tick the box that applies to you.)

As a non-resident, will 90% or more of your world income be included in determining your taxable income earned in Canada in 2023?

Yes (Fill out the previous page.)

No (Enter "0" on line 13, and do not fill in lines 2 to 12 as you are not entitled to the personal tax credits.)

Call the international tax and non-resident enquiries line at **1-800-959-8281** if you are unsure of your residency status.

Provincial or territorial personal tax credits return

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Your employer or payer will deduct provincial or territorial taxes after allowing the provincial or territorial basic personal amount if you are claiming the basic personal amount **only**.

Note: You may be able to claim the child amount on Form TD1SK, 2023 Saskatchewan Personal Tax Credits Return if you are a Saskatchewan resident supporting children under 18 at any time during 2023. Therefore, you may want to fill out Form TD1SK even if you are **only** claiming the basic personal amount on this form.

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- \$11.00 for each day that you live in the prescribed northern zone
- \$22.00 for each day that you live in the prescribed northern zone if, during that time, you live in a dwelling that you maintain, and you are the only person living in that dwelling who is claiming this deduction

Employees living in a prescribed **intermediate** zone may claim 50% of the total of the above amounts.

For more information, go to canada.ca/taxes-northern-residents.

\$

Additional tax to be deducted

You may want to have more tax deducted from each payment if you receive other income such as non-employment income from CPP or QPP benefits, or old age security pension. You may have less tax to pay when you file your income tax and benefit return by doing this. Enter the additional tax amount you want deducted from each payment to choose this option. You may fill out a new Form TD1 to change this deduction later.

\$

Reduction in tax deductions

You may ask to have less tax deducted at source if you are eligible for deductions or non-refundable tax credits that are not listed on this form (for example, periodic contributions to a registered retirement savings plan (RRSP), child care or employment expenses, charitable donations, and tuition and education amounts carried forward from the previous year). To make this request, fill out Form T1213, Request to Reduce Tax Deductions at Source, to get a letter of authority from your tax services office. Give the letter of authority to your employer or payer. You do not need a letter of authority if your employer deducts RRSP contributions from your salary.

Forms and publications

To get our forms and publications, go to canada.ca/cra-forms-publications or call **1-800-959-5525**.

Personal information (including the SIN) is collected for the purposes of the administration or enforcement of the Income Tax Act and related programs and activities including administering tax, benefits, audit, compliance, and collection. The information collected may be used or disclosed for purposes of other federal acts that provide for the imposition and collection of a tax or duty. It may also be disclosed to other federal, provincial, territorial, or foreign government institutions to the extent authorized by law. Failure to provide this information may result in interest payable, penalties, or other actions. Under the Privacy Act, individuals have a right of protection, access to and correction of their personal information, or to file a complaint with the Privacy Commissioner of Canada regarding the handling of their personal information. Refer to Personal Information Bank CRA PPU 120 on Info Source at canada.ca/cra-information-about-programs.

Certification

I certify that the information given on this form is correct and complete.

Signature _____

Date _____

It is a serious offence to make a false return.

Apply what you've learned

Now that you know more about how to collaborate, how would you handle the following situations? **Circle** two answers.

1. You are filling out a form to submit to the HR department. You don't understand the form very well.
 - a. I would just leave out what I don't understand. The HR department will figure it out.
 - b. I would ask someone from the HR department to help me fill out the form.
 - c. I would fill out as much as I can and ask someone from the HR department to explain what I don't understand. Then, I would fill out the rest.

2. You are at the payroll department. You have questions about the personal tax credits returns.
 - a. I would say, "Do you have a moment for me?"
 - b. I would say, "This form is too hard to fill out. You need to help me do it."
 - c. I would say, "This form is a little hard for me. Can I get your help to fill it out?"

3. You need to fill out and submit a lot of documents to the HR and payroll departments. It's hard to remember all of them.
 - a. I would fill out and submit the ones I remember.
 - b. I would ask them if I was missing any documents.
 - c. I would make a list so I remember all of them.

4. Your documents are on the coffee table. Your pets are around and may start to play and wrinkle them.
 - a. I would let my pets play. If I need to, I can ask for another copy.
 - b. I would work on my documents in a separate room that is away from my pets.
 - c. I would keep the documents in a safe place away from my pets.

5. You are preparing your documents to submit to the HR and payroll departments. Some of them are ready. You need more time to prepare the others.
 - a. I would ask someone from HR and payroll if I could submit what I have ready. Then I would work on the rest.
 - b. I would negotiate a later deadline.
 - c. I would submit the ones that I have prepared. I wouldn't bother about the rest.

Jessica's story

Jessica just started a new job as an equipment cleaner. She likes the job and the workplace but she is having some challenges.

She wants to take the initiative and show her team and supervisor that she likes helping others. Sometimes it goes well, sometimes it doesn't.

A few days ago, when Jessica had some spare time, she helped a co-worker. Her supervisor said they did a great job together.

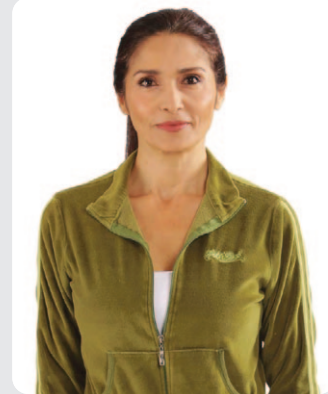
Today, when Jessica was doing a task, she noticed that her co-worker needed help. She left her task to help the co-worker, but her supervisor asked her to go back to her workstation.

Sometimes some of Jessica's co-workers aren't okay with what she does. Once she took a tool from another co-worker's workstation and her co-worker didn't like it. Jessica is confused because she needed to do her work and that's why she took the tool.

There are times when Jessica isn't okay with what her co-workers say or do. A co-worker keeps telling jokes that Jessica isn't comfortable with. He's a nice person, so Jessica isn't sure if she should tell him that she doesn't like his jokes.

Jessica's workplace is very diverse. Employees have different backgrounds and abilities. This is new for Jessica. She wants to be respectful and learn more about them but isn't sure how to do it.

Jessica wants to stay in this job and work well with her co-workers. She needs help to do it effectively.



