

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](#)

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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 (for 2006-2009 and earlier) 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

Plus, with ProFile you enjoy a consistent level of advanced features that include:

- Customizable client correspondence
- Database queries and reporting
- Online tools to quickly and easily stay in touch with your clients

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:

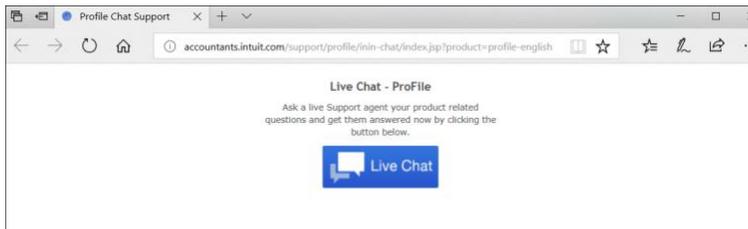
The online toolbar

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

- Click the *Live Chat* icon...



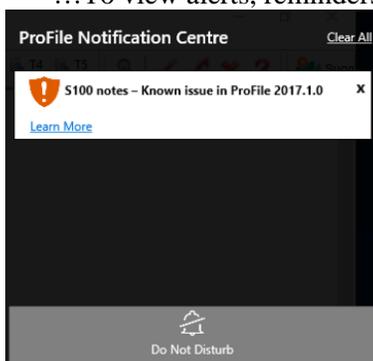
... To engage a ProFile support agent and chat online



Click the *Notification Centre*...



...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

Backup to Cloud

Securely protect your returns online using ProFile's Backup to Cloud. Here's how you can get started:

 Enable Backup to Cloud You'll need to turn it on in your Environment Options .	 Choose when to back up You can back up to the cloud automatically when you save your return or have more control by backing up with ProFile Hub .	 Download on demand Rest easy, you can retrieve your returns if they are lost or damaged.
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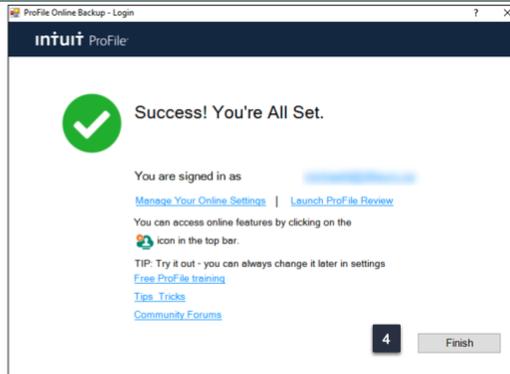
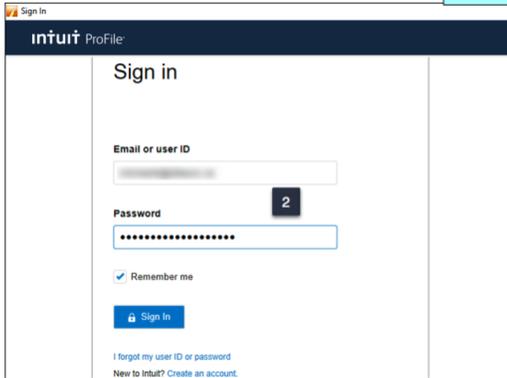
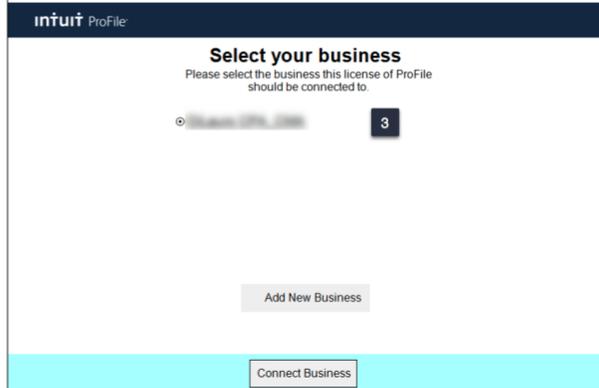
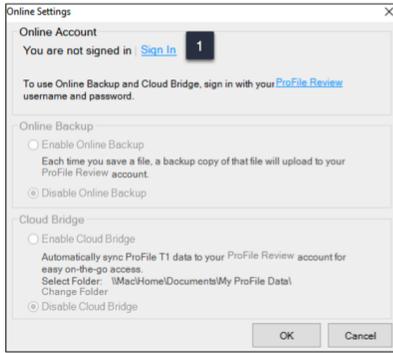
Don't show again

