# Instructor's Handbook

## Purpose of this Handbook

This guide is designed to accompany structured and guided ProFile training as provided by recognized learning institutions. It also serves as a companion document to the PowerPoint presentation files to be used by teaching professionals. This document is, therefore, focused in its scope and it is not intended as a self-study training guide.

#### **Additional Resources**

This document provides numerous resources to accounting professionals. Refer to these sites to explore additional training opportunities

Professional Accounting Software

Tax Preparation & efiling Return Software

Professional Tax Software Training



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#### Intuit, Inc. 5100 Spectrum Way, Mississauga, ON L4W 552

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#### Introduction

Intuit ProFile Tax software is reliable and easy-to-use, and it offers sophisticated features that help tax preparers experience a more productive tax season. The following paragraphs summarize the key components of Intuit ProFile Professional Tax software

ProFile T1 imports and converts data created by competing software products. Whether you carry files forward individually or in batches, you will find the process quick and convenient. Using ProFile's WYSIWYG (what you see is what you get) forms, you can view and edit federal T1 and Québec TP1 forms in either French or English. You can also print all tax forms in either language at the click of a button.

ProFile T2 is designed for professional preparation of corporate tax returns in all provinces and territories. ProFile T2 includes:

- Federal T2 returns, including T2 RSI (where applicable) and Corporation Internet Filing
- Provincial corporate tax returns for Alberta (including AT1 RSI), for Ontario returns with taxation years ending prior to January 1, 2009 (including CT23 disk filing) and for Quebec (CO-17).
- Provincial capital tax returns for Manitoba, Saskatchewan and British Columbia

ProFile T3 prepares Trust income tax returns and supporting schedules, including T3 and T5 slips that the trust receives. Simply enter slip information on intuitive income-reporting screens and ProFile T3 automatically transfers the amounts to the appropriate forms. ProFile T3 also integrates business and rental income statements. In addition to T3 slips, the software allows you to prepare NR4 slips for non-resident taxpayers (including the NR4 summary).

ProFile FX (Forms Expert) gives you more than 80 of the most commonly-used CRA forms which supplement the form-sets in Intuit's other tax applications. Here are a few highlights of ProFile FX:

- Customizable options help you complete and file the forms you need.
- Automatic form selection facilitates form printing.
- Audit and review features help pinpoint potential errors
- Forms flexibility lets you print facsimile forms on plain paper or directly onto pre-printed CRA forms. ProFile FX also prepares magnetic media files for T4, T4A, T5, T5018 and NR4 slips, as well as for the RL1, RL2, RL3 and RL4.
- Import identification from an existing ProFile T1 or T2 data file minimizes potential data entry errors.

#### **Benefits of Using ProFile**

ProFile is powerful, efficient and secure tax software that helps you get your work done quickly and efficiently. Here's how you benefit by using Profile:

- With phone, email or in-product live chat support, you have year-round access to knowledgeable Canadian technical experts
- With its comprehensive set of forms and schedules, ProFile lets you handle just about every tax scenario in any jurisdiction, including Québec
- With a built-in auditor that runs up to 2,800 diagnostic checks of your tax returns, ProFile always has your back
- Flexible Licensing means you can install ProFile on more than one personal computer without having to pay additional licensing fees
- Work with QuickBooks? So does ProFile! There's no need for manual data entry because you can now export data from QuickBooks directly into ProFile



## Chapter 1 All About Taxation

### **Learning Objectives**

## At this chapter's end students will understand:

- The history of taxation
- How tax dollars are raised and disbursed
- The role of the Canda Revenue Agency
- A taxpayer's filing options
- Taxpayer responsibilities
- How to get information to help you file a tax return
- How to access and use CRA electronic services

#### Additional Resources

This document provides numerous resources to accounting professionals. Refer to these sites to explore additional training opportunities

Professional Accounting Software

Tax Preparation & efiling Return Software

Professional Tax Software Training

#### What are Taxes?

Taxes are mandatory payments made by individuals and corporations to government. Tax is levied upon various transactions that include income, property, and sales. Taxes are used to support the government, and the programs and services it provides.

Different levels of government collect tax. For example, in Canada individuals pay:

- federal taxes used for programs such as National Defence, Old Age Security, Canada child tax benefit, and transfers to provinces and territories
- provincial and territorial taxes used for services such as bridges and highways, education, hospitals, and wildlife conservation, and
- municipal taxes for services such as police, ambulance and fire services, libraries, parks and playgrounds, public transportation, and garbage and recycling collection

Without a tax system, government would not have the revenue it needs to provide key services. Citizens support the tax system by paying their fair share of taxes. In return, they benefit from the programs and services provided by the government.

#### How are your tax dollars spent?

Many of the benefits you enjoy today are made possible through taxes. The government collects taxes to pay for the facilities, services, and programs that it provides. Canada's tax system contributes to programs and disbursements that include:

- roads
- public utilities
- education
- health care
- economic development
- cultural activities
- defence
- law enforcement, and
- other programs and services

Tax revenue also helps redistribute wealth to benefit lower-income families, students, seniors, and people with disabilities. Tax revenue funds social programs such as:

- old age security
- employment insurance
- Canada child benefit
- universal child care benefit, and
- working income tax benefit

The tax system also supports businesses and boosts the economy in other ways.

Here is the Canadian government's distribution of expenditures for the 2018-2019 fiscal year (most recent year on record).



More information on government expenditures for 2018-2019 is contained in the Annual Financial Report of the Government of Canada. <u>https://www.fin.gc.ca/afr-rfa/2019/report-rapport-eng.asp#\_Toc525903642</u>

#### Characteristics of a tax system

Per the Government of Canada, a tax system is defined by these characteristics:

- 1. the source (who pays the tax)
- 2. the tax-base
- 3. the rates to be applied to the base
- 4. general exemptions and deductions
- 5. other measures, such as how tax is to be paid

Source:<u>https://www.canada.ca/en/revenue-agency/services/tax/individuals/educational-programs/why-taxes/canada-tax-system.html</u>

These characteristics determine how much revenue is produced, how fair the tax system is, and its ability to produce economic growth.

A tax system needs to benefit all, and it should be flexible, so the government can use it to achieve specific social and economic objectives. Finally, the process for administering the tax system has to be practical, efficient and fair.

In Canada, the federal government follows these guidelines when it develops new tax legislation:

- **Fairness** the tax system needs to ensure that all taxpayers share the tax burden equally. People with similar financial circumstances should receive the same tax treatment. In other words, all high-income earners whether they are individuals or corporations, should pay their fair share of tax. Also, similar products should be subject to the same rate of sales tax
- **Stability** the federal government needs a stable and dependable source of tax revenue, so it can manage the country's economy
- **Canadian priorities** the tax system helps meet the national/provincial/territorial and economic needs that are priorities for most Canadians
- **Consultation** the federal government is committed to consulting Canadians before making final legislative proposals for tax amendments

Canada's tax system has evolved over many years to accommodate the needs of an increasingly complex society. However, the guiding principle has always been the same: our elected Parliament must have ultimate control over tax legislation.

Canada's tax system is based on the self-assessment principle, which means that taxpayers complete their tax return each year to report their income and to calculate whether they owe tax or receive a refund. It is considered the most economical and efficient way to collect income tax.

#### An abridged history of tax

Many people assume that taxes are a recent development and that our ancestors did not have to pay them. This, however, is not the case.

#### History of taxes in the world

Tax as we know it today, existed in various forms in different societies throughout civilization. Kings, queens, chiefs, rulers, and people in authority were responsible for imposing and collecting taxes from the people they ruled. What was taxed, when it was taxed, and how much tax was imposed varied from society to society.

The French and Latin of the 13th century were credited with the first use of a word similar to tax. The French had *Taxer* and the Latin used *Taxare* to describe the following tasks: to estimate, to assess, or to access repeatedly.

#### Canadian taxation before Confederation

The colonial governments collected taxes and sent them to the two mother countries: England and France. The colonial governments usually collected revenue by charging customs duties. In 1650, Louis XIV of France imposed the first recorded tax in Canadian history—an export tax of 50% on beaver pelts and 10% on moose hides that were leaving his colonies.

In 1867 *The British North America Act* was passed, allowing the Canadian government to raise money by taxation. Over the next 50 years, the federal government used only indirect taxes such as customs duties and excise taxes to raise the money it needed. Direct taxation was only levied in the four Canadian provinces of Ontario, Quebec, Nova Scotia, and New Brunswick.

The Fathers of Confederation divided the governmental responsibilities of this new country between the federal and provincial governments. The most expensive areas of responsibility—railways, roads, bridges, and harbours – were the responsibility of the federal government. The provincial governments were responsible for education, health, and welfare.

#### Canadian taxation after Confederation

On August 4, 1914 Britain declared war on Germany and, as a British colony, Canada joined Britain in the Great War. The pressures of financing World War I soon brought major changes to the Canadian tax system.

In 1916 the Canadian government used a new method of direct taxation by imposing a corporation tax known as the business profit war tax. It affected corporations only if their profits were more than a certain percentage of their invested capital. Although this was not income tax as we know it today, it was a milestone in the history of Canadian taxation.

It was in 1917 that the federal government, led by Sir Robert L. Borden, introduced the *Income War Tax Act*. "I have placed no time limit upon this measure . . . a year or two after the war is over, the measure should be definitely reviewed," stated Sir Thomas White, Minister of Finance.

In July 1917, the federal government imposed a general tax on corporate and personal income that was collected by the Department of Finance.

#### Other key milestones in the Canadian tax system include:

**1927** - The Department of National Revenue was created.

**1952** - For the first time, the Department of National Revenue became involved in an area other than income tax when it began to collect old age security tax on personal and corporate income. The department assessed this tax under the *Old Age Security Act*.

January 1, 1991 - The federal government replaced the federal sales tax with the goods and services tax (GST).

**May 2007** - The Government of Canada introduced the Taxpayer Bill of Rights, which outlines what a taxpayer can expect from the CRA.

#### **Common Canadian taxes**

In Canada, there are various taxes, tariffs, and duties. In this section, we will briefly explain the following common Canadian tax and salary deductions:

- income tax;
- employment insurance (EI) premiums;
- Canada Pension Plan (CPP) contributions;
- provincial sales taxes (PST); and
- goods and services tax/harmonized sales tax (GST/HST).

#### **Source deductions**

**All individuals pay income tax** to the federal, provincial, and territorial governments. The amount of income tax is based on the taxable income (total earnings minus allowable deductions) earned during the tax year.

Income tax is collected in various ways. The most common method, commonly called *Source Deductions*, sees employers deduct income tax from each employee's pay cheque and remit it directly to the Canada Revenue Agency on the employee's behalf.

If an employee did not have enough tax deducted through source deductions, she may have tax owing when she files her tax return. Individuals who regularly have a balance owing may have to pay their income taxes by instalments.

**Employment insurance (EI)** provides temporary financial assistance to unemployed Canadians who, through no fault of their own, have lost their job. EI, therefore, assists them while they look for work or upgrade their skills. Canadians who are sick, pregnant, or caring for a newborn or adopted child, as well as those who must care for a family member who is seriously ill with a significant risk of death, may also be assisted by EI.

Like income tax, EI premiums are deducted at source by an employer from an employee's wages. In addition to the amount deducted on an employee's pay cheque, employers also contribute to the EI pool, usually at a rate of 1.4 times the amount deducted from all employees.

The **Canada Pension Plan (CPP)** provides contributors with a stipulated amount when they lose income because of retirement, death, or disability. In the event of death, the plan provides benefits to the contributor's survivors. With very few exceptions, every employed person in Canada over the age of 18 pays into the Canada Pension Plan. CPP, as with income tax and employment insurance, is also deducted by an employer at source. In addition, employers also contribute to CPP at a rate equal to the amount deducted from all employees. For employees in Quebec, the employer deducts Quebec Pension Plan (QPP) contributions instead of CPP contributions.

#### Refunds

It can happen that an individual is entitled to a refund of the taxes that were deducted at source. Refunds can be triggered if an individual:

- had too much tax withheld during the year
- paid more tax instalments than necessary, or
- is entitled to claim more refundable tax credits than the total taxes paid. Examples of these credits include:
  - Canada Pension Plan (CPP) overpayment;
  - employment insurance (EI) overpayment;
  - working income tax benefit (WITB); and
  - o provincial or territorial credits, which vary depending on the province or territory where you live.

In addition to getting a refund, individuals may also want to file an income tax return to receive certain credits and benefits paid throughout the year, or to report amounts that can reduce the amount of tax that must be paid in the future.

#### **Other taxes**

**Provincial sales tax (PST)** is a tax that most provinces levy on the sale of goods and services. PST is generally added to the sales price of an item being purchased. The items that are taxed and the tax rate vary from province to province.

**Goods and services tax (GST)** is a federal tax that is charged on the sale of most goods and services in Canada at a consistent rate of 5%. It is important to note that the federal government, though, does not tax essentials such as groceries, prescription drugs, residential rent, health care and dental care.

In some provinces, the GST is combined with the PST and the two are collected together at a combined rate. This is known as **harmonized sales tax (HST)**.

#### About the Canada Revenue Agency (CRA)

The CRA's mission is to administer tax, benefits and related programs, and to ensure compliance on behalf of governments across Canada, thereby contributing to the ongoing economic and social well-being of Canadians. It does this by:

- collecting taxes and administering tax laws for the federal government and most provinces and territories
- delivering credit and benefit programs to Canadians such as:
  - Canada child benefit (CCB)
  - o goods and services tax/harmonized sales tax (GST/HST) credit, and
  - working income tax benefit (WITB)
  - collecting Canada Pension Plan (CPP) contributions and employment insurance (EI) premiums, and
- administering Canada's international tax agreements with other countries

In carrying out its mission, the CRA affects the lives of many Canadians daily.

#### **Getting information from the CRA**

The CRA offers all its services, (including Internet, telephone, and correspondence services), to Canadians in both official languages.

#### **CRA Web site**

The CRA Web site <u>https://www.canada.ca/en/services/taxes/income-tax.html</u> is a valuable resource if you need tax information, or information on programs and services.

The best way to navigate the site is to start in the section for Individuals. Menus throughout this section offer information sorted by topic or client group (such as information for students or employees).

#### **Forms and publications**

CRA guides, forms, pamphlets, interpretation bulletins, information circulars, and other publications, provide details on tax topics and can help you to understand the tax system. To get forms and publications, go to <a href="https://www.canada.ca/en/revenue-agency/services/forms-publications.html">https://www.canada.ca/en/revenue-agency/services/forms-publications.html</a> or call **1-800-959-8281**.

If you are blind or partially sighted, you can get publications in braille, large print, e-text, or MP3 by going to www.cra.gc.ca/alternate. You can also get publications and personalized correspondence in these formats by calling **1-800-959-8281**.

#### **Examples of CRA programs**

Here are some examples of the programs administered by the Canada Revenue Agency (CRA):

#### Goods and services tax/harmonized sales tax (GST/HST) credit

You are eligible for the GST/HST credit if you are considered a Canadian resident for income tax purposes. You must also meet **one** of the following criteria:

- you are at least 19 years old
- you have a spouse or common-law partner
- you are a parent and live with your child

For more information on the GST/HST credit, consult CRA's guide: <u>https://www.canada.ca/en/revenue-agency/services/forms-publications/publications/rc4210.html</u>

#### Canada child benefit (CCB)

Administered by CRA, the Canada Child Benefit is a tax-free monthly payment made to eligible families to help the cost of raising children under the age of 18 years of age. For more information, consult the table below or visit CRA's website: <u>https://www.canada.ca/en/revenue-agency/services/child-family-benefits.html</u>

• Find out if you	are eligible for benefit	ts and credits		
				8
	Married or common- law with children under 18 years old	Single with children under 18 years old	Married or common-law with no children	Single and 19 or older with no children
Canada child benefit	Yes	Yes	No	No
Goods and services tax/harmonized sales tax (GST/HST) credit	Yes	Yes	Yes	Yes
Provincial and territorial benefits and credits	Yes	Yes	Yes	Yes

#### **Tuition amounts**

The tuition, education, and textbook amount is a non-refundable tax credit available to students to reduce the amount of income tax they must pay.

If you do not have to pay tax, you can carry forward or transfer all or part of your unused tuition, education, and textbook amounts. To carry forward the credit to use in a future year, you must file a tax return and attach a completed Schedule 11.

#### **Registered retirement savings plans (RRSPs)**

Money that you contribute to an RRSP can be used to reduce the amount of tax you have to pay.

The amount of RRSP contributions that you can deduct on your tax return is determined by your RRSP deduction limit. This is often called your "contribution room".

The RRSP deduction limit is calculated based on the income you report on your tax return and on the carry-forward of unused amounts from previous years.

You may want to file a tax return to begin building up your RRSP contribution room and have a greater deduction limit available for use in future years.

#### **CRA electronic services**

The CRA's electronic services are quick, easy and secure, and they allow you to view, change and manage your personal tax information. Some of the most widely used services are:

**Child and family benefits calculators** – Estimate the amount of CCB, GST/HST credit and other provincial and territorial benefits that you may be entitled to receive.

**Direct deposit** – You can have your income tax refund, CCB, and GST/HST credit deposited directly into your accont at your financial institution in Canada.

**Electronic payments** – Make your payment online using the CRA's My Payment service or using your financial institution's telephone or Internet banking services.

**My Account** – This is a secure, convenient, and time-saving way to access and manage your tax and benefit information online, seven days a week. If you are not registered with My Account but need information right away, use Quick Access to get fast, easy, and secure access to some of your information.

**Tax Information Phone Service (TIPS)** – For personal and general tax information by telephone, use the automated service, TIPS, by calling **1-800-267-6999**.

#### How the CRA gets information

The CRA not only gets information from your tax return, but from other sources as well. Other individuals and organizations have a responsibility to report payments and send deductions to the CRA. They include:

- employers
- financial institutions
- other organizations that pay interest or dividends; and
- those making payments to non-residents of Canada.

#### **Compliance with tax laws**

The CRA is responsible for collecting taxes owed and for discouraging tax avoidance. To do this, CRA may carry out a more detailed post review after your tax return has been assessed.

#### **Review of your tax return**

Each year, the CRA conducts several review activities that promote awareness of, and compliance with, the laws it administers. These reviews are an important part of maintaining the integrity of and Canadians' confidence in the Canadian tax system.

Three of CRA review programs are the:

- Pre-assessment review program
- Processing review program, and
- Matching program

Under these programs, CRA compares the information on a tax return to that provided by employers or financial institutions. By reviewing the deductions and credits on the return, CRA ensure that various income amounts have been correctly reported.

If the CRA makes changes to your return after a notice of assessment has been sent, they will send you a notice of reassessment that explains any changes.

#### Filing a Tax Return

If you earned income during the year you have to complete an income tax return and send it to the CRA. Generally, income tax returns are due by April 30, and the CRA begins processing returns in mid-February.

The *Income Tax and Benefit* return is the form you use to report income and to apply for benefits such as the Canada child tax benefit (CCTB), the goods and services tax / harmonized sales tax (GST/HST) credit, and the working income tax benefit (WITB).

The *T1 General, Income Tax and Benefit Return* covers all tax situations. It is available by going to <u>https://www.canada.ca/en/revenue-agency/services/forms-publications.html</u>

#### **Filing options**

The CRA encourages all Canadians to file their taxes electronically. Electronic filing helps to reduce costs, achieve greater accuracy and faster processing, and it also is environmentally friendly. The CRA's electronic tax-filing services are known as NETFILE and EFILE.

NETFILE is a fast, easy and secure service that allows you to send your return directly to the CRA from mid-February to the end of November using the Internet. Internet-filed returns must be prepared using one of the commercial tax preparation software packages or Web applications certified by the CRA to meet its system requirements. Intuit's TurboTax is an example of a CRA-approved software package.

EFILE is an automated system that allows registered electronic tax-filing service providers (professional accountants and tax preparers) to send income tax information to the CRA electronically. To use this service, an individual must take her documents to a tax preparation service provider who will prepare the electronic return, using software such as Intuit's ProFile, and send it to CRA under its EFILE system.

The table below illustrates the filing method for tax returns received by CRA between February and November 2020.

	by filing method	
Retur Filing method	ns received from February 10, 2020 Number of returns	to November 8, 2020 Percentage of total
EFILE	17,305,680	57.1%
EFILE	17,305,680 9,931,286	57.1% 32.7%
EFILE NETFILE File my Return (FMR)	17,305,680 9,931,286 69,555	57.1% 32.7% 0.2%
EFILE NETFILE File my Return (FMR) Total - electronic	17,305,680 9,931,286 69,555 <b>27,306,521</b>	57.1% 32.7% 0.2% 90.0%
EFILE NETFILE File my Return (FMR) Total - electronic Paper	17,305,680 9,931,286 69,555 <b>27,306,521</b> 3,026,180	57.1% 32.7% 0.2% 90.0% 10.0%

#### Filing a Tax Return

Using CRA's *T1 General, Income Tax and Return* form, individual taxpayers can prepare their own tax return and mail it to their CRA tax centre. Because it is a manual process, calculating the correct amounts on the tax return can be a complex process, and the probability of omissions and errors is very high.

Here is the first page of CRA's *T1 General, Income Tax and Return* as it would appear if it were hand-written. We will explore this form in more detail in Chapter 4.

	Income Tax an	d Benefit Return	2019
Before you start: f you are filling out this ret	urn for a <b>deceased person</b> , make sure	you enter their information in all the boxes	in Step 1.
Step 1 – Identificatio	n and other information		ON
lo	dentification	Information about you	1
Print your na	ame and address below.	Enter your social	
First name and initial		Insurance number (SIN):	Month Day
Marianne		Enter your date of birth: 1 + 9 + 8 + 0	
Last name		Your language of correspondences Engli	ch Francoia
Saint-Laurent	Street No. Street name	Votre langue de correspondence :	
Main St	- Street NO. Street name		
PO Box	RR	Is this return for a deceased	person?
·		Ensure the SIN information above is for the de	ceased person.
City	Prov./Terr. Postal code	If this <b>return</b> is for a	Month Dav
Anytown	O   N   M   5   A   1   A   6	deceased person, enter the	
E.	mail address	date of death:	
EI		Marital status	
By providing an email add email notifications from the	ress, you are <b>registering</b> to receive e CRA and <b>agree</b> to the <b>Terms of use</b>	Tick the box that applies to your mar December 31, 2019:	ital status on
Enter an email address:	nail@anytown.co	1 Married 2 Living common-law	3 Widowe
		4 Divorced 5 Separated	6 🖌 Single
Information	about your residence		
Enter your province or terr residence on <b>December</b> 3	ritory of 81, 2019: ONTARIO	Information about your spo common-law partner (if you ticked bo	use or ox 1 or 2 above)
Enter the province or territ	tory	Enter their SIN:	
where you currently resid	le if it is		
address above:	ing	Enter their first name:	
If you were self-employed	in 2019,	Enter their net income for 2019	1
where your business had	a	Enter the amount of universal child	
permanent establishment:		care benefit (UCCB) from line 11700	
If you became or ceased	to be a <b>resident of Canada</b> for	of their return:	
income tax purposes in 20	019, enter the date of:	Enter the amount of UCCB repayment	
Month Day	Month Day	from line 21300 of their return:	
entry	or departure	Tick this box if they were self-employed in	2019: 1
		Do not use this area	
Do not uno	17100		
17200			
this area 17200			

#### After you file

It usually takes about four to six weeks to process paper returns and two weeks to process returns filed using NETFILE and EFILE.

After the CRA processes a tax return, the agency will send you a notice of assessment showing any changes or corrections made (such as identifying and correcting a math error). The notice will indicate that you either are entitled to a refund or that you have a balance owing.

If you overpaid your taxes during the tax year, the CRA will issue a refund cheque attached to your notice of assessment, or it will directly deposit the funds into your account at a financial institution in Canada.

On the other hand, if you have a balance owing because you paid less taxes than you should have, and you did not attach the payment to your return when it was filed, the notice of assessment will contain instructions on how to pay the balance owing to avoid any interest charges.

#### **Taxpayer Roles and Responsibilities**

As a taxpayer, you have certain obligations. You are responsible for:

- filing an income tax and benefit return by the deadline
- paying the correct amount of tax
- giving the CRA the necessary information to assess your return
- giving the CRA up-to-date information, in order to receive accurate benefits, and to avoid unnecessary delays in sending the benefits, and
- getting help when necessary

#### Self-assessment

Earlier in this chapter, we learned that Canada has a self-assessment tax system. This means that taxpayers complete their tax return to report their annual income and to calculate whether they owe tax or are entitled to receive a refund.

Under the self-assessment system, Canadian residents and non-residents with Canadian income are responsible for making sure they have paid their taxes according to the *Income Tax Act* (the Act). Income and deductions are listed on the income tax and benefit return so both the taxpayer and the CRA can calculate the taxes the taxpayer has to pay.

In this way, taxpayers can check to make sure they are receiving fair and equal treatment under the Act. At the same time, the CRA can properly administer the tax laws.

#### Chapter 1 Quiz

Question 1: True or False: Taxes are a new concept and have only been collected since 1950

**Correct answer is False** 

Question 2: The tax revenue collected by the government is used to:

- A. Transfer funds amongst the provinces
- B. Pay interest on the public debt
- C. Pay for programs such as national defence
- D. All the above

Correct answer is D

Question 3: True or False: Goods and services tax (GST) is applied to all goods and services sold in Canada

**Correct answer is False** 

**Question 4:** True or False: If you are 18 years old or over and working, you may have to make contributions to the Canada Pension Plan

**Correct answer is True** 

Question 5: True or False: 90% of tax returns are electronically filed with CRA

**Correct answer is True** 

Question 6: True or False: If you do not owe income tax, you do not have to file a tax return

**Correct answer is False** 

Question 7: The various types of taxes include which of the following?

- A. Income tax
- B. Provincial sales tax
- C. Federal sales tax
- D. All the above

#### Correct answer is D

**Question 8:** True or False: The term *Source Deductions* is used to describe amounts that employers deduct from their employees' pay cheques

**Correct answer is True** 

Question 9: True or False: The Canada Revenue Agency is responsible for making all the tax laws in Canada

Answer is FALSE: CRA administers the tax laws proposed by the Department of Finance and passed by Parliament

Question 10: As a taxpayer, your role and responsibilities include:

- A. Filing an income tax return
- B. Giving CRA the necessary information so that it can accurately assess your tax return
- C. Use a self-assessment method to report and remit the correct amount of tax
- D. All the above

Correct answer is D



## Chapter 2 Installation & Set Up

### **Learning Objectives**

## At this chapter's end students will understand:

- How to install and activate ProFile
- How to manage ProFile licenses
- How to set up EFILE credentials
- How to use ProFile's Options menu

#### Additional Resources

This document provides numerous resources to accounting professionals. Refer to these sites to explore additional training opportunities

Professional Accounting Software

Tax Preparation & efiling Return Software

Professional Tax Software Training

#### Chapter 2 Installation and Set-Up

#### **A Proper Setup**

With its multifaceted installation options and its depth of features, it is important to fully grasp the various ways you can install and set up ProFile. The options discussed in this chapter range from a set-up for a one-person tax office to a large-scale set-up for a team of tax preparers. No matter the scenario, the objective remains the same: maximizing efficiency and understanding the needs of the tax preparer(s) who will be using ProFile.

Before diving into the various installation options, it is important to note the following specifications and system requirements:

#### **ProFile Specifications**

- Internet connectivity is required for activation, licensing, auto-update and additional functionality such as EFILE
- Network/workstation install UNC path is not supported
- .NET 4.5.2 installation & registration are required
- Apple products are not supported

#### **System Requirements**

- Processor: 1GHz or faster processor
- OS: Windows 10<sup>™</sup> (recommended), Windows 8.1 <sup>™</sup>
- Memory: 4 GB or higher
- Hard Drive: 3 GB for installation
- Printer: Windows compatible
- Display: 1024 X 768 minimum resolution; 16 bit or higher colour
- Internet: IE 11 or higher and high-speed connection
- Other: eReview feature requires a MAPI email client and a PDF reader application (for example: Adobe PDF Reader<sup>®</sup>), Microsoft .NET framework 4.5.2

#### **SINGLE-USER INSTALLATION**

This sequence of instructions explains how to install ProFile on the local (C:\) drive of your personal computer:

• Start by visiting ProFile's website (profile.intuit.ca) and download the gpsetup.exe file



Double click gpsetup.exe and follow the installation prompts



- During installation, make sure that you choose the Program Files folder of your local drive (usually drive C:\) as the file destination
- Follow the prompts to complete the installation

ProFile - InstallShield Wizard		×
Choose Destination Location Select folder where setup will	install files.	
PROFILE	Install ProFile to: C:\Program Files (x86)\ProFile\	Change
Installahreid	< gack Next >	Cancel

#### **ProFile activation**

Once installed, activate ProFile by entering your license information.

- Launch ProFile
- In the window that opens, enter your software Product Code and License Key

ProFile License Activation	1	×
<b>intuit</b> ProFi	le.	
Activate Pr	oFile	
To activate ProFile,	please enter your Product Code and License Key.	
Product Code	License Key	
Product Code	License Key Activate	
Where do I find thi	s information?	
OnePay customer?	Free Trial Activation >   2011 or older license? >	

#### Finding your licensing information

Read on if you're not sure where to find the licensing information required for the window above.

- After purchasing ProFile, you will receive an emailed receipt containing the product information to be entered in this window
- If you purchased ProFile through Intuit's Web Store, you will find the codes at the very bottom of the receipt

	ProFile Québec Tax Suite License (1-	4)	1	\$325.00		\$325.00	
	Required to activate your product(s): Product Code: 496-998 License Key: 5612018834						
L					Sub-total:	\$2,355.00	

If you placed your order by telephone, the codes will appear in the Order Details section

Quantity     Item Id     Unit Price     Ext Price       1     423452     \$1,680.00     \$1,680.00       FR PROFILE TY14 QUEBEC SUITE     1     423522     \$325.00       1     423522     \$325.00     \$325.00       FR ProFile TY14 Quebec Suite License (1-4)     Required to activate your product:       Product Code://96.998     License Key::9059.8678.952	ORDER DETAILS	
1       423452       \$1,680.00       \$1,680.00         FR PROFILE TY14 QUEBEC SUITE         1       423522       \$325.00       \$325.00         FR ProFile TY14 Quebec Suite License (1-4)         Required to activate your product:         Product Code://96.998       License Key::9059.8678.952	Quantity Item Id	Unit Price Ext Price
1 423522 \$325.00 \$325.00 FR ProFile TY14 Quebec Suite License (1-4) Required to activate your product: Product Code://96.998 License Key:9059.8678.952	1 423452 FR PROFILE TY14 Q	\$1,680.00 \$1,680.00 UEBEC SUITE
Required to activate your product: Product Code://96.998 License Key:9059-8678-952	1 423522 FR ProFile TY14 Qu	\$325.00 \$325.00 ebec Suite License (1-4)
	Required to activat Product Code:496-	te your product: -998 License Key:9059-8678-952

• After entering the license and activating the software, a green checkmark will appear indicating that the product is ready to go.



#### **Managing Your Licences**

• Keeping track of your ProFile licenses is an easy yet important part of the installation and set-up process. Start by clicking *Help > Manage Licenses* 



• Click on Details

License			-	×
You are c	urrently licensed for			
T1 → T2 ↓ 13 → FX	T1 T1/TP1 Loens - T2 License E T3 T3/TP464 Lice FX FX/Q License	rej xxpirdis on 2019-12- ense	31	
Ad	d New License	Detail	s	

• If you purchased additional licenses or modules (T2, T3, etc.) click on Add New License

wing active license(s)	. For assistance, pleas	e call Custon	ner Care at 1-80	00-452-9970	or visit <u>Intuit 1</u>	echnical Sup	port.
License Key	Expiry Date	Tax Year	T1	Т2	ТЗ	FX	+T2-EF
7353*****	2019-12-31	2018	TRIAL	TRIAL	TRIAL	TRIAL	
7080*****	2018-12-31	2017	Lic+QC	Lic	Lic+QC	Lic+QC	
5015*****	2017-12-31	2016	Lic+QC	Lic	Lic+QC	Lic+QC	
	uing active license(s)           License Key           7353******           7080******           5015******	Ucense Key         Exply Date           7353*****         2019-12-31           7080*****         2018-12-31           5015*****         2017-12-31	License Key         Expiry Date         Tax Year           7353******         2019-12-31         2018           7080******         2018-12-31         2017           5015******         2017-12-31         2016	License Key         Expiry Date         Tax Year         T1           7353******         2019-12-31         2018         TRIAL           7080******         2018-12-31         2017         Lic+QC           5015******         2017-12-31         2016         Lic+QC	Ving active license(s). For assistance, please call Customer Care at 1-800-452-9970           License Key         Expiry Date         Tax Year         T1         T2           7353******         2019-12-31         2018         TRIAL         TRIAL           7080******         2018-12-31         2017         Lic+QC         Lic           5015*****         2017-12-31         2015         Lic+QC         Lic	Ving active license(s). For assistance, please call Customer Care at 1-800-452-9970 or visit Initial           License Key         Expiry Date         Tax Year         T1         T2         T3           7353******         2019-12-31         2018         TRIAL         TRIAL         TRIAL         TRIAL           7080******         2019-12-31         2017         Lie+QC         Lie         Lie+QC           5015******         2017-12-31         2016         Lie+QC         Lie         Lie+QC	wing active license(s). For assistance, please call Customer Care at 1-800-452-9970 or visit Intuit Technical Survival           License Key         Expiry Date         Tax Year         T1         T2         T3         FX           7353******         2019-12-31         2018         TRIAL         TRIAL

• Enter the new Product Code and License Key

VI ProFile License Activation	×
Intuit ProFile <sup>.</sup>	
Activate ProFile	
To activate ProFile, please enter your Product Code and License Key.	
Product Code License Key	
Product Code License Key	Activate
Where do I find this information?	
OnePay customer? >   Free Trial Activation >   2011 or older license? >	

- To remove licenses—those that are old or outdated, for example—return to the License window, select the license to remove
- Click on Delete Selected License

Product Code	License Key	Expiry Date	Tax Year	T1	T2	тз	FX	+T2-EF
818902	8158*****	2017-12-31	2016	Lic+QC	Lic	Lic+QC	Lic+QC	
 818902	5015*****	2017-12-31	2016	Lic+QC	Lic	Lic+QC	Lic+QC	
	This I	iconso codo is	inactivo	boorussi	it is our	rriddon by i	iho olhor l	iconco

#### **PROFILE WORKSTATION INSTALLATION**

In a network environment, where an office has multiple tax preparers, you may not want to install ProFile on each individual computer. In other words, you'll want a workstation installation. Here's how to do it:

- Ensure that your network is properly setup and configured. You may require an IT professional or Network Administrator for guidance on how to best proceed with this setup
- Perform a full installation of ProFile on the server and restart the server
- From the workstation, map the drive in which ProFile was installed by following these steps:
- Click on Computer, then choose Map network drive



• Enter the address of the server by browsing to the target location (example: G:\my-server)

Map 1	Network Drive
What no	etwork folder would you like to map?
Drive: Folder:	Z:  Browse
	Example: \\server\share  C Reconnect at logon
	Connect using different credentials Connect to a Web site that you can use to store your documents and pictures.
	Finish Can

- In the mapped network folder where ProFile was installed, right-click on *Workstation Install* and select *Run as administrator*
- Follow the installation wizard
- When completed, a ProFile Workstation icon will appear on the workstation's desktop

#### **Configuring Your Workstation Licenses**

There are two ways to configure workstation licenses. The first method is to configure the license codes for all users. Modify the startup.ini file that is installed on your network server where ProFile is installed. The startup.ini file has the following format:

- [License]
- ProductCode=
- Code=
- Name=

To have a common code used by all client computers, enter the ProFile product code after **ProductCode=** and enter the license key after **Code=** 

- The second method is used when your system administrator wants to limit individual users to specific modules.
- Under this method every user has their own access code (instead of everyone using the same centralized code). It is recommended to leave the startup.init file in the location where ProFile is installed
- After you update the registry and complete the installation process, you are now configured to use ProFile. To run ProFile next time, double-click the *ProFile* icon that was created on your desktop or select *ProFile* from the Start menu.

#### **PROFILE FLEXIBLE LICENSING**

If you have multiple computers and need to access ProFile from any one of them, then Flexible Licensing is for you. Flexible Licensing temporarily suspends a ProFile license on one computer and activates that same license on another computer. With Flexible Licensing, there's no need to constantly delete the license on one machine and then enter it manually on another machine.

• To enable this feature, click the Help menu and then select Configure Flexible Licensing

ProFile Help	F1
What should we build next?	
QuickStart	
Support	>
Live Chat	
Live Community	
Privacy Policy	
auspend Licenses	_
Configure Flexible Licensing	
Licenses	
Send Feedback	
About	

- Click *Enable flexible licensing on this computer* then select the mode of your choice. You can choose a *Manual* mode that requires you to confirm you would like to suspend the license on a given computer, or you can choose an *Automatic* mode that will suspend and activate the licenses for you. We recommend choosing *Automatic* mode
- After choosing your option, click Save

ProFile Flexible Licensing Settings	>
Intuit ProFile <sup>.</sup>	
Flexible Licensing Settings	
You can update your settings for Flexible Licensing below. Click save to update your settings.	
Flexible licensing temporarily suspends a ProFile license on one computer in order for the license to be activated on another computer. Learn More. Learn More	
Enable flexible licensing on this computer	
<ul> <li>Manual - This option will require you to confirm that you would like to suspend your ProFile licenses when you close ProFile.</li> </ul>	
Pick one Prompt me every time when I close ProFile Don't prompt me. I'll do it manually.	
<ul> <li>Automatic - This option will automatically suspend and activate your licenses when you open and close ProFile.</li> </ul>	
You can access these settings by clicking the Help > Configure Flexible Licensing menu item above. Please Note: In order for this functionality to work your computer must be connected to the internet.	
Save	

• In automatic mode, ProFile will confirm your computer's license status whenever you log in and out of the application



#### **Maximum license warnings**

When activating a ProFile license, you may see this warning: *ProFile has been activated the maximum number of times permitted for this license*. This message appears either because a license is being used more times than there are <u>units</u> available for use, or because it was not removed from an older machine before being transferred to a new one.

What's a unit? If you purchased one license, you will receive an extra license unit for an unforeseen situation that may trigger the need to reactivate your license. This means you have two units available. If you then try to activate your license on more than two computers, you will receive the "Maximum activation error" message described above.

To correct this issue, try deleting a license from an unused computer before activating it on a new machine.

- On the old machine, open ProFile and click *Help > Manage License*
- Click on Details

	ProFile Help What should we build next? QuickStart	F1		
	Support Live Chat Privacy Policy	>		
1	Suspend Licenses Configure Flexible Licensing Manage Licenses Send Feedback	License You an	-	×
	About	- T1 - T2 - T3 - FX	T1 T1/TP1 License T2 License - Expires On 2018-12-31 T3 T3/TP646 License FX FX/Q License	

- Click the license you'd like to delete. ProFile displays a message that the license is valid and active  $\blacksquare$
- So that you can enter it on the new machine, make note of this license
- Click on *Delete selected license* to deactivate ProFile on the old machine
- You can now activate the license on your new computer

Intuit Technic Product	License Key	Expiry	Tax	T1	T2	Ť3	FX	+T2-EF
Code	7.000	2018-12-31	2017	Lic+QC	Lic	Lic+QC	Lic+QC	
810802	Mirely-	2017-12-31	2016	Lic+QC	Lic	Lic+QC	Lic+QC	

#### A Basic Setup

In this section, you will learn how to quickly set up the minimum number of options that are required to get ProFile up and running. Once these options are enabled, you can immediately begin working in ProFile.

