

Claim Form Checklist

Use this checklist to double check that everything is correct before sending in your claim form.

Receipt must show the following:

- ☐ Date of sale and time sold
- ☐ Business name, address, phone number, email address
- ☐ Receipt Number
- ☐ Payor's name
- ☐ Descriptions of Item(s) or service purchased
- ☐ Total \$ received and evidence of payment, such as a sale transaction number
- ☐ GST Registration Number (if GST was charged)

In Addition:

- ☐ All of my receipts have all staples removed
- ☐ All of my receipts are taped onto one side only (not front and back) of an 8.5 x 11" piece of paper if they are not already that size.
- ☐ All receipts are cut to fit a 8.5x11" piece of paper and are not folded
- ☐ The tape does not cover any important information
- ☐ The claim form is attached to the top of the pages of receipts
- ☐ The claim form is dated in the space provided at the top of the form
- ☐ I have provided my family mailing address in the space provided on the form (NOTE: this is not your email address)
- ☐ I have signed the claim form
- ☐ My student's/child's name is on the claim in the space provided
- ☐ I have entered all Canadian Tax in the GST line
- ☐ I only included Canadian Tax in the GST column and not U.S. Tax
- ☐ I have totaled each column and written the totals at the bottom
- ☐ When the Unit Total is added to the GST/HST Total it equals the Total Claim
- ☐ Packing slips, statements or order forms will not be accepted as proof of purchase. A receipt must be supplied.
- ☐ I have not used a highlighter on any information on my receipts
- ☐ For items purchased in U.S Dollars or other currency. If the Canadian dollar amount is not listed on the receipt received, a copy of the bank or credit card statement with the transaction amount is required to show the transaction amount. All other information can be blacked out with a black marker or you can take a snip of the one transaction and no other personal information. Another option is to use the [Bank of Canada Currency Converter](#) website. Please send in a copy of the conversion on the date of purchase with your reimbursement. If possible, please try to use Canadian websites to purchase items.
- ☐ Please send in receipts for on-line purchases with date of delivery. If you are handwriting the date of delivery your signature will also be needed. Another option is to send in proof of delivery emails for items ordered on-line.
- ☐ **For Amazon Orders please send in the Printable Order Summary to back up the invoices.**
- ☐ Please submit claims for Internet services in January and June, as services must be reimbursed after use.
- ☐ Handwritten receipts will need an email from the provider to verify the receipt. The receipt has to include the name, address and contact info of the vendor providing goods or services. A receipt number. The date that services or goods were purchased. Itemization of the services and or goods and pricing. Lastly, the final amount paid and evidence such as a transaction number, to show payment.
- ☐ Items and services can not be prepaid. Please send in a reimbursement for goods or services, after services have been provided or items have been delivered.