Enable now **Remind me later**

Accessing your online account

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

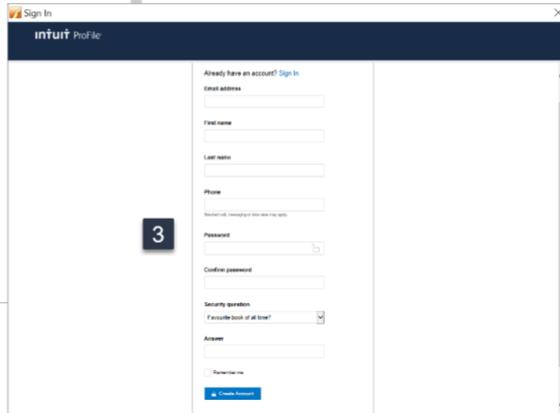
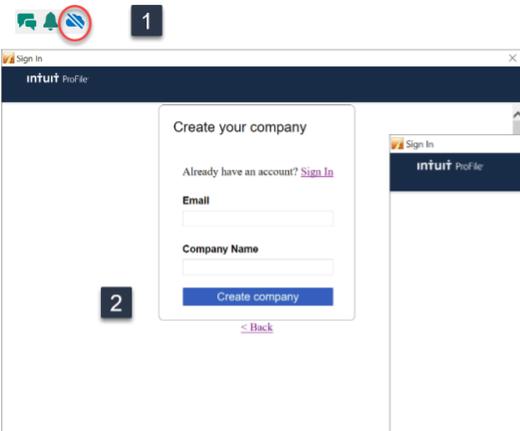
- From the toolbar, click the *Online Settings* icon and ProFile launches the sign-in window
- Click Sign In ¹
- Enter your user ID and password ²
- Select your firm (or add a new one) ³
- Click *Finish* and you're done ⁴



But I don't have an online account

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

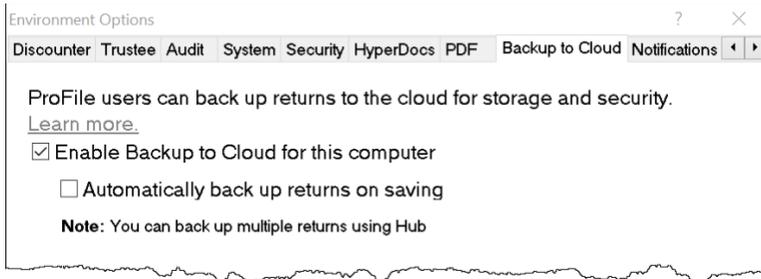
- From the toolbar, click the *Online Settings* icon to launch the sign-in window **1**
- Click *Create Company* **2**
- Enter your credentials and then click *Create account* **3**



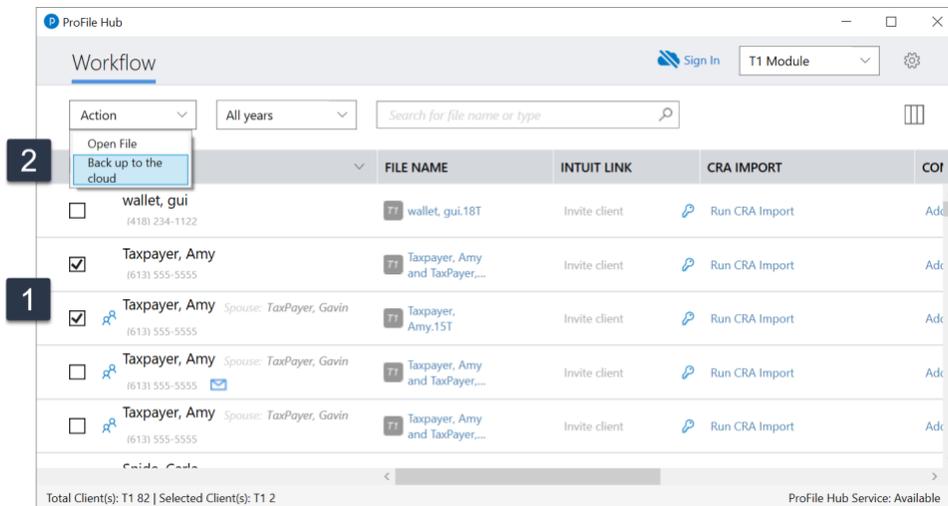
BACK UP TO THE CLOUD

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 the appropriate options. Note that you can choose to 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 ¹
- Click the *Actions* dropdown and choose *Back up to the Cloud* ²