Later in this chapter, we will describe how to delve into more advanced and more sophisticated options.

#### **EFILE Options**

Every professional tax preparer receives bespoke EFILE credentials from CRA. It is important, therefore, to enter and save those credentials in ProFile. Follow these steps to record your credentials:

- Click *EFILE > Options*
- In the left-hand window, click EFILE Internet
- Enter your On-line Number and EFILE password as provided to you by CRA  $^{ lambda2}$

Electronic Filing Options		?	Х
General - T1 - Common - EFILE Internet - T2 - T2 - T2 EFILE - T2 AT1 Net File - T2 OL-17 Internet Filing - T3/FX	<u>CRA Identification</u> EFILE On-Line Number D9331 EFILE Online Password (Case Sensitive)  Points Retain EFILE Log Prompt for Session Type before connecting to CRA Show Print Prompt at End of Session Enable EFILE service	REFERENCE	2
— Transmitter — Contact information — MRQ Sip Numbers — Internet File			
	T1/TP1 Wizard OK Cancel	H	lelp

• In the same window, select T2 EFILE and you should see your credential appear there as well

Electronic Filing Options		? ×
General T1 Common EFILE Internet T2 EFILE T2 EFILE T2 CO-17 Internet Filing T3/FX Transmitter Contact information MRQ Sip Numbers Internet File	CRA Identification EFILE Number EFILE Directory C:Wsers/Michael/Documents/My ProFile Data/12 Returns/EFILE EFILE Web Service (For Technical Support Only) © Default URL	Browse
	T1/TP1 Wizard OK Cancel	Help

#### **Environment Options**

Under the *Options* menu, you will find a host of ProFile preferences. While all preferences are arguably important, there are some that are considered mandatory. Here, therefore, are the options you should set under a basic scenario.

It's important to note that if you're unsure about the functionality of any option, click the Question Mark icon at the top right of the *Environment* window and then click on any function. ProFile will then display tab-specific, context-sensitive help that will guide you in configuring your settings.

ok Display He Přeparer Discounter Trustee Audit System HyperDocs PDF Nothications	/iror	nment Op	tions	5				<b>a</b> .			?
	310	Display	File	Preparer	Discounter	Trustee	Audit	System	HyperDocs	PDF	Notifications
										_	

#### **File Tab**

- Click Options > Environment and then select the File tab.
- Under the *File* tab, ProFile lets you set and/or confirm the default location for all your tax files. By default, Profile creates a general folder called *My ProFile Data* and, within that folder, ProFile establishes sub-folders to store files for each specific tax year and module (for T1, T3 and FX files). Unless you have specific file-location requirements (a server environment, for example), you should accept ProFile's default folder settings.
| Envi | ronment (        | ptions    |              |                |            |           |             |          |          | ?      | ×        |                                  |
|------|------------------|-----------|--------------|----------------|------------|-----------|-------------|----------|----------|--------|----------|----------------------------------|
| Edi  | Displa           | y File    | Preparer     | Discounter     | Trustee    | Audit     | System      | Security | HyperDoc | s PDF  | Bat►     |                                  |
| P    | eferences        |           |              |                |            |           |             |          |          |        |          |                                  |
| ~    | ] Multiple O     | pen Files |              |                | 🗹 Ke       | ep Back   | ир          |          |          |        |          |                                  |
| ~    | ] Save Des       | ktop      |              |                | 🗌 Alle     | w Pass    | word        |          |          |        |          |                                  |
|      | Save Pror        | npt       |              |                | 🗹 Up       | date Do   | cuments F   | older    |          |        |          |                                  |
|      | -<br>  Esc Close | s Window  | ,            |                | □ Dis      | counter   | Info Dialoo | 3        |          |        |          |                                  |
|      | -<br>File Prote  | tion      |              |                |            | Verifica  | tion        |          |          |        |          |                                  |
|      | -<br>Maximum     | Open Tat  | os           |                | - Au       | to save I | iles every  |          |          |        |          |                                  |
|      | 10               | tabs      |              |                | 1          | •         | minutes     |          |          |        |          |                                  |
| D    | efault File T    | ype (mod  | ule):        | [              | Most Rec   | ently Us  | ed          |          | ~        |        |          |                                  |
| B    | ecently Use      | d Files   |              |                |            | _         |             |          |          |        |          |                                  |
| C    | ) Off            |           |              |                |            | 4         | e e         | ntries   |          |        |          |                                  |
|      | ) Attach to      | Reopen n  | nenu item    |                |            |           | Class       |          |          |        |          |                                  |
| C    | ) Attach to      | File menu |              |                |            |           | Liear       |          |          |        |          |                                  |
| Fi   | e Directorie     | s         |              |                |            |           |             |          |          |        |          |                                  |
| N    | lodule           |           |              |                | Direc      | tory:     |             |          | L        | ock 🔄  | •        |                                  |
| 7    | 🛿 2020 T 1       | C         | :\Users\md   | lila\OneDrive\ | My ProFile | Data\2    | D2OT1\      |          |          | - 1    | -        |                                  |
| 7    | 💈 2019 T1        | C         | :\Users\md   | lila\OneDrive\ | My ProFile | Data\2    | D19T1\      |          |          | •      |          |                                  |
| 7    | 🛿 2018 T1        | C         | :\Users\md   | lila\OneDrive\ | My ProFile | Data\2    | D18T1\      |          |          | •      |          |                                  |
| 7    | 🛿 2017 T1        | C         | :\Users\md   | lila\Document  | s\My ProF  | ile Data' | .2017T1\    |          |          | ~      |          |                                  |
| 7    | 7 2016 T1        | C         | :\Users\md   | lila\Document  | s\My ProF  | ile Data' | 2016T1\     |          |          |        |          |                                  |
| 7    | 7 2015 T1        | 0         | :\Users\md   | lila\Document  | s\My ProF  | ile Data' | .2015T1\    |          |          | V 1    | <b>1</b> |                                  |
|      | Office I         | nfo Setu  | p wizard     |                |            |           | OK          |          | Cancel   |        | Help     |                                  |
|      | 0001             |           | pincara      |                |            |           | 0.0         |          | 00.1001  |        | queip    |                                  |
|      | •                | То        | chang        | e a fold       | er's d     | efau      | ılt loc     | ation    | , just c | lick t | he       | menu for each module and tax yea |
| File | Director         | es        |              |                |            |           |             |          |          |        |          |                                  |
| м    | dule             |           |              | Di             | rectory    |           |             |          | Lock     |        |          |                                  |
|      | 0010 T1          | Cillion   | olina dila D | a cum antal    | Au DroE    | le Det    | 1004074     |          |          |        |          |                                  |

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• 7

V

Clicking the "Lock" checkbox to the right of each folder location ensures that ProFile always saves files to that location, and always looks in that location when opening files.

In addition to selecting the file location for all your tax files, you also choose, under the File tab, usability preferences such as the ability to concurrently display multiple tax files; allow password protection and display a list of recently used files.

#### **Preparer Tab**

2017 T1 C:\Users\mdila\Documents\My ProFile Data\2017T1 2016 T1 C:\Users\mdila\Documents\My ProFile Data\2016T1

2015 T1 C:\Users\mdila\Documents\My ProFile Data\2015T1

2014 T1 C:\Users\mdila\Documents\My ProFile Data\2014T1\ 2013 T1\_C/Users/mdila/Documents/My ProFile Data/2013T1/

The Preparer tab of the Options > Environment window, allows tax preparers to enter their firm's address and contact information, as well as their Business Number and Rep or Group ID as determined by CRA. From the Preparer tab, you can also:

- Keep track of the workflow by entering preparer and partner initials
- Enter Québec preparer credentials

Edit     Display     File     Preparer     Discounter     Trustee     Audit     System     Hyp       Preparer     Name:	erDocs PDF Notifications
Preparer           Name:           Firm:           Street:           PO Box, RR:           City:           Province:           Your           Phone:           Finality	
Name:	
Firm:	
Street:	
P0 Box, RR:	
City:	
Province:         V         Postal Code:           Phone:         Fax:	
Phone: Fax:	
Email:	
Initials	
Preparer: Partner:	
Quebec	
Quebec enterprise number (NEQ):	
Professional Representative Number:	
T1013 / RC59	
RepID Business Number	
Group ID G	
Office Info Setup wizard OK Ca	ncel Help

#### **Next steps**

After setting up the basic options just described, you can jump ahead to Chapter 3 and begin working in ProFile. A prudent tax preparer, though, might want to explore the more advanced preferences discussed in the next section.

# An Advanced Setup

This section describes the advanced features and preferences that let you personalize ProFile. These options will help you save time and streamline your workflow during a busy and hectic tax season.

Note that the following preferences are all accessed via the Options > Environment menu.

#### **Edit Tab**

The *Edit* tab lets you set preferences such as enabling fixed decimals data-entry (ProFile automatically places the decimal point to the left of the last two digits entered in a field). From this tab you can also:

- Capitalize every word on a tax return, or just the first letter in every word.
- Manually override a calculated value on the tab return
- Use the Ditto key to quickly copy and paste the same information in adjacent fields
- Allow data to be dragged and dropped from one field to the next
- Ensure that every Social Insurance Number entered in ProFile is valid
- Double-click on a field in a tax return to jump to a related field
- Right-click to enable Cut, Copy and Paste

Enviro	invironment Options ? ×												
Edit	Display	File	Preparer	Discounter	Trustee	Audit	System	HyperDocs	PDF	Notifications			
Pre	ferences												
$\square$	Automatic	: Over	ide		🗌 Ri	ght But							
E	Audibl	e Over	ride		🗹 Do	ouble C							
✓ F	Flyover Memos and Tapes					efault T	ape Des	scriptions					
✓ F	<ul> <li>Restack Tabs on Open</li> <li>Fixed Decimal Entry</li> </ul>				🗹 Cla	ose tap	e on tota	эl					
F						intinuo	us Forms	5					
	Jse Time	er			□ Fo	rm Exp	lorer Ch	ecklist					
	Now Ditte	o Key	_		⊠ Ri	ght Clic	k Cut Co	py Paste					
MA	llow Dra	g and	Drop		⊠Au	to Inse	rt Memo	Date Stam	ıр				
Pre	dictive ty	ping				Capital	ization						
∠ E	nabled	[	Sort Iter	ms	(	⊖ Norr	nal						
Ма	kimum Er	ntries	10		(								
			Ľ		(	● Sma	irt Capite	alization					
Val	dation												
	Active Va	lidatio	n										
Ø١	/alidate S	SIN											
	Office Inf	o Setu	p wizard			OK		Cancel		Help			

#### **Display Tab**

The display tab lets you personalize your on-screen views. From the Display tab, you can:

- Enable on-screen page breaks
- Use brackets for negative numbers

- Display zeroes for all NIL values
- Automatically zoom the displayed tax file to full screen width

Enviror	nment Op	tions								?	$\times$	
Edit	Display	File	Preparer	Discounter	Trustee	Audit	System	HyperDocs	PDF	Notifications		
Prefe	erences											
ΠP	age Break	s		[	Zoom to Screen Width							
⊡ B	racket Neg	gative Nu	imbers	[	🗹 Data Monitor							
ZZ	eroes in NI	L fields		6	🗹 Enable	Font Sc.	aling (requi	res ProFile res	start)			
	ine Decima	al Separa	tors									
M	ab Icons											
Í												
	Office Inf	o Setup	o wizard			OK		Cancel		Help		

#### System Tab

To ensure that you always have the most recent release, click the *Systems* tab and review the Automatic Update settings. Here you can establish the frequency in which ProFile checks for updates and you can also indicate whether you want ProFile to notify you before downloading and installing an update. From the System tab, you can also:

- Enable ProFile's forum-like Live Community
- Enable or disable ProFile's online features

nviror	nment Op	tions								?	>		
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#### **PDF** Tab

Use the PDF tab of the Environment Options to personalize your client's PDF files. Here, you can set file-naming conventions, as well as file location and password protection for all your PDF tax returns.

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#### **Other Environment Settings**

The Options->Environment window features other tabs including settings for establishing Discounter and Trustee credentials, and for enabling more advanced features such as Audit and HyperDocs settings. We will revisit some of these settings later.

### **Options>Module**

ProFile's Module options let you fine-tune the way ProFile works with each individual tax year and module (T1, T2, T3 and FX). This granular level of detail lets you determine the tax settings that ProFile will choose on new files, and on files you are carrying forward from a previous year. In this window, you can also establish your language preference, and you can set variance thresholds for comparing a client's current and previous year's tax file. The paragraphs below describe the Module options you should immediately set.



#### **General Tab**

Scroll down this window to set defaults for new and carried-forward file. These include CRA Authorization levels, pre and post-assessment review settings, and slip descriptions for carried-forward files. In this window, you can also:

- Carry forward Elections Canada and foreign property questions
- Set defaults for language of correspondence and preparer information
- Set client letter and invoice defaults
- Establish naming conventions for your tax files
- Choose form colours for client and spouse tax returns



#### **Data Locking Tab**

This tab lets you enable a warning that prevents you from accidentally creating a tax file. You can also automatically lock a file once a Client and EFILE status is indicated. For example, if you click the *Completed* checkbox in the *Client Status* column, then ProFile will lock a tax file once a tax preparer indicates that the tax file has been completed.

Module Options	? ×
1.2020 T1/TP1 ▼ 12 3.2017-2020 T2 ▼ 12 5.2019 T3/TP648	6 🔻 🖾 <u>7</u> .2020 F× 🔹 🕨
File Template	Browse
General Data Locking Variance Disclaimer T1/TP1 Review	
Warning on file creation	Language
Client Status       EFILE Status         Unknown       Unknown         Carried forward       Not eligible         Work in process       Eligible         Un preparer review       Ready to transmit         In partner review       Transmitted         Printed       Accepted         Output       Not accepted         Not filing       Paper filed	● English ○ French
	ОК
	Cancel
	Help

#### Setting a client status

- To set a file's Client Status, open a tax file and go to File > Properties.
- Click the Client Status dropdown and select the desired status

• Note the checkbox, to the right of the Client Status dropdown, that lets you toggle file locking on and off.

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	Show Password												

#### **Disclaimer Tab**

A standard business disclaimer will alert readers about your involvement with that tax return. ProFile lets you set two different disclaimers.

- A general disclaimer, for the tax return as a whole, which will appear on the last page of the tax jacket
- A business disclaimer that will appear on business-type forms such as the T2125 schedule for selfemployed individuals

Module Options	? ×
🔟 <u>1</u> .2020 T1/TP1 🛛 🔻 🔽 <u>3</u> .2017-2020 T2 🛛 🔻 🗾 <u>5</u> .2019 T3/TP646	🔻 🛛 🔁 <u>7</u> .2020 F× 🔹 🕨
File Template	
	Browse
General Data Locking Variance Disclaimer T1/TP1 Review Standard Disclaimer	Language
Prepared without audit based on information provided by the taxpayer.	<ul> <li>English</li> <li>French</li> </ul>
Business Disclaimer	
×	ОК
	Cancel
	Help

# **Options > Templates**

ProFile includes pre-formatted letters that you can print as part of your client's T1 package. Here is an excerpt of one such letter.



All of ProFile's preformatted letters are saved in a templates subfolder within the *My ProFile Data* folder. To view and edit any template, follow these steps:

- Click on Options>Templates
- Find and double-click the desired template, for example, Letter

Base Templa	te Directory	Scoll Forone ( Scolo	10/11/010	· La Francista · L			
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Attach	English	Attachments	Default	2020 T1 Attachments.RTF			
ngage	English	Engagement letter	Default	2020 T1 Engagement Letter.RTF			
ser1	English	User letter 1	Default	2020 T1 User1.RTF			
Letter	English	Deceased client letter	Default	2020 T1 Deceased letter.RTF			
ser2	English	User letter 2	Default	2020 T1 User2.RTF			
etter	English	Client letter	Default	2020 T1 letter.RTF			
Letter	English	Client letter	Default	2020 T1 TP1 letter.RTF			
voice	English	Client invoice	Default	2020 T1 Invoice.RTF			
Invoice	English	Client invoice	Default	2020 T1TP1 Invoice.RTF			
DLetter	English	Deceased client letter	Default	2020 T1 TP1 Deceased letter.RTF			
_etter	English	Joint client letter	Default	2020 T1 joint letter.RTF			
JLetter	English	Joint client letter	Default	2020 T1 TP1 joint letter.RTF			
Letter	English	Bankrupt client letter	Default	2020 T1 Bankrupt letter.RTF			
BALetter	English	Post bankruptcy authorization	Default	2020 T1 PBA Letter.RTF			
etter English Online payment Email Default: 2020 T1 Email Template.RTF							
nvoice	English	Joint client invoice	Default	2020 T1 Joint Invoice.RTF			
JInvoice	English	Joint client invoice	Default	2020 T1TP1 Joint Invoice.RTF			
abel	English	Mailing label	Default	2020 T1 label.RTF			
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ission	Français	Lettre de mission	Default	F2020 T1 Engagement Letter.RTF			
lient1	Français	Lettre du client 1	Default	F2020 T1 User1.RTF			
Lettre	Français	Lettre - particulier décédé	Default	F2020 T1 Deceased letter.RTF			
lient2	Français	Lettre du client 2	Default	F2020 T1 User2.RTF			
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The Letter template will open in a new window and it will display text in two different colours;

- Text appearing in blue signifies data that flows from ProFile data fields. This type of information is called a *Field Code*. Field codes can only be inserted or removed; they cannot be edited from within the template
- Black font represents free-form text that you can enter and edit

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• To add text (black font), place your cursor in the desired area and begin typing



- To add Field Text, right-click the template at the desired input area
- Click Insert Field

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• Then, from the Insert Field list, choose the desired field and click Insert

Insert Field	×
PreparerInitials	Insert
PreparerFax PreparerFirm PreparerInitials	Cancel
PreparerName PreparerPhone PreparerPostalCode PreparerProvince	
PreparerStreet Refund SigningDate SoouseAddress	
SpouseAge SpouseApt	
Description	

- Click File > Save to save your changes
- Select the location (letter template folder) and enter a file name



• Click Yes to confirm that you want to use this form as the default

Confirm	1	Х
1	Use this file as the template for "Client letter"?	
	Yes No	

• To view the finished product, use the Form Explorer to find and open the client's Letter

Vi Form Explorer							?		×
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Eorm: Letter			<u>O</u> pe	en <u>P</u> ri	nt <u>N</u> ew	List	<u>D</u> etail	<u>K</u> ey	Lin
Forms	Name	Category	Description	Use	d Last year	Step			1
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	🥰 S8	Return + sched	CPP on self-employment and other earni	ngs Yes	N/A	352			
1. Identification	🥰 S11	Return + sched	Federal tuition and education amounts	Yes	N/A	356			
📜 <u>2</u> . Slips	🌮 T183	Filing	Information return for electronic filing	Yes	N/A	388			
3. Income	🖉 Engage	Client	Engagement letter	Yes	N/A	2			. 1
A Deductions	🗊 GST	Client	GST/HST credit	Yes	N/A	450			
4. Deductions	11Summary	Client	T1 Summary	Yes	N/A	453			
📒 <u>5</u> . Tax + credits	🗊 NRTC	Client	NRTC Comparative Summary	Yes	N/A	455			
🦰 <u>6</u> . Return + sc 🕶	Letter	Client	Client letter	Yes	N/A	459			
	Audit	Client	Audit Summary	Yes	N/A	410			
IPI									`
Letter: Client letter									

• You can now preview the changes you made to the Letter template



• If you'd like to make additional changes, right-click the form and select Edit Template



In addition to tax and template files, ProFile stores other types of files in the My Profile Data folder. These other files include EFILE logs, backups, and certain settings file.

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Desktop	*	Link	2017-01-30 10:43	File folder		
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Pictures	*	Settings	2017-09-24 9:46 PM	File folder		
iCloud	*	SettingsBackup1	2017-09-24 9:46 PM	File folder		
Photo Library	*	SettingsBackup2	2017-09-24 9:46 PM	File folder		
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	<u> </u>	T2 Returns	2017-09-05 2:49 PM	File folder		
2016 11	~	Templates	2016-12-26 11:48	File folder		
items 1 item se	elected					8== 1

# **Options>Form Selection**

ProFile has a powerful set of tools for personalizing your print settings. This feature lets you determine the tax forms to send to your clients. For example, rather than printing a complete tax return for each of your clients (which can run many pages) you might want to print a tax summary with just a few selected schedules. Here's how to configure your print settings:

- From the Options > Form Selection menu, choose the module and tax year 🛄
- Choose the print job for the type of the tax return you are preparing for your client—the most common print job being T1 EFILE
- After printing a return, ProFile lets you choose a default status. For example, once printed, you might want to set the status of all tax returns to *Completed*. The window below displays the available types of file status

ļ	Status <u>a</u> fter printing	_
	🗌 Take snapshot	
	Change the status to	
	Completed	~
	Unchanged Carried forward Work in process Waiting for client In preparer review In partner review Ready to print Printed Completed	
	Not filing	

• Under *Form Selection Details,* you can choose the specific print set you'd like to prepare. For example, for each tax return, you can choose to print a copy for your files, your clients and for CRA. It's here that you can also determine options such as duplex printing or four forms per page. You can also set

your PDF options here. 4

- You can rename the prints sets, or add more print sets as well. To do either, just type the desired form names under Print Set Names
- Scroll through the *Form* window to select (or deselect) the forms you would like to save or send to your clients
- Click Carry-forward to assign last year's print settings to the current year <a>[7]</a>

🔟 <u>1</u> .2018 T1/TP1 🛛 🔻 🔽	<u>3</u> .2016	-2018	T2	,	-	13 5.2017 T3/TP646	🛛 🔀 7.2018 FX/Q 🛛 🔻	
Print Job	Form	Selecti	on De	tails				
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Status after printing	Ē	ĕ		E D	5	Print these sets	4	
Take snapshot	1	2 [	3	E D	5	Archive these sets (PDF)	-	
Change the status to	1		3	E D	5	Email these sets (PDF)		
Unchanged $\checkmark$	Ξ	21	য় চ	E D	5	Duplex sets		
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2. Lient	Find	Form:						
3: UHA	n	R	8	4	5	T183-1	Information return for electronic filing - pages 1	-
4:	1	2	3	4	5	T183-2	Information return for electronic filing - pages 2	_
5:		2		4	5	RC71-1	Discounting transaction - pages 1	
	1	2	3	4	5	RC71-2	Discounting transaction - pages 2	
Printing Tips		2	B	4	5	T2201#1	Disability tax credit certificate	
Printing	1	2	3	4	5	T1-1,2	T1 jacket - pages 1,2	
You can drag and drop the form list rows to	1	2	3	4	5	T1-3,4,5	Til jacket - pages 3,4,5	
change their display	1	2	3	4	5	S1 6	ederal Tax	
order.	1	2	3	4	5	S2 🖿	Amounts transferred from your spouse	
	1	2	3	4	5	\$3	Capital gains (or losses)	
	1	2	3	4	5	S3NR	Capital gains (or losses)	
Next	1		3	4	5	S4	Statement of investment income	
	1	2	3	4	5	S5	Details of Dependant	
	1		3	4	5	S6	Working Income Tax Benefit	
	1	2	3	4	5	S7	RRSP and PRPP Unused Contributions, Trans	fers,
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		_	_	_	_			

# **Options>Pricing**

Tax practitioners likely bill out their work by the hour or by the return. In either case, with its *Pricing Schedules*, ProFile lets you choose one method, or both.

In the Pricing Schedule window below, you can:

- Record your GST Registration Number and tax rates and you can set your invoice numbering sequence
- Indicate whether you want to provide a detail or summary invoice to your clients
- Choose whether to bill by tax schedule or by the hour
- Establish your per-schedule pricing
- Carry forward last year's pricing to the current year

Pricing Schedule			?	×
GST Registration Number:	GST/HST rate	0.0		
Next Invoice Number:	PSI rate	0.000		
Automatically Increment In	voice Number			
1. 2018 T1/TF 2 2. 20	17 T1/TP1 😈 3. 2016 T1/TP1 🔟 4. 2 3 /TP1	77 5. 2014 T1/TP1	11 6. 201	• •
Invoice type: X Detailed	Brief Invoice by: Schedule Hou	t		^
T1	Basic charge	paper filed	0.00	
T1	Basic charge	electronically filed	0.00	
S1	Federal tax calculation	per schedule	0.00	
S2	Amounts transferred from your spouse	per schedule	0.00	
S3	Capital gains (or losses)	per schedule	0.00	
S3	Capital gains (or losses)	per item	0.00	
s3 4	Principal Residence	per item	0.00	
S4	Statement of investment income	per schedule	0.00	
S4	Statement of investment income	per item	0.00	
<b>S</b> 5	Eligible / infirm dep / caregiver amounts	per schedule	0.00	
S5	Amount for an eligible dependant	per claim	0.00	
S5	Amounts for infirm dependants	per claim	0.00	
< C	<u>^</u>	4.7	0.00	>
ОК	Print Carry Forward Cancel	Help		
	5			

If you bill for your time, you can keep track of billable hours with ProFile's built-in timer. You'll find the Timer checkbox on the Edit tab of the Environment option.



# Saving your Settings

Personalizing all of ProFile's options and settings might take hours. Which may lead you to ask the following questions:

- Do I need to do this on every computer in my office?
- Do I have to repeat all these steps every time I install a new instance of ProFile?
- Do I need to repeat these steps if I purchase a new computer?
- How do I prevent someone from making changes to my own settings?

Fortunately, the answer to the first three questions is an emphatic "No," and, in the next few paragraphs, you'll learn how to save your settings for future ProFile installations or share them with other users in your office. First, though, let's show you how you can prevent anyone from making unauthorized changes to your settings.

#### **Options>Password**

• To protect your option settings, simply enter and confirm your options password.

🜈 Set Options/D	elete Password	?	$\times$				
Old password							
Password:							
New password							
Password:							
Confirm:							
EFILE Options (including the set up of login information) are configured through the EFILE > Options menu.							
	OK Canc	el					

It's important to safely record and store your options password as the ProFile support team may not be successful in helping you retrieve it.

#### **Options>Administration**

ProFile lets you save the global settings (those described just above) in a folder that's separate from the program files. This means if you upgrade or replace your computer, or if you reinstall ProFile, you can easily reestablish your customized options. In addition, in a network environment, multiple users can point to one uniform options package that specifies settings such as file location and tax preparer information.

- To view where ProFile stores your global settings, click *Options* and select *Options Administration*.
- The window below tells you your settings will be stored in an *Options Package* subfolder that's located within the *My ProFile Data* folder
- To save your customized settings in the *Options Package* subfolder, click *New*. <sup>2</sup> Any new setting will appear in the *Options Package* area <sup>3</sup>

Options	Administration			?	×		
My Folder: Apply options from this computer.     Apply options from this computer.     Shared Folder: Load options package highlighted below.     Shared Folder: Ask which options package to load on startup.     Acustom: Try to load package from option package groups until available package is for							
Include preparer and discounter name with Option packages. Prompt to save changes. Allow multiple Options package groups Option package directory  VM 1 ProFile Date\Options Package Browse							
3	Peckages		New Delete Load Save	2			
	ОК	Cancel	Help				

- After clicking *New*, enter a name for your customized settings, and click *OK*
- Your settings are now saved in ProFile's Options Package subfolder

New Settings			?	×
Settings Name				
General PF Set	tings			
	OK	Cancel		

Should you, in the future, need to reinstall ProFile, or if you add a new user or computer, return to *Options>Administration* and then:

- Select the applicable radio button (in this example, an office of a sole tax preparer)  $\blacksquare$
- Highlight the Options Package
- Click Load, and ProFile will apply your settings
- Note that you can optionally click the Multiple Options checkbox to create more than one package

Options	Administration			?	$\times$			
<b>()</b> 1.	My Folder: Apply options from th		Leam more					
02.	Shared Folder: Load options par	ckage highlighted below.						
O 3.	Shared Folder: Ask which option	s package to load on star	tup.					
<u> </u>	4. Custom: Try to load package from option package groups until available package is found.							
Option p	mpt to save changes. w multiple Options package group ackage directory Home\Documents\My ProFile Dat	s 4		Browse				
Options	Packages							
Ge	neral PF Settings	~		New				
2				Delete				
			3	Load				
				Save				
	ОК	Cancel	Help					

# Chapter 2 Quiz

Question 1: True or False: You can install ProFile for a single-user or in a multi-user environment

Correct answer is True

**Question 2:** ProFile's Flexible licensing lets you:

- A. Allow up to ten simultaneous ProFile users
- B. Keep ProFile running in the background
- C. Ensure that multiple users have access to their files
- D. Install ProFile on multiple computers for non-concurrent usage

#### Correct answer is D

**Question 3:** ProFile's *Environment* options has features that include:

- A. A file tab to indicate the location of saved tax files
- B. A tax preparer tab to record names, addresses and other contact information
- C. A systems tab to enable Live Community and other online features
- D. All of the above

Correct answer is D

Question 4: True or False: You can EFILE tax returns without setting any EFILE Options

**Correct answer is FALSE** 

Question 5: True or False: There is an option to lock a tax file and thereby prevent further changes

**Correct answer is True** 

Question 6: What is the key difference between Environment and Module options?

- A. Environment options are used by a tax preparer, Module by a systems administrator
- B. There is no key difference between the two options
- C. Unlike Environment options, Module options are module and year specific
- D. None of the above

#### Correct answer is C

Question 7: True or False: ProFile cannot create PDFs of a tax file.

**Correct answer is False** 

Question 8: True or False: ProFile has an option that lets you invoice your clients

Correct answer is True

Question 9: The ability to save all your option settings is found by clicking:

- A. File > Save Tax Settings
- B. Settings > Options
- C. Options > Administration
- D. None of the above

#### Correct answer is C

**Question 10:** True or False: To prevent unauthorized changes to your settings, ProFile lets you create an options password.

#### **Correct answer is True**



# Chapter 3 **A Tour** of ProFile

# **Learning Objectives**

# At this chapter's end students will understand:

- How to navigate in ProFile
- How to set various display options
- How to use ProFile's auditor
- How to decipher font colours and field symbols
- How to enter data
- How to use memos and tapes
- How to work with the Form Explorer

# Additional Resources

This document provides numerous resources to accounting professionals. Refer to these sites to explore additional training opportunities

Professional Accounting Software

Tax Preparation & efiling Return Software

Professional Tax Software Training

# Chapter 3: A Tour of ProFile

# **NAVIGATING IN PROFILE**

# Tabs, Menus and Tools

It's easy to find your way around ProFile. No matter the type of return you work with, you will always see the same ProFile user interface—commonly known as MAUI (Multiple Access User Interface). This means, no matter the type of return you are preparing, ProFile's uniform menus, toolbars and tabs make navigation a snap.

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#### Tabs

Every time you create a tax return, ProFile displays a tab for each open form. You'll see the tabs just above the form you're currently working in, and you can navigate to any open form by clicking its tab.



You have the option to display the form name and icon on each tab, or just form name itself. Go to the Display tab of the Options>Environment window to choose your preferred setting.

#### The Menu Bar

As with all software applications, you can use the *Menu Bar* to navigate in ProFile. Using menus, you can, for example, create or open tax files, setup preferences, arrange windows, and jump to specific areas of a tax file.



#### **The Toolbars**

Toolbars consist of icons that let you quickly and easily move around in ProFile. You can view (or hide) ProFile's three toolbars by clicking *Options>Toolbars* 

• The three toolbars are: Audit and review marks, Forms and Shortcuts



• The Audit and review marks toolbar lets a partner or preparer approve or request changes to any line on a tax return. We'll discuss review marks later in this chapter.



• The *Shortcuts* toolbar features icons that let you jump to a specific area. With shortcuts, you can, for example, create or carry-forward tax files, find tax forms, toggle between spousal returns; print single schedules or complete returns; open additional forms; and view file properties

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		_	

- The *Forms* toolbar, or JumpBar, is a customizable area on the toolbar that lets you add a favourite form—making it "stick"—and rendering it available in any tax file. Once you add a form to the JumpBar, it becomes a mouse click away on every tax return that you open.
- To add a form to the JumpBar, click and hold the form's tab, and then drag it over to the JumpBar



# **Display Options**

On the toolbar below, the *Spousal* icon indicates that two tax files are open (one for each spouse). Clicking that icon will toggle between the spouses' returns and display each one on your monitor in turn.



• If you prefer viewing both spouses' files at the same time, click the *Tile* icon to view each tax file, tiled horizontally one above the other

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Canada Revenue Agence du revenu	Protected b when completed
Agency du Canada	2019
Income Tax and B	Renefit Return
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Before you start: If you are filling out this return for a deceased person, make sure you	enter their information in all the boxes in Step 1
Oten 4 Identification and other information	enter men monnation in an tie boxes in step 1.
Step 1 – Identification and other information	ON
Identification	Information about you
Print your name and address below	Enter your appiel insurance surgers (SNI): 480,084,385
First name and initial	Enter your social insurance number (SiN). 409 904 300
John	Enter your date of birth: 1976/10/10
Last name	
Arma	Your language of correspondence: English Français
2331 Main St	
PO Box RR	Is this return for a deceased person?
	Ensure the SIN information above is for a deceased person.
City Prov./Terr. Postal code	person enter the date of death: V000//mm/dd
anytown ON M1A 1A1	
<u> </u>	
Medified 00.10.55 [FUID FUED FUED FUED A	12 442 75
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0 1 RRSD/DRDD 6 2 T4 7 3. T1 6 4 S11 8 5 Dependent 6 52	1 7 Medical 1 8 Summany 1 84 9 T778 1 Donations
Step 1 – Identification and other information	
	ON 8
Identification	Information about you
Print your name and address below.	Enter your social insurance number (SIN): 111 111 118
Martha	Year/Month/Day
Last name	Enter your date of birth:
Mar	Your language of correspondence: English Français
Mailing address: Apt No. – Street No. Street name	Votre langue de correspondance : X
PO Box PR	Is this return for a deceased person?
	Ensure the SIN information above is for a deceased person.
City Prov./Terr. Postal code	If this return is for the deceased Year/Month/Day
anytown ON M1A 1A1	person, enter the date of death: yyyy/mm/dd
<	×

• If you use multiple monitors, you can display a file on each screen, Click the *Launch* icon to create a floating window for the second file, and then then drag it over to your second monitor

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PO Box Canada Revenue Agence du revenu Agency du Canada	
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anytown	Benefit Return
Before you start:	
By providing an email addres	u enter their information in all the boxes in Step '
the CRA and agree to the T Step 1 – Identification and other information	
Enter an email address:	
Identification	Information about you
Enter your province or territe First name and initial	Enter your social insurance number (SIN): 489
residence on December 31 John	Enter your date of birth:
Last name	Your language of correspondence: English
you currently reside if it is Mailing address: Apt No. – Street No. Street name	Votre langue de correspondance :
same as your mailing addres 2331 Main St	le this return for a deconsed perce
PO Box RR	Ensure the SIN information above is for a deceased person.
City Prov./Terr. Postal code	If this return is for the deceased
Modified 04:54:08 anytown ON M1A 1A1	person, enter the date of death: y:
٢	>
Modified 00:20:14 EFILE: Eligible Balance/Ref (13,443.7	5) + //

• You can also use the Windows menu to cascade, tile or manually arrange your open windows

PROFILE - [2019 T1/TP1: Arma, John - T1 jacket]	×
Pile Edit Audit Goto Form Options EFILE Online Train	aining Window Help _ &
📄 - 🖻 🛅 - 🔲 🚳 🛞 🗟 📝 🖬 🗛 🐸	Tile Horizontally
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# **The Auditor**

ProFile comes with a comprehensive auditor that constantly scans a tax file and alerts you to missing or erroneous information. ProFile's auditor also makes suggestions for optimizing a tax return, and it reminds you about memos you may have entered, amounts you may have calculated, or review marks that you annotated on a tax return. ProFile, in fact, has two types of auditors. Let's look at each one.

#### **The Passive Auditor**

As you work on a tax file, the *Passive Auditor* constantly scans the return and, when it detects a potential error, highlights that area of the tax file with a yellow background. When you move your cursor over that yellow field, the passive auditor opens a context-sensitive message.

• In the example below, ProFile's *Passive Auditor* highlights Box 16 of an individual's T4 slip. When you hover your mouse over that field, ProFile's auditor cautions that the recorded CPP amount differs from CRA's suggested value.

🚯 <u>1</u> . Info 🛛 🗊 <u>3</u> . Summary 🗎	77 <u>4</u> . T1 🛛 🖗 <u>2</u> .	T4	🗢 <u>5</u> . S11   🙀 <u>6</u> . De	ependant   🙀 <u>7</u> . 177	78 🔂 <u>8</u> . T5 +			
T4 Statement of Remuneration Paid T4 Slip								
		Box	Slip #1	Slip #2	Slip #3	Slip #4	Total	
			•			•		
Description			ABC Inc					
Province of employment		10	Ontario	-	-	<b>-</b>		
Employment income		14	61,000.00	0.00	0.00	0.00	61,000.00	
Employee's contributions	CPP	16	2,222.00	T4 Box 16 (CPP pre	miums) may be inco	orrect. CRA's 0.00	2,222.00	
QPP		17	0.00	formula suggests \$	2,748.90. Please cheo	ck. 0.00	0.00	
	El premiums	18	850.00	0.00	0.00	0.00	850.00	
	PPIP	55	0.00	0.00	0.00	0.00	0.00	
Exempt	CPP/QPP	28	No	No	No	No		
	El		No	No	No	No		
	PPIP		No	No	No	No		
Employment code		29		v	*	-		
RPP contributions		20	0.00	0.00	0.00	0.00	0.00	
Pension adjustment		52	0.00	0.00	0.00	0.00	0.00	
Income tax deducted		22	24,000.00	0.00	0.00	0.00	24,000.00	
El insurable earnings		24	53,100.00	0.00	0.00	0.00	53,100.00	
CPP/QPP pensionable earn	ings	26	57,400.00	0.00	0.00	0.00	57,400.00	
PPIP insurable earnings		26	0.00	0.00	0.00	0.00	0.00	
Onion dues		44	0.00	0.00	0.00	0.00	0.00	
Charitable donations 46 0.00					0.00	0.00	0.00	
Other information			0.00	0.00	0.00	0.00	0.00	
Cleidy Answer	$\sim$	J~~~~~	u		- <u>0.00</u>	$\sim \sim \sim 0.00$		

Other examples of ProFile's *Passive Audit* messages include:

- Missing data that is necessary for filing
- Missing EFILE information
- Amounts on tax slips that fall outside the tolerance range (as in the CPP example above)
- Opportunities for additional claims (for example, the taxpayer is eligible for a disability amount)
- Claims that may be more beneficial on a spouse's return
- Filing requirements specific to a return (taxpayer subject to minimum tax)
- Suggestions to reduce a claim (excessive RRSP deduction or unnecessary CCA claim)
- Planning opportunities
- Other forms or elections that may be necessary but have not been included in the tax file

#### **The Active Auditor**

The *Active Auditor* displays a list of audit messages that apply to the current tax file. These include passive audit messages mentioned above, as well as additional warnings such as notices or processing errors, EFILE messages, fields with memos or calculations attached, overridden fields, or fields with review marks attached.

