

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

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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 fast 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 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 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:

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Autres Box - Case Amount - Montant renseignements (voir au verso)	Box - 0	Case	Amount - Montant	Box - Cas		Amount - Montant	

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

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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

Canada Revenue Agency Agence du revenu du Canada Protected Income Tax and Benefit Return Before you start: If you are filling out this return for a deceased person, make sure you enter their information in all the boxes i Step 1 – Identification and other information Identification Print your name and address below. First name and initial Johnny Last name 2020 Smith St PO Box PO Box RR City Prov./Terr. Postal code Antown Mailing address, but No. – Street No. Street name 2020 Smith St PO Box RR Enter your for a deceased person, enter the date of death: Email address, bou are registering to receive email notifications from the CRA and agree to the Terms of use under Step 1 in the guide. Enter ne email address; jc0101@profile.co Information about your residence Enter your province or territory of residence on December 31, 2019; <u>Ortario</u> Enter the province or territory where you currently reside if it is not the same as your mailing address above: If you were self-employed in 2019, enter the province or territory where your business had a	Burgers Protected B when completed Income Tax and Benefit Return 2019 ecceased person, make sure you enter their information in all the boxes in Step 1. on 8 ther information on 8 ion Information about you address below. Enter your social insurance number (SIN): 4 8 7 4 8 7 5 8 9 o. Street name Fater your social insurance number (SIN): 4 8 7 4 8 7 5 8 9 v./Terr. Postal code N M 4 1 A 1 A 1 V.Terr. Postal code N M 4 1 A 1 A 1 Pess Tick the box that applies to your marital status on December 31, 2019: 1 Married 2 Living common-law is gree to the Terms of use Information about your spouse or common-law partner (if you ticked box 1 or 2 above) Enter their first name: Enter their first name: Enter their net income for 2019 to claim certain credits: Inter their certain	Canada Revenue Agency Agence du revenu du Canada Protected B when complete Income Tax and Benefit Return 2019 Before you start: If you are filling out his return for a deceased person, make sure you enter their information in all the boxes in Step 1. 2019 Step 1 – Identification and other information ON 8 Identification Information about you Print your name and address below. Information about you First name and initial 2000 smints: Vear Month Day (Year Mailing address: Apt No. – Street No. Street name Is this return for a deceased person. Français Votre langue de correspondance: Image: Street in Français Votre langue de correspondance: Image: Street in Français Votre langue de correspondance: Maital status By providing an email address. PO Box RR Is this return for a deceased person. Marital status on December 31, 2019. Information about your residence Information about your residence Marital status on December 31, 2019. Information about your residence Information about your spouse or common-law partner (if you ticked box 1 or 2 above) Enter the province or territory where your currently reside if it is not the same as your mailing address above: Information about your spouse or common-law partner (if you ticked box 1 or 2 above) If you became or ceased to be a resident	
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• On Page 3, enter the employment income amount as indicated on the employer's T4

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Step 2 – Total income					
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(See line 10100 in the guide.)		10105			
Commissions included on line 10100	(box 42 of all T4 slips)	10120			
Wage-loss replacement contributions	(See line 10100 in the guide.)	10130			
Other employment income			10400	+	
Old age security pension (box 18 of the	he T4A(OAS) slip)		11300	+	
CPP or QPP benefits (box 20 of the 1	T4A(P) slip)		11400	+	
Disability benefits included on line 11	400 (box 16 of the T4A(P) slip)	11410			
Other pensions and superannuation (See line 11500 in the guide and	complete line 31400 in the			
Worksheet for the return.)			11500	+	
Elected split-pension amount (Get an	d complete Form T1032.)		11600	+	
Universal child care benefit (UCCB) (See the RC62 slip.)		11700	+	
UCCB amount designated to a depen	ndant	11701			
Employment insurance and other ben	nefits (box 14 of the T4E slip)		11900	+	
Employment insurance maternity and parental insurance plan benefits	parental benefits and provincia	11905			
Taxable amount of dividends (eligible (Complete the Worksheet for the retu	and other than eligible) from ta rn.)	xable Canadian corporations	12000	+	
Taxable amount of dividends other th line 12000, from taxable Canadian co	an eligible dividends, included o prorations	n 12010			
Interest and other investment income	(Complete the Worksheet for th	e return.)	12100	+	
Net partnership income: limited or not	n-active partners only		12200	+	
Registered disability savings plan inc	ome (box 131 of the T4A slip)		12500	+	
Rental income	Gross 12599		Net 12600	+	
Taxable capital gains (Complete Scho	edule 3.)		12700	+	
Support payments received	Total 12799	Taxable amo	unt 12800	+	
RRSP income (from all T4RSP slips)			12900	+	
Other income	Specific		13000	+	
Taxable scholarship fellowships bur	saries and artists' project grants	1	13010	+	_
Self-employment income	cance, and antone project grant	·			
Business income	Gross 12499		Not 13500		
Professional income	Gross 19699		Net 19700	-	
Commission income	Gross 13099		Net 12000	<u> </u>	
Earming income	Gross 14000		Net 14100		
Fishing income	Gross 14099		Net 14100	7 1	
Workers' companyation banafita (bay	Gross 14299		Net 14300	+	
Social assistance payments	To or the 15007 slip)	14400	_		
Net federal supplements (her 24 of th	a T40/04S) alia)	14500 +	_		
Add lines 11400 44500 and 14000	(Coo line 25000 in Char 4.)	14600 +	-		
Add lines 10100, 10100 to 11100, 10	(See line 2000 In Step 4.)	=	F 14/00	+	
12100 to 12500, 12600, 12700, 1280 13900, 14100, 14300, and 14700.	0, 12900 to 13010, 13500, 1370	0, This is your total incor	ne. 15000	=	9000 00
	_ -				
5006-R	Page 3				