Vocabulary

Diverse: with people of different cultures, races, religions, abilities, ages, genders and sexual orientations

Take the initiative: to do more than is expected of you

When to collaborate? Identify areas

Jessica wants to do well in her job. She wants to learn how to work with her co-workers effectively.

TASK

What areas should Jessica work on to improve her ability to collaborate?

Answer the questions.

1. Which are the three areas Jessica needs to work on to collaborate better?

Circle your answers.

- a. Managing her stress
- b. Taking the initiative in the right way
- c. Setting and respecting boundaries
- d. Learning more about the people she works with

2. What are two examples that show Jessica needs to learn to set and respect boundaries?

3. What is one example that shows Jessica needs to take the initiative in the right way?

4. What is one example that shows Jessica needs to learn more about the people she works with?

REFLECT

Think of a new job or volunteer experience you had.

- How is Jessica's experience similar to your own?
- Are there any differences? What are they?
- What are three areas you needed to work on to collaborate better?

Think of your future job.

What are three areas you may need to work on to collaborate better?

What does collaborating look like? Identify actions

What could Jessica do to collaborate better?

TASK 1

Check () the four actions that show collaboration.

- Ask if it's okay to borrow her co-worker's tool
- Borrow her co-worker's tool without asking
- Help her co-worker when she has time
- Ignore her co-worker's request for help
- Help everyone even if she doesn't complete her tasks
- Learn about differences between co-workers and herself
- Tell her co-worker politely that she isn't okay with his jokes

REFLECT

Think of the new job or volunteer experience you had.

What did you do to collaborate better in the three areas you needed to work on?

Think of one action for each area.

Think of your future job.

What will you do to collaborate better in the three areas you may need to work on?

Think of one action for each area.

Why collaborate? Identify the purpose



When you start a new job, collaborating can help you in many ways. It can help you do more for your team, understand the differences between you and your co-workers and help them understand you.

When you do more for your team, you show that you want to achieve better results together. When you understand the differences between you and your co-workers, you show respect.

It can be hard to collaborate when you are confused or overwhelmed. If you keep in mind how you could benefit from collaborating, you can stay motivated and keep going.

TASK

Why should Jessica collaborate?

Complete the sentences with your ideas. You can write more than one idea.

We have done the first one as an example.

1. If Jessica learns more about her co-workers:

she will understand the differences between them and herself.

2. If Jessica understands the differences among co-workers:

3. If Jessica learns when she should help her co-workers:

4. If Jessica tells her co-worker that she isn't comfortable with his jokes:

5. If Jessica learns how to borrow her co-workers' tools:

REFLECT

Think of your future job.

Why will it be important to collaborate better in the three areas you may need to work on?

Think of at least one purpose for each area.

How can you collaborate effectively? Identify and practise strategies



When you start a new job, collaboration is one of the most important skills to use. You will need to take the initiative, set boundaries and respect co-workers' boundaries.

You will also need to learn about and respect differences among your co-workers.

It's a lot to handle. You may feel confused or overwhelmed but there are many strategies that can help you. Why not use them and see what happens!

REFLECT

Think of the challenges that Jessica is facing.

How can she collaborate better?

Do you know of any strategies she could use?

Strategies to take the initiative

Taking the initiative in your new job is a great way to show that you want to do more for your team and get good results.

Employees who take the initiative can be very successful in their jobs. Employers call these employees “self-starters”.

When you are a new employee, taking the initiative can help you make a good impression, build relationships with your co-workers and grow in your career.

A small circular icon with a white lowercase letter 'i' on a dark background, indicating an information or tip section.

Vocabulary

Self-starter: a worker who takes the initiative

Workflow: the order of steps to complete a task

Jessica took the initiative a few times in her new workplace. Sometimes it worked well, but sometimes it didn't. Jessica needs strategies to take the initiative in the right way.

Here are some that can help:

Learn what taking the initiative means

Taking the initiative means doing more than your supervisor, manager or team expects.

Know what taking the initiative looks like

You take the initiative when you do extra work when you have spare time. You could help your co-worker, clean up a work area or ask your supervisor or manager what else you could do. Supervisors and managers love it when workers keep busy!

Learn when to take the initiative

First complete the tasks that your supervisor, manager or team expects you to do. This is important because each workplace has a workflow. Your co-workers may need to wait for you to complete your task so they can start theirs.

For example, if you are a material cutter in a doors and windows company, the production team waits for you to cut the material so they can do glazing or framing next. They can't do it if you don't cut the material first. Their tasks depend on yours.

When you've done all your tasks and have time for something extra, then you should take the initiative!

When you take the initiative, you need to think about how it affects others. When other co-workers are involved, ask if it's okay first. For example, when you see that your co-worker is struggling and you can help, ask if they would like you to help. This is very important when you are a new employee because you and your co-workers don't know each other well.

Taking the initiative is a transferable skill. Use it in your employment program, in your job and in your community.

TASK

Read about what Jessica did at work yesterday.

Underline one example that shows she took the initiative the right way.

Double underline one example that shows she didn't take the initiative the right way.

Circle one example that shows she could have taken the initiative, but she didn't.

Jessica's shift starts at 7:00 AM. She got to work at 6:45 AM, put on her PPE, and started to work. It was a slow day. Jessica only had 15 orders to complete by 12:00 PM. She completed all the orders by 11:45 AM. She had 15 minutes before lunch time. She thought that she couldn't complete any other tasks in 15 minutes, so she went to the bathroom to wash her hands and slowly get ready for lunch.

When Jessica came back from lunch, her supervisor gave her new work orders to complete. They were small ones so Jessica was able to complete them quickly. When she was done, she saw that another new employee, Adam, had a job to complete by the end of the day but he was struggling. Jessica offered to help Adam, and they were able to complete the job together!

Jessica still had some time before the end of her shift. She noticed that the tools station looked messy and decided to tidy it up. Because Jessica is a new worker, she couldn't remember exactly where each tool should go. She put them in random places, but she thought the station looked much tidier than before.

When the evening shift workers started their shift after Jessica had tidied up the tools station, they were all confused because they had trouble finding their tools in the station.