To display the *Active Auditor*, click its toolbar icon or press *F9* on your keyboard. The *Active Auditor* will then display at the bottom of your screen.



Note the tabs in the audit window. These tabs include:

- Summary which consolidates all messages from the other tabs
- *Warnings* that indicate potential processing problems, including messages about data may have been overlooked
- *Notices* that alert you to important dates or deadlines. Notices also alert you to amounts that fall outside a calculated range
- Sign-offs which display Review Marks that a partner or tax preparer added to the tax return
- Issues for any field that has a correction or question review mark attached to it
- Overrides that alert you to a change that you made to a field's calculated amount
- Memos to remind you that you attached a note to a field in the tax file
- *EFILE* warnings to prevent you from EFILING a tax file. In addition, any messages originating from CRA, after an EFILE was processed, will appear here.
- Carry forward that lists all the data brought forward from a prior year's return
- Tapes that highlight a field where ProFile's calculator was used
- Variance that highlights any changes made after you took a snapshot of the tax return
- Data Import that lists taxpayer data imported using CRA's Auto-fill My Return

#### Acting on audit messages

- To act on an audit message, double click that message.
- ProFile will open the applicable form, circle the item, and add a yellow background to the field

PROFILE - [2019 T1/TP1: Arma, John - Statement of remuneration paid] - C X									×		
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T4 Statement of Remuneration Paid T4 Slip											
		Box	Slip #1	Slip #2	Slip #3	Slip #4	Total				
			•			<u> </u>					
Description			ABC Inc								
Province of employment		10	Ontario								
Employment income		14	14,000.00	0.00	0.00	0.00	61,000.00				
Employee's contributions	CPP	1	2,222.00	0.00	0.00	0.00	2,222.00				
	QPP	17	0.00	0.00	0.00	0.00	0.00				
	El premiums	18	850.00	0.00	0.00	0.00	850.00				
	PPIP	55	0.00	0.00	0.00	0.00	0.00				
Exempt	CPP/QPP	28	NO	NO	NO	NO					
			NO	NO	NO	NO					
Employment code	FFIF	29	NO	NO	110	110					
RPP contributions		20	0.00	0.00	0.00	0.00	0.00				
Pension adjustment		52	0.00	0.00	0.00	0.00	0.00				
Income tax deducted		22	24,000.00	0.00	0.00	0.00	24,000.00				
El insurable earnings		24	53,100.00	0.00	0.00	0.00	53,100.00				~
🔍 Summary 🍳 Warnings	🔍 Notices 🦂	Sigi	n-offs 🗰 Issues	🔒 Overrides 📝	Memos 🔸 EFILE	🝁 T1135 🗦 Onlin	ne change  😟 Data I	Import 😟 Carry forwards	📱 Tapes 🍳	Variance	• •
Rotice T4/1 T4	Box 16 (CPP pren	niums	) may be incorrect. (	CRA's formula sugge	sts \$2,748.90. Please	check.					^
Notice Dependant/1 Ple	ase enter a valid	SIN.									
Notice Dependant/2 Ple	ase enter a valid	SIN.				71000					
Notice (1206 If a	iny income report	ted by	taxpayer is taxable a	as 'split income', ent	er the details on Forr	n 11206. avid be deducted?					~
Modified 00:2	25:21 EFILI	E	in the second second	Eligible Baland	ce/Refund	(13,336.81)					+

# **Personalizing ProFile's Auditor**

#### **Options>Environment**

Chapter 2 described how *Options>Environment* allows you to personalize ProFile to your requirements. The *Audit* tab, also found under *Options>Environment*, lets you choose how you'd like to work with ProFile's *Auditor*. From this window, you can:

nviron	nment Op	tions								?	×
Edit	Display	File	Preparer	Discounter	Trustee	Audit	System	HyperDocs	PDF	Notifications	
Prefe	rences										
٧P	assive Auc	litor			🗹 Cin	le Field:					
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	lear Revie	w Marks	on edit								
Sum	mary Tab I	ncludes			Audit S	Summary	Includes				
>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	/arnings lotices teparer Sig anther Sign-off iorrection M luestion M lvertides femos	gn-off h-off Marks arks		•		arnings tices sparer Sig rtner Sig Sign-off rection M rection M renides mos	gn-off n-off Marks arks				Í
Preve	ent Filing										
NT NN	/arnings lotices lo Sign-off orrection M luestion M lverrides	Aarks arks				EFII SEN EDI EDI Mag	nos LE Errors ID Errors Errors Warnings Media Er	1015			
<											
Rem	ove Audit I	Message	88								
0	n Preparer	Sign-of	F		🗹 On Pa	rtner Sig	n-off				
Remi	ove Audit I in Preparer	Message Sign-of	es f		🗹 On Pa	rtner Sig	n-off				

- Enable or disable features such as the *Passive Auditor*, review marks and circled fields
- Choose the information to display on the *Summary Tab* of the *Active Auditor*
- Determine the audit messages that will prevent ProFile from EFILING a return
- Remove audit messages on partner or preparer sign-off

# **PUTTING IT ALL TOGETHER**

# **Getting Started**

Up to this point, you learned about ProFile's set-up options, and you also read about ProFile's overall features and functions. In this section, we'll tie all that information together and show you how those features help you become an effective and efficient tax preparer.

#### Where to start

You start by either creating a new tax return or carrying forward a file from the previous year, and you accomplish either of those tasks by clicking the appropriate icon on the toolbar.



Over and above its own prior-year files, ProFile lets you carry forward files prepared in other tax applications including TurboTax, CanTax and TaxPrep. In addition, you can carry forward DT Max files by clicking, File > DT Max Carry Forward

Marry forward fi	le							×
<u>1.2018 T1</u>	▼ 12 <u>3</u> .T2		<u>1.2017</u>	T3 🔻	🖾 <u>6</u> .2018 FX	T		
Look in:	2018T1			~				
Returns	Name	Size	Item type	Date modified				^
💼 2018 T1	📜 BackupFiles		File folder	11/1/2019 10:				
	🚸 Balzac, Sarah	76.5 KB	ProFile 20	9/21/2019 11:				
	🚸 Carsonn, An	76.4 KB	ProFile 20	9/22/2019 2:0				
Shortcuts	🚸 Carsonn, Carla	30.1 KB	ProFile 20	9/22/2019 2:0				
🚮 Desktop	🔶 Carsonn, Joh	34.4 KB	ProFile 20	9/22/2019 2:0				
ڬ My Documents	• FORECAST	1.35	ProFile 20	7/19/2019 11:				
	🚸 Hruzec, Sam	43.6 KB	ProFile 20	9/22/2019 3:2				
	🚸 Joonna, JAne	25.0 KB	ProFile 20	11/13/2018 6:				
	ModTp12018	34.4 KB	ProFile 20	1/16/2019 12:				
	🚸 Shepard, Jane	34.7 KB	ProFile 20	11/1/2019 10:				
	A Christen Dan	RORVD	Dro Eilo 00	0/00/0010 2-0				
File name:							~	Carry forward
Files of type:	2018 ProFile T1 (*.	18T)					~	Cancel
	2018 TurboTax T1	(*.TT18)						Holp
	2018 Cantax(tm) 1 2018 TayProp(tm)	1 (1.P18) E1 (* 119)						rieip
	2018 ProFile T1 (*.:	18T)						

Whether you start with a new or carried-forward return, keep the following in mind:

- ProFile opens a tax file at the *Personal Information* page. This is where you enter the taxpayer's contact information, as well as residency, marital status and other information
- ProFile automatically opens other forms and schedules, such as the T1 Jacket. You can tell which forms are open by glancing at the forms' representative tabs
- The yellow fields denote the Passive Auditor's warnings about missing information

#### 2019 Personal information Info Taxpayer personal information Marital status Indicate your marital status on December 31, 2019 SIN 1 Married 2 Living common-law 3 Widowed Title First name 4 Divorced 5 Separated 6 X Single Last name If status changed in 2019, enter date of change mm/dd Last name changed in 2019? Yes X No Yes X No Were you married or living common-law at any Do you want to change your address? \_\_\_\_\_Yes \_\_\_\_<u>N</u>o time in this tax year? Care of Residency Street address Apt # R.R. P.O. Box Province of residence City on 2019/12/31 Ontario Province Province of self-employment Postal code If you became or ceased to be a Canadian resident in Primary phone ) entry mm/dd 2019, enter date of: yyyy/mm/dd Birth date Age or departure mm/dd yyyy/mm/dd Date of Death Male Eemale Gender Province or territory where taxpayer resides if different from mailing Yes X No Are you a non-resident? address: Residency status Resident CRA online mail: Already registered Yes X No Country (other than Canada) Did you dispose of a property (or properties) in 2019 for which you are Email address: claiming a principal residence exemption? Yes X No By providing your email address or updating an already registered email address, I understand I am registering for online mail and Use preparer address for: accept the terms and conditions that are set out on page 2 of the form X Nothing Notice of Assessment and Refund N of A T183. Paper notices will not be mailed to me from the CRA. T1 mailing address Do you want preparer to get <u> Y</u>es <u>X N</u>o Electronic Notice of Assessment? By checking yes on the box above, I am allowing the CRA to electronically provide my assessment results and my notices of assessment and reassessment to the electronic filer (including a discounter) named in Part C of T183. I will now receive a copy of my notices of assessment and reassessment from my electronic filer.

#### **Entering data**

- Even though ProFile automatically opens the tax jacket, it's important to note that you enter data on supporting forms and schedules, and not directly on the jacket itself.
- When you click on the *T4* tab, ProFile will launch the *T4 Slip* window which, after you enter an employee's earnings, will look like this

T4 Statement of Remuneration Paid T4 Slip									
		Box	Slip #1	Slip #2	Slip #3	Slip #4	Total		
	_		•				<u>.</u> Y		
Description			ABC INC				ł		
Province of employment		10	Ontario	-		•			
Employment income		14	65,999.00	0.00	0.00	0.00	65,999.00		
Employee's contributions	CPP 2	16	2,593.00	0.00	0.00	0.00	2,593.00		
	QPP	17	0.00	0.00	0.00	0.00	0.00		
	El premiums	18	858.00	0.00	0.00	0.00	858.00		
	PPIP	55	0.00	0.00	0.00	0.00	0.00		
Exempt	CPP/QPP	28	No	No	No	No	5		
	EI		No	No	No	No	}		
	PPIP		No	No	No	No			
Employment code		29		~	*	*			
RPP contributions		20	0.00	0.00	0.00	0.00	0.00		
Pension adjustment		52	0.00	0.00	0.00	0.00	0.00		
Income tax deducted		22	12,500.00	0.00	0.00	0.00	12,500.00		
El insurable earnings	3	24	52,000.00	0.00	0.00	0.00	51,700.00		
CPP/QPP pensionable earni	ings 4	26	55,900.00	0.00	0.00	0.00	5 55,900.00		
PPIP insurable earnings		56	0.00	0.00	0.00	0.00	0.00		
Union dues		44	0.00	0.00	0.00	0.00	0.00		
Charitable donations		46	0.00	0.00	0.00	0.00	0.00		
Other information									
Clergy housing allowance			0.00	0.00	0.00	0.00	0.00		
Transfer allowance to T1223	17			-	-	-			
Board and lodging		30	0.00	0.00	0.00	0.00	0.00		
Special work site		31	0.00	0.00	0.00	0.00	0.00}		
Travel in prescribed zone	~~~~~	32	0.00	0.00	0.00	0.00	0.00}		

# **Colours, Diamonds and Arrows**

#### Learning about colours

A close glance at the window above reveals fields that have different font colours. Here's what those colours signify:

Fields with ...

- Purple fonts denote data carried forward from a prior year
- Black fonts are for direct data entry
- Red fonts mean that you overrode a calculated field
- Blue fonts indicate a field calculated by ProFile
- Green fonts denote a locked field

#### **Arrows and Diamonds**

The right edge of certain fields may display an up-arrow, a down-arrow, or a diamond. Here's what those diagrams signify:

• If a field displays a *down* arrow, then a dropdown menu exists for that field

Residency		
Province of residence		
on 2019/12/31	Ontario	
Province of self-employment	NA	^
If you became or ceased to be a 0	British Columbia	
2019, enter date of:	Alberta	
	Saskatchewan	
	Manitoba	
	Ontario	
	Québec	
Are you a non-resident?	New Brunswick	$\mathbf{v}$
Residency status	Resident	Ŧ
and town town		

- When a field displays an *up* arrow, it means the data in that field originates from another form. In addition, ProFile displays amounts in those fields in blue font
- When a field has an up-arrow view, double-click it (or press F6) and ProFile will jump to the referenced form

					Pr	otected B when com	pleted	`	
Attach only the document	ts (schedules, information slips, fo	rms, or receipts) r	eques	sted to support any c	laim or deduction. Keep	all other supporting o	locuments.		
Step 2 - Total in	ncome								
As a resident of Canada	vou have to report your inco	ome from all sou	urces	both inside and ou	tside Canada.				
The Income Tax and Ber	nefit Guide may have additior	al information f	or cer	tain lines. 🛛 🦰					
Employment income (box 14 (	of all T4 slips)				10100 90,00	0 00			
Tax-exempt income for emer	gency services volunteers								
(See line 10100 in the guide.)	)	1	0105	0.00					
Commissions included on line	: 10100 (box 42 of all T4 slips)	1	0120	0 00 🕯					
Wage loss replacement contr	ibutione (See line 10100 in the qui	1a) <b>1</b> 1	0130	പറ 🖻					
Other employment income	T4								T/ Clin
Old age security pension (bo	Statement of Remuneration	Paid							14 Silp
CPP or QPP benefits (box 20			Por	Slip #1	Slip #2	Slip #2	Slip #	4	Total
Disability benefits included or			DOX	Slip #1	Slip #Z	Slip #5	Sub #	4	Total
Other pensions and superan				1 Deather			-		1
line 31400 in the Worksheet	Description			Parker					
Elected split-pension amount				Enterprises					
Universal child care benefit	Province of employment		10	Ontario					
UCCB amount designated to	Employment income		14	90 000 00	0.00	0.00	Ě (	0 00	90,000,00
Employment insurance and o	Employee's contributions	CPP	16	2,748.00	0.00	0.00		0.00	2,748.00
Employment insurance mater		QPP	17	0.00	0.00	0.00		0.00	0.00
<		El premiums	18	860.00	0.00	0.00		0.00	860.00
		PPIP	55	0.00	0.00	0.00	(	0.00	0.00
	Exempt	CPP/QPP	28	No	No	No	No		
		EI		No	No	No	No		
		PPIP		No	No	No	No		
	Employment code		29		-	-	*		
	RPP contributions		20	0.00	0.00	0.00	(	0.00	0.00
	Pension adjustment		52	0.00	0.00	0.00		0.00	0.00
	Income tax deducted		22	19,000.00	0.00	0.00		0.00	19,000.00
	El insurable earnings		24	53,100.00	0.00	0.00		0.00	53,100.00
	CPP/QPP pensionable earn	iings	26	57,400.00	0.00	0.00		0.00	57,400.00
	PIP insurable earnings			0.00	0.00	0.00		0.00	0.00

#### **Overrides**

If you decide to override a calculated field, ProFile does two things; it displays a red diamond in that field, and it also displays the overridden amount in red font.

T4 Statement of Remuneration Paid								
		Box	Slip #1	Sli				
			•					
Description			ABC INC					
Province of employment		10	Ontario					
Employment income		14	65,999.00					
Employee's contributions	CPP	16	2,593.00	•				
	QPP	17	0.00					
	El premiums	18	858.00					
	PPIP	55	0.00					
Exempt	CPP/QPP	28	No	No				
	EI		No	No				
	PPIP		No	No				
Employment code		29		-				
RPP contributions		20	0.00					
Pension adjustment		52	0.00					
Income tax deducted		22	12,500.00					
El insurable earnings	24	52,000.00						
CPP/QPP pensionable earni	26	55,900.00						
PPIP insurable earnings	56	0.00						
Union dues		44	0.00					
Charitable donations		46	0.00					

Overrides are great for "what if?" scenarios. After you complete your what-if analysis, just press the F2 key to cancel the override and return that field back to ProFile's original, calculated value.

# **Memos and Tapes**

ProFile's memos are great for embedding notes and reminders into any field on a tax return. And you can use ProFile's calculator to add up a series of numbers and enter the total into any field of the tax return.

#### **Using Memos**

- To record a memo, click into any field
- Press the F8 key
- Type in your note
- Click OK

Ask client to confirm this amount		
☐ <u>C</u> arry-forward to next year Inse Review Mark		
Carry-forward to next year     Inse     Review Mark		
☐ ⊈arry-forward to next year Inse Review Mark		
<u>C</u> arry-forward to next year     Inse     Review Mark		
Carry-forward to next year Inse		
Review Mark	t Date !	Stamp
Tromon Prant	( D dio	r camp
None ○ ✓ Preparer ○	<b>X</b> <u>E</u> n	or
O ✔ Pa <u>r</u> tner O	<u>Q</u> u	estion
0K Cancel		low

#### **Using Tapes**

- To use *Tapes*, click on a field
- Press CTRL+F8
- In the window that opens, enter a description (optional), and a value on each line
- Press the = key and ProFile will paste the sum directly into the selected field

🌈 Таре	*****	? ×		
Jan		120.00	÷	
Feb		144.00		
Mar		148.00	÷	
Apr		141.00	÷	
	+/-	- 0.00	÷	
Descriptions Post Decimals 2 \$				
L Carry-rorward de	escriptions			
Larry-rorward de	Course	C	J	

When you record a memo, or use a tape in a field, ProFile puts a green background in that field. To display the underlying memo or tape, just hover your mouse over that field

ý,	۱.	Carrying charges and interest expenses				1
Ş		Accounting fees		0 00		1
}		Management or safe custody fees		0 00		1
ş		Investment counsel fees		0 00		1
9		Reported on T5013 slips		0 00		1
4				0 00		1
1		Legal fees paid to collect, establish or increase the amount of support payments		0 00		1
Į		Interest on money borrowed to earn interest, dividend, and royalty income		558.00	Jan 120.00 +	
3		Interest on money borrowed to acquire an interest in a limited partnership or a partnership in whi	ch you are not	20	Feb 144.00 -	
j		an active partner:			Mar 148.00	
£		Tax shelter	0 00		Apr. 141.00	
)		Rental and leasing property	0 00		Tetal 552.00	
5		Resource property	0 00		10tai 555.00	
Į			0 00	0 00		1
)		Enter-this amount on line 221 of your return.		553 00	man man	
	_					_

# Finding What You Need

When preparing a tax return, you will want to add additional forms and schedules. And, given you don't enter data directly on the tax jacket, this means you have to find those supporting forms and schedules somewhere in ProFile.



Though ProFile's toolbar includes a *Search* field that lets you enter the name of the form or schedule that you need, you may want a little more horsepower than that. You may indeed want to use *The Form Explorer*.

# THE FORM EXPLORER

If you don't know the name of the form that you'd like to open; if you only know the line number you'd like to access; if you'd like to see the forms that were used on this—or the prior year's—return, then *Form Explorer* is for you.

• To open the Form Explorer, click on the Filing Cabinet icon, or just press your keyboard's F4 key

	V Form Explorer					?		X
	📶 Taxpayer, Amy			- M . H . [			1	
4	Eorm: I		_	Open Print N	ew L	ist <u>D</u> etail	<u>K</u> ey	Line
_	Forms	Name	Category 1	Description 2	Used	Last year	Step	^
	📜 <u>1</u> . Identification	🝯 Info	Identification	Personal information	Yes	Yes	1	
	<u>=</u> <u>2</u> . Slips	CarryFWD	Identification	Carryforward Summary	Yes	No	4	
3	📜 <u>3</u> . Income	💽 T2202/TL11	Slips	Tuition and education credit certificate	No	No	6	
Ľ	🦰 <u>4</u> . Deductions	IS T3	Slips	Statement of trust income Statement of remuneration paid	No Yes	No Yes	7	
	📜 <u>5</u> . Tax + credits	5 T4A	Slips	Statement of pension, annuity and other in	No	No	9	
	<u>6</u> . Return + sch	💽 T4ADAS	Slips	Statement of Old Age Security	No	No	10	
	📜 <u>7</u> . Filing	S T4AP	Slips	Statement of Canada Pension Plan benefits	No	No	11	
	📜 <u>8</u> . Client 🛛 💌	S TARCA	Slips	Statement of distributions from a RCA	No No	No	12	
	T1	I 4E	Slips	Statement of Employment Insurance and Statement of profit sharing plan allocations	No	No	13	
	TP1	T4RIF	Slips	Statement of income from a RRIF	No	No	15	~

- If you use Windows Explorer <sup>™</sup>, you'll be comfortable with ProFile's Form Explorer
- The right pane of the *Form Explorer* window includes column headings for each form's full name, its category, and its description
- Notice too, for carried forward files, the Form Explorer indicates whether a form was used in the current or prior year
- In the left pane, you'll find folders that let you filter which forms to display
- To find a form, just type its name in the search field

#### Form Explorer Icons

There are four icons at the top right of the *Form Explorer* window. These icons provide different view options. The bullets below explain each icon's purpose:

				1		_	
11 Taxpayer, Amy			¥ 🐘 📜	1		1	1221
orm: I			<u>Open</u> Print N		ist <u>D</u> etail	<u>K</u> ey	Lin <u>e</u>
Forms	Name	Category	Description	Used	Last year	Step	^
1 Identification	🕑 Info	Identification	Personal information	Yes	Yes	1	
T. Identification	👔 Dependant	Identification	Dependant information	No	No	3	
<u>2</u> . Slips		Identification	Carryforward Summary	Yes	No	4	
3. Income	ST2202/TL11	Slips	Tuition and education credit certificate	No	No	6	
4 Deductions	💽 T3	Slips	Statement of trust income	No	No	7	
<u>-</u>	💽 T4	Slips	Statement of remuneration paid	Yes	Yes	8	
<u>5</u> . I ax + credits	💽 T4A	Slips	Statement of pension, annuity and other in	No	No	9	
<u>6</u> . Return + sch	S T4ADAS	Slips	Statement of Old Age Security	No	No	10	
7. Filing	S T4AP	Slips	Statement of Canada Pension Plan benefits	No	No	11	
0.05	S T4ARCA	Slips	Statement of distributions from a RCA	No	No	12	
	💽 T4E	Slips	Statement of Employment Insurance and	No	No	13	
T1	T4PS	Slips	Statement of profit-sharing plan allocations	No	No	14	
TP1	S T4BIE	Slips	Statement of income from a RRIF	No	No	15	

- As the name implies, the *Detail* view provides complete information, such as category and description, for each form.
- The List view gives you a simplified view where all forms are displayed as icons.
- The *Key view* lets you use keywords to find the required form. This view is ideal when you know what information you're searching but you're not sure of the form's name.
- Lastly, the *Line* view provides a line by line listing of all available forms. You find a form, in this view, by entering a tax line number in the Form field

#### One more thing

• If you right-click inside the *Form Explorer* window, you will open a dialog box that lets you choose whether to print, open or sort the *Form Explorer* view. Your options include sorting by name, category, descriptions, step or by whether the form was used



# THE DATA MONITOR

As you add information, and append more forms to the return, ProFile constantly updates the taxpayer's tax status. At the very bottom of the window, ProFile displays an at-a-glance summary of the taxpayer's tax status. This display is called the *Data Monitor*.

As you can see in the example below, the *Data Monitor* reveals that the taxpayer has a refund of \$339.60. The *Data Monitor* reveals other information too, including available GST credits and Internet Filing eligibility.

PROFILE - [2019 T1/TP1: Shepard, Jane - T1 jacket]	- 🗆 X
Pile Edit Audit Goto Form Options EFILE Online Training Wind	dow Help _ & ×
	📲 🏭 🕶 👘 🔍 📰 ⊊ 🖨 🖨 🗮 5a
① 1. Info     ① 2. 11     ③ 3. 14     ③ 4. RKSPLimit     +     □      □     □     □      □      □      □      □      □      □      □      □      □      □      □      □      □      □      □      □      □    □    □     □     □     □     □     □     □     □     □     □     □    □	_
Liew/Pearliew	BC 8
Identification Print your name and address below. First name and initial	Enter your social insurance number (SIN): 000 000 000
Jane Last name	Enter your date of birth:
Shepard Mailing address: Apt No. – Street No. Street name	Your language of correspondence:         English         Français           Votre langue de correspondance :         X
PO Box     RR       City     Prov./Terr.       Vancouver     BC       VOA 1A1	Is this return for a deceased person? Ensure the SIN information above is for a deceased person. If this return is for the deceased Year/Month/Day person, enter the date of death: yyyy/mm/dd
Email address By providing an email address, you are registering to receive email notifications from the CRA and agree to the Terms of use under Step 1 in the guide. Enter an email address:	Marital status       Tick the box that applies to your marital status on       December 31, 2019:       1     Married       2     Living common-law       3     Widowed       4     December 31
Information about your residence Enter your province or territory of residence on December 31, 2019: British Columbia	Information about your spouse or common-law partner (if you ticked box 1 or 2 above)
Modified 01:42:27 EFILE: Not eligible Balance/Refund	(339.60)

#### **Customizing the Data Monitor**

You can customize and add information to the Data Monitor.

- For example, to display line 15000, just highlight it
- Click the "+" sign at the bottom of the window
- You have just added Line 15000 to the Data Monitor
| PROFILE - [2019 T1/TP1: Shepa                     | rd, Jane - T1 jacket]               |               |                        |                    | - 0      | ×     |
|---|-------------------------------------|---------------|------------------------|--------------------|----------|-------|
| Eile Edit Audit Goto Er                           | arm Ontions FEILE Online            | Training W    | indow Help             |                    |          |       |
| File Edit Addit Goto Pr                           | onn options Erice Online            | naming w      | indow Help             |                    |          | - · · |
| 📄 - 📑 🚺 - 🖬 🙆                                     | ) 🏫 🔍 📝 📓 🔒                         | 🛬 = 👻         | - 🖬 🖬 - 🛍 🍈            | Q 📰 🚰 🚔            | 🗐 불 Se   |       |
| 🚯 <u>1</u> . Info 🔟 <u>2</u> . T1 💽 <u>3</u> . T4 | 🕘 <u>4</u> . RRSPLimit   +          |               |                        |                    |          |       |
| Taxable capital gains (Complete Schee             | dule 3.)                            |               | 12700                  | 0 00               |          | ^     |
| Support payments received                         | Total 12799                         | 0 00 👕        | Taxable amount 12800   | 0 00               |          |       |
| RRSP income (from all T4RSP slips)                |                                     |               | 12900                  | 0 00               |          |       |
| Other income                                      | Specify:                            |               | 13000                  | 0 00               |          |       |
| Taxable scholarship, fellowships, bur             | saries, and artists' project grants |               | 13010                  | 0 00 😭             |          |       |
| Self-employment income                            |                                     |               |                        |                    |          |       |
| Business income                                   | Gross 13499                         | 0 00          | Net 13500              | 0 00               |          |       |
| Professional income                               | Gross 13699                         | 0 00          | Net 13700              | 0 00               |          |       |
| Commission income                                 | Gross 13899                         | 0 00          | Net 13900              | 0 00               |          |       |
| Farming income                                    | Gross 14099                         | 0 00 🛑        | Net 14100              | 0 00 🔷             |          |       |
| Fishing income                                    | Gross 14299                         | 0 00 👕        | Net 14300              | 0 00               |          |       |
| Workers' compensation benefits (box               | 10 of the T5007 slip)               | 14400         | 0 00                   |                    |          |       |
| Social assistance payments                        |                                     | 14500         | 0 00                   |                    |          |       |
| Net federal supplements (box 21 of th             | e T4A(OAS) slip)                    | 14600         | 0 00                   |                    |          |       |
| Add lines 14400, 14500, and 14600. (              | See line 25000 in Step 4.)          |               | 0 00 14700             | 0 00               |          |       |
| Add lines 10100, 10400 to 11400, 115              | 00 to 11700, 11900, 12000,          |               |                        |                    |          |       |
| 12100 to 12500, 12600, 12700, 12800               | ), 12900 to 13010, 13500, 13700,    | This is a     | num total income 1500  | 00,000,00          |          |       |
| 13900, 14100, 14300, and 14700.                   |                                     | i nis is y    | our total income. 1500 | 90,000.00          |          |       |
|   |                                     |               |                        | Dratasted R when a | omploted | - 1   |
| Oton 2 Not in como                                |                                     |               |                        | Protected b when c | ompieted |       |
| Step 5 - Net income                               |                                     |               |                        |                    | _        | 、 * I |
|   |                                     |               |                        |                    |          |       |
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Removing a data monitor is easy. Just right-click it and select Delete

# THE POWER OF A *RIGHT-CLICK*

Right-click a form to get quick and easy access to additional functionality. Keep in mind, though, that a right-click is form dependent. For example, a right-click over an area of the T4, opens a window with a set of instructions including *Print, Carry forward, Close, and Copy Memos and Tapes* 

Copy field code	
Copy Memo/Tape	
Paste Memo/Tape	
Close form	Esc
Print form	
New window	
Launch window	
Create FX	
Create T3	
Carry forward	
Previous year's return	
Show auditor	Ctrl+F9
Environment	

• If you right-click on a field, you'll see additional commands, including *Link to related forms, Cut, Copy, Paste*, as well as *Insert/Delete columns* and *Attach Memo/Tape* 

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# **REVIEW MARKS**

*Review Marks* let you or approve, or request changes on, any field of a tax file. There are four different types of *Review Marks*.

• The *Preparer Sign-off* lets you confirm the amounts entered on each line of a return. It also allows you to approve any errors or issues signaled by the *Passive Auditor* 



• The *Partner Sign-Off* is similar to the *Prepare Sign-Off*, except that it's used in an office where a supervisor or partner approves all returns



• Use Correction Required to flag a field error on the return



• Use the Question Mark to tag a field for further analysis



#### **Using a Review Mark**

• In the example below, the Auditor warns you that a T4's CPP amount may be incorrect



- To indicate that the amount is indeed the correct T4 value, select *a Sign-off Review Mark* and click the yellow field
- ProFile adds a review mark to that field, and also signals it in the Sign-offs tab of the Active Auditor

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# Chapter 3 Quiz

Question 1: ProFile uses Tabs to:

- A. Indicate which forms are open on a tax return
- B. Create multiple copies of a tax return
- C. Toggle back and forth between different tax files
- D. All the above

#### **Correct answer is A**

Question 2: True or False: All of ProFile's toolbars are customizable

**Correct answer is False** 

Question 3: ProFile's toolbars include:

- A. Audit & Review Marks; Tax Prep; EFILE settings
- B. Audit & Review Marks; Forms; Shortcuts
- C. EFILE settings, Shortcuts, Archive and Save
- D. None of the above

Correct answer is B

Question 4: True or False: You can hide ProFile's three main toolbars

**Correct answer is True** 

Question 5: True or False: You can add any ProFile form to the JumpBar

**Correct answer is True** 

Question 6: You can use ProFile's display options to:

- A. Launch tax returns so that they display on two monitors
- B. Tile multiple tax returns
- C. Display multiple tax returns on a monitor
- D. All the above

#### **Correct answer is D**

Question 7: True or False: ProFile has two Auditors (Passive and Active)

**Correct answer is True** 

Question 8: True or False: A field with a yellow background indicates a Passive audit message

**Correct answer is True** 

Question 9: Which of the following types of messages might the Active Auditor display?

- A. Warnings that indicate potential processing issues
- B. A list of data carried forward from a prior year
- C. Notices to alert you to important dates or deadlines
- D. All the above

#### Correct answer is D

Question 10: True or False: You can go to the Environment option to personalize the Auditor

#### **Correct answer is True**



# Chapter 4 **A Basic T1**

# **Learning Objectives**

# At this chapter's end students will understand:

- How to prepare an individual's basic T1 tax return
- How to prepare a T1 for a married couple
- The A to Z of preparing a T1 for a client
- How to use CRA's EFILE system

#### Additional Resources

This document provides numerous resources to accounting professionals. Refer to these sites to explore additional training opportunities

Professional Accounting Software

Tax Preparation & efiling Return Software

Professional Tax Software Training

# Chapter 4: A Basic T1

## **T1 BASICS**

First of all, professional tax preparers rarely, if ever, use the term "tax return." Most will distinguish a tax return by its type. For example, tax preparers will simply call a personal tax return a "T1." Likewise, a corporate tax return is a "T2," and a trust return, a "T3."

In this section, we will explore the differences between a manually prepared T1 and one prepared in ProFile.

#### **Paper versus ProFile**

Chapter 1 illustrated a page of a hand-written T1. Let's explore how you would manually prepare a full T1 tax return using CRA's downloaded forms and schedules.

• Assume that Johnny Carsonn was a student during the tax year and that he also worked part-time. Here is the T4 slip—statement of remuneration—that Johnny received from his employer:

Anytown ON M1A 1A1	proyer's name - Nom de remployeur oFile 2021 Tour 12 Main St	Year Année 2019	Agence du revenu du Canada Statemen État de I	T4 t of Remuneration Paid a rémunération payée
54       Employer's account number / Numéro de compte de l'employeur       Province of employement. Employeers. El contributions – line 30800       El insurance 30800         Social insurance number       Exempt - Exemption       10       ON       16       280       50         12       487 487 589       28       Employee's name and address – Nom et adresse de l'employé       17       26       9,000         12       487 487 589       PECHRIO ALE RPAP       RPAP       Employee's CIPP contributions – line 30200       CPP/QPP pensionable         12       A87 487 589       PECHRIO ALE RPAP       RPAP       Employee's QPP contributions – line 30200       CPP/QPP pensionable         14       145       80       Reprover's El premiums – line 31200       Union dues – line         12       CARSONN       JOHNNY       Intal-initale       18       145       80         18       145       80       RPP or DPSP registrice       44       Charitable donations do l'employé         2020       Smith Street       JOHNNY       Pension adjustment – line 20000       RPP or DPSP registrice       18       145       18	ytown ON M1A 1A1	14	Employment Income – line 10100 Revenus d'emploi – ligne 10100	Income tax deducted – line 437 Impôt sur le revenu retenu – ligne
Social insurance number Numéro dissurance sociale       Exempt - Exemption CPP/QPP EI       10 ON Employment code 28       16 280,50       24 9,00         12       487 487 589       28       28       29       29       Employment code 29       Cotations de l'employé au PRO-line 30800 Cotations de l'employé au PRO-line 31200       CPP/QPP pensionalut Gaine ouvrant droit à pensi 26 9,00         Employee's name and address - Nom et adresse de l'employé Last name (n capital letters) - Nom de tamilie (en lettres moulées)       First name - Prenom Intal-Initale       Intal-Initale       18       145,80       44         CARSONN       JOHNNY       OHNNY       Charitable donations Cotsations de l'employé au nRO-line 30000       Charitable donations Dend de bientaliance         2020 Smith Street       JOHNNY       Pension adjustment - line 20000       RPP or DPSP registrin N'dragriement d'un RPJ	Employer's account number / Numéro de compte de l'employeur	Province of employment E	9,000 00	El insurable earnings Gains assurables d'AE
12       487 487 589       28       Employee's CPP contributions - line 30000       Call a contract docume       Cant a contract docume	Social insurance number Exempt - Exempti Numéro diseaurance sociale CPP/OPP EL PS		<u> </u>	9,000 00
Employee's name and address – Nom et adresse de l'employé     Employee's El premiums – line 31200     Union dues – line       Last name (in capital letters) – Nom de tamilie (en lettres moudes)     First name – Prenom     Initial – Initiale       CARSONN     JOHNNY     Initial – Initiale     Initial – Initiale       2020 Smith Street     Pension adjustment – line 20000     RPP or DPSP registrin	487 487 589	Code d'empioi Cot 29	Interprete Support Contributions – line 30800 Itsations de l'employé au RPQ – ligne 30800 7	Gains ouvrant droit à pension - RP 26 9,000 00
2020 Smith Street 46 Pension adjustment – line 20600 RPP or DPSP registr Factour d'équivalence – Igne 20600 N <sup>4</sup> d'agrément d'un RPJ	sployee's name and address - Nom et adresse de l'employé Last name (in capital letters) - Nom de tamilie (en lettres mouées) First name - F CARSONN JOHNNY	Prénom Inital-Initale	BPP contributions – line 20700 Cotizations à un RPA – Kane 20700 Cotizations à un RPA – Kane 20700	Cotisations syndicales – line 21200 Cotisations syndicales – ligne : 44 Charitable donations – line 3 Dons de bienfaisance – liane 3
Anytown ON CAN M4A 1A1	2020 Smith Street Anytown ON CAN N	20 M4A 1A1	Pension adjustment – line 20600           Pacteur d'équivalence – tigne 20600           2           Employee's PPIP premiums – see over	46 RPP or DPSP registration nu N <sup>4</sup> d'agrément d'un RPA ou d'ur 50 PPIP Insurable earnings

• Because Johnny was a full-time university student, he also received the following tuition slip

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		T2202 Tuition	and E	nrolme	nt Ce	rtifi	ca	te			Year	1				
	Cer	tificat pour fra	ais de s	scolarit	é et d	ins	cri	iption	n		Anné	e	2 0	1	9	
Name and address of designa Nom et adresse de l'établisser	ted educational institution ment d'enseignement		1	1 School Catégo	type rie d'éco	le			12 Fh	ving a	school or club u club de pilota	ige				
ProFile 2021 Tour 1212 Main St				4 Studer	tnumber	r		_	15 Fi	er Ac	count Number					
Anytown ON M1A1A1				Numér	o d'étudia	ant			N	iméro	de compte du	déc	larant			
				10101	010	_	-			_	22	_	22			
Name of program or course Nom du programme ou du	cours		Session periods/	From YY/MM	To YY/N	M		of mo part-1 Nom	ber nths ime/ ibre		Number of months full-time/ Nombre		Elig part-t	ble tui me an ais de	tion fe d full- scolar	ies, time/ rité
Student Name Nom de l'étudiant			d'études	AA/MM	AAA	M		de m temps	ois à partiel		de mois à temps plein		étude	à tem	mps p ps ple	artiel in
JOHNNY	CARSONN		1	2019 0	1 2019	12				1	08				1	761
			2				11			1		1				
Student address Adresse de l'étudiant			3				11			1						
			4				11					1				
2020 Smith St				Tot	ls / Tota	ux	24			25	80	26				761
Anytown M4A 1A1	ON CAN		Information for students: See the back of Certificate 1. If you want to transfer all or pa your tuition amount, complete the back of Certificate 2							part of	F					
	17 Social insurance n Numéro d'assuran	umber (SIN) ce sociale (NAS)	Rens	eignemen	ts pour	les é	tudi	iants :	Lisez k une pa remplis	e vers rtie o isez l	so du certificat u la totalité de v le verso du certi	1. Si vos f	vous de trais de t 2.	ésirez scolari	transf té,	érer
	4 8 7 4 8	7 5 8 9														
See the privacy notice on the n	ext page.															2
Consultez l'avis de confidential	ité à la page suivante.												6			10
22202 (20)														ar	12	d:

To manually prepare a T1, first obtain a copy of CRA's *T1 General, Income Tax and Benefit Return.* You can download a fillable PDF from CRA's website, or a hard copy from any Canada Post outlet.