• 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 Amoun	ts Schedule 11
Only the student must complete this schedule and attach it to their return. If the student is transferson, the other person should not attach this schedule to their return.	erring an amount to another
If you are a student, complete this schedule to determine:	
 your tuition, education, and textbook amounts 	
 the tuition amount you can transfer to a designated individual 	
 the unused amount, if any, you can carry forward to a future year 	
Use your completed designated forms (T2202, TL11A, and/or TL11C) or other official tuition tax schedule.	receipts to complete this
For more information, see Guide P105, Students and Income Tax.	
Tuition, education, and textbook amounts claimed by the student for 2019	
Unused federal tuition, education, and textbook amounts from your 2018 notice of assessment or notice of reassessment	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 institution must be more than \$100. Also complete the 2019 enrolment information below.	32000 + 7616 2
Eligible tuition fees paid to foreign educational institutions for 2019 from the forms noted above or your official tuition tax receipts. To qualify, the fees you paid to attend each institution must be mothan \$100. Also complete the 2019 enrolment information below.	ore 32001 + 3
Add lines 1, 2, and 3. Total available tuition, education, and textbook amounts for 2	019 = 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%.	5
Total of lines 1 to 20 in Step 5 of your return13709	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 4 or line 7 where is less	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

	Protec	ted B when co	mple	ted
Step 5 – Federal tax (formerly 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	+		~~
- And remained to the Area			~	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

Info	2019 Personal information
Taxpayer personal information	Marital status
SIN 487 487 589 Title Mr First name Johnny Last name CARSONN Last name CARSONN Last name changed in 2019? Yes Do you want to change your address? Yes Care of Street address Street address 2020 Smith Street P.O. Box R.R. City Anytown Prowince ON Postal code M4A 1A1 Primary phone<(900) 090-9099	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 No 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 Are you a non-resident? Yes No Residency status Resident Im//dd Ont go dispose of a property (or properties) in 2019 for which you are claiming a principal residence exemption? Yes No
by providing your email adverse or objacting 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 No 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.	Use preparer address for: ∑ Nothing Notice of Assessment and Befund N of A I1 mailing address

• Once again, here is Johnny's T4 slip

Employer's name - Nom de l'employeur ProFile 2021 Tour	I ∳ Yea	Canada Rev Agency	enue Agence du revenu du Canada	Stateme	T4	on Paid
1212 Main St	Anne	2019		État de	a la rémunération	payée
			Employment Income -	line 10100	Income tax deduct	ed - line 43700
Anytown ON M1A 1A1		14	9	000 00	22	900.00
54 Employer's account number / Numéro de compte d	l'employeur Pr	ovince of employme Province d'emploi	ent Employee's CPP contrib Collisations de l'employé a	utions - line 30800 u RPC - ligne 30800	El Insurab Gains assu	le earnings irables d'AE
Social insurance number	Exempt - Exemption	10 ON	16	280 50	24	00,000,00
Numéro d'assurance sociale	CPP/GPP EI PPIP	Employment code Code d'emploi	Employee's QPP contrib Cotisations de l'employé a	utions - line 30800 u RRQ - ligne 30800	CPP/QPP pensio Gains ouvrant droit à p	nable earnings ension - RPC/1
407 407 505	RPC/RRQ AE RPAP	29	17		26 5	9,000.00
Employee's name and address - Nom et ad	esse de l'employé		Employee's El premiu Cotisations de l'employé à	ms – line 31200 I'AE – ligne 31200	Union dues Cotisations syndic	- line 21200 ales - ligne 21
Last name (in capital letters) - Nom de familie (en lettres moui	es) First name - Prénom	Initial - Initiale	18	145.80	44	
- CARSONN	JOHNNY		RPP contribution Cotisations à un Rt	s – line 20700 PA – ligne 20700	Charitable donal Dons de bienfais	tions - line 349 ance - ligne 34
			20		46	
2020 Smith Street			Pension adjustme Facteur d'équivaler	int – line 20500 ice – ligne 20500	RPP or DPSP re N° d'agrément d'un	gistration numb RPA ou d'un P
Aputown ON CAN	M4A 1	A1	52		50	
Anytown ON OAN	MHO 1	~	Employee's PPIP pren Cotisations de l'employé au	ilums - see over RPAP - voir au verso	PPIP Insura Gains assura	ble earnings bles du RPAP
			55		56	
Box - Case Amoun	- Montant Bo	ox - Case	Amount - Montant	Box - Car	ise Amount -1	Vontant
Other information (see over)						
Autres Box - Case Amoun	- Montant Bo	x - Case	Amount - Montant	Box - Ca	Amount - I	Vontant