REFLECT

Think of a new job or volunteer experience you had.

- Did you take the initiative? What did you do?
- How did it help you and your team?

Think of your future job.

- What strategy will you use to take the initiative?
- What would taking the initiative look like?

Strategies to set and respect boundaries

Setting boundaries can help you feel safer and happier at work and in your daily life. When you set boundaries, you help others understand what works and doesn't work for you.

When you are happy at work, it's very likely that you will pass your probationary period and keep your job.



Vocabulary

Set a boundary: let others know how you would like to be treated so you feel respected and safe. This helps others know what is okay and not okay.

Jessica doesn't feel comfortable with the jokes that her co-worker tells. Her co-worker wasn't happy when she borrowed a tool without asking. She needs strategies to set, understand and respect boundaries.

Here are some that can help:

Learn when to set boundaries

There are times when you should set a boundary right away. Examples of this are when:

- A co-worker asks for your phone number or email address, but you don't want to share it
- A co-worker asks you to do something that is not safe

There are times when you should wait and see before you set a boundary. If it keeps happening all the time and you aren't okay with it, then you should do it. Examples of this are when:

- A co-worker always asks you for help and you aren't able to finish your tasks because of it
- A co-worker always borrows your tool but doesn't return it

Understand why you need to set boundaries

You set boundaries for different reasons.

Sometimes it's because you help a co-worker too much and can't finish your work. This can happen a lot when you are a new employee and want to build relationships with your co-workers.

Other times it's because the way someone behaves makes you uncomfortable. They may tell jokes or make comments you don't like.

You also need to set boundaries if a co-worker asks you to do something but you don't have the right PPE or training.

Communicate your boundaries

Tell your co-workers, friends and family members what your boundaries are. It's important to do this because others may not know what is okay and not okay for you.

Here is what you can say:

- I can't help you now because I really need to finish this.
- Sorry, but I don't like when you make jokes like that.
- I'm sorry, I'm not comfortable doing it without training.

There may be times when you can't do something now but can do it later. When that happens, explain that you are busy right now but will be happy to do it later.

Here is what you can say:

- I'd be happy to help when I'm done this. Is that okay?
- I don't have time now, but I can do it later today.

Don't feel guilty

When you set boundaries, you may feel bad. It can be because you weren't able to help a co-worker, friend, or family member. It can also be because you told them you didn't like something they did or said. That's okay. Setting boundaries for good reasons isn't a bad thing. You just need to do it nicely so you don't hurt other people's feelings.

Respect others' boundaries

Just like you, your co-workers, friends, and family members have boundaries too. It's important that you respect them. Don't take it personally when they can't do something for you or they don't like what you said or did.

Some people are good at communicating their boundaries, and some aren't as good. One way you can make sure you respect their boundaries is to ask.

Here is what you can say:

- Is it okay if I borrow your drill?
- Could I quickly use your computer?
- Would you like some help?

TASK

Write what Jessica should do and say.

1. A co-worker often tells Jessica that they like her clothes. However, they also keep asking how much she paid for them. Jessica isn't comfortable sharing that.

What should Jessica do?

What should Jessica say?

2. Jessica keeps her cleaning equipment and supplies very organized. When others use and put them in the wrong place, it takes Jessica longer to find them.

What should Jessica do?

What should Jessica say?

3. A co-worker needs some help, but Jessica has an important task to complete. She would like to help but her supervisor is waiting for her to complete her task.

What should Jessica do?

What should Jessica say?

-
4. Some of Jessica's co-workers say mean things about others when they aren't around. When Jessica is with them, they try to get her to join in. Jessica doesn't like to do that. What should Jessica do?

What should Jessica say?

5. Jessica hasn't completed her on-the-job training yet. Her supervisor doesn't remember and asks her to do something she doesn't know how to do yet. It could be dangerous. What should Jessica do?

What should Jessica say?

REFLECT

Think of a boundary you would like to set.

- Why do you need to set that boundary?
- How will you communicate it?

Strategies to work in a diverse and inclusive workplace

In a diverse and inclusive workplace, everyone feels welcome and accepted. Many employers have a policy about this. However, a workplace becomes truly inclusive when co-workers learn about, understand and respect the differences between each other. You all appreciate the skills that each person brings to the workplace.

i

Vocabulary

Inclusive: welcoming and respecting people of different cultures, races, religions, abilities, ages, genders and sexual orientations

Jessica is new to the workplace. She doesn't know her co-workers well. She wants to get to know them better so she can always be respectful. She isn't sure how to do it.

Here are some strategies that can help:

Learn the difference between intent and impact

Intent is what you mean to do or say. Impact is how your actions or words affect others.

Sometimes you may do or say things without intending to hurt others' feelings. However, it may impact them in a different way. For example, you may ask someone where they are from just because you want to know. But they may not feel okay sharing that with you.

Show interest

Show that you want to learn more when you notice that your co-worker does something in a way that you aren't used to. It can help you understand your co-worker better and show respect.

Here is what you can say:

- I'd like to know more about...
- I'm curious to learn more about...
- Tell me more about...

Ask to understand

Ask when you aren't sure why your actions or what you said hurt the other person.

Here is what you can say:

- I'm sorry. I don't know why I hurt your feelings. Can you help me understand?
- Can you please explain so I can understand?

There may be times when people don't want to explain and that's okay. It may be because they don't feel comfortable.

Apologize

Say sorry when you hurt another person's feelings even if you didn't mean to.

Here is what you can say:

- Sorry, I didn't know that.
- Sorry, it's new to me but I'm trying to learn.

Understand other people's intent

Try to understand what other people intend. They may do something that offends you, without intending to. It may take others time to understand differences because of many reasons, such as culture, language and experiences. For example, someone may use the wrong pronouns for you, but they may not intend to disrespect you. That may be because English is not their first language.

Help co-workers learn about you

Tell your co-workers more about yourself if you feel comfortable. For example, if someone asks you why you do something because they don't know about your culture or religion, take the opportunity to tell them more about it.

Here is what you can say:

- I wasn't taking a break. I was in the quiet room praying.
- It's a tradition in my culture to wear these clothes.
- People from my culture eat this food every day. It's one of our favourite foods.