• Start with Page 1 of the tax return (the T1 Jacket) and begin entering personal information such as name, address and other personal details

Agency Agence du revenu Agency du Canada	Protected B when complete
Income Tax and	d Benefit Return 2019
Before you start: If you are filling out this return for a deceased person, make sure	you enter their information in all the boxes in Step 1.
Step 1 – Identification and other information	ол[8
Identification	Information about you
Print your name and address below. First name and initial	Enter your social insurance number (SIN): 4 8 7 4 8 7 5 8 9 Year Month Day
Johnny	Enter your date of birth: 2 0 0 0 0 1 0 1
Last name	Your language of correspondence: English Francais
Carsonn	Votre langue de correspondance
Mailing address: Apt No. – Street No. Street name	
2020 Smith St PO Box RR	Is this return for a deceased person?
	Ensure the SIN information above is for the deceased person.
City Prov./Terr. Postal code	If this return is for a
Anytown 0 N M 4 A 1 A 1	deceased person, enter the
Email address	date of death:
By providing an email address, you are registering to receive email notifications from the CRA and agree to the Terms of use	Marital status Tick the box that applies to your marital status on December 31, 2019:
under Step 1 in the guide.	1 Married 2 Living common-law 3 Widowed
	4 Divorced 5 Separated 6 X Single
Information about your residence	
Enter your province or territory of residence on December 31, 2019: Ontario	Information about your spouse or common-law partner (if you ticked box 1 or 2 above)
Enter the province or territory where you currently reside if it is not the same as your mailing	Enter their SIN:
address above:	Enter their first name:
If you were self-employed in 2019, enter the province or territory	Enter their net income for 2019 to claim certain credits:
where your business had a permanent establishment:	Enter the amount of universal child care benefit (UCCB) from line 11700
If you became or ceased to be a resident of Canada for	of their return:
income tax purposes in 2019, enter the date of: Month Day Month Day	Enter the amount of UCCB repayment from line 21300 of their return:
entry or departure	Tick this box if they were self-employed in 2019: 1
	Do not use this area
Do not use 47200	
this area 1/200 1/100	
5006-R Page 1	

• On Page 3, enter the employment income amount as indicated on the employer's T4

			Protect	ed B when comple	eted
Attach only the documents (schedules any claim or deduction. Keep all other se	s, information slips, forms, or rec upporting documents.	ceipts) requested to support		-	
Step 2 – Total income					
As a resident of Canada, you have to re The Income Tax and Benefit Guide may	port your income from all source have additional information for	es both inside and outside Ca certain lines.	anada.		
Employment income (box 14 of all T4 sl	ips)		10100	9000.00	
Tax-exempt income for emergency service	ices volunteers				-
(See line 10100 in the guide.)		10105			
Commissions included on line 10100 (be	ox 42 of all T4 slips)	10120			
Wage-loss replacement contributions (S	ee line 10100 in the guide.)	10130			
Other employment income			10400 -	+	
Old age security pension (box 18 of the	T4A(OAS) slip)		11300 -	+	
CPP or QPP benefits (box 20 of the T4A	A(P) slip)		11400 -	+	
Disability benefits included on line 1140	0 (box 16 of the T4A(P) slip)	11410			
Other pensions and superannuation (Se Worksheet for the return.)	e line 11500 in the guide and co	mplete line 31400 in the	11500 -	+	
Elected split-pension amount (Get and o	complete Form T1032.)		11600 -	+	
Universal child care benefit (UCCB) (Se	e the RC62 slip.)		11700 -	+	i .
UCCB amount designated to a dependa	int	11701			-
Employment insurance and other benefi	ts (box 14 of the T4E slip)		11900 -	+	
Employment insurance maternity and pa parental insurance plan benefits	arental benefits and provincial	11905			-
Taxable amount of dividends (eligible ar (Complete the Worksheet for the return.	nd other than eligible) from taxal	ble Canadian corporations	- 12000 -		
Taxable amount of dividends other than line 12000, from taxable Canadian corpo	eligible dividends, included on	12010			
Interest and other investment income (C	complete the Worksheet for the r	return.)	12100 -	+	
Net partnership income: limited or non-a	active partners only	,	12200 -	+	-
Registered disability savings plan incom	e (box 131 of the T4A slip)		12500 -	+	-
Rental income	Gross 12599	Ne	12600 -	+	-
Taxable capital gains (Complete Schedu	ule 3.)		12700 -	+	
Support payments received	Total 12799	Taxable amoun	12800 -	+	-
RRSP income (from all T4RSP slips)	10121 12100		12900 -	+	-
Other income	Specify		13000 -	+	-
Taxable scholarship, fellowships, bursar	ies, and artists' project grants		13010 -	+	-
Self-employment income			_ 13010 _		
Business income	Gross 13499	Ne	13500 -	•	
Professional income	Gross 13699	Ne	13700 -		
Commission income	Gross 13899	Ne	13900 -		
Farming income	Gross 14099	Ne	14100 -		
Fishing income	Gross 14299	Ne	14200		
Workers' compensation benefits (box 10	of the T5007 slip)	14400	14300	-	
Social assistance navments		14500 ±			
Net federal supplements (box 21 of the	T44(OAS) slip)	14600 +			
Add lines 14400, 14500, and 14600, (Se	e line 25000 in Sten 4 )	-	14700		
Add lines 14400, 14500, and 14000, (cd Add lines 10100, 10400 to 11400, 11500 12100 to 12500, 12600, 12700, 12800, 13900, 14100, 14300, and 14700.	0 to 11700, 11900, 12000, 12900 to 13010, 13500, 13700,	This is your total income	15000	- 	]
			_		
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• Find Schedule 11 and use the T2202 issued by the learning institution to calculate the eligible tuition credit. In this example, because of insufficient income, no tuition credits are applied.

	Protected B when completed
T1-2019 Federal Tuition, Education, and Textbook An	nounts Schedule 11
Only the student must complete this schedule and attach it to their return. If the student is person, the other person should not attach this schedule to their return.	s transferring an amount to another
If you are a student, complete this schedule to determine:	
<ul> <li>your tuition, education, and textbook amounts</li> </ul>	
<ul> <li>the tuition amount you can transfer to a designated individual</li> </ul>	
<ul> <li>the unused amount, if any, you can carry forward to a future year</li> </ul>	
Use your completed designated forms (T2202, TL11A, and/or TL11C) or other official tuiti schedule.	on tax receipts to complete this
For more information, see Guide P105, Students and Income Tax.	
Tuition, education, and textbook amounts claimed by the student for 2	2019
Unused federal tuition, education, and textbook amounts from your 2018 notice of assessment	nent or 1
Eligible tuition fees paid to Canadian educational institutions for 2019 from the forms noted above or your official tuition tax receipts. To qualify, the fees you paid to attend each institu must be more than \$100. Also complete the <b>2019 enrolment information</b> below.	1 ution 32000 + <sup>7616</sup> 2
Eligible tuition fees paid to foreign educational institutions for 2019 from the forms noted at your official tuition tax receipts. To qualify, the fees you paid to attend each institution must than \$100. Also complete the <b>2019 enrolment information</b> below.	bove or t be more 32001 + 3
Add lines 1, 2, and 3. Total available tuition, education, and textbook amount	s for 2019 = 4
Enter the amount of your taxable income from line 26000 of your return if it is \$47,630 or less. Otherwise, complete Part B in Step 5 of your return and enter the result of the following calculation: amount from line 43 in Part C of your return divided by 15%.	<sup>8992</sup> 5
Total of lines 1 to 20 in Step 5 of your return _	13709 6
Line 5 minus line 6 (if negative, enter "0") =	0 7
Unused tuition, education, and textbook amounts you are claiming for 2019. Amount from line for Jine Z	man

• You will also need to navigate to Step 5 of the T1 and enter the basic personal amount at line 3000, along with other relevant amounts as calculated in the prior steps

Step 5 - Federal tax (formerly Schedule 1)	Protect	ted B when co	mple	ted
Step 5 - Federal tax (tottlery Schedule 1)				
Part A – Federal non-refundable tax credits				
Basic personal amount claim \$12,069	_30000	12069	00	1
Age amount (if you were born in 1954 or earlier) (Complete the Worksheet for the return.) (maximum \$7,494)	30100 -	+		2
Spouse or common-law partner amount (Complete Schedule 5.)	30300 -	+		3
Amount for an eligible dependant (Complete Schedule 5.)	30400 -	+		4
Canada caregiver amount for spouse or common-law partner, or eligible dependant age 18 or older (Complete Schedule 5.)	30425 -	+		5
Canada caregiver amount for other infirm dependants age 18 or older (Complete Schedule 5.)	30450 +	+		6
Canada caregiver amount for infirm children under 18 years of age Enter the number of children for whom you are claiming this amount. 30499 × \$ 223( =	30500	+		7
Base CPP or QPP contributions: through employment income (Complete Schedule 8 or get and complete Form RC381, whichever applies.)	30800 -	+ 272	25	• 8
on self-employment and other earnings (Complete Schedule 8 or get and complete Form RC381, whichever applies.)	31000 -	+		• 9
Employment insurance premiums: through employment from box 18 and box 55 of all T4 slips (maximum \$860.22)	31200 -	+ 145	80	• 10
on self-employment and other eligible earnings (Complete Schedule 13.)	31217 +	+		• 11
Volunteer firefighters' amount	31220 -	+		12
Search and rescue volunteers' amount	31240 -	+		13
Canada employment amount (Enter \$1,222 or the total of your employment income you reported on lines 10100 and 10400, whichever is less.)	31260 +	+ 1222	00	14
Home buyers' amount	31270 +	+		15
Home accessibility expenses (Complete the Worksheet for the return.) (maximum \$10,000)	31285 +	+		16
Adoption expenses	31300 -	+		17
Pension income amount (Complete the Worksheet for the return.) (maximum \$2,000)	31400 +	+		18
Disability amount (for self) (Claim \$8,416 or if you were under 18 years of age, complete the Worksheet for the return.)	31600 +	+		19
Disability amount transferred from a dependant (Complete the Worksheet for the return.)	31800 +	+		20
Interest paid on your student loans (See Guide P105.)	31900 +	+		21
Your tuition, education, and textbook amounts (Complete Schedule 11.)	32300 +	+		22
Tuition amount transferred from a child	32400	+	6	-~~ <u>`</u>
- And reverse to the set of the A f			~	١

# **Paper Observations**

As the example above illustrates, manually preparing a T1 is a protracted and complex affair. The need for complicated calculations, the risk of omitting a schedule or form, or of not transferring the proper amounts to the right forms, all mean that the probability of errors and omissions is quite high.

# Once again, in ProFile

Let's now explore the same T1as entered in Profile:

- Launch ProFile and go to File > New > 2019 T1
- After ProFile opens the *Info* page, enter the individual's name, social insurance number, date of birth and other relevant information
- The Info page should look like this

Taxpaver personal information	Marital status
Taxpayer personal information       SIN     487 487 589       Title     Mr       First name     Johnny       Last name cARSONN       Last name changed in 2019?     Yes       Do you want to change your address?     Yes       Street address     2020 Smith Street       P.O. Box     R.R.       City     Anytown       Province     ON       Postal code     MA1 1A1       Primary phone     (909) 090-9099       Birth date     2000/01/01       Date of Death www.mindid     Age	Marrital status         Indicate your marital status on December 31, 2019         1 ☐ Married       2 ☐ Living common-law       3 ☐ Widowed         4 ☐ Divorced       5 ☐ Separated       6 ☑ Single         If status changed in 2019, enter date of change       mm/dd         Were you married or living common-law at any time in this tax year?       Yes       №o         Residency       Province of residence on 2019/12/31       Ontario       Province of self-employment         If you became or ceased to be a Canadian resident in 2019, enter date of:       entry       mm/dd
Gender       Male       Female         Province or territory where taxpayer resides if different from mailing address:       CRA online mail:       Already registered       Yes       No         Email address:       By providing your email address or updating an already registered email address, I understand I am registering for online mail and accept the terms and conditions that are set out on page 2 of the form T183. Paper notices will not be mailed to me from the CRA.         Do you want preparer to get       Electronic Notice of Assessment?       Yes       X No         By chcking yes on the box above, I am allowing the CRA to electronically provide my assessment to the electronic fire (including a discounter) named in Part C of T183. I will now receive a copy of my protices of assessment from my electronic fire (including a discounter) named in Part C of T183. I will now receive a copy of my	Are you a non-resident?       Yes       Yo         Residency status       Resident       Resident         Country (other than Canada)       Did you dispose of a property (or properties) in 2019 for which you are claiming a principal residence exemption?       Yes       Yes         Use preparer address for:       Yething       Nothing       Notice of Assessment and Refund       N of A         I1 mailing address       I1 mailing address       In the second secon

• Once again, here is Johnny's T4 slip

Employer's name - Nom de l'employeur ProFile 2021 Tour 1212 Main St	Year Année	Canada Re Agency 2019	Meriue	Agence du revenu du Canada	Statem État d	ent of e la ré	T4 Remuneration Pair munération payée	d
			5	mployment income - line 10	100	in.	Income tax deducted - line 4	43700
Anytown ON M1A 1A1		14	,	9,000	00	22	900	00
54 Employer's account number / Numêro de compte de l'employeur	Provin	ce of employe	tent Em	ployee's CPP contributions - ations de l'employé au RPC	- line 30800		El insurable earning Gains assurables d'A	ps ME
Example Example	10	ON	16	280	50	24	9,000 0	00
Social insurance number Exempt - Exempt	PIP Em	pioyment code	Em Cotin	pioyee's QPP contributions -	- line 30800	00 Gal	CPP/QPP pensionable ear	nings
12 487 487 589	29	lobe d'emploi	17	alloris de remploye au And	- igne soa	26	9.000	0
Last name (in capital letters) - Nom de tamilie (en letters mouldes) First name CARSONN JOHNNY	-Prénom Ini	tal – Initiale	18	RPP contributions – line Cotisations à un RPA – lig	20700 ne 20700	44	Charitable donations – line Dons de bienfalsance – lige	e 349
2020 Smith Street			20	Pension adjustment - In	20600	46	RPP or DPSP registration	numb
			52	Facteur d'équivalence – lig	ne 20500	50	N° d'agrément d'un RPA ou o	fun R
Anytown ON CAN	M4A 1A1		Cotisat	mployee's PPIP premiums ions de l'employé au RPAP -	see over - voir au ver	50	PPIP insurable earnir Gains assurables du R	igs PAP
Other information (see over) Amount - Montant	Box -	Case	<u>Б</u> Ат	iount - Montant	Box - C	iase	Amount - Montant	-

• To record the T4 slip in ProFile, press the *F4* key to open Form Explorer and then, in the Search field, type T4. Double-click on T4 in the right pane of the Form Explorer window, and ProFile will open that form

V Form Explorer						
Carsonn Johnny						
Eorm: t4						
					_	_
Forms	Name	Category	Description	U	Last	S
1. Identification	<b></b>	Identificati	Personal information	Y	N/A	1
📜 2. Slips	👪 Dependant	Identificati	Dependant information	No	N/A	3
📜 3 Income	@CarryFWD	Identificati	Carryforward Summary	Y	N/A	4
4. Deductions	I€T2202/TL	Slips	Tuition and education credit	Y	N/A	6
5. Tax + credits	6 T3	Slips	Statement of trust income	No	N/A	7
5 Heturn + schedules	l≪T4	Slips	Statement of remuneration	Y	N/A	8
<u>2</u> Filling	ILT4A	Slips	Statement of pension, ann	No	N/A	9
Chin Chin	<b>T4A0AS</b>	Slips	Statement of Old Age Secu	No	N/A	10
A lised	6 T4AP	Slips	Statement of Canada Pensi	No	N/A	11
B. Data entered	<b>T4ARCA</b>	Slips	Statement of distributions fr	No	N/A	12
C Last year	G-T4E	Slips	Statement of Employment I	No	N/A	13
	<b>T4PS</b>	Slips	Statement of profit-sharing	No	N/A	14
	6 T4RIF	Slips	Statement of income from	No	N/A	15
T1	<b>I</b> T4RSP	Slips	Statement of RRSP income	No	N/A	16
TP1	IR TE	Sinc	Statement of investment in	No	MIA	17

- Enter the amounts as they appear on the T4 Slip
- ProFile will transfer the T4 amounts to the corresponding line on the T1 return itself (the T1 Jacket)



• Here, again, is Johnny's tuition slip

Canada Revenue Agency	Agence du revenu du Canada									Pro	tec	ted	B/I ed/r	Prote	egé B pis rempli
										Fo	or sta	udent	/Po	ur étu	diant
	C	ertificat pour fra	and E	scolari	té et i	d'ins	cat	e ption		Year	e	2	0	1 9	
Name and address of design Nom et adresse de l'établisse	ated educational institution ment d'enseignement		1	11 Schoo Catég	type prie d'éc	ole		12 Fly Éci	ing s	school or club u club de pilota	sge	_	_		
ProFile 2021 Tour 1212 Main St Anytown ON M1A1A1				14 Studer Numér	nt numb to d'étua	er fiant		15 File Nu	er Ac	count Number o de compte du	déc	laran	t		
Name of program or cours Nom du programme ou du     Computer Science     Student Name     Nom de fét utingt	e i cours		Session periods/ Périodes d'études	From YY/MM De AA/MN		o MM A MM	2	Number of months part-time/ Nombre de mois à temps partiel		22 Number of months full-time/ Nombre de mois à temps plein		23 E par étu	ligible rt-time Frais admi udes et à	e tuitic e and de sc ssible à temps	n fees, full-time/ olarité s pour os partiel plein
JOHNNY	CARSONN		1	2019 0	1 201	9 12	þ			08			_		7616
Student address Adresse de l'étudiant			3		-		ł						_		0
2020 Smith St			-	Tot	als / To	taux	24		25	08	26				7616
Anytown M4A 1A1	ON CAN	e number (SIN) rance sociale (NAS)	Rens	mation fo eigneme	r stude	nts: Se yo	tudia	e back of Cert ition amount, ants : Lisez le une par remplisi	veri tie o	te 1. If you wan plete the back so du certificat u la totalité de e verso du cert	t to t of Ce 1. Si vos f	transl entific vous frais o t 2.	ier all ate 2 dési de so	rez tra olarité	rt of Insférer
See the privacy notice on the Consultez lavis de confidentia	4 8 7 4 next page.	8 7 5 8 9													2
T2202 (20)												(	Ca	an	adä

- Use Form Explorer to find and open the T2202 tuition form. Record the slip information on that form
- ProFile will transfer those amounts to the Schedule 11. As in the earlier paper-filed ProFile applies no tuition credit on the Schedule 11.

					. iti a un 🗖 ale ca		<b>.</b>	Protect	ted B - when completed
	T1-2019		Fe	deral Ti	lition, Educ	cation, and	Textbook A	mounts	Schedule 11
	Only the student mu	st comp	lete thi	is schedule	and attach it to the	heir return. If the st	udent is transferri	ng an amount to an	other person, the other
	If you are a student, c	omplete	this s	chedule to c	eturn. letermine:				
T2202/TL11	,					-	<b>Fuition</b>	Cline	
Tuition and education cr	edit certificates						lullon	Slips	
		Box	S	lip #1	Slip #2	Slip #3	Slip #4	Total this	schedule.
			4				Þ		
		-	Conco	ordia U					
Description									
T2202, TI 11A, TI 11C							_		0 00 1
Tuition fees paid to Cana	idian educational	26	7	616.00	0.00	0.00	0.00	7,616.00	
institutions			_					200	7,616 00 2
I uition fees paid to foreig	n educational			0.00	0.00	0.00	0.00	0.00	
Number of months in par	t-time enrolment	24/B	_	0	0	0	0		•
Number of months in full	-time enrolment	25/C		8	0	0	0	8 200	0 00 🗂 3
TL11D									7,616 00 4
Tuition fees paid		_	_	0.00	0.00	0.00	0.00	0.00	
Chantable donations	following calculation:	amount f	fom	e 43 in Par	C of your return	divided by15%	.00	8 991 75	
	Amount from Line 8A	of Form	T12	10 40 III 1 UI	o or your return	anaca by 1070.		0 00	
	Total of lines 1 to 20 in	n Step 5	of y	ır return				13,709 05 6	
	Line 5 minus line 6 (if	negative	, ent	"0")				0 00 7	
	Unused tuition, educa	tion, and	l text	ok amount	s you are choose	g for 2019			0.00
	Line 7 minus line 8	line 7, v	vnicne	is less				000	000 0
	2019 tuition amount y	ou are c	laiming	for 2019				000 3	
	Enter the amount of lin	ne 2 plus	s line 3	, or the am	ount from line 9, v	whichever is less.			0 00 10
	Add lines 8 and 10.	line 2020	00 of	our roturn		Total tuiti	ion, education, a	ind textbook	0.00 11
	Enter this amount on	ine szst	JU 01 Y	our return.		amounts cia	limed by the stu	tent for 2019	000
	2019 enrolment in	formati	ion						
	The CRA needs the fo	llowing i	nforma	tion to adm	inister federal pro	grams, such as th	e Canada workers	benefit,	
	scholarship exemption	n, life lon	ng learr	ning plan, ar	nd various provinc	ial and territorial pr	rograms.		
	Tick this box if you we	ere eligib	le for t	he disability	tax credit or you	had, in the year, a	a mental or physic	al	
	impairment and a doci	cor has c e effects	certified	a that you c ir impairmei	annot reasonably nt	be expected to be	enrolled as a full-	ume 3200	5
			5, 100					5200	

• At Step 5 of the T1 Jacket itself, ProFile automatically inserts all relevant amounts

Ston 5 Endoral tax (formarly Schodulo 1)	FIOLECIEU	b when completed
Step 5 – Federal tax (formerly Schedule 1)		
Part A – Federal non-refundable tax credits		
Basic personal amount claim \$12	069 30000	12.069 00 1
Age amount (if you were born in 1954 or earlier) (Complete the Worksheet for the return.) (maximum \$7,	494) 30100	0 00 2
Spouse or common-law partner amount (Complete Schedule 5.)	30300	0 00 🔒 3
Amount for an eligible dependant (Complete Schedule 5.)	30400	0 00 4
Canada caregiver amount for spouse or common-law partner, or eligible dependant age 18 or older		
(Complete Schedule 5.)	30425	0 00 5
Canada caregiver amount for other infirm dependants age 18 or older (Complete Schedule 5.)	30450	0 00 🛑 6
Canada caregiver amount for infirm children under 18 years of age		
Enter the number of children for whom you are claiming this amount 30499 0 x \$ 2,230	= 30500	0 00 7
Base CPP or QPP contributions:		Â
through employment income	00000	070 05
(Complete Schedule & or get and complete Form RC381, whichever applies.)	30800	272 25
on self-employment and other earnings	24000	
Complete Schedule 6 or get and complete Form RC361, whichever applies.)	51000	000 • 9
Employment insurance premiums: through employment from how 19 and how 55 of all T4 alians (maximum \$950	22) 21200	145 00 0 . 10
unough employment non box to and box 55 of an 14 sings (maximum 3000	21217	0 00 - 11
on self-employment and other engible earlings (complete schedule 13)	21220	
Volunteer menighters amount	51220	
Search and rescue volunteers amount	31240	000 13
Canada employment amount (Enter \$1,222 of the total of your employment	31260	1 222 00 14
Home you reported on mes forto and 10400, which even is less.	31270	0.00 15
nome buyers amount (maximum \$10)	000 21295	0 00 15
nome accessionity expenses (Complete the Worksheet for the fetum.) (maximum \$10,	21200	
Adoption expenses	51300	
Pension income amount (Complete the Worksheet for the return.) (maximum 32,	000) 31400	000 18
Disability amount (for self) (Claim \$8,416 or if you were under 18 years of age, complete the Worksheet for the return.)	31600	0 00 19
Disability amount transferred from a dependent (Complete the Worksheet for the return.)	31800	0 00 20
Interact paid on your student loans (See Quide D105.)	31900	0 00 20
Neur tuition, advication, and taytheak amounte (Complete Schodule 11)	22200	0 00 21
Tuition amount transferred from a shild	2200	0 00 22
Tullion amount transiened from a child	22400	0 00 23
Amounts transferred from your spouse or common-law partner (Complete Schedule 2)	p2600	0 00 24
dependent shildren hern in 2002 or later	25	
Enter \$2,252 or 2% of line 22600, whichover is less	25	
Enter \$2,552 or 5% or line 23600 , Whichever is less. 269/5	20	
Line 25 minus line 26 (if negative, enter "0") 000	21	

- Here is snapshot of Johnny's tax return
- Note that the last page of the tax return indicates that Johnny is receiving a refund of \$1,124.00

			Protected B	3 when completed
Canada Revenue Agenoy	Agence du revenu du Canada			2019
	Income Tax and B	enefit	Return	
	adda and datas in 1992. Here are			
Before you start:			- In the formation to all the barries to C	
If you are filling out this re	turn for a deceased person, make sure you	enter the	eir information in all the boxes in S	Step 1.
Step 1 – Identificat	uon and other mormation			ON B
	Identification		Information about you	
Print yo First name and initial	our name and address below.	Enter yo	ur social insurance number (SIN):	487 487 589
Johnny		Enter vo	ur date of birth	Year/Month/Day
Last name CARSONN		Your lan	puage of correspondence En	noish Français
Mailing address: Apt No Street	Attach only the documents (schedules, information s	lips, forms	, or receipts) requested to support any claim	n or deduction. Keep all other supporting documents.
2020 Smith Street	Step 2 - Total Income As a resident of Canada, you have to report you	ir income	from all sources both inside and outside	ide Canada
	The Income Tax and Benefit Guide may have ac	ditional i	information for certain lines.	
City	Employment income (box 14 of all T4 slips)		10	9,000 9,000
raycom	Tax-exempt income for emergency services volunteers (See line 10100 in the quide )		10105	
By providing an email address, vo	Commissions included on line 10100 (box 42 of all T4 slip	s)	10120 0 00	
the CRA and agree to the Terms	Wage loss replacement contributions (See line 10100 in t	he guide.)	10130 0 00	
Enter an email address:	Other employment income Old age security pension (box 18 of the T#A(OAS) win)		Step 4 - Taxable income	e
Informat	CPP or QPP benefits (box 20 of the T4A(P) slip)		Canadian Forces personnel and police deduct	ction (box 43 of all T4 slips) 24400 0 00
Enter your province or territory of	Disability benefits included on line 11400 (box 16 of the T	4A(P) slip	Security options deductions	24900 0 000
residence on December 31, 201	line 31400 in the Worksheet for the return.)	e guide an	amount at line 14600. If so, see line 25000 in t	the guide.) 25000 0 00
Enter the province or territory wh	Elected split-pension amount (Get and complete Form T10	032.)	Limited partnership losses of other years	25100 0 00
you currently reside if it is not th	Universal child care benefit (UCCB) (See the RC62 slip.)		Non-capital losses of other years	25300 0 00
Kurren and a sold and a 2014	Employment insurance and other benefits (box 14 of the	T4E slip)	Capital gains deduction (Get and complete For	orm T657.) 25400 0 00
enter the province or territory wh	Employment insurance maternity and parental benefits		Northern residents deductions (Get and comp	plete Form T2222.) 25500 0 00
your business had a permanent e	Amounts from box 36 of T4E Exempt PPIP benefits (included in T4E box 36) and/or EI m	naternity ar	Additional deductions Add lines 24400 to 25600	25700 000 000
If you became or ceased to be	benefits under the Indian Act (T90).	d provinci		
Month/Day	parental insurance plan benefits	in province	Line 23600 minus line 25700 (if negative, ente	er try init is your taxable income. pouro 6,991[73]
	corporations (Complete the Worksheet for the return.)	ble) from b		Protected B when completed
	Taxable amount of dividends other than eligible dividends		Step 5 - Federal tax (for	rmer/w Schedule 1)
	Interest and other investment income (Complete the Work	sheet for t	Part A – Federal non-refundable	Protected B when completed
	Net partnership income: limited or non-active partners on	ly	Basic personal amount	Step 7 - Refund or balance owing
	Registered disability savings plan income (box 131 of the	T4A slip)	Age amount (if you were here in 1961.	Net federal tax: enter the amount from line 61 from the previous page 42000 0 0
	Rental income Gross 125	99	Spouse or common-law partner amour	In (Complete Schedule 8 or get and complete Form RC381, whichever applies.) 42100 000
	Taxable capital gama (complete Schedule 5.)		Amount for an eligible dependant (Con	m Employment insurance premiums payable on self-employment and other eligible earnings (Complete Schedule 13.) 42120 000
	Support payments received Total 127 PRSP income (from all T4RSP slips)	99	Canada caregiver amount for spouse o (Complete Schedule 5.)	Provincial or territorial tax (Attach Form 428, even if the result is "0".) 42800 0 00
	Other income	Specify:	Canada caregiver amount for other infir	Tr Add lines 42000, 42100, 42120, 42200, and 42800. This is your total payable. 43500 0 0 •
	Taxable scholarship, fellowships, bursaries, and artists'	project gra	Canada caregiver amount for infirm chi	ni Total income tax deducted (amounts from all Canadian slips) 43700 900 00 •
	Business income Gross 134	199	Base CPP or QPP contributions:	CPP overpayment (see line 30800 in the guide.) 44800 0 00 •
	<		through employment income (Complete Schedule 8 or get and cor	Employment insurance overpayment (See line 45000 in the guide.) 45000 0 0 0
			on self-employment and other earning	Commare action incensive (complete Schedule 14.)     Refundable medical expense supplement (Complete the Worksheet for the return.)     45200     0
			Complete Schedule 8 or get and cor Employment insurance premiums	Canada workers benefit (CWB) (Complete Schedule 6.) 45300 0 0
			through employment from box 18 and	Refund of investment tax credit (Get and complete Form T2038(ND).)
			on self-employment and other eligible	
			Search and rescue volunteers' amount	t Eligible educator school supply tax credit
			Canada employment amount (Enter \$1	1 Supplies expenses (maximum \$1,000) 46800 0 0  X 15 00 % = 46900 0 00 •
				Tax paid by instalments     17500     000     17500     000     17500     000     17500     000
				Add lines 43700 to 45700, and 46900 to 47900. These are your total credits. 48200 1,124 00 > 1,124 00
				Line 43500 minus line 48200 This is your refund or balance owing. (1,124 00)
				Enter the amount below on whichever line applies.
				Refund 48400 1,124 00 • Balance owing 48500 0 00 •
				Direct deposit - Enrol or update
				By providing my banking information I authorize the Receiver General to deposit in the bank account number shown below any amounts payable to me by the CRA, until otherwise notified by me. Lunderstand that this authorization will replace all of my previous direct deposit authorizations.
				Branch Institution
				46000 46100 46200
				(5 digits) (3 digits) (maximum 12 digits)
				rou can also register for Direct Deposit through the following methods:     My Account online
				MyCRA mobile application B continue (CDA at 1.500, 659,8281

## Conclusion

ProFile provides guided tax preparation that requires you to simply enter information on the required forms and slip (in the above example, T4 and T2202) and ProFile then completes the T1 based on those entries.

Contrast that with the same hand-written example, and the benefits gained by using tax-preparation software are immediately evident.

## **A TAX PRACTITIONER APPROACH**

## Preparing a T1 for a Married Couple

This section explores how a tax preparer works with a client T1. In this example, a married couple, Angela Carsonn and Martin St-Pierre, have asked you to file their T1 returns. So that you can proceed, they provide you with the following slips:

• T4 slips that itemize each spouse's employment earnings

	Employer's name - Nom de l'employeur ProFile 2021 Tour	<b>Year</b>	Canada Reven Agency 2019	ue Agence du revenu du Canada	Statemen	t of F	T4 Remuneration Pa	id
	1212 Main St	Annee	2010	Employment income – line 1	Etat de	la rér	nunération payée Income tax deducted – line	e # 43700
	Anytown ON M1A 1A1		14	Revenus d'emploi – ligne 10 52.900	00 2	2 Imp	bôt sur le revenu retenu – li 8.812	gne 43700
ildu	54 Employer's account number / Numèro de compte de l'employeur	Province	of employment	Employee's CPP contributions	s – line 30800 C – liane 30800		El insurable earnir Gains assurables d	ngs d'AE
s rer	23122 3131 RP 0001 Social insurance number Exempt - Exempt	ion 10 (	ON	16 2,519	40	24	52,900	00
le foi	Numero d'assurance sociale CPP/QPP EI Pri 12 453 545 121 28 28	PIP Emplo Code	yment code e d'emploi	Employee's QPP contributions Cotisations de l'employe au RR	a – line 30800 Q – ligne 30800	Gair	CPP/QPP pensionable ea ns ouvrant droit à pension -	arnings - RPC/RRQ
8		29 PAP		17		26	52,900	00
égé	Employee's name and address - Nom et adresse de l'employe	i i		Employee's El premiums – I Cotisations de l'employé à l'AE -	ine 31200 - ligne 31200		Union dues – line 2 Cotisations syndicales – li	1200 igne 21200
Prot	Last name (in capital letters) – Nom de familie (en lettres moulées) First name –	Prènom Initial-	- Initiale	18 856	98	44	The Holds down from 1	
l/þ			,	Cotisations à un RPA – li 20	igne 20700	46	Charitable donations – li Dons de bienfaisance – li	ne 34900 gne 34900
nplete	2020 Smith Street			Pension adjustment – I	ne 20600	40	RPP or DPSP registratio	n number
en cor	Anvtown ON CAN	/4A 1A1	[	52	Igne 20000	50	<ul> <li>a agrement a un NEA oc</li> </ul>	
whe			C	Employee's PPIP premiums tisations de l'employé au RPAP	– see over – voir au verso		PPIP insurable earr Gains assurables du	nings RPAP
ed E			[	55		56		
Protect	Other information See over)	Box – Ca	se	Amount - Montant	Box – Cas		Amount – Montant	
4 (19)	Autres Box - Case Amount - Montant renseignements (voir au verso)	Box – Ca	ise	Amount Montant	Box – Cas	] [	Amount – Montant	
							RC-14-599	1

	Employer's name - Nom de l'employeur ProFile 2021 Tour 1212 Main St	Year Année 20	ada Revenue acy 19	Àgence du revenu du Canada	Statement o État de la	T4 of Remuneration Pa rémunération payé	aid e
	Anytown ON M1A 1A1		14	mployment income – line 10 Revenus d'emploi – ligne 10 52,900	.00 22	Income tax deducted – line Impôt sur le revenu retenu – li 7,999	e 43700 igne 43700 12
rempli	54 Employer's account number / Numéro de compte de l'employeur 23122 3131 RP 0001	Province of en Province of 10 ON	nployment En l'emploi Cotis 16	nployee's CPP contributions sations de l'employé au RPC 2.519	- line 30800 - ligne 30800	El insurable earni Gains assurables o 24 52.900	ngs d'AE
une fois	Social insurance number Numéro d'assurance sociale 12 245 243 241 Decidior 4 de la construction de la cons	PIP Employme Code d'e	nt code En mploi Cotis 17	nployee's QPP contributions sations de l'employé au RRC	- line 30800 2 - ligne 30800	CPP/QPP pensionable ea Gains ouvrant droit à pension - 26 52,900	arnings - RPC/RRQ .00
otégé B	Employee's name and address – Nom et adresse de l'employ Last name (in capital letters) – Nom de famille (en lettres moulées) First name -	é Prénom Initial – Initi	ale Cotis	Employee's El premiums – li sations de l'employé à l'AE – 856	ne 31200 - ligne 31200 - 98	Union dues – line 2 Cotisations syndicales – li 44	1200 igne 21200
I/ Pr	ST-PIERRE Martin		] _	RPP contributions – lin Cotisations à un RPA – li	e 20700 gne 20700	Charitable donations – li Dons de bienfaisance – li	ine 34900 gne 34900
r completed	2020 Smith St		20	Pension adjustment – lir Facteur d'équivalence – li	ne 20600 gne 20600	RPP or DPSP registratio N° d'agrément d'un RPA ou 50	n number u d'un RPDB
led B wher	Anytown ON CAN	M4A 1A1	Cotisa	imployee's PPIP premiums - tions de l'employé au RPAP	- see over '- voir au verso	PPIP insurable earr Gains assurables du 56	nings RPAP
Protect	Other information (see over)	Box – Case	Ar	nount – Montant	Box – Case	Amount – Montant	
T4 (19)	Autres Box-Case Amount-Montant renseignements (voir au verso)	Box – Case	Ar	nount – Montant	Box – Case	Amount – Montant	

• There is also a charitable donation receipt and a T5 slip issued by a financial institution that lists the amount of investment income earned in the tax year.

Canada Revenue Agence du du Canada	revenu <b>T5</b> Stateme État de	ent of Investme s revenus de p	nt Income lacement	Year 2 0 1	9 when	completed /	Protégé B une fois rempli
Dividends from Canadian corporations -	Dividendes de sociétés canadiennes	Federal credit -	Crédit fédéral	Année			
24 Actual amount of eligible dividends	25 Taxable amount of eligible dividends	26 Dividend tax of divid	edit for eligible ends	13 Interest from C	Canadian sources 18	Capital gai	ns dividends
Montant réel des dividendes déterminés	Montant imposable des dividendes	Crédit d'impôt pour div	idendes déterminés	Intérêts de sour	2,121.44	Dividendes sur	gains en capital
10 Actual amount of dividends	11 Taxable amount of dividends	12 Dividend tax cre other than elic	dit for dividends	21 Report Code	22 Recipient identifi	ication number	23 Recipient type
	Ciria char eigere dividenda		ible dividenda		453 545 1	121	2
Montant réel des dividendes autres que des dividendes déterminés	Montant imposable des dividendes autres que des dividendes déterminés	Crédit d'impôt po autres que des divid	ur dividendes andes déterminés	Code du feuillet	Numéro d'identification	du bénéficiaire	Type de bénéficiaire
Other information (see the back) Autres renseignements (lisez le verso) Box	/ Case Amount / Montant	Box / Ca	ase Amou	int / Montant	Box / Case	Amount	/ Montant
Recipient's name (last name first) and	address – Nom, prénom et adresse d	lu bénéficiaire		Payer's name and	d address – Nom et a	dresse du payeu	ır
CARSONN ANGELA			PROFILE	2021 TOUR			
ST-PIERRE MARTIN			1212 MAI	NST			
2020 SMITH STREET							
			ANYTOW	N	C	ON M1A	1A1
ANYTOWN ON CAN	M 4 A	1 A 1					
Currency and identification codes Codes de devise et d'identification	27 28 7 Foreign currency Trar Devises étrangères is de confidentialité dans votre déclaratio	nsit – Succursale n.	29 Numéro	Recipient account de compte du bénéf	For i Pour obt	nformation enir des rei	, see the back. nseignements, lisez le verso. 1

Markinson Canada	Date Received/Don recu le: Date Issued/Recu émis le: Place of Issue/Lieu d'émission:	Nov 17, 2019 Toronto, ON
316 - 4211 Yonge Sitnet, Toronto, ON M2P 2A9 7. 416-227-8700   F. 416-227-6600   www.parkinson.ca Charlable Business No./ No. d'organisme de bienfaisance enregisiré : 10809 1786 RR0001	DUPLICATE REC REÇU EN DOUE	EIPT
	Receipt No./Numéro du reçu:	L100032816
Angela Carsonn 1010 Main St	ntant de	a don: \$100.00
Anytown, ON M5A 1A1	Jujees	ybordon
This is an official tax receipt for income tax purposes. / Recu officiel aux fins de l'impôt. Canada Revenue Agency: www.cra.gc.ca/charbesandgiving Agence du revenu du Canada: www.cra.arc.gc.ca/chrta-gung/menu-tra.html	Authorized signa	ture/Signature autorisée

With these slips you are ready to proceed.