• 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

Va Form Explorer						
🔟 Carsonn. Johnny						
Eorm: t4						
Form	Name	Category	Description	U	Last	S
1. Identification	of Info	Identificati	Personal information	Υ	NA	1
📜 2. Silps	# Dependant	Identificati	Dependant information	No	N/A.	3
📜 3. Income	@CarryFWD	Identificati	Canyforward Summary	Y	N/A.	4
M Deductions	IFT2202/TL	Sips	Tuition and education credit	Υ	N/A	6
5 Tax + credits	🖡 T3	Slips	Statement of trust income	No	N/A	7
5 Pietum + Itchedulet	i≰T4	Sips	Statement of remuneration	Y	N/A	8
2 Fing	IAT4A	Slips	Statement of pension, ann	No	N/A	9
1 3 M	T4AOAS	Slips	Statement of Old Age Secu	No	N/A	10
🐂 🛕 Ured	IA T4AP	Sips	Statement of Canada Pensi	No	N/A	11
📜 B. Data entered	I T4ARCA	Sips	Statement of distributions fr	No	N/A	12
📒 🖸 Last year	G T4E	Sips	Statement of Employment I	No	N/A	13
	& T4PS	Sips	Statement of profit-sharing	No	N/A	14
	& T4RIF	Slips	Statement of income from	No	N/A.	15
TI	& T4RSP	Slips	Statement of RRSP income	No	NA	16
TACA-torrest of com	LIA TE	Sinc	Statement of invectment in	No	NZA	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)



Canada Revenue Agence du revenu Agency du Canada										Pro when F	con or st	cted B / Proté mpleted / une fo tudent / Pour étud	gé B is rempli iant
	T2202 Tuition a Certificat pour frain	and E s de s	nrolm	en ité	t Cer et d'	tific	cript	ion		Yea	r	2 0 1 9]
Name and address of designated educational insti Nom et adresse de l'établissement d'enseignemen	tution it	1	1 Scho Caté	ol typ	d'écol	e		12 Flyi Éco	ing s ble o	chool or club u club de pilot	sge		
ProFile 2021 Tour 1212 Main St Anytown ON M1A1A1		3	4 Stude Num	int n	umber l'étudia	nt		15 File Nu	r Ao méro	count Number de compte du	dé	clarant	
13 Name of program or course Nom du programme ou du cours Computer Science	S P	Session periods/	19 From YY/MI	1	To YY/MI A	v	21 of pi	lumber months art-time/ lombre		22 Number of months full-time/ Nombre		Eligible tuitior part-time and fi Frais de sco admissibles	n fees, ull-time/ plarité
Student Name Nom de l'étudiant JOHNNY CARS	SONN	l'études	AA/M	01	AA/M	M	ten	e mois à lips partiel		de mois à temps plein 08		études à temp et à temps	plein 7616
Student address Adresse de l'étudiant		2			_		E						0
2020 Smith St	E	4	Тс	tals	/ Tota	ux	24		25	08	20	5	0 7616
Anytown M4A 1A1	ON CAN surance number (SIN) d'assurance sociale (NAS) 7 4 8 7 5 8 9	Inforr Rens	nation f	or st	pour le	you you	e the b ur tuitic udiant	ack of Cert n amount, s : Lisez le une par rempliss	vers tie or ez k	e 1. If you war plete the back to du certificat u la totalité de e verso du cer	1. S vos	transfer all or par Certificate 2 Si vous désirez tran frais de scolarité, at 2.	of hsférer
See the privacy notice on the next page. Consultez l'avis de confidentialité à la page suivant												Can	2 ada

- 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.