If someone says your name wrong, you can teach them how to say it.

Here is what you can say:

- Sorry, this is how to say my name...

Understanding diversity and inclusion is a transferable skill. Use it in your employment program, in your job and in your community.

TASK

Write which strategy Jessica could use in these situations.

Write what Jessica could say.

1. Jessica has a co-worker whose name is hard for her to say. She said it wrong once but wants to make sure she says it right from now on.

Strategy:

Jessica could say:

2. Jessica's co-worker is wearing a necklace. Jessica wonders if the patterns on it have a cultural meaning.

Strategy:

Jessica could say:

3. Jessica wonders why her co-worker goes to the quiet room a few times a day.

Strategy:

Jessica could say:

-
4. Jessica is eating something they often make in her culture. Her co-worker says, "What's that food? I've never seen it before."

Strategy:

Jessica could say:

5. Jessica isn't sure why her co-worker didn't like it when she offered some of her food.

Strategy:

Jessica could say:

Apply what you've learned

Now that you know more about how to collaborate, how would you handle the following situations? **Circle** two answers.

1. You see your co-worker needs help, but you are working on an important task.
 - a. I would leave my task to help my co-worker. My task can wait.
 - b. I would explain I was busy and encourage them to let the supervisor know they need help.
 - c. I would let my co-worker know that I could help when I finish my task.

2. You need to use a staple gun, but yours isn't working.
 - a. I would take my co-worker's staple gun and use it all day.
 - b. I would ask my co-worker if I could use their staple gun.
 - c. I would ask if anyone has an extra staple gun I could borrow.

3. You completed your tasks and have some spare time.
 - a. I would clean my workstation.
 - b. I would take an extra break. I work fast and deserve one.
 - c. I would ask if any of my co-workers need help.

4. It's break time. Your co-worker is listening to music in their language.
 - a. I would ask what the words of the song mean.
 - b. I would ask about the music in their country.
 - c. I would tell them that the language in the workplace is English.

5. Your co-worker tells you that you say their name wrong.
 - a. I would say, "Sorry about that."
 - b. I would say, "Your name is too hard to say. I am trying my best."
 - c. I would say, "Can you teach me how to say it?"

What's next?

Qualifying for health benefits

When you pass your probationary period, most likely you will become a permanent employee.

In many companies this means that you will qualify for health benefits. When you qualify for health benefits, the employer and you share the cost of your health expenses.

Each time payroll calculates your pay, they will take off the amount that you need to pay. However, the company pays most of your health expenses. You can also add your family members to the plan if they qualify.

How do health benefits work?

The HR department will tell you what health benefits the company offers. They may give you a summary of the benefits and tell you where to get more information about it. You usually find it in a health benefits manual. It can be on paper or online.

They may ask you to read the information and choose a plan.

Practise reading a health benefits summary

Look at the subheadings if you want to get a general idea about what the benefits offer.

Use key words to understand the details. Here are some you will find in many health benefits summaries and manuals:

Coverage: services included in the benefits

Coverage level: who is included in the benefits

Dependents: family members who can be included in the benefits

Life insurance: amount paid if the employee passes away. The employee chooses who would get the payment.

Extended health care: medical services that aren't covered by the provincial health plan such as vision and prescription medication

Paramedical coverage: services of specialists such as chiropractors and massage therapists

Dental care: care for teeth

Basic dental coverage: dental services such as cleaning and filling

Major dental coverage: dental procedures such as dental crowns (caps on damaged teeth) and dentures (false teeth)

Health Benefits Summary	
Coverage levels	
Single (self only)	
Couple (self and one dependent)	
Family (self and two or more dependents)	
Life insurance	
Employee Life Insurance:	\$20,000
Extended health care coverage	
PARAMEDICAL COVERAGE	
Acupuncturists, chiropractors, dieticians, massage therapists, naturopaths, osteopaths, physiotherapists, psychologists, social workers	\$350 per year
Prescription drug expenses	90%
VISION CARE EXPENSES	
Glasses, contact lenses and laser eye surgery	\$200 every two years
Dental care	
Basic dental coverage	90%
Major dental coverage	50%
Accidental dental injury coverage	50%
Questions? Contact Human Resources	

TASK

Answer the questions using the health benefits summary.

1. How much is the employee life insurance?

2. What services are included in paramedical coverage? Write at least two services.

3. How much of the prescription drugs expenses do the health benefits cover?

4. What is included in vision care?

5. How much would you get for vision care every two years?

Practise filling out an application for health benefits

After you learn about the health benefits that the company offers, you will fill out an application form to sign up for your health benefits.

Application forms can look different, but most of them ask for the same type of information. Here is some information that you will need to write on most application forms:

- Your information
- Your dependents' information
- Your beneficiaries' information. These are the people you choose to get your life insurance amount if you pass away. You can choose one or more people.
- Your signature and the date

What do you need to choose?

When you fill out your application, you will need to choose:

- Type of coverage: this can be dental care only, extended health care only, or both
- Coverage level

All this will affect the amount that you pay for the benefits each time you get paid.

TASK

Imagine that you have passed your probationary period and are applying for health benefits.

Fill out the employee application form for health benefits.

Tips for filling out forms



- Write in print. This makes it easy for others to read.
- Write small if there isn't much space.
- Double-check contact information: address, phone number and email.

How to write dates on forms



Follow the format on the form.

It tells you what to write first: day, month, or year. It also tells you how many numbers to write.

To follow this format:

- **YYYY/MM/DD**

First write the year (four numbers), then the month (two numbers) and then the day (two numbers).

For example, for May 27, 2023 write: **2023/05/27**

- **DD/MM/YYYY**

First write the day (two numbers), then the month (two numbers) and then the year (four numbers).