#### Authorize a Representative

As a professional tax preparer, you will want all new clients to complete and sign CRA's *Authorize a Representative* form. Think of this form as your T1 Launchpad. With it, you have access to CRA's website where you can obtain your clients' tax information. The information that this form unlocks includes: Notices of Assessments, client data summary, account balances, as well as information slips such as T3, T4, T5 and RRSP slips. Here's how you complete and file the Authorize a Representative form

• Create a new tax return in ProFile and fill out the *Personal Information* page. Here's an excerpt of Angela's information page

#### **2019 Personal information** Taxpayer personal information Marital status Indicate your marital status on December 31, 2019 453 545 121 SIN 1 X Married 2 Living common-law 3 Widowed Title MS First name Angela 4 Divorced 5 Separated 6 Single CARSONN Last name If status changed in 2019, enter date of change mm/dd Last name changed in 2019? Yes X No Were you married or living common-law at any Do you want to change your address? Yes X No Yes No time in this tax year? Care of Street address 2020 Smith Street Apt # Residency P.O. Box R.R. Province of residence City Anytown on 2019/12/31 Ontario Province ON Province of self-employment M4A 1A1 Postal code If you became or ceased to be a Canadian resident in Primary phone (999) 999-9989 entry mm/dd 2019, enter date of: 1989/09/09 Birth date Age 30 mm/dd or departure yyyy/mm/dd Date of Death Gender Male <u>F</u>emale Province or territory where taxpayer resides if different from mailing Yes X No Are you a non-resident? address: Residency status Resident CRA online mail: Already registered Yes X No Country (other than Canada) Did you dispose of a property (or properties) in 2019 for which you are Email address claiming a principal residence exemption? Yes X No By providing your email address or updating an already registered email address, I understand I am registering for online mail and Use preparer address for: accept the terms and conditions that are set out on page 2 of the form T183. Paper notices will not be mailed to me from the CRA. X Nothing Notice of Assessment and Refund N of A T1 mailing address Do you want preparer to get X Yes No Electronic Notice of Assessment? By checking yes on the box above, I am allowing the CRA to electronically provide my assessment results and my notices of assessment and reassessment to the electronic filer (including a discounter) named in Part C of T183. I will now receive a copy of my notices of assessment and reassessment from my electronic filer.

Info

To enter Martin's spousal information, scroll to the Spousal information section at the bottom of . Angela's Personal Information page



After entering both spouses' personal information, press F5



- Alternatively, click the toolbar's Spouse toggle icon
- ProFile will ask if you want to open an existing return for the spouse, or create a new one. Because they are new clients, select *Create a new return for spouse*

Couple Retu	'ns			×
<ul> <li>Create a</li> <li>Open ar</li> </ul>	new return fo existing retu	or spouse rn	•	
	OK		Cancel	

- Press F4 to open ProFile's Form Explorer and, in the Search field, enter AuthorizeRep
- Check the box that reads *Enable printing and EFILE of this authorization request* and ensure that the information on the form is accurate
- Submit the form to your client for signature

Authorize a Representative – signature page
Enable printing and EFILE of this authorization request
Select "EFILE Authorize a Representative" under the "EFILE" menu to file this authorization.
Instructions:
<ol> <li>Print this page and have it signed and dated by the taxpayer or legal representative.</li> <li>Retain a conv of the signed and dated signature page in your files for six years from the date that this information is transmitted to</li> </ol>
the Canada Revenue Agency (CRA). Do not send the signature page to CRA by mail or fax unless requested to do so.
Taunauss information
SIN _ First name _ Last name _
453 545 121 Angela CARSONN
Representative information and authorization
Individual     Representative ID: AAA4341
Group Group ID: G
Level of authorization (1 or 2): 2
Signature and date
I am the legal representative for this taxpayer.
By signing and dating this page, you authorize the Canada Revenue Agency to interact with the representative mentioned above.
Angela CARSONN
Signature of taxpayer or legal representative Date of signature

• It is especially important that your client signs the form before you submit it to CRA. Once signed, click *EFILE > EFILE Authorize a Representative* 

EFILE/ReFILE this return	Ctrl+F11
Attach a Doc	
EFILE Pre-authorized Debit for this taxpayer	
EFILE the T1135	
EFILE Authorize a Representative	
EFILE Cancel a Representative	
Build T1 EFILE Online Batch	
EFILE Online Batch	
Build TP1 NetFile	
TP1 Connect	
Reports	>
Print All ACKs	
View Notice of Assessment (ENOA)	
Set EFILE Password	
Options	

Once CRA authorizes access, log into CRA's Represent a Client portal at www.canada.ca and select Tax

• Choose CRA login and enter your CRA Represent a Client credentials



• Enter Angela's social insurance number and click Access SIN

Access Client Information
To access information on behalf of clients, the CRA must have authorizations on file from these clients granting online access.
Enter the Social Insurance Number (SIN) or the Business Number (BN) of the account you want to access:
SIN (no spaces or dashes)
453 545 121
Access SIN
BN (no spaces or dashes)
Access BN

• You are now at Angela's Information page. Note the tax information that CRA makes available includes: prior-year Notice of Assessment, Statements of Account, and RRSP and TFSA balances

Accounts and payments Income tax balance: \$0.00 View statement of account Go to Accounts and payments details    Benefits and credits No benefits and credits payments are currently expected. Go to Benefits and credits details	Go to Tax returns details  Related services  Client data enquire  Client summary  Tax information silos (T4 and more)  Proof of income statement (option 'C' print)  Audit enquiries  Register my formal dispute  Qoen a non-resident tax account  File a GST/HST rebate
Accounts and payments Income tax balance: \$0.00 View statement of account Go to Accounts and payments details O Benefits and credits No benefits and credits payments are currently expected. Go to Benefits and credits details O	Related services • Client data enquiry • Client summary • Tax information sigs (T4 and more) • Proof of income statement (option 'C' print) • Audit enquiries • Register my formal dispute • Open a non-resident tax account • File a GST/HST rebate
Income tax balance: \$0.00 View statement of account Go to Accounts and payments details O Benefits and credits No benefits and credits payments are currently expected. Go to Benefits and credits details O	Client summary     Tax information alips (T4 and more)     Proof of income statement (option 'C' print)     Audit enquiries     Register my formal dispute     Open a non-resident tax account     File a GST/HST rebate
View statement of account Go to Accounts and payments details O Benefits and credits No benefits and credits payments are currently expected. Go to Benefits and credits details O	Tax information slips (T4 and more)     Proof of income statement (option 'C' print)     Audit enquiries     Register my formal dispute     Open a non-resident tax account     File a GST/HST rebate
Go to Accounts and payments details O Benefits and credits No benefits and credits payments are currently expected. Go to Benefits and credits details O	Proof of income statement (option 'C' print)     Audit enquiries     Register my formal dispute     Open a non-resident tax account     File a GST/HST rebate
Go to Accounts and payments details O Benefits and credits No benefits and credits payments are currently expected. Go to Benefits and credits details O	Audit enquiries     Register my formal dispute     Open a non-resident tax account     File a GST/HST rebate
Benefits and credits No benefits and credits payments are currently expected. Go to Benefits and credits details O	Hegister my formal dispute     Open a non-resident tax account     File a GST/HST rebate
Benefits and credits No benefits and credits payments are currently expected. Go to Benefits and credits details O	File a GST/HST rebate
No benefits and credits payments are currently expected.	
No benefits and credits payments are currently expected.	Request CPP/EI ruling
Go to Benefits and credits details O	Request a remittance voucher
	Climate Action Incentive Payments
	<ul> <li>Request relief of penalties and interest</li> </ul>
RRSP and TFSA	
Your 2019 RRSP deduction limit: \$22,050.00	
Your 2019 TFSA contribution room: \$53,273.00 TFEA- Important Information	
As of January 1, 2019	

#### **Entering tax data**

With the tax returns open in ProFile, use *Form Explorer* to open the required forms and schedules.

• Press *F4* to open *Form Explorer*, and, in the *Search* field, enter *T4*. Record the slip information on Jane's T4 form. Press *F5* to toggle to Martin's return where you can enter his T4 information as well

T4 Statement of Remuneration	n Paid								T4 SI	lip							
		Box	Slin #1	Slin #2	Slip	#3	Slin #	4	Tota								
			•	out at			on p a	•									
Description			ProFile Tour														
Province of employment		10	Ontario														
Employment income		14	52,900.00	0.00		0.00	0	0.00	52,90	00.00							
Employee's contributions	CPP	16	2,519.40	0.00		0.00	0	0.00	2,5	19.40							
	QPP	17	0.00	0.00		0.00	(	0.00		0.00							
	El premiums	18	856.98	0.00		0.00	0	0.00	8	56.98							
	PPIP	55	0.00	0.00		0.00	0	0.00		0.00							
Exempt	CPP/QPP	28	No	No	No	No											
	EI		No	No	No	No											
	PPIP		No	T4													1
Employment code		29		Statement of Re												14 51	<b>IP</b>
RPP contributions		20	0.00														_
Pension adjustment		52	0.00				Box		Slip #1	SI	ip #2		Slip #3	SI	ip #4	Total	
Income tax deducted		22	8,812.09					•							•		
El insurable earnings		24	52,900.00	Description				ProF	ile Tour								
CPP/QPP pensionable ear	nings	26	52,900.00														
PPIP insurable earnings		56	0.00														
Union dues		44	0.00	Province of emp	loyment		10	Onta	rio	-		-		-			
Charitable donations		46	0.00	Employment inc	ome		14		52,900.00		0.00		0.00		0.00	52,90	0.00
				Employee's cont	tributions	CPP	16		2,519.40		0.00		0.00		0.00	2,51	9.40
						QPP	17		0.00		0.00		0.00		0.00		0.00
						El premiums	18	_	856.98		0.00		0.00		0.00	85	6.98
						PPIP	55		0.00		0.00		0.00		0.00		0.00
				Exempt		CPP/QPP	28	NO		No		No		No			
						El		NO		No		No		No			
				-		PPIP	-	NO		NO		NO		NO			
				Employment co	de		29	-		-		-		-			
				RPP contribution	ns		20	-	0.00		0.00		0.00		0.00		0.00
				Pension adjustr	nent		52	-	0.00		0.00		0.00		0.00		0.00
				income tax dedu	lcted		22		7,999.12		0.00		0.00		0.00	7,99	9.12
				El insurable earr	nings		24		52,900.00		0.00		0.00		0.00	52,90	00.00
				CPP/QPP pensi	onable earn	nings	26		52,900.00		0.00		0.00		0.00	52,90	0.00
				PPIP insurable e	earnings		56	-	0.00		0.00		0.00		0.00		0.00
				Union dues			44	-	0.00		0.00		0.00		0.00		0.00
				Charitable donat	ions		46		0.00		0.00		0.00		0.00		0.00

- From Martin's T1, press F4 to find the T5 form and record that slip's information
- Assuming that each spouse contributed 50% of the invested amount, enter "50" on the line that reads, "% reported by spouse"

T5 Statement of Investment Income T5 Slip								
		Box	Slip #1	Slip #2	Slip #3	Slip #4	Total	
			•			<u> </u>		
Description			ProFile					
% reported by spous	se		50.0	0.0	0.0	0.0		
% reported by taxpa	yer		50.0	0.0	0.0	0.0		
Currency				÷		Ĵ.		
Exchange rate to co	nvert to Cdn \$		0	0	0	<u> </u>		
Eligible dividends	Actual Amount	24	0.00	0.00	0.00	0.00	0.00	
	Taxable Amount	25	0.00	0.00	0.00	0.00	0.00	
Interest from Canadian sources		13	2,121.44	0.00	0.00	0.00	2,121.44	
Source of Box 13 interest (for EFILE)			1/Bank	1/Bank	1/Bank	1/Bank	-	
Capital gains dividen	ds	18	0.00	0.00	0.00	0.00	0.00	
Dividends	Actual Amount	10	0.00	0.00	0.00	0.00	0.00	
	Taxable Amount	11	0.00	0.00	0.00	0.00	0.00	
Other income from C	Canadian sources	14	0.00	0.00	0.00	0.00	0.00	
Name of foreign cour	ntry							
Foreign income		15	0.00	0.00	0.00	0.00	0.00	
Foreign tax paid		16	0.00	0.00	0.00	0.00	0.00	
Royalties	Work or invention	17	0.00	0.00	0.00	0.00	0.00	
	Other		0.00	0.00	0.00	0.00	0.00	
Accrued income: An	nuities	19	0.00	0.00	0.00	0.00	0.00	
Box 19 received due	to death of spouse?		NO	NO	NO	NO		
Equity linked notes	canadian	30	0.00	0.00	0.00	0.00	0.00	
Interest	foreign source		0.00	0.00	0.00	0.00	0.00	

• Press F5 to return to Angela's return and then use *Form Explorer* to open the *DON* (*Charitable Donations*) form. Record that slip's amount as indicated below

Donations	Charitable (	donations
Charitable donations details		
Name of organizati	ion	Amount paid
Parkinson Society Of Canada		100 00
		0 00
Reported on slips	Claim: Own slips	0 00
	Total current year donations	100 00
Donations to U.S. organizations		
Name of organizati	ion	Amount paid
		0 00
	Total current year donations	0 00
Other gifts		
Donations made to government entities		0 00
Donations made to prescribed universities outside Canada.		0 00
Donations made to the United Nations, its agencies, and		
certain charitable organizations outside Canada.		0 00
Donations made to a registered museum or cultural organization.		0 00
Community Food Program Donation (Farmers)		0 00

#### Wrapping things up

Before finalizing things, you'll want to double-check the tax returns. As discussed earlier, ProFile's auditor is a powerful tool that alerts you to any errors or missing information. In addition to the auditor, you will want to refer to the *Slip Summary* form. This form lists, on a single page, the information from every slip used on a T1.

• Press F4 to open Form Explorer and find Angela's Slip Summary. Use it to confirm the T4 amounts

• Press F5 to toggle to Martin's T1 and consult his Slip Summary as well

	2019 S	lip Summa	ary				
					2019	Slip Summa	ary
NAME: CARSONN Angela							
and a second second second				NAME: St-Pierre, Martin			
T4 Slips - Feuillets T4		1	Total	, , , , , , , , , , , , , , , , , , , ,			
Description	Prof	File Tour		T4 Slips - Feuillets T4		1	Total
				Description	P	roFile Tour	
Province of employment	0						
Employment income	14	52 000 00	52 000 00				
CPP contributions	14	2 510 40	2,510.00	Province of employment		Intano	
El promiumo	10	2,019.40	2,019.40	Employment income	14	52,900.00	52,900.00
Er preinkuns	10	830.98	830.98	CPP contributions	16	2,519.40	2,519.40
nicome tax deducted	22	8,812.09	8,812.09	EI premiums	18	856.98	856.98
El insurable earnings	24	52,900.00	52,900.00	Income tax deducted	22	7,999.12	7,999.12
CPP/QPP pensionable earnings	26	52,900.00	52,900.00	EI insurable earnings	24	52,900.00	52,900.00
				CPP/QPP pensionable earnings	26	52,900.00	52,900.00
				TECH TO UN A TE		-	-
				15 Slips - Feuillets 15		1	Total
				Description	P	roFile	
				% reported by spouse		50.0	
				% reported by taxpaver		50.0	
				Interest from Canadian sources	13	2 121 44	2 121 44
				Sector Canada Sources	15	2,121.44	2,121.77

• You can also use ProFile's *Sign-offs* Review Marks to indicate, on each form, that you have verified and confirmed all entered amounts

T4 Statement of Remuneration Paid								
		Box	Slip #1	$\rightarrow$				
		•	- ζ					
Description		ProFile Tour	ľ\$					
Province of employment	10	Ontario	K.					
Employment income	14	52,900.00	<b>- X</b>					
Employee's contributions	CPP	16	2,519.40					
	QPP	17	0.00	<b>.</b> (				
	El premiums	18	856.98	<b>*</b> >				
	PPIP	55	0.00	5				
Exempt	CPP/QPP	28	No	<u>المجا</u>				
	EI		No	No				
	PPIP		No	Ne				
Employment code		29		<u> </u>				
RPP contributions		20	0.00	کر 🏼				
Pension adjustment		52	0.00	$\rightarrow$				
Income tax deducted	22	7,999.12	<u>.</u>					
El insurable earnings	24	52,900.00						
CPP/QPP pensionable earn	ings	26	52,900.00	R				
PPIP insurable earnings		56	0.00	<b>.</b> 2				
Haisa dues	m	_44_	$\sqrt{\sqrt{-0.000}}$	<b>y</b>				

#### Using the auditor

Press F9 to consult ProFile's Active Auditor. With the Active Auditor you can:

- View the return for errors, omissions, and suggestions
- Double-click an audit message to jump to the related form
- Use a sign-off to clear an audit message

PROFILE - [2019 T1/TP1: CARSONN, Angela - Other deductions]			- 🗆 ×
File Edit Audit Goto Form Options EFILE Online Training Window Help			- 5 ×
	🚔 🚔 🗮 Search	. 🖌 🖌 💥 🤶 🐳 Suggestion	Fi 🖡 🙆 👂
13. Dependant   🖾 2. T5   📋 4. Donations   📋 6. Slips   🖾 5. T4   🚳 1. Info   🝁 7. T1206   🌮 9. T183 📟 OtherDedi	uct 3. AuthorizeRep +		
Other Deduct			^
Other de	eductions		÷
Annual union, professional or like dues - line 21200			
Annual dilon, professional of the ddes - time 21200			
Union name			
Union dues reported on 14 slips	000		
Taxable annual union or professional dues	000		
	0 00		
Non-taxable annual union or professional dues			
	0 00		
Total	000		_
Do you qualify for the GST/HST rebate? Yes No X			
Expenses eligible for the GST rebate 0.00			
Expenses eligible for the HST rebate 0.00			
Carrying charges and interest expenses - line 22100			
Accounting fees	0 00		
Management or safe custody fees	0 00		
Investment counsel fees	0 00		
Reported on T5013 slips	000		
	000		
Legal fees paid to collect, establish or increase the amount of support payments	000		
Interest on money borrowed to earn interest, dwidend, and both income	000		
an active partner:			
Tax shelter 0 00			
Rental and leasing property 0 00			
Resource property 000			
	0,00		
Enter this amount on line 2 100 of your return. 221	0.00		
Other employment epenses - line 22900			
and a second			×
🔍 Summary 🍳 Warr as 🔍 Notices 🖌 Sign-offs 💥 Issues 📊 Overrides 🏹 Memos 🍁 EFILE 🍁 T1135	🔰 Online change 🗟 Data Import 🗟 Carry forwards 🛛	Tapes 🍳 Variance 🗦 EDI	
Notice T1206     If any income reported by taxpayer is taxable as 'split income' enter the details on Form T1206			<b>^</b>
Notice T183 Electronic delivery of the notices in the software has been selected. A valid request authorizing you a	s a representative must be on file with the CRA, for you to rece	eive the taxpaver's notices electronically in the sof	ftware and provide
them with a copy. Paper notices will not be mailed to the taxpayer from the CRA.			
Notice OtherDeduct Taxpayer has investment income. Are there carrying charges or interest expenses that could be deduced	cted?		
			*
Modified 00:17:10 EFILE: Eligible Balance/Refund	(3,123.58) T1:15000: Total income	53,960.72	+

#### Out the door

You'll need to provide to your clients a copy of their tax returns. You can, of course, print the return or, as is becoming increasing popular, provide a PDF copy. In either case, you will want your clients to sign CRA's T183 which authorizes you to EFILE the T1on their behalf.

- To print the return, click the toolbar's *Print* icon
- ProFile will open the *Print Selection* window—ready to print only those forms that you selected under *Options>Print Selection*

2019 T1/TP1 Print Selection	?	×
Print Job	✓ 1. CARSONN, Angela ✓ 2. St-Pierre, Martin ✓ 3. CARSONN, Johnny	
Allow multiple jobs	Print Details	
T1 Paper	1 D D F Print these sets	
TP1 paper		
T1 EFILE		
T1 Review	III 2 3 HI III Duplex sets	
	III 2 3 III III Review marks	
	II 2 3 III II 4 per page	
After printing	Find Form:	•
Take snapshot	Information return for electronic filing - pages 1	^
Change the status to	I I I I I I I I I I I I I I I I I I I	
Completed ~	I 2 3 B RC71-1 Discounting transaction - pages 1	
Options	II 2 3 II RC71-2 Discounting transaction - pages 2	
	I 2 3 B RC72-1 Notice of the actual amount of the refund of tax - pages 1	
	III 2 3 III RC72-2 Notice of the actual amount of the refund of tax - pages 2	
Print All Pages V	🔟 🖻 🗊 🗊 T1-1,2 T1 jacket-pages 1,2	
✓ Date in heading	🔟 📔 🗊 🗊 T1-3,4,5,6,7,8 T1 jacket - pages 3,4,5,6,7,8	
✓ Default printer	III I III III III III III III IIII IIII IIII	
Merge print sets	III III III III IIII IIII IIII IIIII IIII	
Show only Selected	III 2 3 III III S5 Details of Dependant	
Printing Tips	2 3 9 56 Canada Workers Benefit	
After printing	RRSP and PRPP Onused Contributions, Transfers, and H	
To change the Client Status	CPP on self-employment and other earnings     Departions and gifts	
after printing the file select a new status from the drop	Image: Second state     Image: Second state       Imag	
down list.		-
<u>Nex</u>	I 2 3 I Federal tuition and education amounts	
	I 2 3 I S S13 Employment Insurance Premiums on Self-Employment ar	6
	II 2 3 II 5 S14 Climate Action Incentive	
	III 2 3 III III SA Statement of world income	
	III 2 3 III III SB Allowable amount of non-refundable tax credits	
	III III III III III III III III III II	~
Simplified	Print Setup Set Defaults Cancel	Help

- If you'd rather email a PDF, first enter the client's email address on the *Personal Information* form, then click *Print / Email PDF*
- In the *eReview Print Selection* window, ProFile enters the email address for you
- After confirming the address, click *Email* to send the tax file

2019 T1/TP1 eReview Print Select	ion	? ×
Print Job	I CARSONN Angela VI 2 SARiarra Martin VI 3 CARSONN Johnny	
Allow multiple jobs	Print Details	
T1 Paper TP1 paper T1 Early Business T1 Early E	[1]         [2]         [3]         [4]         Email these sets (PDF)           [3]         [3]         [4]         [4]         Review marks	
TP1 EDI		
	Find Form:	•
	I I I I I Information return for electronic filing - pages 1	^
	I I I I T183-2 Information return for electronic filing - pages 2	
After Build PDF/Email	I I I F RC71-1 Discounting transaction - pages 1	
Take snapshot	I I I F RC71-2 Discounting transaction - pages 2	
Change the status to	I I RC72-1 Notice of the actual amount of the refund of tax - page	es1
Completed $\sim$	I I RC72-2 Notice of the actual amount of the refund of tax - page	es 2
Ontions	II II II II T1-1,2 T1 jacket-pages 1,2	
Options	II II II II T1-3,4,5,6,7,8 T1 jacket - pages 3,4,5,6,7,8	
Keep selections	I I I I S2 Amounts transferred from your spouse	
🗹 Date in heading	I I I I S 3 Capital gains (or losses)	
Merge print sets	II II II II II II S S5 Details of Dependant	
Show only Selected	II II II II II S6 Canada Workers Benefit	
Delete PDF	II	and H
Besolution 300 DPI V	II II II II II II S S8 CPP on self-employment and other earnings	
Email Template	I I I I S S9 Donations and gifts	
(nana)	II II II II Donations Charitable donations	
Churles *	I I I I I S S10 El and PPIP Premiums	
Printing Tips	E E S11 Federal tuition and education amounts	
🦲 Print Job	I I I I I S S13 Employment Insurance Premiums on Self-Employm	ent an
To allow multiple Print Jobs	I I I I S S14 Climate Action Incentive	
select the Allow multiple jobs checkbox.	I I I SA Statement of world income	
	I I I I SB Allowable amount of non-refundable tax credits	
Next	Electing Under Section 217 of the Income Tax Act	~
(	Email address for CARSONN, Angela	
	Angela@angela.co	
Simplified	Preview Email Cancel	Help

#### **EFILE it**

The last step is to EFILE the return. EFILE is CRA's electronic-filing portal that all professional tax preparers are required to use. Remember that before you can EFILE a tax return, your client will need to sign CRA's T183.

Canada Revenue Agence du revenu Agency du Canada	Information Re an Individual's I	P wh	en completed		
The information found on this form corresponds to the tr     Before you fill out this form, read the information and in     Ded O could be be informed to be a set of the information of the informati	ax year indicated on the istructions on page 2 of	right. this form.	Vauralastaasia filasasust fillasust	Tax Year	: 2019
<ul> <li>Part G Host be signed by the individual identified in Part submitted) and Part E (once your return has been submit Give the signed original of this form to your electronic fi Part A - Identification and address as shown</li> </ul>	tted). ler and keep a copy for	yourself.	. Your electronic mer must mi out r	ans D (phor to y	our return being
First name	Last name	indutory/		Social insur	ance number
Angela	CARSON	N		453 545 1	21
Mailing address: Apt number - Street number - Street nam	ne PO Box	RR	City	Prov./Terr	Postal code
2020 Smith Street			Anytown	ON	M4A 1A1
Get your CRA mail electronically delivered i	n My Account at o	anada.ca/my_ac	count (optional)		
Email Address:					<b>^</b>
By providing an email address, I am registering to receive	email notifications from	the CRA and I agree t	to the Terms of use on page 2 of	this form.	
Part B - Declaration of amounts from your In	come Tax and Be	nefit Return (man	datory)		
Enter the following amounts from your return, if applicab	le:				
Total income (line 15000)		53,960 72			
Taxable income (line 26000)		45,886 62	Refund (line 48400)		3,123 58
			or		
Total federal non-refundable tax credits (line 35000)		2,875 45	Balance owing (line 48500)		0 00 🗎
Part C - Pre-authorized debit agreement (opt	ional)				
Do you want to Pre-authorize the CRA to v below:	withdraw a specif	ied amount from	your bank account? If so,	, fill in the in	formation
I hereby authorize the electronic filer to create this person: as per the agreement details listed below. I adknowledge t	al pre-authorized debit that I have read and un	on my behalf. I author derstood the informatio	ize the CRA to automatically withd on about pre-authorized debit on p	raw the funds fro	m my bank account n.
			VVVV	/mm/dd	
	Signature		Year N	fonth Day	
One time payment for your Income Tax and Benefit Retur	n, to be VVV	//mm/dd , for the ar	mount of 000		
withdrawn on	Year	Month Day			
Branch No.	Einancial Institution N	_	Bank account number		
Part D. Electronic filer identification (mandat	004)				
Businio Canada C	www.	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	man harrow		

• To EFILE the T1 return, just click the EFILE menu and select EFILE/ReFILE this return



And that's it. Job done!

# Chapter 4 Quiz

**Question 1:** Tax preparers use the term "T1" to describe:

- A. The form an employer sends to an employee at year-end
- B. A statement that a bank sends to investors
- C. A corporate tax return
- D. A personal tax return

#### Correct answer is D

Question 2: True or False: You record all income and deductions directly onto ProFile's T1 jacket

#### **Correct answer is False**

Question 3: ProFile's Info page is used to:

- A. Enter all amounts earned during the year
- B. Enter the names of employers, banks and investments houses
- C. Indicate which forms and schedules you want to use on a T1
- D. Enter the name, address and other personal information

#### Correct answer is D

**Question 4:** True or False: Each type of income (T4, T5, etc.) is recorded on a dedicated form or Schedule in ProFile

#### **Correct answer is True**

Question 5: True or False: The T2202 Form is used to enter tuition amounts paid to a learning institution

#### **Correct answer is True**

**Question 6:** A signed T1013 form is used to:

- A. Get a client's sign-off on a completed T1
- B. Record deductions and credits
- C. Ensure that there are no CRA omissions
- D. Access CRA's website and obtain a client's tax information

#### **Correct answer is D**

Question 7: True or False: There is an icon on ProFile's toolbar to toggle between spouses' T1s

#### **Correct answer is True**

Question 8: True or False: You use the Slip Summary form to verify the amounts from all slips

#### Correct answer is True

Question 9: A signed T183 is used to:

- A. Record the amount of tax deducted on a T4 slip
- B. Get a client's authorization to EFILE a T1
- C. Change an error on a filed T1
- D. All the above

#### Correct answer is B

Question 10: True or False: ProFile cannot EFILE a T1. You can only do so from CRA's website

#### **Correct answer is False**



# Chapter 5 Advanced T1 Work

# **Learning Objectives**

# At this chapter's end students will understand:

- How to prepare a T1 when there are dependents
- How ProFile optimizes a T1
- How to prepare a T1 for the self-employed

### Additional Resources

This document provides numerous resources to accounting professionals. Refer to these sites to explore additional training opportunities

Professional Accounting Software

Tax Preparation & efiling Return Software

Professional Tax Software Training

# Chapter 5: Advanced T1 Work

## **DEPENDANTS AND DEDUCTIONS**

Now that you have learned the basics, let's explore T1 preparation at a more advanced level. Chapter 4 introduced a married couple Angela Carsonn and Martin St-Pierre. We also prepared a separate and independent tax return for a university student by the name of Johnny Carsonn. Chapter 4, therefore, assumed no relation between the married couple (Angela and Martin) and the student (Johnny). In this chapter, you will learn how ProFile works T1 returns when there is a relationship between a married couple and a dependant (son or daughter).

Let's begin, though, by assuming that the married couple, Angela Carsonn and Martin St-Pierre, provide even more forms.

TD		R	EGISTERED SAVING	RETIREMENT SS PLAN ATTACH TO	TD Waterhouse Canada Inc. 77 Bloor St. W. P.O. Box 5999, Station F Toronto, ON M4Y 2T1 FEDERAL INCOME TAX RETURN
DATE Feb 12, 2020	NUMBER	DURING THE FIRST 60 DAYS OF THE YEAR 8000.00	DUR ING OF	THE REMAINDER THE YEAR	CONTRIBUTOR'S NAME Angela Carsonn
Angela Carsonn				ANNUITANT'S SOCIAL INSURANCE NUMBER 453 545 121	CONTRIBUTOR'S SOCIAL INSURANCE NUMBER 453 545 121
				Contributio in pa	n was in whole or in kind
Official tax r	eceipt	Registered (CANAD	under the A) and sub	income tax act ject thereto.	The Casula Tout Company La social Casula Tout (Natherized Tignature Dignature due propose autorise)

• These forms include the following RSP slip

• And a schedule of Medical Expense

Medical Expenses				
Date	Name	Provider	Description	Amount
March 14, 2019	Angela Carsonn	Clear Sight Eyes	Eyeglasses	1588.44
June 28, 2019	Angela Carsonn	Dr. Nicholls	Dental	888.78
November 30, 2019	Angela Carsonn	Barclay & Associates	Physiotherapy	1044.22

• Further assume that Angela's son, Johnny Carsonn was at university full-time and had the following tuition certificate

<b>*</b>	Canada Revenue Agency	Agence du revenu du Canada											Pro when	tec com	ted B	/ Pro	tég fois	é B rempli
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				Session	YY/M	n M	YY/M	м		part-tir	me/		full-time/		Fra	nie and ais de s	cola	rité
Compu	ter Science			Périodes	De		À			Nom	bre		Nombre		ad	missible	es p	our
Student N	ame			d'études	AA/M	М	AA/M	М		de mo	ns a partiel		de mois a temps plein		étude	s à ten	nps p	partiel
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						otai	37 1014	u.x.	-				08					7010
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See the pri	vacy notice on the r	next page.																
Consulter	l'avis de confidential	lité à la nage suivante																2
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12202 (20)																au .	LU	ua

As in Chapter 4, assume that Johnny also received this T4 slip.

The goal therefore is to apply all available deductions and credits to minimize the family's tax liability. In ProFile, this process is called *Optimization*.

	Employer's name – Nom de l'employeur ProFile 2021 Tour 1212 Main St		Canada Rever Agency 2019	Agence du revenu du Canada	Statemen État de l	T4 Statement of Remuneration Paid État de la rémunération payée					
	Anytown ON M1A1A1			Employment income – I Revenus d'emploi – lig	ine 10100 ne 10100	Inc Impôt	come tax deducted – line sur le revenu retenu – lig	43700 gne 43700			
			14	9,0	00000	2	900.	00			
mpli	54 Employer's account number / Numéro de compte de l'employeur	Provinc	e of employmen	Employee's CPP contribu Cotisations de l'employé au	itions – line 30800 RPC – ligne 30800		El insurable earnin Gains assurables d	igs 'AE			
s re	23122 3131 RP 0001 Social insurance number Exempt – Exempt	ion 10	ON	16	280.50	24	9,000	00			
e foi	Social insurance number     CPP/QPP El PP     12     28     28		oloyment code ode d'emploi	Employee's QPP contribu Cotisations de l'employé au	itions – line 30800 RRQ – ligne 30800	CF Gains c	PP/QPP pensionable ea ouvrant droit à pension –	rnings RPC/RRQ			
nn		29		17		26	9,000	00			
gé E	Employee's name and address – Nom et adresse de l'employe			Employee's El premiun Cotisations de l'employé à l	ns – line 31200 I'AE – ligne 31200	Ca	Union dues – line 21 otisations syndicales – lig	200 gne 21200			
oté	Last name (in capital letters) – Nom de famille (en lettres moulées) First name –	Prénom Initi	ial – Initiale	18 .	145.80	44					
/ Pr	CARSONN JOHNNY			RPP contributions Cotisations à un RP	s – line 20700 A – ligne 20700		L Charitable donations – lir ons de bienfaisance – lig	ne 34900 ane 34900			
eted				20		46					
mple	2020 Smith Street			Pension adjustmer Facteur d'équivalence	nt – line 20600 ce – ligne 20600	F	RPP or DPSP registration d'agrément d'un RPA ou	n number d'un RPDB			
00 L				52		50					
whei	Anytown ON CAN	/14A 1A1		Employee's PPIP premi	ums – see over		PPIP insurable earn	ings BPAP			
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ote	Other information	Box-C	Jase	Amount - Montant	Box – Case	]	Amount – Montant				
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T4	(voir au verso)						RC-14-599	1			

#### **Recording RRSP contributions**

• With Angela and Martin's tax return open, press F4 and, in the Form Explorer, enter *RSP* in the search field. Profile will open the *RRSP/PRPP deduction* form

RRSP/PRPP	RRSP/	PRPP de	duction
RRSP contributions			
Verify unused amount from Box B	Notice of Assessment or enter it as 'Prior to 2	019'.	
		Contributio	ns made to
Description	Contribution period	Own RRSPs	Spousal RRSPs
TDW	January 1, 2020 to March 2, 2020	8,000 00	0 00
	March 2 to December 31, 2019	000	0 00
	Subtotal	8,000 00	000
PRPP Contributions			
		Employee C	ontributions
Description	Contribution period	Made to Own PRPP	
	January 1, 2019 to December 31, 2019	0 00	
	Subtotal	0.00	
PRPP employer contributions: January	1, 2019 to December 31, 2019		
Lamount from your PRPP contribution rec	eipts) - report on line 200 ro	000	
Total RRSP/PRPP contributions			
		Contributio	ns made to
		Own RRSP/PRPP	Spousal RRSPs
RRSP contributions		8,000 00	0 00
PRPP contributions		0 00	
	Subtotal	8,000 00	0 00
Less: Designated Home Buyers' Plan (HB	P) repayment	0 00	
Designated Lifelong Learning Plan (	LLP) repayment	0 00	
Non-deductible contributions due to	HBP or LLP withdrawal	0 00	000
Refund of undeducted contributions	included above	000	000
Total RRSP/PRPP contributions		8,000 00	000
Saskatchewan Pension Plan (SPP	) contributions		
Contribution period		Own SPP	Spousal SPP
Brie 2019 (amount area man	man and a start and a start and a start a star	, opal	000

• When entering RRSP contributions on this form, scroll down to enter or confirm the taxpayer's deduction limit (which you will find on CRA's Notice of Assessment). Note that ProFile will not allow an RRSP deduction until you fill in this field

RRSP/PRPP deduction limit	
Option 1: Enter limit from 2018 Notice of (Re)Assessment	9,500
Option 2: Calculate the limit	
2018 earned income 0 X 18%	0 A
Lesser of A or \$26,500	0
Less:Pension adjustment from 2018 T4/T4A slips	0
2019 past service pension adjustment	0
Plus: 2019 pension adjustment reversal from T10 slip	0
Subtota	al O
Plus: Unused RRSP/PRPP deduction room from 2018	0
Subtota	ıl 9,500
Less:Saskatchewan Pension Plan deduction	0
RRSP/PRPP deduction limit for 2019	9,500
And A	

#### **Entering Medical Expenses**

- To optimize a married couple's tax return, you will want to combine and claim medical expenses on only one of the spouse's returns. Assume, therefore, that you have decided to enter the medical expenses on Angela's T1
- Press F4, enter *Med* in the *Search* field and ProFile will open the *Medical Expenses* form
• Enter the medical expenses as illustrated below

Medical					Med	ical exp	oenses				
Optimize medic	cal expenses? Yes	<u>N</u> o X									
Medical expe	enses - line 33099										
Period covered	by claim: from 20	19/01/01 to 20	<b>19/12/</b> 3	1							
Payment date	Name of patient	Payment made to		Description of expense	* Subject to limitation?	Amount	Claim				
2019/03/14	Angela CARSONN	Clear Sight Eyes	E	Eyeglasses	No	1,588 44	1,588 44				
2019/06/28	Angela CARSONN	Dr. Nicholls		Dental	No	888 78	888 78				
2019/11/30	Angela CARSONN	Barclay & Associate	s F	Physiotherapy	No	1,044 22	1,044 22				
yyyy/mm/dd					No	0 00	0 00				
Medical expenses subtotal											
Are you claimin	ig medical expenses? Yes	-		T		<b>C</b>					
Dramiuma na	aid to private boolth consise pl			Taxpa		Spouse					
Employee/Pr	acipient paid premiume for pri	ans vate health convices al				000					
	cription Drug Incurance Plan	2018	aii			0.00					
Nova Scotia	Seniors' Dharmacare Drogram	- 2010				000	oloo				
Nova Scotla	Seniors Filamacale Flogram	•				000	000				
Total medica	I expenses - line 33099						3,521.44				
Allowable an	mount of medical expens	ses for other depe	ndants	- line 33199							
Name of other	dependant					Net income	0 00				
Payment date	Payment mad	de to	Descrip	tion of expense	* Subject to limitation?	Amount	Claim				
yyyy/mm/dd					No	0 00	0 00				
L					Total	medical expenses	0 00				
· Vuena	mm mm mm		~ `~~		$\sim$						

**Recording Dependant Information** 

• With all of the spouses' information entered in ProFile, the last step is to record the slip information for the couple's son, Johnny. To do this, you will use a ProFile's *Family Linking* feature.

# **FAMILY LINKING**



When you create a dependant's tax return, ProFile will link the return with that of the parents. You can tell *Family Linking* is enabled by the toolbar icon/dropdown menu that lets you toggle amongst the family's tax files.