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 return 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 filling in key tax 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)
- Have a valid Form T1013 Authorization Form (described in Chapter 3) for each client

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
- T4RIF, Statement of Income from a Registered Retirement Income Fund
- T4RSP, Statement of Registered Retirement Savings Plan Income
- 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
- T1204, Government Service Contract Payments
- RENT ASSIST

Other Tax-Related Information

- RRSP contribution limit
- Lifelong Learning Plan repayment amount
- Capital gains and losses
- Federal tuition, education, and textbook carryover amounts
- Home Buyers' Plan repayment amount
- Non-capital losses
- Capital gains deductions
- Provincial 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
- 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
- Provincial tuition, education, and textbook carryforward
- Unfiled returns
- External refund set-off amounts
- Disability tax credit eligibility
- Review
- Internal refund set-off notification

- Reassessment in progress
- CPP payments (T4A(P))
- Working income tax benefit
- Emigration Date
- Direct deposit indicators
- T4A income
- Outstanding GST/HST returns
- Immigration Date
- EFILE ineligibility indicators

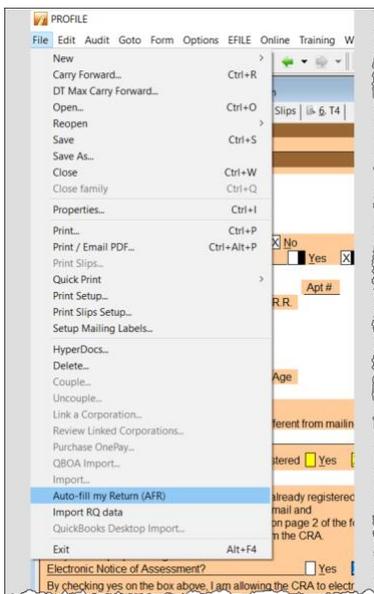
AFR Download

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.

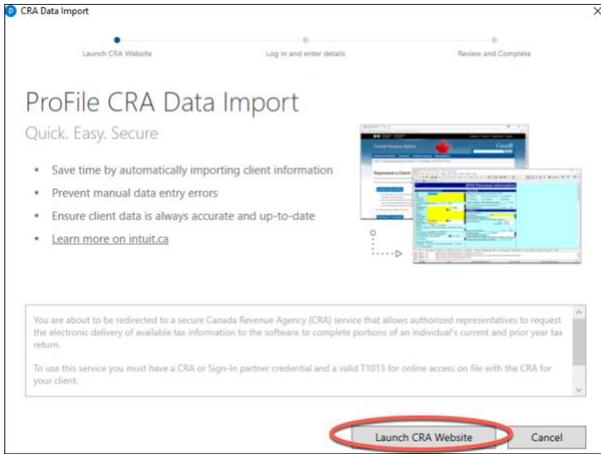
If you notice a mistake in the tax-related information, have an account-specific question about other tax-related information, or need additional information, call the individual income tax and trust enquiries line at 1-800-959-8281.

Using AutoFill My Return (AFR)