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

	FIDIECIEU D 1	when completed
Step 5 – Federal tax (formerly Schedule 1)		
Part A – Federal non-refundable tax credits		
Basic personal amount claim \$12,06	9 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:		
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	0 00 • 9
Employment insurance premiums:	b4000	
through employment from box 18 and box 55 of all 14 slips (maximum \$860.22	31200	145 80 • 10
on self-employment and other eligible earnings (Complete Schedule 13)	31217	000 • 11
Volunteer firefighters' amount	31220	000 12
Search and rescue volunteers' amount	31240	0 00 13
Canada employment amount (Enter \$1,222 or the total of your employment	21260	1 222 00 14
Income you reported on lines 10100 and 10400, whichever is tess.)	21200	1,222 00 14
Home buyers amount (maximum \$10,000	012/0	
Adaption excessionly expenses (Complete the Worksheet for the return.) (maximum \$10,000	21200	
Adoption expenses	51300	
Disability amount (Complete the Worksheet for the return.) (maximum \$2,000) 51400	18
(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 dependant (Complete the Worksheet for the return.)	31800	0 00 20
Interest paid on your student loans (See Guide P105.)	31900	0 00 21
Your tuition, education, and textbook amounts (Complete Schedule 11)	32300	0 00 🔒 22
Tuition amount transferred from a child	32400	0 00 23
Amounts transferred from your spouse or common-law partner (Complete Schedule 2)	32600	0 00 24
Medical expenses for self, spouse or common-law partner, and your		· -
dependent children born in 2002 or later 33099 0 00	25	
Enter \$2,352 or 3% of line 23600 , whichever is less. 269 75	26	
Line 25 minus line 26 (if negative, enter "0") 00	27	

- 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



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 1212 Main St	Year Année Canada Re Agency 2019	venue Agence du revenu du Canada	Statement of État de la ré	T4 Remuneration Pai munération payée	id
	Anytown ON M1A 1A1	14	Employment income – line Revenus d'emploi – ligne 52,90	10100 10100 In 0 00 22	Income tax deducted – line mpôt sur le revenu retenu – lig 8,812	43700 ne 43700 09
s rempli	54 Employer's account number / Numèro de compte de l'employeur 23122 3131 RP 0001 Social las unas a unabra Exempt - Exempt	Province of employm Province d'employ 10 ON	tent Employee's CPP contribution Cotisations de l'employé au Ri 16 2,51	ns – line 30800 PC – ligne 30800 9 40 24	El insurable earning Gains assurables d' 52,900	AE DO
s une foi	abcall instraince number CPP/QPP EI P 12 453 545 121 28	PIP Employment code Code d'emploi 29	Employee's QPP contributio Colisations de l'employé au Ri	ns – line 30800 RQ – ligne 30800 Ga	CPP/QPP pensionable ear ains ouvrant droit à pension – 52,900 (nings RPC/RRQ DO
rotégé E	Employee's name and address – Nom et adresse de l'employe Las name (in capital letters) – Nom de tamilie (en lettres moulées) Fist name –	é Prènom Initial – Initiale	Employee's El premiums - Cotisations de l'employé à l'AB	line 31200 - ligne 31200 6 98	Union dues – line 212 Cotisations syndicales – lig	200 ine 21200
pleted / F	CARSONN Angela		RPP contributions – Cotisations à un RPA –	line 20700 ligne 20700 46	Charitable donations – lin Dons de bienfaisance – lig	e 34900 ne 34900
d B when com	Anytown ON CAN	M4A 1A1	Facteur d'équivalence - 52 Employee's PPIP premium Cotisations de l'employé au RP/	ligne 20600 50 s - see over 50 AP - voir au verso 56	PPIP insurable earnin Gains assurables du R	ngs RPAP
Protecte	Other information (see over)	Box – Case	Amount – Montant	Box - Case	Amount – Montant	
T4 (19)	Autres Box - Case Amount - Montant renseignements (voir au verso)	Box – Case	Amount – Montant	Box - Case	Amount – Montant BC-14-599	