- From Angela's T1, Press F4 and enter Dep in Form Explorer's Search field
- Enter Johnny's personal information on the Dependant

information form

Dependant			Dependar	nt information
Are you eligible to receive the Child T Family caregiver amount claimed by	ax Benefit?	Yes X You X	No  Spouse	
	Dependant #1		Dependant #2	Dependant #3
	1			•
Social Insurance Number	487 487 589	-		•
First name	Johnny			
Last name	CARSONN			
Relationship	Son	↓N/A		N/A
Ridhodstan	20mm mar	man and a second	(marked and a second	Marriagen Marria

• To create Johnny's T1 return, right-click on any field in the form and select Return for Johnny



• ProFile will open a window to confirm the action. Click OK



• From Johnny's tax file, return to Form Explorer and enter his T4 and T2202 (tuition) information

T4 Statement of Remuneration	n Paid					1	T4 Slip				
		Box	Slip #1	Slip #2	Slip #3	Slip #4	Total				
			4			•					
Description			ProFile Tour								
Province of employment		10	Ontario								
Employment income		14	9,000.00	0.00	0.00	0.00	9,000.00	)			
Employee's contributions	CPP	16	280.50	0.00	0.00	0.00	280.50	)			
	QPP	17	0.00	0.00	0.00	0.00	0.00	)			
	El premiums	18	145.80	0.00	0.00	0.00	145.80	)			
	PPIP	55	0.00	0.00	0.00	0.00	0.00	)			
Exempt	CPP/QPP	28	No	T2202/TL 44	AU						
	EI		No	Tuition and aduce	ation cradit cortificator					Tuition	Slips
	PPIP		No	Tultion and educa	ation credit certificates	)				Turtion	
Employment code		29		2		Box	Slip #1	Slip #2	Slip #3	Slip #4	Total
RPP contributions		20	0.00	_			1			•	
Pension adjustment		52	0.00				ProFile Tour				
Income tax deducted		22	900.00	Description			i i oi iio i oui				
El insurable earnings		24	9,000.00								
CPP/QPP pensionable ear	nings	26	9,000.00	T2202, TL11A, TI	L11C						
PPIP insurable earnings		56	0.00	Tuition fees paid t	o Canadian education	al 26	7,616.00	0.00	0.00	0.00	7,616.00
Union dues		44	0.00	institutions							
Charitable donations		46	0.00	Tuition fees paid t	o foreign educational		0.00	0.00	0.00	0.00	0.00
				institutions							
				Number of months	s in part-time enrolme	nt 24/B	0	0	0	0	0
				Number of months	s in full-time enrolmen	t 25/C	8	0	0	0	8
				TL11D							
				Tuition fees paid			0.00	0.00	0.00	0.00	0.00
				Charitable donation	ns		0.00	0.00	0.00	0.00	0.00

#### **Tuition transfers**

When a student's income isn't high enough to use up all available tuition credits, CRA allows that student to transfer the excess credit to a family member. ProFile takes care of this transfer automatically. It does so by a process called *optimization*.

• Because Johnny had excess tuition expenses, ProFile automatically transfers the applicable tuition credit to the appropriate spouse. A quick glance at line 32400 of Martin's T1 confirms the transfer



There is a setting in ProFile that toggles family linking on or off. To make sure that this setting is enabled, go to Options > Module and scroll down, under the General tab, to the section that reads "Allow family linking."



## **O**PTIMIZING

As mentioned in the previous paragraph, ProFile provides seamless, invisible optimization, and it alerts you with audit messages designed to achieve the most beneficial tax results for a tax preparer's clients. Here is what ProFile's optimization prowess includes: medical expenses; donations and losses; foreign tax credits; advantageous caregiver and infirm dependant claims between spouses; smart disability credit transfers; and intelligent transfer of tax credits between taxpayers and their dependants.

#### **Pension Splitting**

Splitting pension income is another example of ProFile's optimization capability. Let's look at an example.

The screenshot below shows the Tax Summary for a married couple named Sarah and John. In this example, Sarah earns significantly more that her spouse, John, with her income stemming from a pension of \$78,211. Tax practitioners will know that there is an opportunity, therefore, to split the pension income and reduce the couple's overall tax liability.

Summary			
		Sarah	John
Total income			
Employment *	10100	0	20,000
Old Age Security	11300	0	
CPP/QPP benefits	11400		<b>0</b>
Other pensions	11500	78,211	0
Split-pension amount	11600		0
Universal Child Care Benefit	11700	0	<b>^</b> 0 <b>^</b>
Employment Insurance	11900	0	▲ 0 ▲
Taxable dividends	12000	0	<b>^</b> 0 <b>^</b>
Interest	12100	0	▲ 0 ▲
Limited partnership	12200	0	<b>^</b> 0 <b>^</b>
RDSP	12500	0	▲ 0 ▲
Rental	12600	0	<b>0</b>
Taxable capital gains	12700	0	▲ 0 ▲
Support payments	12800	0	<b>0</b>
RRSP	12900	0	▲ 0 <sup>▲</sup>
Other *	13000	0	0
Self-employment *	13500	0	<b>0</b>
Workers' compensation and			<b>^</b>
social assistance	14700	U U	V
Total income	15000	78,211	20,000

- To begin the optimization process, go to the pension-transferor's return and open form T1032
- Scroll down the form and click Split-Pension Income



• ProFile opens the *T1032Opt* pension worksheet form. Right-click the form and select *Optimize split* pension income

11032Opt	0	pti	mize - Split-pension i
nformation for the el	ected split-pension amount		~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~
he Split-Pension Income plit-Pension Income.	optimization worksheet helps you	determin	e the amount, if any, to enter on line G of the T1032 - Joip
o view the amount that v	ve suggest for transfer, right click or	n the wor	ksheet and select Optimize split-pension income.
or additional information	press <f1> to access help for this</f1>	s worksh	eet.
alculation of the ele	ected split-pension amount Z	er tr	Optimize split pension income
			Copy field code
Elected split-pension am	lount	16	Convibleme (Tree
Total payable (line	John	10	Copy Merrio/ Tape
43500)	Combined	16	Paste Memo/ lape
	Sarah	11	Attach a Doc
Balance owing / refund	John	(1	Class form
	Combined	9	Close form
Combined net benefit (co	ost)		Print form
ummary of the elect	ed split-pension amount		Launch window
We have determined that	transferring \$27,754.62 to John's r	eturn v	Create FX
suggested amount, the b	alance owing of \$9,959.73 is decre	ased t	Create TB
Maximum split-pension a	mount (from line F of your T1032)		Carry forward
Please enter the split-p	pension amount you wish to tran	sfer to	Previous year's return
mis amount will appear t	Shime G on your 11032.		Show auditor Ctrl+F9
npact of electing a s	plit-pension amount on your	comt	-Environment

- As illustrated in the window below, ProFile will run an analysis and then suggest the pension income to transfer
- The form highlights the net benefit of accepting the suggested transfer
- It also provides a chart outlining the tax liability under different transfer scenarios
- To accept ProFile's suggested transfer, right-click the form and select *Elect split-pension amount of* \$27,754.62

T1032Opt			Op	otimi	ze -	Spli	t-per	nsio	n inc	come	9
nformation for th	e elected split-p	pension am	ount								
he Split-Pension Inc plit-Pension Income	ome optimization v	vorksheet help	ps you det	ermine the	amount, if	any, to ente	er on line G	of the T103	32 - Joint E	ection to	
o view the amount t	nat we suggest for t	ransfer, right	click on th	e workshee	et and sele	t O timi	Optimi	ze spiit pens	ion income		
or additional informa	ation, press <f1> to</f1>	o access help	for this w	orksheet.			Elect sp	lit-pension	amount of \$	27,754.62	
alculation of the	elected split-p	ension amo	ount	trapefor	Suggo	tod trans	Conv.N	lemo/Tane			
			Zen	uansier	Sugges	teu trans	Dacte N	lemo/Tane			
							Fasteriv	iemo/ iape			
Elected split-pension	n amount			0.00		27,754.6	Attach	a Doc			
otal navable (line	Sarah			16,295.72		7,413.0	Close fo	orm			Esc
(intel 13500)	John			0.00		5,960.5	Print fo	rm			
,	Combined			16,295.72		13,373.5	Mauri	ndaw			
Palanaa owing / rafu	Saran			11,959.72		2,541.1		nuow			
Salarice owing / relu	Combined			0.050.73		7.037.5	Launch	window			
Combined net benef	it (cost)			9,909.10		2,922,1	Create	FX			
							Create	T3			
ummary of the e	lected split-pen	sion amour	nt				Carry fo	orward			
We have determined	that transferring \$2	7.754.62 to J	ohn's retu	rn will result	t in the low	est combi	Previou	s vear's retu	m		
suggested amount, t	he balance owing o	of \$9,959.73 is	s decrease	d to \$7,037	.57. This r	epresents	Themos	s year s reca			
							Show a	uditor			Ctrl+F9
Aaximum split-pens	ion amount (from lir	ne F of your T	1032)				Environ	ment			
Please enter the s	olit-pension amou	nt you wish	to transfe	r to John.						-	
'his amount will app	ear on line G on yo	ur T1032.				Elected sp	lit-pensior	n amount		0.00	G
unant of election	e a anlit nanaiam	amount am		mbinedt	tel nevel						
ipact of electing	a spin-pension	amount on	i your co	mbined to	stai payai	ne					_
\$000	1										
17	, 										.
Combined 16	_										
total 15		_									
payable 15											
ine 43500) 14						_			_		
12											
134											

TIP: To learn more about optimizing, go to *Help* > *ProFile Help*, click the *Search* tab and enter "Optimizing" in the Search field

🌈 ProFile Help							$\times$
2019 T1/TP1 Y	Help \	Web Site	Sources	Contacts			
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Coptimizing List Topics Select Topic to display. Gifts and Income Tax Medical: Medical expen Optimizing charitable do Optimizing Iosses Optimizing medical expe Display	ProFile pro messages addition to credit opti claims bet intelligent dependani Optimizing Optimizing	ovides se designeto o the opt imization tween sp transfer ts. <u>medica</u> donatio	amless, invisibl d to achieve the imizations descr. s, advantageou ouses, smart dis of tax credits b <u>expenses</u> ins	e optimization best results ibed here, th s caregiver ar ability credit etween taxpa	is, and s for your i ere are fi in firm transfer, yers and	avvy au clients. I oreign ti depend and their	dit In ax ant
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Topic was jaritally diserted     Topic was irrelevant						Subr	mit
Display comments area.	V E	nable anony	mous help tracking				

# **PROFILE AND THE SELF-EMPLOYED**

As professional-grade tax software, ProFile can accommodate many types scenarios. Examples include rental income, investment income and income from self-employment. This section will illustrate ProFile's ability to accommodate the latter scenario.

Sam Hruzec, runs an un-incorporated marketing business called SH Marketing Services. Sam has asked you to prepare his T1. Other than the Statement of Revenue and Expenses below, Sam has no other income or expenses.

SH Marketing Services P&L	
Jan - Dec 2019	
Revenue	91,773
EXPENSES	
Accounting Fees	4,800
Advertising & Promotion	1,447
Interest & Bank Charges	1,547
Office expenses	1,398
Telephone	626
Travel Expense	780
Vehicle Expenses Biz KM	3255
Total KM	10061
Fuel	827
Insurance	914
Repairs	637
Parking	112
Home Office Expenses	
Total space	1695
Business use space	317
Home Insurance	628
Home Rep/Maint	1775
Heat	1288
Hydro	764
Property Tax	3840

#### T2125

You will record all of Sam's business-related activities on form T2125, *Statement of Business or Professional Activities*. After entering Sam's personal and contact information on the Info page, use Form Explorer to find and open the *T2125* 

Vice Form Explorer								?		×
11 Hruzec, Sam			~	<b>1</b>	ж.				2	
Eorm: T2125				<u>O</u> pen	Print	New	List	<u>D</u> etail	<u>K</u> ey	Line
Forms	Name	Category	Description		Used	Last year	Step			^
T1	🜌 T2091WS#	Income	Principal Residence Worksheet		No	N/A	88			
	12121#	Income	Fishing activities		No	N/A	89			
1. Identification	3 T2121CCASum	Income	Summary of CCA for fishing activitie	es	No	N/A	90			
📒 2. Slips	3 T2121CEC#	Income	Cumulative eligible capital for fishing	g activi	No	N/A	91			
3 Income	T2121Asset#	Income	Asset details		No	N/A	92			
St Do to al	"T2121AssetList#	Income	Asset list		No	N/A	94			
4. Deductions	3 T2121CCA#	Income	Details of CCA		No	N/A	93			
📜 <u>5</u> . Tax + credi 💌	T2121Compara	Income	T2121 - Comparative summary		No	N/A	95			
TP1	12125#	Income	Business activities		No	N/A	96			
161	TOLOFOROU		and the second s				~7			Y

Here's how to complete form T2125

• Enter the business contact details and other required information under identification area, and record the gross sales under Part 3 – Business Income

The Agency         Out Charas         Business of Professional Activities           Up a sub tournes as a profession fill in a separate Form T2125         In a separate Form T2125           Fill in this form a see Guide T4002, Self-employed Business, Professional, Commission, Farming, and Fishing Income.         Part 1 - Identification           Your name         Your social insurance number         238 137 848           Business and         Business and         Your social insurance number         238 137 848           Business and social social insurance number         238 137 848         Business and the social insurance number           Sit Matching         Characters)         RT           Business and the social insurance number         238 137 848         Business and the social insurance number           Sit Matching         Characters)         RT         Business and the social insurance number           Sit Matching         Characters)         RT         Business and the social insurance number           Sit Matching         VearMonthOay         Vear Amment or suite         To the social insurance number           Sit Matching method         Name add does of person of fime penping this form tack add does of person of fime penping this form tack add does of person of fime penping this form tack add does of person of fime penping this form tack add the social general tack addresses, also forom theory of a noc         PArt2 - Hoteert business anothore theory of a noc	ينائد ا	Canada Revenue	Agence du re	venu	Sta	tement of	Protect	ed B when completed	
L Use this form to calculate your self-employment business and professional income. For each business or profession, fill in this form and send at why your income tax and benefit return. For more information on how to fill in this form, see Guide T4002. Self-employed Business, Professional, Commission, Farming, and Fishing Income.  Part 1 - Identification Variance HutZec, Sam User and	Ŧ	Agency	du Canada		Business or P	rofessional Activities			
Part 1- Identification       Year social insurance number       238 137 548         Business name       Business name       RT         Business name       It's characters)       RT         Business name       It's characters)       RT         Business name       City       RT         Business name       City       RT         Business name       City       Province or territory       Postal code         Anytom       ON       MA9 491       Rt         Frecal period       ON       MA9 491       Rt         Promotion       Calendar Year       Was this your last year of business?       Yes       Ms         Promotion       Tax shelter identification number       Pattership business number       Your percentage of the pattership         Name and address of person or fim preparing this form       State of the pattership       Your apprecentage of the pattership         Name and address of person or fim preparing this form       State of the pattership       Your apprecentage of the pattership         Name and address of person or fim preparing this form       State of the pattership       Your apprecentage of the pattership         Name and address of person or fim preparing this form       State of the pattership       Your apprecentage of the pattership         Name and address of person	Use this For each Fill in thi For more Income.	form to calculate to business or profe s form and send it information on ho	your self-emp ssion, fill in a with your inc w to fill in this	loyment busi separate Fo ome tax and s form, see G	ness and professiona rm T2125. benefit return. uide T4002, <i>Self-emp</i>	il income. ployed Business, Professional, Co	ommission, Fan	ming, and Fishing	
Your name         Your social insurance number         238 137 848           Business name         Business number         Usiness number         238 137 848           Business address         Number         Street, P.O. Box         RT           Street, P.O. Box         Apartment or suite         (15 characters)         RT           Street, P.O. Box         Apartment or suite         (15 characters)         RT           Filesal period         From: Year/Month/Day         Year/Month/Day         (15 characters)         Rt           Promotion         Cost         Accrual X         MA9 A91         See the appendix in Guide 14002;           Promotion         Tax shelter identification number         Part Sec Mayor         Your percentage of the partnership business number         Your percentage of the partnership business number           Accrual X         TS         (9 digits)         To port occos 16 (10 0000 %           Name and address of person or firm preparing this form         Maccural transmission or free scientification number         Part 2 - Internet business activities           If your web pages or websites generate business a professional income firm? Enter "0" if none         P           Part 2 - Internet business activities         If your percentage or website addresses, and webage addresses, and webage addresses, and webage or website addresses, and webage or website addresses, and webage addresses, an	— Part 1	- Identification							
Business name Business name Business number RT Business number RT Business address add	Your name	Hruzec, Sam				Your social insurance num	nber 238 1	37 848	
On Markening       (1) Characteristy       (1) Ch	Business r	name				Business number		DT	
Field period       Was this your last year of business?       Yes    No            Prom:       Year/Month/Day       Calendar Year       Industry code (press F6)       #11119         Was this your last year of business?       Yes    No          Industry code (press F6)       #11119         Accounting method       Tax shelter identification number       Your percentage of       #11119         Accounting method       Tax shelter identification number       Your percentage of         Mame and address of person or firm preparing this form       Accounting method       Tax shelter identification number       Your percentage of         Mare and address of person or firm preparing this form       Accounting method       Tax shelter identification number       Your percentage of         Moot Mare and address of person or firm preparing this form       Accounting method       Tax shelter identification number       Your percentage of         More and subsets generate business or professional income, fill in this part of the form.       How many Internet web pages and websites does your business earn income from? Enter 'U' if none       P         Provide up to fire main web page or website addresses, also known as uniform resource locator (URL):       Http:///       Part 3A - Business income.         Mary Wain the fourth year, and 'Urbern the hun and all subsequent tax year's for more inflormation, see chapter 2 or guide 14002       91,773 00       91,773 00       91,773	Business a Number 1212 City Anytown	address Street, P.O. Box Oak St		Provi	Apartmeni E nce or territory Pos	t or suite stal code		KI	
Main product or service Promotion Industry code (press FG) e11119 Promotion See the appendix in Guide T4002) Accounting method Cash Accrual X TS Part as helter identification number TS Part 2 - Internet business activities If your web pages or websites generate business or professional income, fill in this part of the form. Part 2 - Internet business activities Provide up to five main web page or website addresses, also known as uniform resource locator (URL): <a href="http://www.maintagenerate-business-addresses">http://www.maintagenerate-business-addresses-also known as uniform resource locator (URL): <a (url):="" 0"="" <a="" addresses,="" also="" as="" five="" href="http:///" if="" known="" locator="" main="" one="" or="" page="" provide="" resource="" to="" uniform="" up="" web="" website="">http://</a> Part 2- Internet web pages and websites does your business and websites  If you are business income If you have business income, tick this box and complete this part. Do not complete parts 3A and 3B on the same form. <a href="http://">per dincome Ig Business income</a> If you have business income, tick this box and complete this part. Do not complete parts 3A and 3B on the same form. <a href="http://">pertocentage 0000 91,773 00</a>  If you have business income, tick this box and complete this part. Do not complete parts 3A and 3B on the same form. <a href="http://">pertocentage 0,000 91,773 00</a>  If you are using the quick method for GST/HST collected or collectible)  <a href="http://"> <a (url):="" 0"="" <="" addresses,="" also="" as="" five="" href="http://&lt;/a&gt; &lt;/a&gt; &lt;/a&gt; If you are using the quick method for GST/HST Collected&lt;/td&gt;&lt;td&gt;Main produ&lt;/td&gt;&lt;td&gt;uct or service&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;Industry code (press F6)&lt;/td&gt;&lt;td&gt;811119&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Accounting metricical       Tax sheller identification number       Pattership dusiness number       Your percentage of&lt;br&gt;the partnership         Name and address of person or firm preparing this form       ABC IMPOT       100.0000       %         Name and address of person or firm preparing this form       ABC IMPOT       100.0000       %         Name and address of person or firm preparing this form       ABC IMPOT       100.0000       %         Name and address of person or firm preparing this form       ABC IMPOT       100.0000       %         Name and address of person or firm preparing this form       ABC IMPOT       100.0000       %         Name and address of person or firm preparing this form       ABC IMPOT       100.0000       %         Name and address of person or firm preparing this form       ABC IMPOT       100.0000       %         Part 2 - Internet business activities       If you web pages and websites deer your person addresses, also known as uniform resource locator (URL):       100.0000       100.0000         May year, 80% in the fourth year, and 100% of the math and all subsequent tax years for more information, see chapter 2 or guide 14002.       Part 3A - Business income       91.773 00         May year, 80% in the fourth year, and 100% of the math and all subsequent tax years for more information, see chapter 2 or guide 14002.       91.773 00       100.000         May year, 80% in the fourth year, and 10&lt;/td&gt;&lt;td&gt;Promotion&lt;/td&gt;&lt;td&gt;n methed&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;Tay abob&lt;/td&gt;&lt;td&gt;dentification and&lt;/td&gt;&lt;td&gt;(see the appendix in Guide&lt;/td&gt;&lt;td&gt;T4002)&lt;/td&gt;&lt;td&gt;and a start of&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Name and address of person or firm preparing this form       100 0000 1/2         ABC IMPOT       000 Main St         Laval, Québec J1K1A1       Part 2 - Internet business activities         If you web pages or websites generate business or professional income, fill in this part of the form.       p         How many Internet web pages and websites does your business earn income from? Enter " if="" known="" locator="" main="" none="" or="" p="" page="" provide="" resource="" td="" to="" uniform="" up="" web="" website=""><td>commission (</td><td>g method only) Cash</td><td>Accrual</td><td>Tax shelter TS</td><td>dentification number</td><td>(9 digits)</td><td>the pa</td><td>artnership</td><td></td></a></a></a>	commission (	g method only) Cash	Accrual	Tax shelter TS	dentification number	(9 digits)	the pa	artnership	
ABC IMPOT 1000 Main St 1000 Ma	Name and	address of person	or firm prepa	l iring this form			100.	0000 %	
1000/mail Sile         1000/mail Sile         Part 2 - Internet business activities         If your web pages or websites generate business or professional income, fill in this part of the form.         How many Internet web pages and websites does your business earn income fom? Enter "0" if none       D         Provide up to five main web page or website addresses, also known as uniform resource locator (URL):       D         http://	ABC IMPC	T		_					
Part 2 - Internet business activities         If your web pages or websites generate business or professional income, fill in this part of the form.         How many Internet web pages and websites does your business earn income from? Enter "0" if none       D         Provide up to five main web page or website addresses, also known as uniform resource locator (URL): <a href="http://">http://</a> Provide up to five main web page or website addresses, also known as uniform resource locator (URL): <a href="http://">http://</a> Provide up to five main web page or website addresses, also known as uniform resource locator (URL): <a href="http://">http://</a> Provide up to five main web page or website addresses, also known as uniform resource locator (URL): <a href="http://">http://</a> Provide up to five main web page or website addresses, also known as uniform resource locator (URL): <a href="http://">http://</a> Part 3A - Business income       Total addresses         If you have business income       © commission         ross sales, commissions, or fees (include GST/HST collected or collectible)       91,773 00         come reported on T44 slips       0 00         come reported on T44 slips       0 00         ges for services (T4A box 28)       0 00         Nus Goods and services tax and provincial sales tax (GST and PST) or harmonized sales tax (HST) (if included in sales above)       0 00         Returns, allowances, and discounts (if included in amount 3A)       0 00	aval Qu	ébec J1K1A1							
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ype of income       August Summission         iross sales, commissions, or fees (include GST/HST collected or collectible)       91,773 00         iccome reported on T4 slips       0 000         come reported on T4 slips       0 000         ces for services (T4A box 28)       0 000         ees for services (T4A box 28)       0 000         linus Goods and services tax and provincial sales tax (GST and PST) or harmonized       91,773 00         sales tax (HST) (if included in sales above)       0 000         Returns, allowances, and discounts (if included in amount 3A)       0 000         Subtotal: Amount 3A minus amount 3B       91,773 00         If you are using the quick method for GST/HST Government assistance calculated as follows:       0 000         GST/HST collected or collectible on sales, commissions and fees eligible for the quick method plus GST/HST collected or collectible) multiplied by the applicable quick method remittance rate       0 000         Subtotal: Amount 3D minus amount 3E       0 000       3E         GST/HST remitted, calculated or (sales, commissions and fees eligible for the quick method plus GST/HST collected or collectible) multiplied by the applicable quick method remittance rate       0 000       3E         Subtotal: Amount 3D minus amount 3C plus amount 3E (enterers line 8000 of Part-290)       01773 00       3C	d year, 80 Part 3A	% in the fourth y – Business in have business in	ear, and 100 come	% in the linth	and all subsequent	tax years. For more information	i, see chapter I 3B on the sa	z or guide 14002. me form.	$\overline{}$
ross sales, commissions, or rees (include GST/HST collected or collectible)       91,773,00         iccome reported on T4 slips       0,00         cess for services (T4A box 28)       0,00         ees for services (T4A box 28)       0,00         gales tax (HST) (if included in sales above)       0,00         Returns, allowances, and discounts (if included in amount 3A)       0,00         Subtotal: Amount 3A minus amount 3B       91,773,00         If you are using the quick method for GST/HST Government assistance calculated as follows:       0,00         GST/HST collected or collectible on sales, commissions and fees eligible for the quick method plus GST/HST collected or collectible) multiplied by the applicable quick method remittance rate       0,00         Subtotal: Amount 3D minus amount 3E       0,00         91,773,00       3E	ype of inco	ome X <u>B</u> usir	ness 🗌 <u>C</u> e	ommission		C14-3		04 770/00	
come reported on T4A slips       0 00         come reported on T4A slips       0 00         ees for services (T4A box 28)       0 00         binus Goods and services tax and provincial sales tax (GST and PST) or harmonized       91,773 00         sales tax (HST) (if included in sales above)       0 00         Returns, allowances, and discounts (if included in amount 3A)       0 00         Subtotal: Amount 3A minus amount 3B       91,773 00         If you are using the quick method for GST/HST Government assistance calculated as follows:       0 00         GST/HST collected or collectible on sales, commissions and fees eligible for the quick method plus GST/HST collected or collectible) multiplied by the applicable quick method plus GST/HST collected or collectible) multiplied by the applicable quick method remittance rate       0 00         Subtotal: Amount 3D minus amount 3E       0 00       3F         diusted prosecales: Amount 3C plus amount 3E (enteres line 8000 of Part-29)       0 00       3F	come rep	orted on T4 slips	or rees (inclu	ue GST/HS	collected or collec	uble)		91,77300	
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91,773 00 3A         sales tax (HST) (if included in sales above)       0 00         Returns, allowances, and discounts (if included in amount 3A)       0 00         Subtotal: Amount 3A minus amount 3B       91,773 00 3C         If you are using the quick method for GST/HST Government assistance calculated as follows:       0 00 3D         GST/HST collected or collectible on sales, commissions and fees eligible for the quick method plus GST/HST collected or collectible) multiplied by the applicable quick method remittance rate       0 00 3E         Subtotal: Amount 3D minus amount 3E       0 00 3E         GST/HST remitted, calculated on (sales, commissions and fees eligible for the quick method plus GST/HST collected or collectible) multiplied by the applicable quick method remittance rate       0 00 3E         Subtotal: Amount 3D minus amount 3C plus amount 3E (enterers line 8000 of Part-29)       0 1773 00 3C	ees for se	rvices (T4A box 2	28)					00 00	
Subtotal: Amount 3A minus amount 3B       91,773       00       3C         If you are using the quick method for GST/HST Government assistance calculated as follows:       91,773       00       3C         GST/HST collected or collectible on sales, commissions and fees eligible for the quick method plus GST/HST collected or collectible) multiplied by the applicable quick method remittance rate       000       3E         Subtotal: Amount 3D minus amount 3C plus amount 3C plus amount 3E (enteres line 8000 of Part-29)       0177300       3C	linus Goo sale Retu	ds and services t s tax (HST) (if inc irns, allowances,	ax and provir cluded in sale and discoun	ncial sales ta es above) ts (if include	ux (GST and PST) o d in amount 3A)	r harmonized	0 00	91,773 00	3A 3B
applicable quick method remittance rate 0000 3E Subtotal: Amount 3D minus amount 3E 0000 3F diusted gross-sales: Amount 3C plus amount 3E (enterse line 8000 of Part-29)	If you an GST/HS <u>quick me</u> GST/HS for the qu	re using the qui T collected or col ethod T remitted, calcul uick method plus	ck method f lectible on sa lated on (sale GST/HST co	for GST/HST ales, commise es, commise ollected or co	Government assis ssions and fees elig ions and fees eligib illectible) multiplied	Subtotal: Amount 3A minu: tance calculated as follows: ible for the	s amount 3B	91,773 91,773 91	3C
diusted prose-sales: Amount 3C plus amount 3E (enterses line 8000 of Dat-290)	applicabl	ie quick method r	emittance ra	te		Subtotal: Amount 3D minu	0 00 3E	oloo	35
	diusted a	ross sales: Amo	unt 3C nlue	amount 3F (	entersa line 8000 a	f Part-29X	s amount SE		3G

• Record all business expenses in Part 4 of the T2125

Marca At routh my man al month my	man and a second	an	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		ma		$\sim$
Gross business or professional income (line 8299 of Part 3C) or Gr	ross profit (line	8519 of F	art 3D)			91,77	3 00 📕 4
Expenses (enter only the business part)							
Advertising			8521	1,447	00 48	}	
Meals and entertainment	0 00 x	50%					
Meals and entertainment (long haul truck drivers)	0 00 x	80%	8523	0	00 4C	;	
Bad debts			8590	0	00 4D	)	
Insurance			8690	0	00 4E		
Interest			8710	1,547	00 4F	:	
Business taxes, licences, and memberships			8760	0	00 4G	6	
Office expenses			8810	1,398	00 4H	ł	
Office stationery and supplies			8811	0	00 41		
Professional fees (includes legal and accounting fees)			8860	4,800	00 4J		
Management and administration fees			8871	0	00 4K	[	
Rent			8910	0	00 4L		
Repairs and maintenance			8960	0	00 4N	1	
Salaries, wages, and benefits (including employer's contributions)			9060	0	00 4N	l	
Property taxes			9180	0	00 4C	)	
Travel expenses			9200	780	00 4P	)	
Utilities			9220	626	00 4G	2	
Fuel costs (except for motor vehicles)			9224	0	00 4R	Ł	
Delivery, freight, and express			9275	0	00 4S	;	
Motor vehicle expenses (not including CCA)							
(see Chart A) - from worksheet	8	81 35 🕯					
Motor vehicle expenses (not including CCA)		_					
me Charthat and	m		9	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	35 <b>4</b> T	$\sim$	my /

• Note, however, that you don't record vehicle expenses on the T2125 itself, but on the *Business Auto* ancillary form (see illustration below), and you indicate, at the top of the *Business Auto* form, where to send the vehicle expenses

Here are other key points to consider with the Business Auto form

- You must indicate the business kilometers and the total number of kilometers driven in the tax year
- ProFile uses these values to calculate the allowable vehicle expense
- Any vehicle loan or leasing costs are calculated in a separate area of the *Business Auto* form. See *Chart D*, at the bottom of the window below, which is where the eligible leasing cost is calculated

Business Auto MO	tor	vehi	cle	e expe	nses (	Busin	ess	s)
Allocation of expenses Fiscal period Start End	%	Amoun	t	CCA	Terminal Loss	Recapture	Owne busin	ed by ess?
T2125#1:SH Marketing 2019/01/01 2019/12/31	100	881.3	35	0.00	0.00	0.00	Yes	
_yyyy/mm/ddyyyy/mm/dd	d 0	0.0	00	0.00	0.00	0.00	NO	
Chart A - Motor vehicle expenses								
Description of automobile Filmore					_		-	
Enter the kilometers you drove in the tax year to earn bu	isiness	income				3,25	5 1	
Enter the total kilometers you drove in the tax year						10,06	1 2	
		Тах	able		Non Eligible	Tota	al	
Fuel and oil					827 00	8	27/00	3
Interest (see Chart B)		000		000	0 00		0 00	4
Insurance					914 00	9'	14 00	5
License and registration	_				0 00		0 00	6
Maintenance and repairs		0 00		0 00	637 00	6	37 00	7
Leasing (See Chart D)		0 00		0 00	0 00		0 00	8
Other expenses (specify)		0 00		0 00	0 00		0 00	9
		0 00		0 00	0 00		0 00	10
Total motor vehicle expenses	<u> </u>	0 00		0 00	2,378 00	2,3	78 00	11
Business use part: Multiply line 11 by 32.35 %		0 00		0 00	769 35	70	59 35	12
Business parking fees		0 00		0 00	112 00	11	12 00	13
Supplementary business insurance					0 00		0 00	14
Allowable motor vehicle expenses		0 00		0 00	881 35	88	31 35	15
Change And	enger v		ZOT		and sample	alarma and a second		~

One further step in recording Sam's business expenses is to enter the allowable *home office expense*. As a selfemployed individual working from home, Sam can deduct a portion of her home expenses. This portion is calculated by adding up all of Sam's home expenses and multiplying it by a factor that represents the percentage of the home's area used to run her business.

- To record home expenses, scroll down to Part 7 at bottom of the T2125
- Enter the home's total area and the area used for business
- Enter the operating costs for the home including heat, electricity, insurance, etc.
- ProFile will calculate the allowable home office expense and include it as an eligible business expense on the T2125

After entering all required information on the T2125, ProFile will calculate the gross and net business income and transfer it to the T1 Jacket.

Part 7 – Calculation of business-use-of-home expenses	
Area of home used for business (A) 317	
Total area of home (B) 1,695	
Heat	1,288 00 7A
Electricity	764 00 7B
Insurance	628 00 7C
Maintenance	1,775 00 7D
Mortgage interest	0 00 7E
Property taxes	3,840 00 7F
Other expenses (specify):	
	0 00 7G
Subtotal: Add amounts 7A to 7G	8,295 00 7H
Personal-use part of the business-use-of-home expenses	6,743 66 71
Subtotal: Amount 7I	1,551 34 7J
Capital cost allowance (business part only), which means amount i of Area A minus any portion of	
CCA that is for personal use or entered on line 9936 of Part 4.	0 00 7K
Amount carried forward from previous year	0 00 7L
Subtotal: Add amounts 7J to 7L	1,551 34 7M
Net income (loss) after adjustments (amount 5C) (if negative, enter "0")	80,293 65 7N
Business-use-of-home expenses available to carry forward: Amount 7Mminus amount 7N	
(if negative, enter "0")	0 00 70
Allowable Naim: The lesser of amount 7M and 7N above lenter your share of this amount on line 2045 of Pro-	1,551 3A ZR

## **PART-YEAR RESIDENTS**

If someone is newly arrived in Canada, follow these steps to set up a T1 return.

- Complete the Info page as you normally would. So that ProFile can prepare the proper schedules, ensure that you select the correct province of residence
- On the Info page, report the date of entry into Canada
- After reporting the date of entry, ProFile will open additional fields, including Line 52920 and 52930. In these fields, report Canadian and foreign-sourced non-resident income. In this example, there is \$9,000 of foreign-sourced, non-resident income
- Once you enter an amount on either Line 52920 or 52930, ProFile will tick the box to prorate non-refundable tax credits
- Note how the auditor alerts you that amounts are prorated
- You may then complete the rest of the return as you normally would

Info	2019 Personal information
Taxpaver personal information	Marital status
SIN 1111118 Title M First name Rene	Indicate your marital status on December 31, 2019 1 Married 2 Living common-law 3 Widowed
Last name Descartes Last name changed in 2019? Yes X No	4 ∐Dworced 2 ∐Separated 2 K Single If status changed in 2019, enter date of change mm/dd
Do you want to change your address? Yes X No Care of Street address 12011 Main St	Were you married or living common-law at any time in this tax year? Yes No
P.O. Box City ANytown	Residency Province of residence on 2019/10/21 Ontario
Province ON Postal code K1A 1A1 Diamage Appendix (112) 555 1312	Province of self-employment If you became or ceased to be a Canada
Birth date 1988/12/12 Age 31 Date of Death yyyy/mm/dd	2019, enter date of: or departure prorated. or departure or departure
Gender X Male Eemale Province or territory where taxpayer resides if different from mailing	Canada 52530 0.00
address:	Spouse's or common-law partner's et income while the taxpayer is living triside of Canada 52570 0.000
Email address: By providing your email address or updating an already registered	Canadian sourced non-resident incone 52920 9,000,00 Foreign sourced non-resident incone 52980 9,000,00
email address, i understand i am régistering for online mail and accept the terms and conditions that are set out on page 2 of the form T183. Paper notices will not be mailed to me from the CRA.	Prorate non-refundable tax credits r part year resident?
Do you want preparer to get Electronic Notice of Assessment? Yes X No	Are you a non-resident? Yes X No Residency status Resident

Residency rules, for both Canadian citizens and non-Canadians, can be a complex affair. For more information, consult CRA's guides, such as T4058 Non-Residents and Income Tax, and T4055 Newcomers to Canada.

# Chapter 5 Quiz

Question 1: The feature that allows you to prepare T1s for married couples and their dependants is called:

- A. Hub and Link
- B. Synchronization
- C. ProFile Review
- D. Family Linking

#### Correct answer is D

**Question 2:** True or False: ProFile will calculate the allowable RRSP deduction even if no deduction limit indicated:

#### **Correct answer is False**

**Question 3:** Select the best way to create a dependant's T1:

- A. Go to the *File* menu and click *New T1*
- B. Right-click a T1 Jacket and select New
- C. Click the *Synchronize* icon
- D. Right-click the dependant's name on the Dependant form, and click Return for...

Correct answer is D

**Question 4:** True or False: If a dependant has excess tuition credits, ProFile will transfer the excess amount to a parent's linked return

**Correct answer is True** 

Question 5: True or False: ProFile has an option to toggle Family Linking on or off

**Correct answer is True** 

Question 6: Which of following tax situations does ProFile's Optimization verify?

- A. Medical expenses
- B. Charitable donations
- C. Tuition credits
- D. All the above

#### **Correct answer is D**

Question 7: True or False: The T1032 form allows you to optimize and split pension income between spouses

#### **Correct answer is True**

Question 8: True or False: ProFile cannot prepare tax returns for self-employed individuals

#### **Correct answer is False**

**Question 9:** To prepare a T2125, ProFile requires the following. Choose the best answer:

- A. ProFile cannot prepare a T2125 return
- B. A statement of revenue and expenses (Income Statement or Profit & Loss)
- C. A balance sheet
- D. None of the above

#### Correct answer is B

Question 10: True or False: ProFile can prepare a T1 for part-year residents

#### **Correct answer is True**



# Chapter 6 An Online World

# **Learning Objectives**

# At this chapter's end students will understand:

- How to use ProFile's online tools
- How to use CRA's AutoFill My Return
- How to ReFile a T1

#### Additional Resources

This document provides numerous resources to accounting professionals. Refer to these sites to explore additional training opportunities

Professional Accounting Software

Tax Preparation & efiling Return Software

Professional Tax Software Training

# Chapter 6: An Online World

## **GETTING ONLINE**

Every day, more and more businesses are taking things online. Online information is part of our everyday lives. It should come as no surprise, then, that tax preparers too are increasingly using online tools. Canada Revenue Agency, for example, demands that tax preparers EFILE tax returns and, at the same time, with a dedicated *Represent a Client* account, CRA gives tax preparers online access to an array of client information that was unthinkable just a few short years ago. ProFile is building on this cloud trend as well. As a ProFile user, you have access to an increasing number of cloud tools. Let's take a closer look:

#### The online toolbar

The Online toolbar sits permanently under ProFile's Menu bar. Let's explore these four icons:

• Click the *Live Chat* icon...