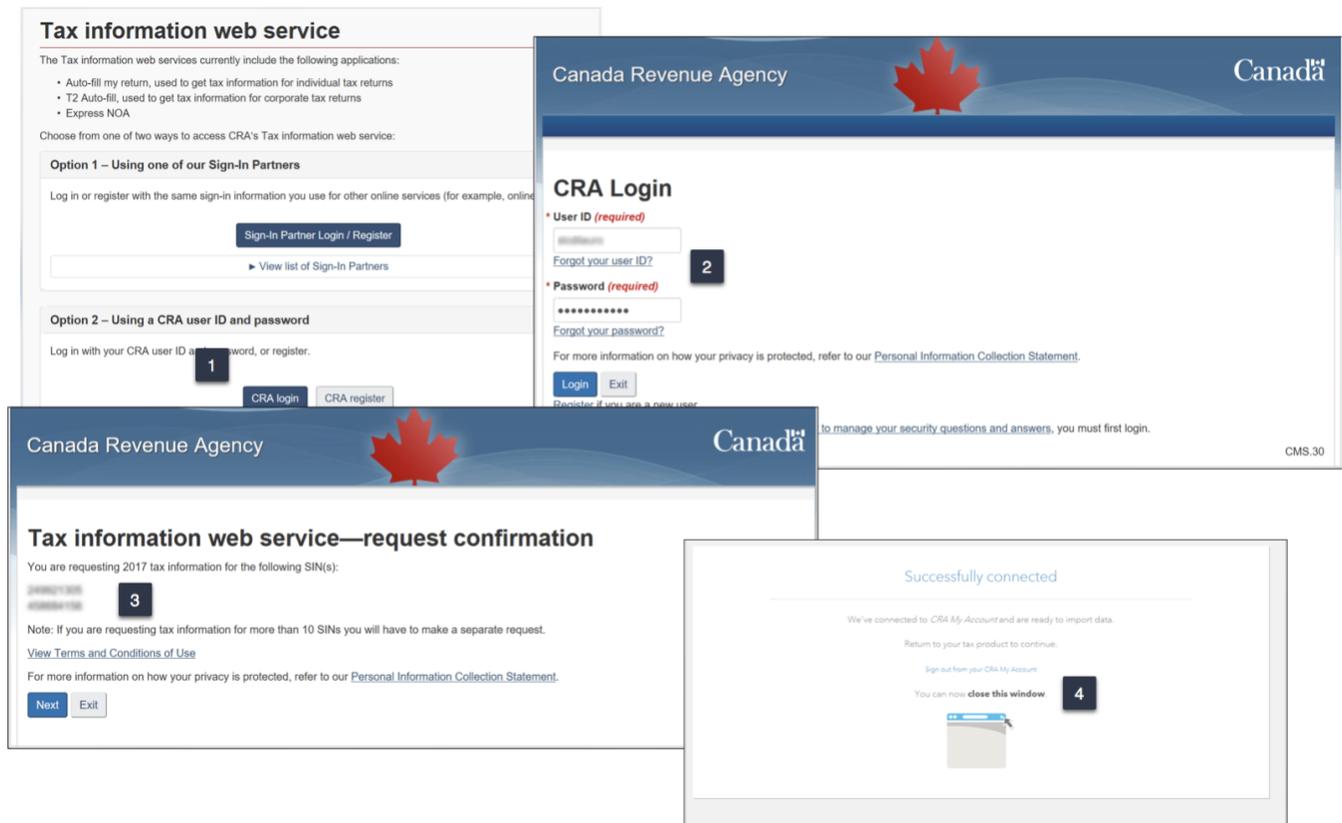
- With a client file open in ProFile, click *File>Import CRA Data*



- Click *Launch CRA Website*



- ProFile will open a browser and take you to CRA's website
- Click CRA Login ¹
- Enter your credentials ²
- Confirm CRA's request then click *Next* ³
- Close the window to return to ProFile ⁴



- Profile displays the Data Import Worksheet where you can select or deselect the information to import into the tax file ¹

- Click *Import Selected Data* ²
- Close the window that confirms the import is complete ³
- ProFile will list the imported information on the *Data Import Summary* form ⁴
- You have successfully used CRA's Autofill My Return

Data Import Worksheet

Review the imported data below

Check/Uncheck All [Expand All](#) [Collapse All](#)

Check	Imported Information	Amount	Box	Action
<input checked="" type="checkbox"/>	T4 Statement (3 item(s))			
<input checked="" type="checkbox"/>	GOVERNMENT DOWNLOADED DATA	LINE ITEM		
<input checked="" type="checkbox"/>	1896.81	14		Add As New
<input checked="" type="checkbox"/>	13558.36	14		Add As New
<input checked="" type="checkbox"/>	CITY OF OTTAWA	53.27	14	Add As New
<input checked="" type="checkbox"/>	T4A Statement (2 item(s))			
<input checked="" type="checkbox"/>	GOVERNMENT DOWNLOADED DATA	LINE ITEM		
<input checked="" type="checkbox"/>	THE GOVERNMENT OF CANADA LE GOUVERNEMENT DU CANADA	1471.00	105	Add As New

Select Client:

Data Import Summary

Summary

Data Imported on Apr 02 2018 01:32:33 PM

Here is the overview of all imported slips and CDE data from the CRA / Revenu Québec. You can see each individual slip by clicking on the details link.