	Employer's name – Nom de l'employeur ProFile 2021 Tour 1212 Main St	I≑ I Year Année	Canada Reve Agency 2019	Agence du revenu du Canada	Statemer État de	nt of la ré	T4 Remuneration Pa	id
	Anytown ON M1A 1A1		14	Employment income – I Revenus d'emploi – lig 52,	ine 10100 ne 10100 900 00	Im 22	Income tax deducted – line pôt sur le revenu retenu – li 7,999	43700 gne 43700 12
rempli	54 Employer's account number / Numéro de compte de l'employeur 23122 3131 RP 0001	Provinc Prov 10	e of employment	t Employee's CPP contribu Cotisations de l'employé au 16 2.5	itions – line 30800 RPC – ligne 30800	24	El insurable earnir Gains assurables d 52.900	ias iAE
une fois	Social insurance number Numéro d'assurance sociale 12 245 243 241 Exempt - Exemp CPP/QPP EI P 28	PIP Emp Co	loyment code ode d'emploi	Employee's QPP contribu Cotisations de l'employé au 17	utions – line 30800 I RRQ – ligne 30800	Gai	CPP/QPP pensionable ea ins ouvrant droit à pension - 52.900	mings RPC/RRQ
otégé B	RPC/RRQ AE R Employee's name and address – Nom et adresse de l'employ last name (n capital letters) – Non de familie (en lettres moulées) Fist name.	PAP	al – Initiale	Employee's El premiur Cotisations de l'employé à 18	ns – line 31200 l'AE – ligne 31200	44	Union dues – line 21 Cotisations syndicales – li	1200 gne 21200
d / Pro	ST-PIERRE Martin			RPP contributions Cotisations à un RP	s – line 20700 A – ligne 20700		Charitable donations – li Dons de bienfaisance – li	ne 34900 gne 34900
completed	2020 Smith St			20 Pension adjustmer Facteur d'équivalent	nt – line 20600 ce – ligne 20600	46	RPP or DPSP registratio N° d'agrément d'un RPA ou	n number d'un RPDB
ed B when c	Anytown ON CAN	M4A 1A1		Employee's PPIP premi Cotisations de l'employé au f	ums – see over RPAP – voir au verso	50	PPIP insurable earn Gains assurables du	ings RPAP
Protecte	Box - Case Amount - Montant Other information (see over)	Box - C	Case	Amount – Montant	Box – Cas		Amount – Montant	
T4 (19)	Autres Box - Case Amount - Montant renseignements (voir au verso)	Box - C	Case	Amount – Montant	Box – Cas	e] _	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 di Agency du Canad	a T5 Stateme	ent of Investme s revenus de p	ent Income lacement	Year 2 0 1 9	Protected B when completed	/ Protégé B / une fois rempl
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 c divid	redit for eligible lends	13 Interest from Can	adian sources 18 Capital ga	ins dividends
Mantant dal das di Mandas diferentata	Montant imposable des dividendes	Out of a line of a second	idenden diterrelede		2,121.44	
Montant reel des dividendes determines	déterminés	Credit d'impôt pour div	idendes détermines	Intérêts de source	canadienne Dividendes su	r gains en capital
10 Actual amount of dividends other than eligible dividends	11 other than eligible dividends	12 Olvidend tax cre other than elig	gible dividends	21 Report Code 22	Recipient identification number	23 Recipient type
				0	453 545 121	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	our dividendes endes déterminés	Code du feuillet	Numéro d'identification du bénéficiaire	Type de bénéficiaire
(see the back) Autres renseignements (lisez le verso) Bo	x / Case Amount / Montant	Box / C	ase Amou	unt / Montant	Box / Case Amoun	t / Montant
CARSONN ANGELA ST-PIERRE MARTIN 2020 SMITH STREET	aduress – Norr, prenom et adresse d		PROFILE 1212 MAI	2021 TOUR		Δ 1Δ1
ANYTOWN ON CAN	M 4 A	1 A 1	ANTIOW			
Jurrency and identification codes codes de devise et d'identification	Foreign currency Trar Devises étrangères vis de confidentialité dans votre déclaratio	nsit – Succursale n.	29 F Numéro	Recipient account de compte du bénéficia	For information Pour obtenir des re aire	n, see the back. nseignements, lisez le verso. 1

M Parkinson 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, Tonorito, ON M2P 2A9 1: 416-227-9700 F. 416-227-9600 www.parkinson.ca Charlable Business No / No. d'organisme de tiemfasance enregistré : 10809 1786 RR0001	DUPLICATE REC REÇU EN DOUE	EIPT
	Receipt No./Numéro du reçu:	L100032816
Angela Carsonn 1010 Main St	ntant du	don: \$100.00
Anytown, ON M5A 1A1	Jujees	ybridm
This is an official tax receipt for income tax purposes. / Recu officiel aux fins de l'impôt. Canada Revenue Agency: www.cra.gc.ca/charibesandgiving Agence du revenu du Canada: www.cra-arc.gc.ca/b/rta-gung/menu-/ha.html	Authorized signal	ture/Signature autorisé

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

Info	2019 Personal information
Texneyer personal information	Marital status
SIN 453 545 121 Title MS First name Angela Last name CARSONN Last name CARSONN Care of Yes Street address 2020 Smith Street P.O. Box R.R. City Anytown Province ON Postal code M44 1A1 Primary phone (999) 999-9989 Birth date 1989/09/09 Date of Death ywy/mm/dd	Indicate your marital status on December 31, 2019 1 X 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 No Residence on 2019/12/31 Ontario Province of self-employment Ontario mm/dd If you became or ceased to be a Canadian resident in 2019, enter date of: entry mm/dd
Gender Male Eemale Province or territory where taxpayer resides if different from mailing address: CRA online mail: Already registered Yes X No	Are you a non-resident? Yes X No Residency status Country (other than Canada) Did you dispose of a property (or properties) in 2019 for which you are
Ernai 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? X Yes No 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.	Claiming a principal residence exemption? Yes No Use preparer address for: No X Nothing Notice of Assessment and Refund N of A I 1 mailing address I 1