... To engage a ProFile support agent and chat online



E. Click the Notification Centre...



F. ... To view alerts, reminders and other ProFile messages



• Click the Online Settings to access ProFile's online tools...



• ...Including a service to back up your files online

Ø		×
	Backup to Cloud	
Securely protect your returns or	nline using ProFile's Backup to Cloud. I	Here's how you can get started:
Enable Backup to Cloud	Choose when to back up	Download on demand
You'll need to turn it on in your <u>Environment Options.</u>	You can back up to the cloud automatically when you save your return or have more control by backing up with <u>ProFile Hub.</u>	Rest easy, you can retrieve your returns if they are lost or damaged.
□ Don't show again	Enable now	Remind me later

## Accessing your online account

If you have a ProFile account, getting online is quick and easy:

- From the toolbar, click the Online Settings icon and ProFile launches the sign-in window
- Click Sign In 🔳
- Enter your user ID and password

- Select your firm (or add a new one)
- Click *Finish* and you're done



#### But I don't have an online account

If you don't have an online account, creating one is a snap:

- From the toolbar, click the Online Settings icon to launch the sign-in window
- Click Create Company
- Enter your credentials and then click Create account

FR A 🔊 🛛 1			
V Sign In		X	
intuit ProFile			
	Create your company	Gen In	×
	Already have an account? Sign In	intuit PoFie	Â
	Email	Already have an account? Sign in Email address	
	Company Name	Protome	
2	Create company	Lad same	
	<u>&lt; Back</u>	Prove	
		Servity genetics	
		Provueb look of all time? U Actives	
		herester w	
		B Create Account	~

## BACK UP TO THE CLOUD

To back your files up to ProFile's cloud servers, you must first enable the feature:

• Click *Environment > Options*, select the *Backup to Cloud* tab and click your desired options. Note that one of the options lets you automatically back up all files upon saving



- To manually back up one or multiple files from the Menu Bar, click *Go to>Hub*, select the desired files
- Click the Actions dropdown and choose Back up to the Cloud

P	ProFile H	ub						- 🗆 X	-
	Wor	kflow				እ Sign In	T1 Module	~ 🐯	
	Actio	n V	All years $\sim$	Search for file name or type	2	Q			
2	Back	k up to the	`		INTUIT LINK	CR	A IMPORT	COL	
		wallet, gui (418) 234-1122		77) wallet, gui.18T	Invite client	🖉 Ru	n CRA Import	Add	^
	$\checkmark$	Taxpayer, Amy (613) 555-5555		Taxpayer, Amy and TaxPayer,	Invite client	🖉 Ru	n CRA Import	Adc	
1	<b>V</b> 9	C (613) 555-5555	Spouse: TaxPayer, Gavin	TT Taxpayer, Amy.15T	Invite client	🖉 Ru	n CRA Import	Ado	
		(613) 555-5555	Spouse: TaxPayer, Gavin	Taxpayer, Amy and TaxPayer,	Invite client	🖉 Ru	n CRA Import	Ado	
	D A	C Taxpayer, Amy (613) 555-5555	Spouse: TaxPayer, Gavin	Taxpayer, Amy and TaxPayer,	Invite client	🖉 Ru	n CRA Import	Ado	
		Coide Carla		<				>	~
То	tal Client(	s): T1 82   Selected Cli	ent(s): T1 2				ProFile	Hub Service: Available	

# **AUTO-FILL MY RETURN**

AutoFill My Return (AFR) is a secure Canada Revenue Agency (CRA) service that allows individuals and authorized representatives to automatically fill-in parts of a T1 with information that the CRA has available at the time of filing the return. Many authorized representatives are already accessing CRA's online services to gather client information. AFR is the logical next step. By automatically populating key data, CRA's AFR simplifies the tax preparation process.

To use the AFR service, a tax preparer must:

- Register and be an approved electronic filer
- Register in CRA's *Represent a Client* and have a RepID, GroupID or business number (BN)
- Submit a signed Authorize a Representative Form to CRA for each client (as described in Chapter 3)

It is important to note that AFR service is not mandatory for EFILE certified software products. Some products include the service in their product, but others may not. ProFile falls in the former category and has full AFR functionality.

#### Summary of Tax Information that CRA delivers with AFMR

#### **Information Slips**

- T3, Statement of Trust Income Allocations and Designations
- T4, Statement of Remuneration Paid
- T4A, Statement of Pension, Retirement, Annuity, and Other Income
- T4A(OAS), Statement of Old Age Security
- T4A(P), Statement of Canada Pension Plan Benefits
- T4E, Statement of Employment Insurance and Other Benefits

- T5, Statement of Investment Income
- T5007, Statement of Benefits
- T5008, Statement of Securities Transactions
- RC62, Universal Child Care Benefit Statement
- RC210, Working Income Tax Benefit Advance Payments Statement
- Registered Retirement Savings Plan contribution receipt

- T4RIF, Statement of Income from a Registered Retirement Income Fund
- T4RSP, Statement of Registered Retirement Savings Plan Income

#### **Other Tax-Related Information**

- RRSP contribution limit
- Lifelong Learning Plan repayment amount
- Capital gains and losses
- Federal tuition, education, and textbook carryover amounts

#### **Client Data Enquiry (CDE)**

- Home Buyers' Plan
- Social assistance or workers' compensation benefits
- Working income tax benefit advance payments (RC210)
- Reassessment information
- New balance owing message for prior claim(s) on a refund
- Current tax year return
- Insolvency, consumer proposal indicator
- Recent page access
- Provincial tuition, education, and textbook carryforward
- Unfiled returns
- External refund set-off amounts
- Reassessment in progress
- CPP payments (T4A(P))
- Working income tax benefit
- Emigration Date
- Direct deposit indicators

- T1204, Government Service Contract Payments
- RENT ASSIST
- Home Buyers' Plan repayment amount
- Non-capital losses
- Capital gains deductions
- Provincial tuition, education, and textbook carryover amounts
- Lifelong Learning Plan
- Employment insurance and other benefits (T4E)
- Universal child care benefit (RC62)
- Balance owing
- No debt owing indicators
- Bankruptcy
- Other existing outstanding balances
- Federal tuition, education, and textbook carryforward
- Disability tax credit eligibility
- Review
- Internal refund set-off notification
- T4A income
- Outstanding GST/HST returns
- Immigration Date
- EFILE ineligibility indicators

#### **AFR Download**

Before you file a tax return with the CRA using the information delivered by Auto-fill My Return, you must make sure that all the proper fields on the return are filled in and that the information provided is true and accurate.

If you notice a mistake on an information slip, contact the employer, payer, or administrator responsible for preparing that slip.

If you notice a mistake in the tax-related information, have an account-specific question about other tax-related information, or need additional information, call the individual income tax and trust enquiries line at 1-800-959-8281.

Using AutoFill My Return (AFR)

• With a client file open in ProFile, click File>Import CRA Data



• Click Launch CRA Website



- ProFile will open a browser and take you to CRA's website
- Click CRA Login
- Enter your credentials
- Confirm CRA's request then click Next

• Close the window to return to ProFile



- Profile displays the Data Import Worksheet where you can select or deselect the information to import into the tax file
- Click Import Selected Data
- Close the window that confirms the import is complete
- ProFile will list the imported information on the Data Import Summary form
- You have successfully used CRA's Autofill My Return

A Data Import				×				
aunch CRA Website	O Log in and enter details	Review and Complet	e					
Data Import Works	heet		^	Summary		Data	Import	Summ
eview the imported data below				Data Imported on Apr 02 2018 01:32:33 PM				
Check/UnCheck All		Expand All	ollapse All	Here is the overview of all imported slips and CDE data fro You can see each individual slip by clicking on the details li	m the CRA / Revenu Québ nk.	BC.		
✓ T4 Statement		-	^	Imported Slips		Box	Amount	Details
GOVERNMENT DOWNLOADED DATA	LINE ITEM	1	ACTION	T4		14	1,896.8 13,558.3	1 Details 6 Details
7	1896.81	14 Add As New	~	T4 - CITY OF OTTAWA		14	53.2	7 Details
2	1050.01	14 Add As Hell		T4A - THE GOVERNMENT OF CANADA LE GOUVERI T4A - Province of Ontario	NEMENT DU CANADA	105	1,471.0	0 Details
<b>v</b>	13558.36	14 Add As New	~	Federal Tuition, Education, and Textbook Amounts			9,956.0	0 Details
CITY OF OTTAWA	53.27	14 Add As New	~	Client Data Enquiry				
Z T4A Statement		Add As New		No Debt Indicator			Yes	
	LINE ITEM	Replace Citrior Of	CRA Data langua	Balance Owing Amount			0.0	
THE GOVERNMENT OF CANADA LE GOUV	VERT 1471.00	105 Add As New	Data	auch OA verbaite Log in and effer details	Review and Complete			
	_		Please rev	view the updated status list				
			Success					
					3			

# ALL ABOUT REFILE

If you are an EFILE service provider, you can use ReFILE to EFILE T1 adjustments for tax years between 2016 and 2019. The ReFILE service lets you change the same lines that individual taxpayers can with the "Change my Return" service in CRA's "My Account" portal.

#### Who can use ReFILE?

Preparers can use the ReFILE service if the following conditions apply:

- You have ProFile version 2016.4.3 or later (for tax years 2016 though 2019)
- You have level 2 authorization from your client
- The initial return was filed online (EFILE)
- The initial return was assessed
- You have acquired a new sign-off on a revised T183 from client

#### What does the ReFILE service exclude?

In addition to CRA's standard EFILE and Change My Return exclusions, you **cannot** use the ReFILE service if the taxpayer:

- is amending an election or wants to make an election (for example, using Form T2057, Election on Disposition of Property by a Taxpayer to a Taxable Canadian Corporation)
- is applying for child and family benefits
- is allocating a refund to other CRA accounts
- is applying for the disability tax credit
- has a reassessment in progress
- has a first return that has not been assessed (you can view the Express Notice of Assessment (NOA);
   view the regular NOA on Represent a Client or My Account for Individuals; or have a paper NOA on hand to validate that a return has been assessed)
- is subject to provincial or territorial income tax in more than one jurisdiction
- the first return was filed by the CRA as a 152(7) assessment

You **cannot** use ReFILE to change page 1 of the taxpayer's T1 Income Tax and Benefit Return. Instead, individual taxpayers should use <u>My Account</u> to make changes to the following information:

- marital status
- address
- direct deposit
- email address

In addition, you cannot use ReFILE to change:

- a tax return that has not been assessed
- a tax return where nine reassessments exist for a particular tax year
- a bankruptcy return
- a return prior to the year of bankruptcy
- carryback amounts such as capital or non-capital losses
- a return of an international or non-resident client (including deemed residents of Canada, newcomers to Canada, and individuals who left Canada during the year)
- the elected split-pension amount
- a return where you have income from a business with a permanent establishment outside your province or territory of residence (you have to complete Form T2203, Provincial and Territorial Taxes - Multiple Jurisdictions)

#### **Service limitations**

- The online system accepts only **nine** adjustments per tax year for each taxpayer, whether the taxpayer or you or CRA initiates the adjustments
- If you go over the limit, you will get an automated response saying the limit has been reached and explaining how to send a paper request
- Make additional requests on paper, preferably using <u>Form T1-ADJ, T1 Adjustment Request</u>, and mail them to the CRA

#### **Using ReFILE**

Before attempting to ReFILE a return, verify that you have a valid *Authorize a Representative* form—with level 2 authorization—on file with CRA.

#### To ReFILE a return

- Open a T1 return that has already been filed online, and for which a CRA assessment has been received.
- Go to File >Save As... and save the file under a new name (optional)

📊 Save 2019 T1/TP1 As	?	$\times$
1. Hruzec, Sam		
Hruzec, Sam (333323327)		
Client Status: 2. Work in process v	Locke	əd
EFILE Status: 2. Eligible		$\sim$
SEND Status: 2. Eligible		$\sim$
TP1 Status: 1. Not eligible		$\sim$
T1135 Status: 1. Not eligible		$\sim$
DCN:		
Invoice: 1051 Time: 00:00:00		
Discounted? CRA Errors 2139		
Date Preparer Action Elaps Module Ver.		$\hat{}$
_20/10/02 MDL Modified 2020.0.0		×
Preparer: MDL Partner:		
File Name		
IIIMaciHomelDesktopiHruzec, Sam REFILE.19T		
Password: Save	Cance	эI
Confirm: Help	Advance	d >>

- Enter the new information that mandates a ReFILE. If, for example, a client has received an unexpected
   T4, then enter that new information on ProFile's T4 Slip
- After making the necessary changes to the tax file, press F4 to open Form Explorer and, in the Search field, enter T1ReFILE

	T1 ReFILE Request
	Use this worksheet to amend your 2019 personal tax return
•	ReFILE transmission requests cannot be used to change the following fields:
	- Address - Name
	- Social insurance number
	- Marital status
	- Residency - Elections Canada
	- Alternate address
	- Entail aduless - Information about spouse or common-law partner
	- Direct deposit Changes to these fields must be made by the taxpayor through the CPA "My Account" portal
	Changes to these news must be had by the taxpayer through the order had been been by a country of the second s
l '	<ul> <li>The amended return must include the full return and all the schedules, not only the revised amounts.</li> </ul>
•	<ul> <li>All schedules included in the amended return are considered as amended. This means data from amended schedules will overlay the previous data.</li> </ul>
•	<ul> <li>To amend a T1 return, make sure you completed all the information on the tax return and answer the following questions:</li> </ul>
	SIN 333 323 327
	Name Hruzec, Sam
	Date of ReFILE 2020/04/30
	Is this an amended tax return? XYes 3 10
1	Use the field below to comment on any changes made. The information will not be transmitted to the CRA.

- Ensure the client information (SIN and Name) is correct
- Enter the current date in the Date of ReFILE field
- Select Yes for the line that reads ... "Is this an amended tax return?":
- Note: failing to select the "yes" option will produce an error when attempting to ReFILE.
- Answer any other relevant questions on the form

Note: these questions are not mandatory, and preparers are not required to provide answers. Any notices related to these questions may be ignored.

Before completing the submission, you must update the T183 Form

- Open the T183 used for the initial EFILE of the return
- A letter "R" now displays in the *Year* field indicating the form was referenced for ReFILE. This new designation is permanent and cannot be rescinded from the form

Canada Revenue Agency	Agence du revenu du Canada al	Information Ret n Individual's In	turn for E come Ta	lectroni x and Be	c Filing of enefit Return	Тах	Protected B when completed Year : 2019 R
The information found on this     Before you fill out this form, re     Part G must be signed by the     E (once your return has been     Give the signed original of this     Part A - Identification ance	form corresponds to the tax year i ad the information and instruction individual identified in Part A or by submitted). form to your electronic filer and k	ndicated on the right. s on page 2 of this for the individual's legal eep a copy for yoursel <b>our return</b> (mano	rm. representativ If. datory)	ve. Your ele	ectronic filer must fill out	Parts D (prior to your retu	Irn being submitted) and Part
First name		Last name				Soci	al insurance number
Sam		Hruzec				333	323 327
Mailing address: Apt number	r - Street number - Street nam	e PO Box		RR	City	Prov	/Terr Postal code
1212 Oak St					Anytown	ON	M9A 9A1
Get your CRA mail electr	onically delivered in My	Account at cana	da.ca/my	/-accou	nt (optional)		
Email Address: abc@abc.	co						
By providing an email address	s, I am registering to receive e	mail notifications f	rom the CF	RA and I a	gree to the Terms of	f use on page 2 of th	s form.
Part B - Declaration of an	nounts from your Income	Tax and Benef	fit Return	(mandate	ory)		
Enter the following amounts	from your return, if applicable	£					
Total income (line 15000)			87	,259 42			
Taxable income (line 26000	)		84	,429 67	Refund (line 484	00)	0 00
	× · · · · · · · · · · · · · · · · · · ·	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~	~	or		

- Acquire a new sign-off from the client on the updated T183 form prior to your ReFILE attempt
- After the client signs the updated T183, click EFILE/ReFILE this return...



After the ReFILE process is successfully completed, ProFile will display a confirmation window

EFILE Session	<b></b>
EFILE session starting on Tuesday, March 21, 2017 at 1:07 PM Transmitting C:\Users\sivan1\Documents\My ProFile Data\EFILE\2016T1 C:\Users\sivan1\Documents\My ProFile Data\EFILE\2016T1	TAX AX downloaded.
The Canada Revenue Agency has successfully received the 2016 ReFILE subr Any changes to taxpayer information (listed on the ReFILE webpage as updated to the Canada Revenue Agency. Your client's express notice of reas available for viewing through the software, provided you have met the requirer "What's New" section on the EFILE website for further details. The taxpayer ne information slips and documents for six years. Please keep this confirmation n your records:	nission for invalid) will not be sessment will be ments. Refer to the neds to keep all tax umber and DCN for
EFILE session done.	
Hereini V OK	Cancel Help

#### **Confirming the ReFILE submission**

ProFile enters the ReFILE confirmation number on the *Info* form. to the return. It matches the number displayed in the ReFILE confirmation message.

T1 EFILE/ReFILE confirmation number	
TP1 NetFile confirmation number:	
T1135 EFILE confirmation number:	
T1013 EFILE confirmation number:	
T1PAD confirmation number:	

• You can also confirm the history of the submission by selecting *Properties* option under the *File* menu

Review the history of the return; the ReFILE displays as an *EFILE* with the date of the ReFILE displayed in the *Date* field

Date	Preparer	Action	Elapsed
16/11/23 10:	SD	Modified	
16/11/28 11:	SD	T1 EFILE Ready to Transmit <	Initial EFILE of return
16/11/28 11:	SD	Modified	
17/03/21 14:		T1 EFILE Ready to Transmit	
17/03/21 14:	SD	T1 EFILE Accepted	ReFILE of return
17/03/21 14:	SD	Modified	

# Chapter 6 Quiz

**Question 1:** ProFile features a number of Online tools. These tools include:

- A. ProFile ReFile
- B. ProFile Review
- C. Online backup
- D. All the above

#### Correct answer is D

Question 2: ProFile's toolbars include a dedicated set of icons for accessing online features

Correct answer is True

Question 3: The four online icons are:

- A. Chat, Notifications, Online Settings, and Review
- B. Chat, Explorer, Review and Bridge
- C. Run, Synchronize, Archive and Bridge
- D. None of the above

**Correct answer is A** 

Question 4: True or False: You can use ProFile Review to view T1 returns online

Correct answer is True

**Question 5:** True or False: With ProFile you can use CRA's AutoFill My Return to download tax amounts to a T1 file

**Correct answer is True** 

Question 6: To use CRA's AutoFill My Return, you must:

- A. Register to become an approved electronic filer
- B. Register in CRA's Represent a Client program and have current and valid credentials
- C. Have a signed T1013 Authorization form for each client
- D. All the above

#### Correct answer is D

**Question 7:** True or False: With AutoFill My Return, ProFile will be able to autofill all tax data including RRSP contributions, medical expenses and charitable donations

**Correct answer is False** 

**Question 8:** True or False: ReFile is a CRA service that lets you make adjustments to the same T1 return an unlimited number of times

**Correct answer is False** 

Question 9: What are the ReFile service limits:

- A. You cannot change information such as marital status, address or direct deposit information
- B. T1 ReFile lets adjust the same tax return up to nine times
- C. You must make additional adjustments by paper-filing a T1-ADJ
- D. All the above

#### Correct answer is D

**Question 10:** True or False: Before ReFiling a T1 on behalf of a client, you must first obtain an updated and signed T183

**Correct answer is True** 



# Chapter 7 Data Mining with Client Explorer

# **Learning Objectives**

# At this chapter's end students will understand:

- What Client Explorer does and what information it provides
- How to use Client Explorer at a basic level
- How to use Client Explorer's powerful reporting tools

#### Additional Resources

This document provides numerous resources to accounting professionals. Refer to these sites to explore additional training opportunities

Professional Accounting Software

Tax Preparation & efiling Return Software

Professional Tax Software Training

# Chapter 7: Data-mining with ProFile's Powerful Client Explorer

## **INTRODUCING CLIENT EXPLORER**

Client Explorer is a powerful database, built into ProFile, that helps you manage all aspects of your client files. With Client Explorer, you can create custom filters that let you open, carry-forward and batch EFILE tax returns. You can also export and print customizable reports about your clients and their tax files. Finally, if you want to print groups of returns, you should also use Client Explorer.

The first time you save a new client file, Client Explorer automatically adds a record for that client to the database. Then, whenever you make a change to a client file, ProFile updates the record for that client. Client Explorer does not store all of the data found in each individual client file. Instead, it contains references to the file location. However, you can still print reports and export files that include the data from those client files.

It's important to note that, in addition to Client Explorer, ProFile offers a separate and functionally-different client database called *Classic Database*. This booklet only covers Client Explorer.

*Note*: You can use either the Classic Database or Client Explorer — not both.

#### **Client Explorer Advantages**

The benefits of Client Explorer include:

- Faster network access: Client Explorer works on standalone workstations or small networks, and it also provides faster access for larger offices that share a database over a network.
- Client-centred records: Client Explorer groups files for the same client in a single client record, regardless of the type or year of the file. You see all of a client's files and returns in one place.
- Customized views: You can set and personalize Client Explorer views and save those settings. You can use filters to quickly and easily change how you view your files and which files you view.
- Intuitive batch functionality: Most multi-file-select actions work the same way as Microsoft Windows<sup>®</sup>. You can use filters to view only the files you need, select all of the visible files, and then select an action from the Database menu or from a right-click menu.
- Access to client details: You can use Client Explorer as an address book or contact list. You can change client addresses in the Client Explorer without affecting previously-filed returns. And you can customize the Details pane to include any fields from client returns.

#### Setting up

Your Client Explorer set-up options depend on whether you work alone as a sole practitioner or work with others in a shared network environment.

#### Setting up Client Explorer for a Sole Practitioner

- Click Options -> Database
- Select the *Client Explorer* radio button.
- Click Setup Wizard

atabase / Client Explor	er Options		? >
○ None	Use Client Explorer	🔿 Use Classic Datab	ase
Client Explorer Options			
ProFile Database Serve	er to use		
Personal Server (On	ly you can use)		
O Shared Server			
Database to use			
	Barran I databarra (data		
Database Name	Personal database folder		
PROFILEDB	Versonal database rolder	ile Data\Database	
Database Name PROFILEDB Clear	Personal database rolder	ile Data\Database	
PROFILEDB Clear	Personal database rolder	ile Data\Database Batch Options Ad	vanced >>

• Click Use Client Explorer and in the following window, click No to indicate that you are a sole practitioner

		Client Explorer Setup wizard		×
	Client Explorer Setup wizard	Do you work in an office tax returns or financial pl	where different people n lans in ProFile?	eed to work on the same
Client Explorer Setup wizard	You can set Client Explorer to be your de you can continue using the classic datab	⊖ Yes	No	
This version of ProFile contains a powert Explorer.	<ul> <li>Use Client Explorer</li> <li>Use classic database</li> </ul>			
This tool helps you manage and, if you w information with other members of your of				
ProFile needs you to answer a few quest up properly for your work environment.				
Click the Next button to continue.				
			Back Next	Cancel Help
	Back	Next Cancel	Help	
Back	Next Cancel Help			

- As a sole practitioner, select the first radio button and click Next
- Finally, click Finish

Client Explorer Setup wizard	×
ProFile searched your office network and found that no computers were and file information.	re sharing ProFile client
You have two options at this point. You can:	Client Explorer Setup wizard X
Work with a personal collection of client and file inform	Variation and the sector and DesCite to mark with a second database of struct and the
This database of ProFile client and file information will only be acc by anyone on the network.	information.
	Click the Finish button to exit this wizard.
○ Make this computer a Shared Database Server	
A Shared Database Server is used to share the same ProFile clier with other ProFile users connected to your network; it is preferable always on. Back Next Can	
	Back Finish Cancel Help

#### Setting up Client Explorer for a Shared Database

- Go back to the Setup Wizard, and click *Yes* at the prompt about *working with different people*
- In a following window, click the second radio button to make the computer a shared database

Client Explorer Setup wizard	X		
Do you work in an office where di tax returns or financial plans in Pr	fferent people need to work on the same oFile?		
• Yes	⊖ No		
	Client Explorer Setup wizard		×
	ProFile searched your office network and found that no and file information.	computers were sharin	g ProFile client
	You have two options at this point. You can:		
	$\bigcirc$ Work with a personal collection of client a	nd file information	
	This database of ProFile client and file information by anyone on the network.	will only be accessible I	by you and not
	Make this computer a Shared Database S	erver	
	A Shared Database Server is used to share the sa with other ProFile users connected to your networ always on.	ame ProFile client and fil k; it is preferably on a co	e information omputer that is
Back			
	Back Next	Cancel	Help

• Name your shared database, click *OK* to accept any Windows prompts (such as ProFile Privilege Elevation), and click *Finish* to complete the process

ent Explorer Setup wizard	×
/hat name would you like to give to the new Shared Data	abase Server?
The name of the Shared Database Server will be visible to users an them to configure ProFile to use this server.	ud will make it easier for
	Client Explorer Setup wizard
	You have successfully configured this computer to run a Shared Database Server. You and other users of ProFile can connect to this server and share ProFile client and file information with the Client Explorer. Click the Finish button to exit this wizard.
Request for privilege elevation	
ProFile Privilege Elevation	
Windows® is about to ask you to enter your administrator passwor	d.
Windows Vista requires privilege elevation in order to allow ProFile t the ProFile Database Server. Without privilege elevation, ProFile will able to setup the ProFile Database Server.	io ne
Don't show this again	
Don't show this again	1

#### **Using Client Explorer**

- To open *Client Explorer*, press the F3 key. The first time it launches, Client Explorer displays an empty window
- To load references to the existing files, click Index

Client Explorer		X
⊻iew All Clients	M Save View V Pitter	
Davis u	Search D. Cliest name	-
Actione CC		_
ACIONS	<sup>μ</sup> a o c α e t g n i j κ i m n o p q r s t u v w x y z izj	
Selectall		
Clients <<		
	N N	
Files <<	14	
Save file selection	¢	>
Restore file selection	Files total: 0	

- Browse to the file location (usually *My ProFile Data*) and click *Include subfolders*
- Indicate how you want Client Explorer to handle password protected files
• Click OK

	Add Files To Client Explorer	?	×
	Folder		
-1	C:\Users\Michael\Documents\My ProFile Data.	Brows	зе
_	Include subfolders?		
2	Advanced Password Protected Files Skip password protected files Prompt for passwords Use this password	ß	
	OK Cancel	Hel	p

• After the indexing process is finished, Client Explorer displays all tax files stored in the designated folder



• By default, *View* is set to display *All Clients*. To change that display, just click the View dropdown arrow

🌈 Client Ex	plorer				(
⊻iew	All Clients	×	]	🗗 Sav	e View
Details	All Clients Contact View 		Clien	tname	~
Actions Open Build F Build F Print fi Clear t	T1 - EFILE Eligible T1 - EFILE Not Accepted TP1 - EFILE Eligible T1 - Carryforward to Curre T1 - Current Year - Ready Mare views	nt Year to Print	ef 7 Pro	gh ij DFile: 20171	kl mn (
19 client(s	s) selected <<	Files ☑ 201	7 Pro	File: OttTe	mplate.17T
23 file(s) s Save file se Restore file	selected << lection	K Files total: 156. F	iles v	isible: 23	

- The Contact View, for example, displays full contact information for all your clients
- Use the tabs to search alphabetically

Vient Explorer			×
View Contact View	✓ If Save View	🕈 Filter 🛛 🛱 Details 🥌 Index	
Search By Client name		Search Ciear	
All a b c d e f g	hijk Imno	pqrstuvw	x y z 123
Harp, Betty	Johnseson, Alexia	JOnes, Marisa	JONESONS, LESLIE
SIN	SIN	SIN	SIN
474-441-565	777-777-772	777-777-777	244-517-132
Home Address	Home Address	Home Address	Home Address
1963 19 St Ne	29 Dolan	Vancouver, BC	111ERINWOODS CIRCLE
Calgary, AB	Ottawa, ON	10	NEPEAN, ON
T2E 4R5	K2J 4P6	Jones, Sam	K2J 5M7
Home Phone	Home Phone	SIN	Home Phone
(403) 111-1112	(905) 555-5555	444-444-443	(613) 555-5555
		Home Address	
Hruzec, Sam	JUnes, Jack	Vancouver, BC	Joonna, JAne
SIN	SIN	Jonesons, Helen	SIN
238-137-848	888-888-884	SIN	222-222-222
Home Address	Jones, Jane	248-178-667	
1212 Rue Principale	SIN	Home Address	
Montreal, ON	888-886-777	111ERINWOODS CIRCLE	
M1A 1A1		NEPEAN, ON	
Home Phone		K2J 5M7	
(613) 555-1911		Home Phone	
Email		(613) 555-5555	
mdilauro@me.com			
<			>
Files total: 156. Files visible: 78			

- Client Explorer lets you customize views by setting filters
- Click *Filter* to open the bottom panel where you can restrict the files that *Client Explorer* displays
- The Filters panel lets you select a wide range of parameters including, tax types, tax years, client and

file status and date-range

Olient Explorer			
⊻iew All Clients	Save View 2 Filer	🔁 Details 🧧 Index	
Details X	Search By Client name	Search <u>C</u> lear	
Actions <<	All a b c d e f g h i j k	l m n o p q r s t u v w	x y z 123
Select all	Files	Ames, Anna Files I 2020 ProFile: Jameson, Jameson, 20T	Balzac, Sarah Files I 12 2019 ProFile: Balzac, Sarah and John 19T
Clients <<	Files	2019 ProFile: Ames, Anna and MAn, Man. 19T     12019 ProFile: Ames, Anna and MAn, Man. 19T     Ames, Kalee     Files	2013 ProFile: Balzac, Sarah and John AFTER OPTI      Bardem, Raul      Files      2013 ProFile: Bardem, Baul 191      2013 ProFile: Bardem, Baul 191
	Files	2019 ProFile: Ames, Kalee. 197     2019 ProFile: Ames, Kalee. 197     2019 ProFile: Ames, Kalee. 197     Arma, John	CARBEC INC Files
Files ((	Files           112         2019 ProFile: NoName.19T           ABC INC	Files	CARSONN, Angela
	Files	2019 ProFile: Mar, Martha and Arma, John 19T	<ul> <li>77 2019 ProFile: CARSONN, Angela and Martin St-Pier</li> <li>77 2019 ProFile: CARSONN, Angela 19T</li> <li>76 2019 ProFile: CARSONN, Angela &amp; St Pierre, Martin</li> </ul>
Save file selection	<		>
Restore file selection	Files total: 48		
Filters			Apply Filters X
		Chatra CENID Chatra Escart	
Years         O           L         Y2020         A           V         2019         X           V         2018         X           V         2016         X           V         2016         X           V         2015         X           V         2014         X           V         2013         X	Inthrown Carried forward Winknown Carried forward Work in process Q Eigble Stranger Carried forward Work in process Q Eigble Stranger Carried for clerkt In prepare review Q Transmite C Ready to the process Q Eigble C Transmite C Ready to the process Q Eigble C Transmite C Ready to the process Q Eigble C Transmite C Ready to the process Q Eigble C Transmite C Ready to the process Q Eigble C Transmite Q Eigble Q	Status SEND Status Event Status SEND Status Event Noc Eligible ✓ Ready to transmit K Debt over \$10 M Prior Claim V Prior Claim	Show Spouse In List     Show Competence     Show Competence     Discounted     No     Yes     Pre-Assessed     No     Yes     Advanced
			> >

- Once you create your customized view (see window above) click Save View
- In the dialog box that opens, name your customized view and click OK.

Save View As X					
Please enter a name for your current view.					
Current Corp Clients					
OK Cancel					

#### Using *Client Explorer* to find files

- Client Explorer has a Search tool that helps you find a specific client file
- Use the dropdown field to select the search parameter
- Type the query term, click Search and Client Explorer will display all files matching your search query

<b>⊻</b> iew	Co	ntact View	_	V Filter	C
<u>S</u> earon	Ву	SIN	$\sim$	999999998 Search	
u a	b	Business Number Client name Client Reference # SIN		i j k l m n o p q r s	t
TE	237 00	Trust Number	ht		
Bu	<b>usiness</b> 30141104	Number 17			
M	<b>ailing A</b> 1 Main St	ddress treet			

#### **Client Explorer as a Contact Manger**

• You can easily use Client Explorer as a Contact Manager. Just select a file (by clicking into its checkbox) and the left pane displays contact information for that client



• To carry out more actions, right-click a file to open a context-sensitive window that lets you *Open, Carryforward* or *Print Files,* as well as *Export, Copy* or *Delete* them



# **EFILE WITH CLIENT EXPLORER**

Chapter 4 introduced CRA's EFILE system and described how a tax preparer uses EFILE to electronically file a client's T1. This section illustrates how you can use Client Explorer to EFILE multiple T1s at the same time.

#### **Batch EFILE with Client Explorer**

To create EFILE files for a group of returns:

• Press F3 to open Client Explorer

In the View drop-down list, select the type of EFILE operation that you want to perform. ProFile filters the list to display only files with the selected status.

- To view tax files eligible for EFILE, select T1 EFILE Eligible
- From the list of eligible files, select the files that you want to include in the next transmission <sup>2</sup>
- To prepare the files for submission, choose Build EFILE

iew T1 · EFILE	Eligible	🚺 🔐 Save View 🔻 🤻 Filter 🔁 Details 🥌 Inde
Details	×	Search By Client name V
octions	**	All a b c d e f g h i j k l m n o p
Carry forward Build EFILE		Arma, John
Print files Print forms in the fil	les	These     To 2019 ProFile: Mar, Martha and Arma, John 19T     V     To 2019 ProFile: Mar, Martha and Arma, John 19T
Clear selection		CARSONN, Angela
Select all		<ul> <li>☐ 11 2019 ProFile: CARSONN, Angela and Martin St-Pa</li> <li>☑ 11 2019 ProFile: CARSONN, Angela 19T</li> <li>☐ 11 2019 ProFile: CARSONN, Angela &amp; St Pierre, Martin</li> </ul>
client(s) selected	<<	CARSONN, Johnny
Arma, John		V 11 2019 ProFile: CARSONN, Johnny, 19T

- If necessary, in the Build window that opens, further specify the type of EFILE file to create (or the Agency, Data Type and Slip Type when you are building an electronic media file for slips/relevés).
- Click OK when you're done



- ProFile reports progress on the selected returns as it builds them. A *Successful* build status should appear next to each return
- Click Transmit Now to EFILE the batch

Build EFILE On-Line file: 777777772.TAX $$					
Dupuis, MArie Mruzec, Sam Johnseson, Alexia		Successful. Successful. Successful.			
Client: Johnseson, Alexia File: C:\Users\mdila\Documents\My ProFile Data\2017T1\Johnseson, Alex Status: Successful.					
Transmit now	Transmit later	Cancel			

For more details on transmitting T1 and TP1 returns that you prepared in this way, go to ProFile Help and search for "Transmit a batch of EFILE Online files"

### **PRINTING AND EXPORTING WITH CLIENT EXPLORER**

#### **Export to Excel**

Here's how you can export data from Client Explorer to Microsoft Excel <sup>™</sup>:

- From *Client Explorer,* select the files for the year and module you'd like to export
- Click the Database menu and select Export



• From the Export Files dialog box, click Options

Export Files		?	×
Define your export opt listed below.	ions and click the Export button to extract data from th	e client file	es
Client Name	Filename		^
<no name=""></no>	C:\Users\Michael\Documents\My ProFile Data\2018	T1\NoNe	ame
Chartrand, Jeannine	C:\Users\Michael\Documents\My ProFile Data\2018	i T1∖Belliv	eai
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2018	T1\COP	′ P€
Investor, Jane	C\Users\Michael\Documents\My ProFile Data\2016	iT1\Inves	tor,
Investor, Jane	C\Users\Michael\Documents\My ProFile Data\2018	T1\MAS	ГЕF
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2018	T1\MAS	ΓEF
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2018	iT1∖Pensi	ione
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2018	iT1\Copie	e Je
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2018	iT1\Jacol	oie,
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2018	iT1\Jacqi	Jes
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2018	iT1\Jame	102
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2018	iT1\Sham	iroc
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2018	iT1\Taxp	aye
JoNESONS, HELEN	C:\Users\Michael\Documents\My ProFile Data\2018	iT1\Soleil	l Με 🧹
<			>
Options	Export Cancel	Hel	ρ

The Fields tab of the Export Options window (below) is where you choose the fields code for the information that you want to include in your export

- Click Add to begin selecting the fields you'd like to export
- Select the field to add in your export, then click OK
- To include more fields, keep clicking Add <sup>11</sup>



There are two files you need to create. One is the design of the export which indicates what information you need to extract from the ProFile tax files. This file is saved as a .qex file and it is configured on the *Fields* tab of the Export Options window above. The second file stores the actual information that will be used to import into

Excel. This second file is usually saved as a .txt or .csv file. You save this file on the *Format* tab of the Export Options window above.