For example, for May 27, 2023 write: **27/05/2023**

Employee Health Benefits Application					
Employee information					
Employee last name			Employee first name		
Employee address			City	Province	Postal code
Date of birth (DD/MM/YYYY)			Gender		
Dependents					
Last name	First name	Gender	Date of birth (DD/MM/YYYY)	Relationship	Date of co-habitation if common-law
Beneficiaries					
Name		Relationship	% benefit	Date of birth (DD/MM/YYYY)	
Coverage					
<input type="checkbox"/> Extended Health Care		Coverage level: _____ (S/C/F/O)	S = self only (single)		
<input type="checkbox"/> Dental Care		Coverage level: _____ (S/C/F/O)	C = self and one dependent (couple)		
			F = self and two or more dependents (family)		
			O = no coverage for self or dependents		
Coordination of benefits					
Are you covered by another benefits plan?					
<input type="checkbox"/> Extended Health Care		Coverage level: _____ (S/C/F/O)			
<input type="checkbox"/> Dental Care		Coverage level: _____ (S/C/F/O)			
Employee authorization					
Employee signature				Date	

After you fill out and submit the application form, you will receive your health benefits card from the insurance company. It's an important document that you will need every time you get medical services.

Now you qualify for health benefits! This is one of the many positives about keeping your job. Keep improving your collaboration skills to get a promotion, mentor your co-workers and help your employer achieve their goals. You are on to exciting things!

Self-evaluation

Self-evaluation 1

How well can you do these activities?

Activity	Not at all well	Not very well	Pretty well	Very well	Extremely well
1. I can understand when I need to work with other departments when I start a new job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I can read, understand and fill out forms with my personal and financial information, such as direct deposit and tax forms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I can ask for help to understand and fill out forms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I can prepare and submit documents on time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Self-evaluation 2

How well can you do these activities?

Activity	Not at all well	Not very well	Pretty well	Very well	Extremely well
1. I can do extra work without being asked, after I complete my tasks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I can understand why people set boundaries.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I can set boundaries in a nice way so I don't hurt other people's feelings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I can work with and respect people with different backgrounds and abilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Answer key

Renee's story

PAGE 7

Task 1

1. Payroll
2. HR
3. HR
4. Payroll

PAGE 8

Task 2

Renee: Sorry, what is the employee emergency contacts form for?

HR worker: We need it so we know who to contact if you are in an emergency. You fill it out with the contact information of two people you know. They can be friends or family members.

Renee: Can you please tell me what the tax forms are for?

Payroll worker: Sure thing! The form tells us how much tax we should take off your pay. One is provincial, the other is federal.

Renee: Could you let me know what the direct deposit form is for?

Payroll worker: Of course! It gives us your bank information so we can send your pay directly to your bank account.

Renee: I'm not sure where to get the information to fill out the direct deposit form. Would you be able to tell me?

Payroll worker: For sure! You should be able to find it on your online bank account. If you have cheques, you can find it there too. You can also ask someone at your bank.

PAGE 10

Task

Ask the HR or payroll departments for help

Go to the bank to get her information so she can fill out the direct deposit form

Ask two people she knows to be her emergency contacts

Ask her emergency contacts if she can write their information on the emergency contacts form

PAGE 12

Task

Employee Emergency Contacts	
Name:	<u>Renee Dubois</u>
Home address:	<u>10 Factory Street, London Ontario, R1H 0U0</u>
Phone:	<u>431-444-3535</u>
Email address:	<u>reneed@friends.ca</u>
Primary emergency contact	
Name:	<u>Jackie Fontaine</u>
Relationship to contact:	<u>Friend</u>
Phone:	<u>431-222-1234</u>
Email address:	<u>jackiefon@friends.ca</u>
Secondary emergency contact	
Name:	<u>Taydi Everett</u>
Relationship to contact:	<u>Friend</u>
Phone:	<u>431-666-5678</u>
Email address:	<u></u>
Employee signature:	<u>Renee Dubois</u>
Date:	<u>March 29, 2023 (example)</u>

PAGE 14

Task

Direct Deposit Application		
Your information		
First name Renee	Last name Dubois	Employee number 98765
Address 10 Factory Street		
City London	Province Ontario	Postal code R1H 0U0
Banking information		
Branch address 258 Downtown Drive		
City London	Province Ontario	Postal code N6A 1C5
Branch (transit) number 12345	Bank (institution) number 004	Account number 1234567
X <u>Renee Dubois</u>		<u>March 29, 2023</u>
Employee signature		Date

PAGE 19

Task 1

- Copy of photo ID
- Copy of health card
- Emergency contacts form
- Direct deposit form
- Tax forms

PAGE 20

Task 2

HR documents:

- Copy of photo ID
- Copy of health card
- Emergency contacts form

Payroll documents:

- Direct deposit form
- Tax forms

PAGE 23


Task

Possible answers:

1. Do you have a minute for me?
2. Could you help me find my account number on my cheque please?
3. I need more time to fill out the tax forms. Can I give them to you later?
4. Thank you so much!

PAGE 26

Task 1

 Canada Revenue Agency / Agence du revenu du Canada		2023 Personal Tax Credits Return		Protected B when completed TD1
Read page 2 before filling out this form. Your employer or payer will use this form to determine the amount of your tax deductions.				
Fill out this form based on the best estimate of your circumstances.				
If you do not fill out this form, your tax deductions will only include the basic personal amount, estimated by your employer or payer based on the income they pay you.				
Last name	First name and initial(s)	Date of birth (YYYY/MM/DD)	Employee number	
Dubois	Renee	1986/01/03	98765	
Address	Postal code	For non-residents only Country of permanent residence		Social insurance number
10 Factory Street, London, Ontario	R1H0U0			1 2 3 4 5 6 7 8 9