• 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 Returns	×
 Create a new return for spouse Open an existing return 	
0K 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

	Authoria	ze a Representative – signatur	e page							
Inable printing and EFILE of this authorization request										
Select "EFILE Authorize a Repre	Select "EFILE Authorize a Representative" under the "EFILE" menu to file this authorization.									
Instructions: 1. Print this page and have it sig 2. Retain a copy of the signed a the Canada Revenue Agency	Instructions: 1. Print this page and have it signed and dated by the taxpayer or legal representative. 2. Retain a copy of the signed and dated signature page in your files for six years from the date that this information is transmitted to the Canada Revenue Agency (CRA). Do not send the signature page to CRA by mail or fax unless requested to do so.									
Taxpaver information										
SIN First na	me	Last nan	ne -							
453 545 121 Angela	1	CARSO	NN							
Representative information an	ad authorization	AAA4341	L							
numuai	Representative ib.									
Business	Firm BN:									
Group	Group ID:	G								
Level of authorization (1 or 2):	2									
Enter an expiry date, if applicable	a. yyyy/mm/dd	_								
Signature and date										
I am the legal representative f	for this taxpaver									
By signing and dating this page	you authorize the Can	ada Revenue Agency to interact with	the representative mentioned above							
by signing and damy this page,	you duttion ze the Odli	and noronue regency to intelact with	the representative mentioned above.							
Angela CARSONN		atativa								
ivame of ta	xpayer or legal repres	entative								
			2020/11/29							
Signature o	f taxpayer or legal rep	resentative	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

Represent a Client	
Use this secure service to access tax information on behalf of individuals and businesses,	including your employer.
Choose from one of two ways to access Represent a Client:	
Contrast to Sign-In Patter • Use the same sign in information you use for other online services (for example, unline baseling). • Word in your information will be placed with CPA 'too Sign-In Patters will not information and you or summer and the control of the second set to use your Sign-In Patters. • Ward the Auf and of Sign-In Patters. • Ward the Auf and of Sign-In Patters.	
CRA togin TA register To sum your CRA user CRA use to access to access the comparison of the set	CRA Login
	A11Ba/Prep Exerpt your user ID2
	Passedet: (Population Forgot your datasets)

• 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

The 2017 return was assessed on April 15, 2019 . View your 2017 Notice of Assessment Change my return	
	Go to Tax returns detail:
Accounts and payments	Related services
Income tax balance: \$0.00	Client summary
View statement of account	Tax information slips (T4 and more)
	Proof of income statement (option 'C' print)
Go to Accounts and payments details O	Audit enquiries
	Register my formal dispute
Penelite and evadite	Open a non-resident tax account
	File a GST/HST rebate
No benefits and credits payments are currently expected.	Request CPP/EI ruling
	Climate Action Incentive Payments
Go to Benefits and credits details O	Request relief of penalties and interest
RRSP and TFSA	
Your 2019 RRSP deduction limit: \$22,050.00	
Your 2019 TESA contribution room: \$53,273.00 TEBA-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



- 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	
			4			•		
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	0	`	
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 Canadia	an sources	13	2,121.44	0.00	0.00	0.00	2,121.44	
Source of Box 13 int	erest (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	anadian sources	14	0.00	0.00	0.00	0.00	0.00	
Name of foreign cour	ntry				Ĵ.	Ĵ		
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: Annuities		19	0.00	0.00	0.00	0.00	0.00	
Box 19 received due	to death of spouse?		No	No	No	No	1.000	
Equity linked notes	canadian	30	0.00	0.00	0.00	0.00	0.00	
interest	foreign source	30	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 of	donations
Charitable donations details		
Name of organization	1	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 organization	1	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 Slip Summ	arv	20 C			
				2019 8	Slip Summa	ry
NAME: CARSONN, Angela						
			NAME: St-Pierre, Martin			
T4 Slips - Feuillets T4	1	Total				
Description	ProFile Tour		T4 Slips - Feuillets T4		1	Total
			Description	Pro	File Tour	
Province of amplement	Ontorio					
Employment income	14 52 900 00	52 000 00				
CPP contributions	16 2 519 40	2 519 40	Frovince of employment	Or	itano	63 000 00
El premiums	18 856.98	856.98	Employment income	14	52,900.00	52,900.00
Income tax deducted	22 8 812 09	8 812 09	CPP contributions	10	2,519.40	2,519.40
FI insurable earnings	24 52,000,00	52 000 00	El premiums	18	820.98	800.98
CPP/OPP pensionable earnings	26 52,000,00	52,000,00	income tax deducted	22	7,999.12	7,999.12
cri qri pensionable canangs	-0 52,500.00	52,900.00	El insurable earnings	24	52,900.00	52,900.00
			CPP/QPP pensionable earnings	26	52,900.00	52,900.00
			T5 Slins - Feuillets T5		1	Total
			Description	Pro	File	Total
			ocomputer			
			% reported by spouse		50.0	
			% reported by taxpayer		50.0	
			Interest from Canadian sources	13	2,121.44	2,121.44