- To create and save the second file, navigate to the *Format* tab and click the *Browse* button to the right of the *Export to File* field
- Type in a name for your file
- If you're using a .csv extension, click the dropdown and select All files
- Click Open 💶

Fxport Options	? ×
Fields Format	
Export To File Export Type Tab Delimited   Export Charac	ter 1
Export Field Names	V Open X
Put Double Quotes Around Exported Fields Recalculate Each File Before Exporting	← → ∨ ↑ → This PC > Documents > My ProFile Data > Reports ∨ [O] Search Reports P
	Organize 👻 New folder 📰 🕐
	2015T1 ^ Name Date modified Type Size
	2015T3
	2016FX
	201613
	2017T1
	database
	EFILE
	📙 Link
	Options Packa
	Reports V K
Luau Save Uk Cance	File name: RefVSBalDue.csv 2 3 All files (*.*)
	Open 4 incel

ProFile will return to the Export Options window where you can finalize your setup options

- Note that the file is saved in MyProFile Data\Reports and it is here that you will browse to to import the data into Excel
- Choose the export type, Tab Delimited, for example
- Check Export Field Names, which will put the field code at the top of each column in Excel

M Export Option	15	?	×
Fields Format			
Export To File	C\Users\Michael\Documents\My ProFile Data\Reports\RefVSBalDue.csv	1	🕒
Export Type	Tab Delimited 2 $\checkmark$ Export Character		
Export Field Na     Put Double Ouc     Recalculate Ea	imes 3 ates Around Exported Fields .ch File Before Exporting		
	Load Save Ok Cancel	ł	Help

- Go back to the Field tab and click Save
- ProFile will save the design of the report as a .qex file
- Click Save once more to save the .qex file 3
- Click OK, and you'll be taken back to the main export window

Fixed American Americ	? ×	
Fields Format		
Export		
ClientFirstName	Add	
ClientLastName		
BalanceOwing		
Line466	Delete	
	A	
	<b>V</b>	
	Vare As	×
	← → < ↑ 📜 > This PC > Documents > My ProFile Data > Reports v 🖏 Search Reports	م ر
	Organize - New folder	- 0
	2016FX ^ Name ^ Date modified Type Si	ize
	201671	5
	2016T3	
	201771	
ClientFirstName 1	database	
	EFILE	0
Load Save Ok Cancel	Link	
	Options Packa	
	Settion V C	
	File name: C\Users\Michae\Documents\My ProFile Data\Reports\RefVSBalDue.QEX 2	
	Save as type: Export option files (*.QEX)	、 、
	∧ Hide Folders 3 Save Ca	ancel

• At the Export File window, click *Export* and the information will be sent to the .csv file that you created earlier

Export Files	?	Х
Define your export opt listed below.	ions and click the Export button to extract data from the client fil	es
Client Name	Filename	^
<no name=""></no>	C:\Users\Michael\Documents\My ProFile Data\2016T1\NoNa	ame
Chartrand, Jeannine	C:\Users\Michael\Documents\My ProFile Data\2016T1\Belliv	eal
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2016T1\COP	/Ρŧ
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2016T1\Inves	tor,
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2016T1\MAS	TEF
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2016T1\MAS*	TEF
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2016T1\Pens	ione
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016T1\Copie	e Je
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016T1\Jacol	bie,
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016T1\Jacqu	ues
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016T1\Jame	sor
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016T1\Shar	nroc
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016T1\Taxp	aye
JoNESONS, HELEN	C:\Users\Michael\Documents\My ProFile Data\2016T1\Solei	Ι Με 🧹
<		>
Options	Export Cancel Hel	p

• You are now ready to import the data to Excel, all you need to do is find the .csv file and open it in Excel

F	lome insert	Page Layout	Formulas	Data	Review	View			
ſ	Cut	Calibri (Body)	▼ 12 ▼ .	A- A-	= =	= **	📑 🖓 Wrap	Text	Ge
Pa	aste 🧹 Format	Β <i>Ι</i> <u>U</u>	· · · ·	• A •	= =	-E +E +E	↔ Merg	e & Center 🔻	\$
H3	$1  \stackrel{\scriptscriptstyle A}{\scriptstyle_{\nabla}} \times$	$\checkmark f_X$							
	А	В	С	D	E	F	G	н	
1	ClientFirstName	ClientLastName	BalanceOwing	Line466					
2	Alan	Belliveau	1839.47	0					
3	Jacques	Savoie	10870.34	0					
4	Emilie	Leblanc	0	0.36					
5	Frank	Pensioner	0	383.71					
6	Mary	Pensioner	20374.68	0					
7	Yvan	Gravel	4981.93	0					
8	Anne	Gravel	1700.78	0					
9	Jane	Investor	1481.78	0					
10	Sam	Jacobie	0	0					
11	Jacques	Savoie	10870.34	0					
12	Emilie	Leblanc	0	0.36					
13	James	Jameson	0	3540.86					
14	Frank	Johnseson	31484.52	0					
15	Mary	Jones	3950.23	0					
16	Frank	Pensioner	0	383.71					
17	Mary	Pensioner	20374.68	0					
18	Frank	Pensioner	1044.22	0					
19	Mary	Pensioner	14659.9	0					
20	Frank	Pensioner	647.72	0					
21	Mary	Pensioner	14838.94	0					
22	Alex	Redressement	350.71	0					
23	Fred	ShamrockVilee	214.8	0					
24	LESLIE	JONESONS	1411.31	0					
25	HELEN	JoNESONS	12903.75	0					
26	Amy	Taxpayer	6613.69	0					

#### **Printing Reports**

The steps for printing reports are similar to what you just learned for exporting data. As illustrated in the previous example from Client Explorer, select the files to print, and then click *Database > Print Report* 

• In the Create Report window, click Options.

Create Report	N	?	×
The following returns v	rill be added to the report.		
-			
Client Name	Filename		
<no name=""></no>	C:\Users\Michael\Documents\My ProFile Data\2016	F1\NoNa	me
Chartrand, Jeannine	C:\Users\Michael\Documents\My ProFile Data\2016	F1\Bellive	eau
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2016	F1\COPY	Pε
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2016	F1\In∨est	or,
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2016	F1\MAST	EF
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2016	F1\MAST	EF
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\2016	F1\Pensi	one
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016	F1\Copie	Jε
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016	F1\Jacob	ie,
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016	F1\Jacqu	es
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016	F1\Jame:	108
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016	F1\Sham	roc
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\2016	T1\Taxpa	iye
JoNESONS, HELEN	C:\Users\Michael\Documents\My ProFile Data\2016	F1\Soleil	Με 🗸
<			>
Options	Print Cancel	Help	)

• On the *Header* tab, select text that will appear on all pages. For example, to use today's date, doubleclick on *Today* 

Magnet Options	?	×
Header Fields Footer Format		
Arial ✓ 10 ✓ Auto ▼ None ▼ B <i>I</i> <u>U</u>		
<u> </u>	5	· · · ]
{Today}		$\sim$
I		
		$\sim$
٢		>
Page		
Copy Part		
Today		
Load Save Ok Cancel	Hel	р

- The top row of the Fields tab displays column headings. Select the first cell and then click Properties
- In the *Title Cell Properties* window, you can set up text formatting and enter the text for Title 1
- Click OK to close the window

V Report Options	?	X	]
Header Fields Footer Format			
Column: Add Insert Delete < 🎾 Prop	erties 2		
Title 1 1	Ro	W	
	Ad	d	
	Insi	ert	
	Dek	ete	Title Cell Properties ? ×
	4		Text
	A	1	First Name 3
			Eont Size
			Pr @Yu Gothic Light ∧ Color ■ Black ✓
			Pr @Yu Gothic UI Style  ☐ Bold
			Pr @Yu Gothic UI Semibo Underline
l Re 1	Pic	k.	Pr @Yu Gothic UI Semiligi Pr Agency FB Alignment Left ✓
Load Save Ok Cano	el He	lp	Pr Algerian Pr Arial V Layout Middle V
			Other Sample
			Back Color White V
			Column Width 1.5" First Name
			Row Height 0.2"
			4 OK Apply Cancel Help

- You now need to input data for the report. Double-click the cell directly under *First Name* and choose from a list of *Field Codes*.
- In the Select Field window, choose ClientFistName and click OK

Meport Header Fie	Options Ids Footer Format			? >	<
Column:	Add Insert	Delete < 🏷	Properties		
First Name				Row	112
				Add	
				Incort	
	Market Select Field				? ×
	Personal Info T1 Jacket T1 Sch	edules Invoice			
	Field Name	Description			^
	ClientAddress	Street address	2		
	ClientAge	Age	•		
	ClientApt	Apt. or unit no.			
	ClientBirthDate	Birth date			
	ClientCareOf	Care of			
	ClientCellPhone	Cell phone			
	ClientCity	City			
	ClientCountry	Country (other than Canada)			
	ClientForthlambon	Low manager			
	ClientFirstName	Firstname			
	Clientaenae	Conder			~
	<pre></pre>				>
			Ok	Cancel	Help

• Click Add and repeat the step above to add more fields. Once done, your report template will look like this

Magnet Options					? ×
Header Fields Footer Fi	ormat				
Column: Add	Insert Delete	K >	Properties		
First Name	Last Name	Bal Due	Refund		Row
ClientFirstName	ClientLastName	BalanceOwing	Line466		Add
					Insert
					Delete
					A
					$\forall$
Line466					Pick
		Load	Save Ok	Cancel	Help

• Use the Footer tab to set up footnotes that appear at the bottom of each page.

Report Options					?	×
Header Fields Footer Forma	t					
Arial V	~ Auto	▼ N	Vone 🔻 B	Ⅰ ∐ 📑 喜		
	2		3	4	5	$i \in [1, 1]$
{Page}						$\sim$
						$\sim$
<						>
Page						
Part						
Today CurrentTime						
	Load	Save	Ok	Cancel	He	əlp

• Use the *Format* tab to set up other options such as the printer that will generate the report.

Report Options	?	×
Header Fields Footer Format		
Printer		
Microsoft Print to PDF V	Prop	perties
Margins		
Left 0.5" Top 0.5" Copies 1 Collate		
Right 0.5" ♀ Bottom 0.5" ►		
Black and White Print Grid Lines Shade Alternate Rows		
Load Save Ok Cancel	Н	elp

• Save your setup options and click *OK* to open the *Create Report* window. Click *Print* to run the report.

Create Report		?	×
The following returns v	vill be added to the report.		
Client Name	Filename		^
<no name=""></no>	C:\Users\Michael\Documents\My ProFile Data\201	6T1\No	Name
Chartrand, Jeannine	C:\Users\Michael\Documents\My ProFile Data\201	6T1\Be	lliveat
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\201	6T1\CO	PY Pe
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\201	6⊤1\lnv	estor,
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\201	6T1\MA	STEF
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\201	6T1\MA	STEF
Investor, Jane	C:\Users\Michael\Documents\My ProFile Data\201	6T1\Pe	nsion
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\201	6T1\Co	pie Je
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\201	6T1\Ja	cobie,
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\201	6T1\Ja	cques
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\201	6T1\Jai	mesor
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\201	6T1\Sh	amroc
Jacobie, Sam	C:\Users\Michael\Documents\My ProFile Data\201	6T1\Ta	храує
JoNESONS, HELEN	C:\Users\Michael\Documents\My ProFile Data\201	6T1\So	leil Με 🗸
<			>
Options	Print Cancel	F	lelp

• Here is your report

First Name	Last Name	Bal Due	Refund
		0.00	0.00
Alan	Belliveau	1,839.47	0.00
Mary	Pensioner	20,374.68	0.00
Jane	Investor	1,481.78	0.00
Mary	Pensioner	20,374.68	0.00
Mary	Pensioner	14,659.90	0.00
Mary	Pensioner	14,838.94	0.00
Emilie	Leblanc	0.00	0.36
Sam	Jacobie	0.00	0.00
Emilie	Leblanc	0.00	0.36
James	Jameson	0.00	3,540.86
Fred	ShamrockVilee	214.80	0.00
Amy	Taxpayer	6,613.69	0.00
HELEN	JoNESONS	12,903.75	0.00
LESLIE	JONESONS	1,411.31	0.00
Frank	Pensioner	0.00	383.71
Frank	Johnseson	31,484.52	0.00
Mary	Jones	3,950.23	0.00
Frank	Pensioner	0.00	383.71
Frank	Pensioner	1,044.22	0.00
Frank	Pensioner	647.72	0.00
Alex	Redressement	350.71	0.00
Jacques	Savoie	10,870.34	0.00
Jacques	Savoie	10,870.34	0.00
Anne	Gravel	1,700.78	0.00
Yvan	Gravel	4,981.93	0.00

#### **Creating Mailing Labels with Client Explorer**

Before using Client Explorer to print labels, you will have to set up your mailing labels.

- Go to the File menu and select Setup Mailing Labels
- Click a Module tab<sup>2</sup>
- Click the dropdown to choose your label type <sup>3</sup>
- If you'd like to format your own label, click *New Label* (ProFile will designate it as User Label 1) and

enter the label rows, columns on the right side of the window below.  ${}^{\blacksquare}$ 

• Click OK<sup>5</sup>

	Label Calastian			2	~
	Label Selection			ſ	X
2	1.2020 T1/TP1 🛛 🔻 🚾 <u>3</u> .T2		🔢 <u>4</u> .2019 T	3/TP646	T
	Label Type	Label	<u>D</u> etails		
	12-294 Avery Laser Tags -Manila	/ 12-29	14 Avery Laser Tag:	s -Manila	
	12-294 Avery Laser Tags -Manila 12-295 Avery Laser Tags-White	Labels	s Across	2	Å
3	12-236 Avery Laser Tags Marina 12-297 Avery Laser Tags-White	Labels	s Down	4	÷.
	2160 Avery Addressing 2162 Avery Addressing	Side N	fargin	1"	
	2163 Avery Address/Snipping 2164 Avery Shipping	/ Top M	largin	0.5"	×
		Label	Width	3.37"	Å
		Label	Height	2.5"	
		Horizo	ontal Pitch	4.13"	Å
		Vertica	al Pitch	2.5"	A T
		5	ntinuous Feed		
	<u>N</u> ew Label	0 <u>K</u>	Cancel	<u>H</u> elp	

• To print mailing labels, follow these steps.

Note that when printing a group of labels, all files must be of the same module and tax year.

• Press F3 and from Client Explorer, choose just a few files for a test run



- Click Database > Print Mailing labels
- Mailing labels for spousal returns will show both spouses' names. To avoid printing two labels for each spousal return, check the box marked *Print only one label for coupled returns*<sup>2</sup>
- Click OK 3

Make sure to feed the correct labels into your printer, before starting the print job.

# Chapter 7 Quiz

Question 1: Client Explorer is a database that lets you:

- A. View and manage your clients and their tax files
- B. Create custom filters for selecting only certain types of files
- C. Print or export customized reports
- D. All the above

#### Correct answer is D

**Question 2:** True or False: ProFile has two different database tools: Client Explorer and Classic Database, and you can use both at the same time

#### **Correct answer is False**

Question 3: The first time you launch Client Explorer you must:

- A. Index the existing files
- B. Copy files from the data folder and paste them into Client Explorer
- C. Run the Synchronize and Archive feature
- D. Ensure that all files are linked to each other

Correct answer is A

Question 4: True or False: You cannot share a Client Explorer database with other tax preparers

#### **Correct answer is False**

Question 5: True or False: Client Explorer can only access files stored in one folder and its nested subfolders

**Correct answer is True** 

Question 6: To use Client Explorer as a contact manager, you should:

- A. Create a customized report and export it to Excel
- B. Extract the names and addresses from within the T1 view
- C. You cannot, in fact, use Client Explorer as a contact manager
- D. Click the dropdown arrow in the View field and select Contact View

#### Correct answer is D

Question 7: True or False: You can create your own customized view options (called Filters) in Client Explorer

#### Correct answer is True

Question 8: True or False: You can use Client Explorer to prepare mailing labels

#### Correct answer is True

Question 9: Client explorer lets you:

- A. Carry forward prior-year tax files
- B. EFILE tax returns in a batch
- C. Select and print tax files
- D. All the above

#### Correct answer is D

**Question 10:** There are two special types of files Client Explorer prepares for print jobs and for exporting. The file extensions of these two files are:

- A. .qex and .qrp
- B. .pdf and .atf
- C. .qex and .csv
- D. .gt1 and .at2

#### Correct answer is A



# Chapter 8 Advanced Features

# **Learning Objectives**

# At this chapter's end students will understand:

- The purpose of a file template
- How to attach ancillary documents to a T1
- How to pay CRA using T1 PAD

#### Additional Resources

This document provides numerous resources to accounting professionals. Refer to these sites to explore additional training opportunities

Professional Accounting Software

Tax Preparation & efiling Return Software

Professional Tax Software Training

# Chapter 8: Advanced Features

## **FILE TEMPLATE**

If you find that you are constantly selecting the same checkboxes on ProFile's Info page (for example, the Elections Canada question), or if you find that most of your clients live in the same city or province, you can create a file template that automatically fills in those fields for you. Once you set up a file template, Profile uses the settings in that template to automatically fill in the fields of any new tax return.

In addition to pre-filling fields, you can also set the forms (and the sequence of forms) you want ProFile to open when you create a new file. You can create a separate file template for each ProFile module.

**Note:** When you carry forward prior-year files, information from the previous year will always overwrite any file template data.

To set up a file template:

- Create a new tax return
- Enter default data in any field on any form. The example below has defaults set for City and Province
- Open any forms that you want ProFile to open automatically when you create a new client file that is based on this file template

🕑 1. Info 🛛 📅 2. T1 🛛 🕵 3. T4 🗍 📁 4. Medical 🗎 🖞 5. Donations 🕽 🕵 6. T5	j] + ]
	<b>2019</b> Personal information
Tourses and information	
SIN         Title         First name         Last name         Last name changed in 2019?         Yes         X         No         Do you want to change your address?	Indicate your marital status on December 31, 2019         1       Married       2       Living common-law       3       Widowed         4       Divorced       5       Separated       6       Single         If status changed in 2019, enter date of change       mm/dd         Were you married or living common-law at any       Image: Common law at any
Care of Street address P.O. Box City Province Postal code Primary phone ( ) - Birth date yyyy/mm/dd Age 0	time in this tax year? Yes No  Residency  Province of residence on 2019/12/31  Province of self-employment If you became or ceased to be a Canadian resident in 2019, enter date of: entry or departure mm/dd
Gender Male Eemale Province or territory where taxpayer resides if different from mailing address: CRA online mail: Already registered Yes X No Email address:	Are you a non-resident? Yes X No Residency status Resident Country (other than Canada) Did you dispose of a property (or properties) in 2019 for which you are
By providing your email address or updating an already registered email address, I understand I am registering for online mail and accept the terms and conditions that are set out on page 2 of the form T183. Paper notices will not be mailed to me from the CRA. Do you want preparer to get <u>Electronic Notice of Assessment?</u> Yes X No By checking yes on the box above, I am allowing the CRA to electronically provide my assessment results and my notices of asses	claiming a principal residence exemption?       Yes       X       No         Use preparer address for:       X       Nothing       Notice of Assessment and Refund       N of A         T1 mailing address       T1 mailing address       Nothing       Nothing       Nothing

• Save the file with a generic name, perhaps naming it something like NoName

Save 2019 T1/	TP1 As	_					-	?	$\times$
1. NoName									
NoName									
Client Status:	2. Work in pro	cess					~	🗆 La	ocked
EFILE Status:	1. Not eligible	•							~
SEND Status:	2. Eligible								~
TP1 Status:	1. Not eligible	9							~
T1135 Status:	1. Not eligible	9							~
DCN:									
	····	1	· · · · ·						
Date	Preparer	Action	Elapsed	Module Ver.					^
File Name									*
C:\Users\mdila	a\Documents\/	/ly ProFile [	Data\2019T1\	NoName.19T	t				
Calorap to cite					J				
Files for this ta	ax year not sup	ported.							
Password:							Save	Ca	incel
Confirm:							Help	Adva	nced >>
		Show F	assword						

- In order for ProFile to open any new file with the settings established about, go to the *Options* menu and select *Module*
- Select the file year and module and then, in the File Template area, click Browse



- Search and select the file template on your hard drive
- Click Open

→ ` ↑ <mark>·</mark> ·	> Documents > My ProFile Data >	2019T1	ٽ ~	, Search 2019T1	
ganize 🔻 🛛 New folde	er			III 🕶 🔲	
^	Name	Date modified	Туре	Size	
Quick access	NoName.19T	12/2/2020 11:07 AM	ProFile 2019 T1	30 KB	
Downloads 🖈	Martin.19T	12/1/2020 4:40 PM	ProFile 2019 T1	139 KB	
😻 Dropbox 🛛 🖈	CARSONN, Johnny.19T	12/1/2020 4:40 PM	ProFile 2019 T1	65 KB	
📙 Documents  🖈	Descartes, Marsha.19T	12/1/2020 3:54 PM	ProFile 2019 T1	36 KB	
📙 T2 Returns 🛛 🖈	Descartes, Rene.19T	12/1/2020 3:54 PM	ProFile 2019 T1	98 KB	
🦲 iCloud Drive 🖈	Ames, Kalee.19T	12/1/2020 3:31 PM	ProFile 2019 T1	31 KB	
	Dec1Template.19T	12/1/2020 3:19 PM	ProFile 2019 T1	30 KB	
Dropbox	CARSONN, Angela.19T	12/1/2020 3:15 PM	ProFile 2019 T1	52 KB	
OneDrive	Muth, Mario.19T	12/1/2020 11:55 AM	ProFile 2019 T1	35 KB	
	Belll, Marc.19T	12/1/2020 11:13 AM	ProFile 2019 T1	36 KB	
This PC	Shepard, Jane.19T	11/28/2020 4:00 PM	ProFile 2019 T1	39 KB	
🗊 3D Objects	📄 Mar, Martha and Arma, John.19T	11/28/2020 2:56 PM	ProFile 2019 T1	113 KB	
Documents	Hruzec, Sam.19T	11/23/2020 4:12 PM	ProFile 2019 T1	40 KB	
🕹 Downloads	Bardem, Raul.19T	11/23/2020 2:46 PM	ProFile 2019 T1	39 KB	
📃 Downloads 🗸 🗸	Ames, Anna and MAn, Man.19T	11/22/2020 4:46 PM	ProFile 2019 T1	63 KB	
File n	ame: sc1Template.19T		~	2019 ProFile T1 (*.19T)	

Going forward, ProFile will use the default settings in this template file whenever you create a new file of the same type.

- If you want to share the template with other users on a network, save the template into a shared server folder.
- In Client Explorer, files will display by client name or SIN. On a template, both these fields are blank. When you look for your template on the Client Explorer, the template file appears as *NoName*.
- Select the *NoName* file in the database client list. Below it, you will see the file name you assigned, such as *T1 Template*, in the file details area.
- Open the template when you need to modify the defaults for all your new clients.

# **HyperDocs**

It may happen that you'd like to attach or link an electronic document to a tax file. For example, you may want to attach a PDF of a CRA document such as a tax ruling or an interpretation bulletin. Or you may want to link to an image file itemizing details of charitable donations or medical receipts. With ProFile's HyperDocs, you can do exactly that. In other words, HyperDocs lets you attach multiple documents, in any format, to a form or field of a T1 return.

It's important to note that any HyperDocs document attached to a tax file will be stored for internal purposes only. This means that no HyperDocs attachment will ever get transmitted to CRA.

#### Adding a HyperDocs document

You can choose to attach a HyperDocs to a tax file, or to a specific form or line in a tax file.

- To add a new HyperDocs document to the tax file itself, go to File > HyperDocs and click the Add icon (circled in the image below)
- A window will open letting you select the file you wish to add

MyperDocs				<b>?</b> ×			
Attach or link documents	to this return			S 🛇 🖉 🗌 🔪			
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Comments (for your reference)				V Select Files			×
				$\leftarrow \rightarrow \checkmark \uparrow$ $\bigstar$ > OneDrive >	~ Ŭ	Search OneDrive	Ą
				Organize - New folder		<b>≣</b> •	□ ?
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				🖕 Desktop 🖈 🧔 Attachments		2017-11-06 8:19 PM	File folder
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				🔚 Pictures 🖈			
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				2016 T1     Autoraued Capts			
				PendingCaptures			
				I T2 Returns			
				> 🔗 OneDrive			
				> 🍠 This PC 🗸 🤘			>
				File name:	~	All Files (*.*)	~
						Open (	Cancel

• To attach a HyperDocs to a specific field on a client form, right-click on the field and select Attach HyperDocs

Step 2 - Total income	port your income from a	Il sources both ins	ide and outsid	le Canada.	
When you come to a line on the return	that applies to you, go to	the line number in	n the guide fo	r more information.	
Employment income (box 14 of all T4 slips)		101	18,421,00	Hala	E1
Commissions included on line 101 (box 42 of all T4 slips)	102	0 00		пер	F1
wage loss replacement contributions	402	oloo 🖻	~	T4	F6
(see line 101 in the guide)	103	000	0	T1212	
Other employment income		104	0		
Old Age Security pension (box 18 of the T4A(OAS) slip)		113	0	Cut	
CPP or QPP benefits (box 20 of the T4A(P) slip)		114	0	Сору	
(hey 16 of the T40(D) allo)	152	oloo 🖻		Copy field code	
(bbx to of the 14A(r) sip)	152	115	0	Parte	
Elected epit consists amount (attach Form T1022)		115	0	Faste	
Lieucied spit-pension amount (attach Form 11032)		117	0	Override	F2
Universal Child Care Benefit (UCCB)	195		0	Attach memo	F8
UCCB amount designated to a dependant	105	000	0	Autorite	C11 50
Employment insurance and other benefits (box 14 of the Taxable amount of dividends (eligible and other than eligible	14E SID) hle) from taxable Canadian	119		Attach tape	Ctri+F8
corporations (attach Schedule 4)	ole) non taxable canadian	120	0	Copy Memo/Tape	
Taxable amount of dividends other than eligible dividends	i,			Determine tope	
included on line 120, from taxable Canadian corporations	180	0 00		Attach HyperDoc	
Interest and other investment income (attach Schedule 4	-)	121	0	, and a second	
Net partnership income: limited or non-active partners on	lv .	122	0	REVIEW HILLS	,
Registered disability savings plan income		125	0	Close form	Esc
				Print form	
Rental income Gross	1 <b>60</b> 0 00 <b>-</b>	Net 126	0	New window	
Taxable capital gains (attach Schedule 3)		127	0	Launah mindaw	
Support payments received Total	56 0 00	Taxable amount 128	0	Caunch window	
RRSP income (from all T4RSP slips)		129	0	Create FX	
Other income	Specify:	130	0	Create T3	
Self-employment income				Carry forward	
Business income Gross	62 0 00	Net 135	0	Previous year's return	
Professional income Gross	64 0 00	Net 137	0		
Commission income Gross	66 0 00	Net 139	0	Show auditor	Ctrl+F9
Farming income Gross	68 0 00	Net 141	0	Environment	
Fishing income Gross	0 00	Net 143	0	-	

• After you select the file, ProFile asks whether to embed or link your document

MyperDocs	?	×
Embed Document     Enk Document	Сору	
ОК	Car	icel

- Embedded documents open as read-only and cannot be edited in ProFile
- Linked documents open from the source, so you can edit them directly in ProFile, and your changes will be saved to the source document on your computer

#### Managing attached documents via HyperDocs

Whether you add a HyperDocs to the tax file in general or to a specific area of the tax file, you will find all attached documents in the HyperDocs window. To view all attached documents:

- Go to File > HyperDocs
- All attached documents appear in the HyperDocs window along with any comments that you entered. The HyperDocs window also lists key information that includes:
- The date the document was attached and/or modified
- The process you chose to attach the file (linked or embedded)
- And the form to which the document was attached

MyperDocs						?	$\times$
Attach or link documents into	this tax	return.				- 🐚	00
1. Hruzec, Sam							
HyperDoc Tax Free Car Allowance.png HyperDoc T2125 Statement.xl	Size 65 KB 306 KB	Out No No	Date Linked 11/19/2019 11 11/19/2019 11	Date Modified 11/11/2019 8: 11/12/2019 2:	Type Linked Linked	F T T	Form Tax Retu Tax Retu
Comments (for your reference)							>
					Close	н	lelp

#### **Removing a HyperDocs document**

• To remove a HyperDocs document, right-click on the document in the HyperDocs window and choose *Remove* 

<b>ј</b> Нур	erDo	cs						?	Х
Attach o	or lin	k documents inte	o this tax i	return.				1	0 🕙
1. Hruzed	c, Sar	m							
HyperDc	vee C	Add Open Synchronize Remove Print Go To Field Icons Details	Size 65 KB 306 KR Ctrl+D Ctrl+O Ctrl+Y Ctrl+R Ctrl+P	Out No No	Date Linked 11/19/2019 11 11/19/2019 11	Date Modified 11/11/2019 8: 11/12/2019 2:	Type Linked Linked		Form Tax Retı Tax Retı
		Refresh	F5						
<									>
Comment	ts (foi	r your reference)							~
							Close		Help

#### **Deleted forms**

If you delete a form that had HyperDocs attached to it, the HyperDocs will also be deleted. Deleting a HyperDocs document will only remove the link or embedded document from ProFile - it will not affect the source file stored on your computer.

#### **Opening attached documents**

From the HyperDocs window, double click on the document. If the document is linked, ProFile opens it from its source and saves any changes you make directly to the source file stored on your computer. If the document is embedded, ProFile opens a read-only version.

You can keep HyperDocs documents open while you continue working in ProFile.

#### Synchronizing out-of-date documents via HyperDocs

If you alter a linked document outside of ProFile, you may need to synchronize the document so that ProFile has the latest version of the file.

- Because embedded documents open as read-only, to make changes to an embedded file, you must edit the source file and synchronize it in ProFile
- You can edit linked documents directly in ProFile, as they open from the source and your changes are saved to the source file

Any out-of-date, or unsynchronized, documents are displayed in red in the HyperDocs window along with an exclamation point icon.

- To synchronize an out-of-date file, right click the document and select Synchronize
- Alternatively, after selecting the document, click the green Snyc icon



• Once ProFile has synchronized the document, the exclamation point will disappear, and any red lettering will revert to black font

## **VARIANCE AND SNAPSHOT**

Variance is a feature that you use to highlight significant changes on a tax return. Variance lets you experiment with different scenarios and quickly identify the impact of those change. Variance is only calculated for fields with CRA line numbers. So, not all fields (for example on worksheets) will be included in the variance comparison. You activate the variance feature by taking a snapshot of the tax return.

#### To take a snapshot of your current return

- From the Audit menu, select *Snapshot/variance* and click the *New* button. This will take a picture of the current contents of the tax return
- Give the snapshot a name that will remind you of the purpose of the scenario
- Select the *Activate this snapshot* option to have ProFile compare any changes you make in the file to this snapshot and click *OK*

tive: None			
Description	Preparer	Date	New
None			Delete
			Close
			Help
Take s	napshot	×	
Desc	ription:		
Wha	t if scenario		
Prep	arer:		
MDL			
	ctivate this snapshot		

• As you make changes in the file, you can see the variance analysis on the *Variance* tab of the Active Auditor

°,	Summary	•	Warnings 🔍 Notices 🖌 Sign-offs 🗰 Issues 🔒 Overrides 📝 Memos 🍁 EFILE 🍁 T1135 🗦 Online 🚺
1	Variance	T1	Line 101: Employment income - What if scenario: \$18,421.00 (increase of \$25,901.00 / 140.6%)
	Variance	T1	Line 150: Total income - What if scenario: \$18,421.00 (increase of \$25,901.00 / 140.6%)
8	Variance	T1	Line 234: Net income before adjustments - What if scenario: \$18,421.00 (increase of \$25,901.00 / 140.6%)
-	Variance	T1	Line 236: Net income - What if scenario: \$18,421.00 (increase of \$25,901.00 / 140.6%)
1	Variance	T1	Line 260: Taxable Income - What if scenario: \$18,421.00 (increase of \$25,901.00 / 140.6%)
-	Variance	<b>S1</b>	Line 323: Your tuition, education, and textbook amounts - What if scenario: \$4,701.10 (increase of \$6,806.90 / 144.8%)
10	Variance	<b>S1</b>	Line 335: Unadjusted federal non-refundable tax credits - What if scenario: \$18,421.00 (increase of \$6,814.08 / 37.0%)
		C+	
			EFILE: Eligible Balance/Refund 4,491.47 GST Credit 32.35 Combined bal4,491.47 +

• And you can also view the changes in 'fly-over' messages when your cursor is over a yellow variance field

Step 2 - Total income As a resident of Canada, you have to report you When you come to a line on the return that appli	r income from all ies to you, go to t	sources bot he line num	th inside ber in t	e and outside Canada. he guide for more information.
Employment income (box 14 of all T4 slips)			101	44,322 00 What if scenario: \$18,421.00
Commissions included on line 101 (box 42 of all T4 slips)	102	0 00		(increase of \$25,901.00 / 140.6%)
Wage loss replacement contributions				
(see line 101 in the guide)	103	0 00		
Other employment income			104	0.00
Old Age Security pension (box 18 of the T4A(OAS) slip)			113	0 00
CPP or QPP benefits (box 20 of the T4A(P) slip)			114	0 00
Disability benefits included on line 114				
(box 16 of the T4A(P) slip)	152		~~~~	

#### Shelf-life of a snapshot

Snapshots may have a short self-life. For example, you may have created a snapshot last week using a client RRSP contribution of \$5,000. This week you may want to evaluate the impact of reducing that contribution to \$3,000.

However, if you also added a new T3 slip since taking the first snapshot, variance will detect the impact of both the T3 and the RRSP. To best use variance, make sure you carefully manage which data fields you've changed since taking a snapshot.

#### **Deleting a snapshot**

If you change other data in the return, like adding income from a forgotten contract job, you will need to delete your original snapshot and create a new one, reflecting the extra income, before comparing that scenario to current data.

• On the Snapshot Variance dialog (go to the *Audit* menu and select *Snapshot/variance*, select a snapshot that you no longer need and click the *Delete* button to remove that snapshot.

twe: what if Scenano Description Preparer Date None What if Scenario MDL 2019/11/19	Preparer Date MDL 2019/11/19
None What if Scenario MDL 2019/11/19	o MDL 2019/11/19

#### **Previous year variance**

ProFile includes several features to help you identify and analyze variances between two tax scenarios. If you carry forward information from a previous year's return, you can use these variance features to find out how much a field changed in comparison to the previous year.

To turn on previous year variance:

- Go to the Options menu and select Module
- Click a module tab, for example, *2018T1*
- Click the *Variance* tab.
- Select the Show previous year variance by default checkbox
- Click OK

2.2018	T1/TP1	3.201	7-2019 T2	▼   <sup>10</sup> <u>5</u> .2018 T3/1	TP646 🛛 🕈 🔤 <u>7</u> .2019 FX	/Q 1
ile Tem	plate					
					Browse	
General	Data Locking	Variance	Disclaimer	T1/TP1 Review		
Minimur	m Variance			,		
Dollar (	\$)	30000				
Donar (	<i>•1</i>	00000			C English	
Percent	tage (%)	100	÷		◯ French	
Show	previous year	variance b	y default			
Show	previous year	variance b	y default			
Show	previous year	variance by	y default			
Show	previous year	variance b	y default			
Show	previous year	variance by	y default			
Show	previous year	variance b	y default			
Show	previous year	variance b	y default		ОК	
Show	previous year	variance b	y default		ОК	
Show	previous year	variance b	y default		OK Cancel	

When you carry forward a return and there is a difference between the previous and current year amounts, ProFile highlights the changed fields with an orange background. Move your cursor over the field to see the message associated with that field.

#### Variance thresholds

You can set variance thresholds to meet your own requirements. Go to the *Options > Module* and click the *Variance* tab.

Set a minimum dollar value or percentage of change that will trigger a variance calculation. If you set both a dollar and a percentage amount, ProFile calculates a variance only when the amount differs by more than the dollar value and the minimum percentage.



# T1 PAD

Pre-authorized debit (PAD) is a secure, online, self-service payment option for individuals and businesses. This option lets you set the payment amount you authorize CRA to withdraw from a Canadian chequing account to pay taxes on a date, or multiple dates.

Due to the processes that must take place between the CRA and the financial institution, the selected payment date must be at least five business-days from the date your PAD agreement is created or managed.

A PAD agreement can only be done online. Here's how to do it in ProFile:

- Use Form Explorer to Open *T1PAD*
- Type *Yes* to set up PAD
- Click the Pay in full checkbox
- If you are already set up for Direct Deposit and you want to pay from that account, enter YES. Otherwise enter NO and enter the bank transit info

Do you wish t	to set up Pre-Autho	rized Debits (PAD)	for current year tax owin	g?	Yes
netructione					
Pre-authorize amount you a	d debit (PAD) is a se uthorize the Canada	cure, online, self-ser Revenue Agency (Cf	vice payment option for indiv RA) to withdraw from your Ca	iduals and businesses. This option is anadian chequing account to pay you	ets you set the payment taxes on a date you
Only Paymen To Efile PAD	t on Filing (POF) for Agreement: Go to	the current tax year w the Efile Menu and	ill be allowed to create PAD select "Efile Pre-Authoriz	agreement through T1 Efilers. ed Debit for this TaxPayer"	
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- Go to EFILE and select EFILE Pre-Authorized Debit for this Taxpayer
- Once EFILED, ProFile will record the T1PAD confirmation number in the yellow field above, and on the INFO form as well



# **EXPRESS NOTICE OF ASSESSMENT**

Express Notice of Assessment (NOA) is a CRA service that allows you to view the basic result of an assessment immediately after filing a return and to receive the full notice of assessment the next day.

This instant assessment provides the status of your client's return with a summary of the refund, amount owing, or a zero balance and deposit information, if applicable.

The full notice of assessment provides an account summary with the result of the assessed return showing a refund, a zero balance, or a balance owing, tax assessment summary, explanation of changes and other information, and RRSP/PRPP deduction limit statement. It may also contain the Home Buyers' Plan statement and Lifelong Learning Plan statement.

#### **ENOA requirements**

To use the Express NOA service, you must:

- be a registered electronic filer
- be registered in Represent a Client and have a RepID, GroupID or business number
- have a valid Form T1013, Authorizing or Cancelling a Representative with Level 1 (or higher) authorization for online access on file with the CRA
- have a valid Form T183 and have completed Part C for the Express NOA function

Follow these steps to activate ENOA in ProFile:

Navigate to the Info page and click the ENOA checkbox

Do you want preparer to get Electronic Notice of Assessment?	X Yes	<u>N</u> c
By checking yes on the box above, I am allowing the electronically provide my assessment results and my assessment and reassessment to the electronic filer discounter) named in Part C of T183. I will now receive notices of assessment and reassessment from my electronic for the electronic filer.	CRA to notices of (including re a copy of ectronic fi	f a of my iler.

Open the *T183* Form and confirm that you'd like to receive a one-time electronic notice of assessment.
 Note that ProFile warns you if you don't have a valid authorization form on file with CRA



To proceed to CRA's website and then onto your client's notice of assessment, click EFILE >

View Notice of Assessment (ENOA)

EFILE/ReFILE this return	Ctrl+F11	
EFILE Pre-authorized Debit for this taxpayer		
EFILE the T1013 for this taxpayer		
EFILE the T1135		
Build T1 EFILE Online Batch		
EFILE Online Batch		
Build TP1 NetFile		
TP1 Connect		
Reports		>
Print All ACKs		
View Notice of Assessment (ENOA)		
Set EFILE Password		
Options		
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# Chapter 8 Quiz

Question 1: A file template is used to:

- A. Ensure that all data is recorded properly
- B. Create returns for various family members
- C. Pre-select the fields and forms ProFile will set up on a new tax return
- D. Verify the accuracy of the tax amounts

#### Correct answer is C

Question 2: True or False: A different file template can be set up for each ProFile module

Correct answer is True

Question 3: HyperDocs is designed to:

- A. Link or embed an electronic file to a tax return
- B. Add audit messages to a tax file
- C. Link an amount on a tax return to the relevant information on CRA's websit
- D. Create a hyperlink that can be emailed to a client

#### **Correct answer is A**

Question 4: True or False: You can use HyperDocs to send documents such as donations receipts to CRA

#### **Correct answer is False**

**Question 5:** True or False: HyperDocs lets you attach a document to either the tax return itself or to a line on the return

#### **Correct answer is True**

Question 6: You synchronize a Hyperdocs file by clicking:

- A. On the Synchronize command in the File menu
- B. The source document in Windows Explorer
- C. On the green *Synchronize* icon in the HyperDocs window
- D. You cannot, in fact, synchronize a HyperDocs file

#### Correct answer is C

Question 7: True or False: Once you attach a HyperDocs file to a tax return, you cannot remove it

**Correct answer is False** 

Question 8: True or False: Profile uses a Snapshot to EFILE the tax return to CRA

**Correct answer is False** 

**Question 9:** Select one reason you would use ProFile's *Variance* feature:

- A. To compare the difference between two spouses' T1 files
- B. To highlight significant changes between the prior and current year's T1 files
- C. To track the last time you opened a T1 file
- D. To make sure all tax preparers are using the same version of the tax file

#### Correct answer is B

Question 10: CRA's T1 Pad is used to

- A. Send an electronic payment to CRA
- B. Keep track of all amounts already paid to CRA
- C. Ensure that all client notes are saved in a notepad
- D. Modify a file that you EFILED with CRA

**Correct answer is A**