PAGE 27

Task 2

<p>1. Basic personal amount – Every resident of Canada can enter a basic personal amount of \$15,000. However, if your net income from all sources will be greater than \$165,430 and you enter \$15,000, you may have an amount owing on your income tax and benefit return at the end of the tax year. If your income from all sources will be greater than \$165,430, you have the option to calculate a partial claim. To do so, fill in the appropriate section of Form TD1-WS, Worksheet for the 2023 Personal Tax Credits Return, and enter the calculated amount here.</p>	15,000
<p>2. Canada caregiver amount for infirm children under age 18 – Only one parent may claim \$2,499 for each infirm child born in 2006 or later who lives with both parents throughout the year. If the child does not live with both parents throughout the year, the parent who has the right to claim the "Amount for an eligible dependant" on line 8 may also claim the Canada caregiver amount for the child.</p>	
<p>3. Age amount – If you will be 65 or older on December 31, 2023, and your net income for the year from all sources will be \$42,335 or less, enter \$8,396. You may enter a partial amount if your net income for the year will be between \$42,335 and \$98,309. To calculate a partial amount, fill out the line 3 section of Form TD1-WS.</p>	
<p>4. Pension income amount – If you will receive regular pension payments from a pension plan or fund (not including Canada Pension Plan, Quebec Pension Plan, old age security, or guaranteed income supplement payments), enter whichever is less: \$2,000 or your estimated annual pension income.</p>	
<p>5. Tuition (full-time and part-time) – Fill in this section if you are a student at a university or college, or an educational institution certified by Employment and Social Development Canada, and you will pay more than \$100 per institution in tuition fees. Enter the total tuition fees that you will pay if you are a full-time or part-time student.</p>	
<p>6. Disability amount – If you will claim the disability amount on your income tax and benefit return by using Form T2201, Disability Tax Credit Certificate, enter \$9,428.</p>	
<p>7. Spouse or common-law partner amount – Enter the difference between the amount on line 1 (line 1 plus \$2,499 if your spouse or common-law partner is infirm) and your spouse's or common-law partner's estimated net income for the year if both of the following conditions apply:</p> <ul style="list-style-type: none"> You are supporting your spouse or common-law partner who lives with you Your spouse or common-law partner's net income for the year will be less than the amount on line 1 (line 1 plus \$2,499 if your spouse or common-law partner is infirm) <p>In all cases, go to line 9 if your spouse or common-law partner is infirm and has a net income for the year of \$26,782 or less.</p>	
<p>8. Amount for an eligible dependant – Enter the difference between the amount on line 1 (line 1 plus \$2,499 if your eligible dependant is infirm) and your eligible dependant's estimated net income for the year if all of the following conditions apply:</p> <ul style="list-style-type: none"> You do not have a spouse or common-law partner, or you have a spouse or common-law partner who does not live with you and who you are not supporting or being supported by You are supporting the dependant who is related to you and lives with you The dependant's net income for the year will be less than the amount on line 1 (line 1 plus \$2,499 if your dependant is infirm and you cannot claim the Canada caregiver amount for infirm children under 18 years of age for this dependant) <p>In all cases, go to line 9 if your dependant is 18 years or older, infirm, and has a net income for the year of \$26,782 or less.</p>	
<p>9. Canada caregiver amount for eligible dependant or spouse or common-law partner – Fill out this section if, at any time in the year, you support an infirm eligible dependant (aged 18 or older) or an infirm spouse or common-law partner whose net income for the year will be \$26,782 or less. To calculate the amount you may enter here, fill out the line 9 section of Form TD1-WS.</p>	
<p>10. Canada caregiver amount for dependant(s) age 18 or older – If, at any time in the year, you support an infirm dependant age 18 or older (other than the spouse or common-law partner or eligible dependant you claimed an amount for on line 9 or could have claimed an amount for if their net income were under \$17,499) whose net income for the year will be \$18,783 or less, enter \$7,999. You may enter a partial amount if their net income for the year will be between \$18,783 and \$26,782. To calculate a partial amount, fill out the line 10 section of Form TD1-WS. This worksheet may also be used to calculate your part of the amount if you are sharing it with another caregiver who supports the same dependant. You may claim this amount for more than one infirm dependant age 18 or older.</p>	
<p>11. Amounts transferred from your spouse or common-law partner – If your spouse or common-law partner will not use all of their age amount, pension income amount, tuition amount, or disability amount on their income tax and benefit return, enter the unused amount.</p>	
<p>12. Amounts transferred from a dependant – If your dependant will not use all of their disability amount on their income tax and benefit return, enter the unused amount. If your or your spouse's or common-law partner's dependent child or grandchild will not use all of their tuition amount on their income tax and benefit return, enter the unused amount.</p>	
<p>13. TOTAL CLAIM AMOUNT – Add lines 1 to 12. Your employer or payer will use this amount to determine the amount of your tax deductions.</p>	15,000

PAGE 28

Task 3

Renee doesn't need to fill out part three of the form. She can leave it blank.

Task 4

<p>Certification I certify that the information given on this form is correct and complete.</p> <p>Signature <u> Renee Dubois </u> Date <u>March 29, 2023</u></p> <p><small>It is a serious offence to make a false return.</small></p>
--

PAGE 31

Apply what you've learned

1. b, c
2. a, c
3. b, c
4. b, c
5. a, b

Jessica's story

PAGE 33

Task

1. b, c, d
2. Possible answers:
She borrowed her co-worker's tool and they didn't like it.
She isn't sure if she should tell her co-worker that she doesn't like his jokes.
3. Possible answer:
She left her task to help her co-worker, but her supervisor asked her to go back to her workstation.
4. Possible answer:
In Jessica's workplace, employees have different backgrounds and abilities. This is new to her.

PAGE 35

Task

Ask if it's okay to borrow her co-worker's tool

Help her co-worker when she has time

Learn more about differences between co-workers and herself

Tell her co-worker politely that she isn't okay with his jokes

PAGE 40

Task

Jessica's shift starts at 7:00 AM. She got to work at 6:45 AM, put on her PPE, and started to work. It was a slow day. Jessica only had 15 orders to complete by 12:00 PM.

She completed all the orders by 11:45 AM. She had 15 minutes before lunch time. She thought that she couldn't complete any other tasks in 15 minutes, so she went to the bathroom to wash her hands and slowly get ready for lunch.

When Jessica came back from lunch, her supervisor gave her new work orders to complete. They were small ones so Jessica was able to complete them quickly. When she was done, she saw that another new employee, Adam, had a job to complete by the end of the day but he was struggling. Jessica offered to help Adam, and they were able to complete the job together!

Jessica still had some time before the end of her shift. She noticed that the tools station looked messy and decided to tidy it up. Because Jessica is a new worker, she couldn't remember exactly where each tool should go. She put them in random places, but she thought the station looked much tidier than before.

When the evening shift workers started their shift after Jessica had tidied up the tools station, they were all confused because they had trouble finding their tools in the station.