• 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	>		
			•			
Description			ProFile Tour	3		
Province of employment		10	Ontario	5		
Employment income		14	52,900.00	,		
Employee's contributions	CPP	16	2,519.40	\geq		
	QPP	17	0.00	ſ		
	El premiums	18	856.98	2		
	PPIP	55	0.00	>		
Exempt	CPP/QPP	28	NO K	>		
	El		No	٥,		
	PPIP		NO	F		
Employment code		29	٤	~		
RPP contributions		20	0.00	3		
Pension adjustment			0.00	3		
Income tax deducted			7,999.12	^		
El insurable earnings		24	52,900.00	>		
CPP/QPP pensionable earnings		26	52,900.00	1		
PPIP insurable earnings			0.00	>		
Heise dues many and						

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			- 8 ×
🗋 • 🖲 💆 • 🖬 🕖 🎲 🔍 📝 🖩 🔒 🛫 • 👻 • 🔢 🖬 • 🕮 🖗 🤤 🖕	🚔 🚔 🗮 Search	🔉 🖌 🖍 💥 ? 斜 Suggestion	Fi 🌲 🐟 🕫
🚯 3. Dependant 🖾 2. T5 🗊 4. Donations 🗊 6. Slips 🗟 5. T4 🔀 1. Info 🔶 7. T1206 🌮 9. T183 💻 OtherDedu	t 🖸 8. AuthorizeRep +		
Other Deduct Other de	ductions		^
Annual union, professional or like dues - line 21200			
Union name			
Union dues reported on T4 slips	0 00		
Professional liability insurance	0 00		
Taxable annual union or professional dues			
Non-tavable appual union or professional dues	000		
	000		
Total	0 00		
Do you qualify for the GST/HST rebate? Yes No X			
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		
Long free with the self-set weter black as increases the second of second encounts	000		
Legal fees paid to collect, establish or increase the amount of support payments	000		
Interest on money borrowed to earn incerta, and ender, and the princome	000		
an active partner.			
Tax shelter 0 00			
Rental and leasing property 000			
Resource property 000			
Enter this amount on line 2 100 of your return.	0.00		
Other employment expenses - line 22900			
and a second			×
🔍 Summary 🍳 Warg gs 🔍 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. Notice T183 Electronic delivery of the notices in the software has been selected. A valid request authorizing you as them with a crow. Paner ontices will not be mailed to the taxpayer from the CPA.	a representative must be on file with the CRA, for you to r	receive the taxpayer's notices electronically in the	oftware and provide
Notice OtherDeduct Taxpayer has investment income. Are there carrying charges or interest expenses that could be deduct	ed?		
Modified 00:17:10 EFILE: Eligible Balance/Refund	(3.123.58) T1:15000: Total income	53.960.72	
	4.4 ········		-

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 V 2. St-Pierre Martin V 3. CARSONN, Johnny		
Allow multiple jobs	Print Details		
T1 Paper TP1 paper T1 Early Business	Imposter Imposter Imposter Impo		
TP1 EDI	I I Duplex sets		
	I I B B Review marks		
	I I I I 4 per page		
	E C VI VE Language		
After printing	Find Form:		5
Take snapshot	II 2 3 II 5 T183-1 Information return for electronic filing - pages 1		
	Image: Sector	- 1	
Completed +	II 2 3 B RC71-1 Discounting transaction - pages 1		
Options	I 2 3 II RC71-2 Discounting transaction - pages 2		
Keep selections	III 2 3 III RC72-1 Notice of the actual amount of the refund of tax - pages	1	
Print All Pages ~	Image:	2	
Date in heading	B B I1-1,2 I1 jacket-pages 1,2		
	□ ■ 3 □ ■ 11-3,4,5,6,7,8 II jacket-pages 3,4,5,6,7,8		
	Amounts transferred from your spouse		
Chew sub Colorad	Image:		
Show only Selected	Im		
Printing Tips	B B S7 BRSP and PBPP Unused Contributions Transfers and	ны	
After printing	CPP on self-employment and other earnings		
To change the Client Status after printing the file select a	I 2 3 II 5 S9 Donations and gifts		
new status from the drop	🗾 😫 🗐 🥃 Donations Charitable donations		
down list.	II 2 3 II 5 S10 EI and PPIP Premiums		
	II 2 3 B 5 S11 Federal tuition and education amounts		
	III 2 3 III III S13 Employment Insurance Premiums on Self-Employment	tan	
	II 2 3 II II S14 Climate Action Incentive		
	I 2 3 II 5 SA Statement of world income		
	I I SB SB Allowable amount of non-refundable tax credits		
	III III III III III III SC Flecting Under Section 217 of the Income Tax Act		
Simplified	Print Setup Set Defaults Cancel	Hel	lp