PAGE 44 and 45

Task

Possible answers:

1. What should Jessica do?

She should let her co-worker know that she isn't okay sharing how much she paid for her clothes.

What should Jessica say?

I'm sorry but I'm not comfortable sharing how much I paid for it.

2. What should Jessica do?

She should ask her co-workers to put the equipment and supplies back in their place because it slows her down.

What should Jessica say?

Is it okay if you put those back in their place? That way I can find them faster.

3. What should Jessica do?

She should explain to her co-worker that she is working on something important. She can help when she finishes it.

What should Jessica say?

Sorry, I am working on something important now but I can help when I'm done.

4. What should Jessica do?

She should tell her co-workers that she isn't comfortable talking about someone else, especially when they aren't around.

What should Jessica say?

Sorry, I don't like talking about others when they aren't around.

5. What should Jessica do?

She should let her supervisor know that she hasn't been trained for it yet.

What should Jessica say?

I haven't been trained for it yet. I'd be happy to do it when I get the training.

PAGE 48 and 49

Task

Possible answers:

1. Strategy: Apologize and show interest
Jessica could say: I am sorry about that.
Can you say it for me one more time?
2. Strategy: Show interest
Jessica could say: I like your necklace. What do the patterns mean?
3. Strategy: Show interest
Jessica could say: I saw that you went to the quiet room a couple of times.
Are you okay?
4. Strategy: Help co-workers learn about you
Jessica could say: It's a very common food in our culture. We eat it almost every day.
5. Strategy: Apologize and ask to understand
Jessica could say: I am so sorry, did I make you feel bad? Can you help me understand what I did?

PAGE 50

Apply what you've learned

1. b, c
2. b, c
3. a, c
4. a, b
5. a, c

What's next

PAGE 53

Task

1. \$20,000
2. Possible answers:
Acupuncturists, chiropractors, dieticians, massage therapists, naturopaths, osteopaths, physiotherapists, psychologists, social workers
3. 90%
4. Glasses, contact lenses and laser eye surgery
5. \$200

Forms for practice

Employee Emergency Contacts	
Name:	_____
Home address:	_____
Phone:	Email address: _____
Primary emergency contact	
Name:	_____
Relationship to contact:	_____
Phone:	Email address: _____
Secondary emergency contact	
Name:	_____
Relationship to contact:	_____
Phone:	Email address: _____
Employee signature:	_____
Date:	_____

Direct Deposit Application

Your information

First name	Last name	Employee number
Address		
City	Province	Postal code

Banking information

Branch address		
City	Province	Postal code
Branch (transit) number	Bank (institution) number	Account number

X _____
Employee signature Date



2023 Personal Tax Credits Return

Read page 2 before filling out this form. Your employer or payer will use this form to determine the amount of your tax deductions.

Fill out this form based on the best estimate of your circumstances.

If you do not fill out this form, your tax deductions will only include the basic personal amount, estimated by your employer or payer based on the income they pay you.

Last name		First name and initial(s)	Date of birth (YYYY/MM/DD)	Employee number
Address		Postal code	For non-residents only Country of permanent residence	Social insurance number

1. Basic personal amount – Every resident of Canada can enter a basic personal amount of \$15,000. However, if your net income from all sources will be greater than \$165,430 and you enter \$15,000, you may have an amount owing on your income tax and benefit return at the end of the tax year. If your income from all sources will be greater than \$165,430, you have the option to calculate a partial claim. To do so, fill in the appropriate section of Form TD1-WS, Worksheet for the 2023 Personal Tax Credits Return, and enter the calculated amount here.

2. Canada caregiver amount for infirm children under age 18 – Only one parent may claim \$2,499 for each infirm child born in 2006 or later who lives with both parents throughout the year. If the child does not live with both parents throughout the year, the parent who has the right to claim the "Amount for an eligible dependant" on line 8 may also claim the Canada caregiver amount for the child.

3. Age amount – If you will be 65 or older on December 31, 2023, and your net income for the year from all sources will be \$42,335 or less, enter \$8,396. You may enter a partial amount if your net income for the year will be between \$42,335 and \$98,309. To calculate a partial amount, fill out the line 3 section of Form TD1-WS.

4. Pension income amount – If you will receive regular pension payments from a pension plan or fund (not including Canada Pension Plan, Quebec Pension Plan, old age security, or guaranteed income supplement payments), enter **whichever is less:** \$2,000 or your estimated annual pension income.

5. Tuition (full-time and part-time) – Fill in this section if you are a student at a university or college, or an educational institution certified by Employment and Social Development Canada, and you will pay more than \$100 per institution in tuition fees. Enter the total tuition fees that you will pay if you are a full-time or part-time student.

6. Disability amount – If you will claim the disability amount on your income tax and benefit return by using Form T2201, Disability Tax Credit Certificate, enter \$9,428.

7. Spouse or common-law partner amount – Enter the difference between the amount on line 1 (line 1 plus \$2,499 if your spouse or common-law partner is **infirm**) and your spouse's or common-law partner's estimated net income for the year if **both** of the following conditions apply:

- You are supporting your spouse or common-law partner who lives with you
- Your spouse or common-law partner's net income for the year will be less than the amount on line 1 (line 1 plus \$2,499 if your spouse or common-law partner is **infirm**)

In all cases, go to line 9 if your spouse or common-law partner is **infirm** and has a net income for the year of \$26,782 or less.

8. Amount for an eligible dependant – Enter the difference between the amount on line 1 (line 1 plus \$2,499 if your eligible dependant is **infirm**) and your eligible dependant's estimated net income for the year if **all** of the following conditions apply:

- You do **not** have a spouse or common-law partner, or you **have** a spouse or common-law partner who does not live with you and who you are not supporting or being supported by
- You are supporting the dependant who is related to you and lives with you
- The dependant's net income for the year will be less than the amount on line 1 (line 1 plus \$2,499 if your dependant is **infirm** and you **cannot** claim the **Canada caregiver amount for infirm children under 18 years of age** for this dependant)

In all cases, go to line 9 if your dependant is **18 years or older, infirm**, and has a net income for the year of \$26,782 or less.

9. Canada caregiver amount for eligible dependant or spouse or common-law partner – Fill out this section if, at any time in the year, you support an **infirm** eligible dependant (aged 18 or older) or an **infirm** spouse or common-law partner whose net income for the year will be \$26,782 or less. To calculate the amount you may enter here, fill out the line 9 section of Form TD1-WS.

10. Canada caregiver amount for dependant(s) age 18 or older – If, at any time in the year, you support an **infirm** dependant age 18 or older (**other than** the spouse or common-law partner or eligible dependant you claimed an amount for on line 9 or could have claimed an amount for if their net income were under \$17,499) whose net income for the year will be \$18,783 or less, enter \$7,999. You may enter a partial amount if their net income for the year will be between \$18,783 and \$26,782. To calculate a partial amount, fill out the line 10 section of Form TD1-WS. This worksheet may also be used to calculate your part of the amount if you are sharing it with another caregiver who supports the same dependant. You may claim this amount for more than one infirm dependant age 18 or older.

11. Amounts transferred from your spouse or common-law partner – If your spouse or common-law partner will not use all of their age amount, pension income amount, tuition amount, or disability amount on their income tax and benefit return, enter the unused amount.

12. Amounts transferred from a dependant – If your dependant will not use all of their disability amount on their income tax and benefit return, enter the unused amount. If your or your spouse's or common-law partner's dependent child or grandchild will not use all of their tuition amount on their income tax and benefit return, enter the unused amount.

13. TOTAL CLAIM AMOUNT – Add lines 1 to 12.

Your employer or payer will use this amount to determine the amount of your tax deductions.

Filling out Form TD1

Fill out this form **only** if any of the following apply:

- you have a new employer or payer, and you will receive salary, wages, commissions, pensions, employment insurance benefits, or any other remuneration
- you want to change the amounts you previously claimed (for example, the number of your eligible dependants has changed)
- you want to claim the deduction for living in a prescribed zone
- you want to increase the amount of tax deducted at source

Sign and date it, and give it to your employer or payer.

More than one employer or payer at the same time

If you have more than one employer or payer at the same time and you have already claimed personal tax credit amounts on another Form TD1 for 2023, you **cannot** claim them again. If your total income from all sources will be more than the personal tax credits you claimed on another Form TD1, check this box, enter "0" on Line 13 and do not fill in Lines 2 to 12.

Total income is less than the total claim amount

Tick this box if your total income for the year from **all** employers and payers will be **less** than your total claim amount on line 13. Your employer or payer will not deduct tax from your earnings.

For non-resident only (Tick the box that applies to you.)

As a non-resident, will 90% or more of your world income be included in determining your taxable income earned in Canada in 2023?

Yes (Fill out the previous page.)

No (Enter "0" on line 13, and do not fill in lines 2 to 12 as you are not entitled to the personal tax credits.)

Call the international tax and non-resident enquiries line at **1-800-959-8281** if you are unsure of your residency status.

Provincial or territorial personal tax credits return

You also have to fill out a provincial or territorial TD1 form if your claim amount on line 13 is more than \$15,000. Use the Form TD1 for your province or territory of **employment** if you are an employee. Use the Form TD1 for your province or territory of **residence** if you are a pensioner. Your employer or payer will use both this federal form and your most recent provincial or territorial Form TD1 to determine the amount of your tax deductions.

Your employer or payer will deduct provincial or territorial taxes after allowing the provincial or territorial basic personal amount if you are claiming the basic personal amount **only**.

Note: You may be able to claim the child amount on Form TD1SK, 2023 Saskatchewan Personal Tax Credits Return if you are a Saskatchewan resident supporting children under 18 at any time during 2023. Therefore, you may want to fill out Form TD1SK even if you are **only** claiming the basic personal amount on this form.

Deduction for living in a prescribed zone

You may claim **any** of the following amounts if you live in the Northwest Territories, Nunavut, Yukon, or another prescribed **northern** zone for more than six months in a row beginning or ending in 2023:

- \$11.00 for each day that you live in the prescribed northern zone
- \$22.00 for each day that you live in the prescribed northern zone if, during that time, you live in a dwelling that you maintain, and you are the only person living in that dwelling who is claiming this deduction

Employees living in a prescribed **intermediate** zone may claim 50% of the total of the above amounts.

For more information, go to canada.ca/taxes-northern-residents.

\$

Additional tax to be deducted

You may want to have more tax deducted from each payment if you receive other income such as non-employment income from CPP or QPP benefits, or old age security pension. You may have less tax to pay when you file your income tax and benefit return by doing this. Enter the additional tax amount you want deducted from each payment to choose this option. You may fill out a new Form TD1 to change this deduction later.

\$

Reduction in tax deductions

You may ask to have less tax deducted at source if you are eligible for deductions or non-refundable tax credits that are not listed on this form (for example, periodic contributions to a registered retirement savings plan (RRSP), child care or employment expenses, charitable donations, and tuition and education amounts carried forward from the previous year). To make this request, fill out Form T1213, Request to Reduce Tax Deductions at Source, to get a letter of authority from your tax services office. Give the letter of authority to your employer or payer. You do not need a letter of authority if your employer deducts RRSP contributions from your salary.

Forms and publications

To get our forms and publications, go to canada.ca/cra-forms-publications or call **1-800-959-5525**.

Personal information (including the SIN) is collected for the purposes of the administration or enforcement of the Income Tax Act and related programs and activities including administering tax, benefits, audit, compliance, and collection. The information collected may be used or disclosed for purposes of other federal acts that provide for the imposition and collection of a tax or duty. It may also be disclosed to other federal, provincial, territorial, or foreign government institutions to the extent authorized by law. Failure to provide this information may result in interest payable, penalties, or other actions. Under the Privacy Act, individuals have a right of protection, access to and correction of their personal information, or to file a complaint with the Privacy Commissioner of Canada regarding the handling of their personal information. Refer to Personal Information Bank CRA PPU 120 on Info Source at canada.ca/cra-information-about-programs.

Certification

I certify that the information given on this form is correct and complete.

Signature _____

Date _____

It is a serious offence to make a false return.