- 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	tion	?	×
Print Job	1. CARSONN, Angela V 2. St-Pierre, Martin V 3. CARSONN, Johnny		
Allow multiple jobs	Print Datale		
T1 Paper	E E E E Emelhana sata (PDE)		
TP1 paper			
T1 EFILE	I I I F Review marks		
TP1 EDI	E E E E E E Language		
	Find Form:	•	
	I I I T183-1 Information return for electronic filing - pages 1	^	
	II II II II 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	II II II II II RC71-2 Discounting transaction - pages 2		
Change the status to	I I I F RC72-1 Notice of the actual amount of the refund of tax - page	es 1	
Completed \checkmark	III III III III III III III III IIII IIII	es 2	
Options	I I I I T1-1,2 T1 jacket - pages 1,2		
	II		
Keep selections	I I I I S2 Amounts transferred from your spouse		
✓ Date in heading	E E S S Capital gains (or losses)		
Merge print sets	I I I I S S5 Details of Dependant		
Show only Selected	I I I I S S Canada Workers Benefit		
Delete PDF	RRSP and PRPP Unused Contributions, Transfers, a	and H	
Resolution 300 DPI V	E E E S8 CPP on self-employment and other earnings		
Email Template	I I I I I S S9 Donations and gifts		
(none) Y	I I I I Donations Charitable donations		
	E E B S10 El and PPIP Premiums		
Printing Tips	E E E S11 Federal tuition and education amounts		
🥚 Print Job	Employment Insurance Premiums on Self-Employment	ent an	
To allow multiple Print Jobs	I I I I S14 Climate Action Incentive		
checkbox.	I I I I SA Statement of world income		
Neut	Allowable amount of non-refundable tax credits		
INCAS	I I I I SC Electing Under Section 217 of the Income Tax Act	~	
(Email address for CARSONN, Angela		
	Angela@angela.co		٦.
			-
Simplified	Preview Ernail 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 Return for Electronic Filing of an Individual's Income Tax and Benefit Return			,	Protected B when completed	
					Tax Ye	ar : 2019
 The information found on this form corresponds to the Before you fill out this form, read the information and Part G must be signed by the individual identified in F submitted) and Part E (once your return has been subn Give the signed original of this form to your electronic Part A - I dentification and address as shown 	tax year indicate instructions on pa Part A or by the in hitted). filer and keep a on your ref	d on the right. age 2 of this form. adividual's legal re copy for yourself.	presentati	ve. Your electronic filer must fill (out Parts D (prior t	o your return being
First name	Las	t name			Social ins	surance number
Angela	CAF	RSONN			453 54	5 121
Mailing address: Apt number - Street number - Street na	me PO B	Box	RR	City	Prov./Ter	r Postal code
2020 Smith Street				Anytown	ON	M4A 1A1
Get your CRA mail electronically delivered	in My Accou	nt at canada.	ca/my-a	account (optional)		
Email Address:						
By providing an email address, I am registering to receive	email notificatio	ns from the CRA	and I agre	e to the Terms of use on page 2	2 of this form.	
Part B - Declaration of amounts from your lu	ncome Tax a	and Benefit Re	eturn (m	andatory)		
Enter the following amounts from your return, if applica	ble:	ind benefit it.		and decory y		
Total income (line 15000)		53	960172			
Taxable income (line 26000)			886 62	Befund (line 48400)		3 123 58
		- 40	,000102	Relatio (line 40400)		5,125,50
Total federal non-refundable tax credits (line 35000)		2	875 45	Balance owing (line 48500)	0 00 👕
Part C - Pre-authorized debit agreement (op	tional)					
Do you want to Pre-authorize the CRA to below:	withdraw a	specified am	ount fro	m your bank account? If	so, fill in the	information
I hereby authorize the electronic filer to create this person as per the agreement details listed below. I acknowledge	nal pre-authorize that I have read	d debit on my bei and understood t	half. I auth he informa	orize the CRA to automatically w ation about pre-authorized debit of	vithdraw the funds on page 2 of this	from my bank account form.
yyyy/mm/dd						
	Signature			Ye	ear Month Day	
One time payment for your Income Tax and Benefit Retu	urn, to be	yyyy/mm/do	, for the	amount of 0 00		
withdrawn on		Year Month Da	y	· · · ·	_	
Branch No.	Financial Insti	itution No.		Bank account number		
Part D. Electronic filer identification (mands	top()					
Causion Law Vinner Vinner	~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	snew^~~	when the		which here has a second

• 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

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

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

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

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

Question 6: A signed Authorize a Representative 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 to obtain a client's tax information

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

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

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

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