Imported Slips	Box	Amount	Details
T4 - [REDACTED]	14	1,896.81	Details
T4 - [REDACTED]	14	13,558.36	Details
T4 - CITY OF OTTAWA	14	53.27	Details
T4A - THE GOVERNMENT OF CANADA LE GOUVERNEMENT DU CANADA	105	1,471.00	Details
T4A - Province of Ontario	105	1,024.00	Details
Federal Tuition, Education, and Textbook Amounts		9,956.00	Details

Client Data Enquiry

No Debt Indicator	Yes
Balance Owing Amount	0.0

Data Import Completed

Please review the updated status list

Success

ALL ABOUT REFILE

If you are an EFILE service provider, you can use ReFILE to EFILE T1 adjustments for tax years between 2015 and 2018. 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 2015 though 2018)
- 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 [My Account](#) 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 for 2017 - 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 Form T1-ADJ, T1 Adjustment Request, and mail them to the CRA

Using ReFILE

Before attempting to ReFILE a return, verify that you have a valid T1013 form--with level 2 authorization—on file with CRA. If CRA already has the authorization information on file, another filing of the T1013 is not required.

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)

The screenshot shows a 'Save 2018 T1/TP1 As' dialog box. The 'File Name' field is highlighted with a red oval and contains the text 'C:\Users\mdia\Documents\My ProFile Data\2018T1\Shneve, Raphaelle REFILE 18T'. The 'Preparer' field is set to 'MDL' and 'Partner' is empty. The 'Password' and 'Confirm' fields are also visible.

- 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 2018 personal tax return
- ReFILE transmission requests cannot be used to change the following fields:
 - Address
 - Name
 - Social insurance number
 - Date of birth
 - Marital status
 - Residency
 - Elections Canada
 - Alternate address
 - Email address
 - Information about spouse or common-law partner
 - Direct depositChanges to these fields must be made by the taxpayer through the CRA "My Account" portal.
- The amended return must include the full return and all the schedules, not only the revised amounts.
- All schedules included in the amended return are considered as amended. This means data from amended schedules will overlay the previous data.
- To amend a T1 return, make sure you completed all the information on the tax return and answer the following questions:
SIN
Name 1
Date of ReFILE 2
Is this an amended tax return? Yes No 3

If you are changing any of the fields mentioned below, please select what is the reason of change.

- Ensure the client information (SIN and Name) is correct 1
- Enter the current date in the Date of ReFILE field 2
- Select Yes for the line that reads ... "Is this an amended tax return?": 3
- 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

Information Return for Electronic Filing of an Individual's Income Tax and Benefit Return

Protected B
When completed
Tax Year : 2018 R

The information found on this form corresponds to the tax year indicated on the right.
 Before you fill out this form, read the information and instructions on page 2 of this form.
 Part D must be signed by the individual identified in Part A or by the individual's legal representative. Your electronic filer must fill out Parts C (prior to your return being submitted) and Part E (once your return has been submitted).
 Give the signed original of this form to your electronic filer and keep a copy for yourself.

Part A - Identification and address as shown on your return (mandatory)

First name: Raphaelle | Last name: Shrieve | Social insurance number: 525 515 151
 Mailing address: Apt no - Street no Street name: 101099 Arlington | PO Box: | RR: | City: Anytown | Prov./Terr.: ON | Postal code: K9A 1R4

Get your CRA mail electronically delivered in My Account at canada.ca/my-account (optional)

Email address: |

By providing an email address, I am registering to receive email notifications from the CRA and I agree to the Terms of use on page 2 of this form.

Part B - Declaration of amounts from your General Income Tax and Benefit Return (mandatory)

Enter the following amounts from your return, if applicable:

Total income (line 150)	99,999.00	Refund (line 484)	0.00
Taxable income (line 260)	99,999.00	or	
Total federal non-refundable tax credits (line 350 of Schedule 1)	4,236.15	Balance owing (line 485)	1,718.70

Part C - Electronic filer identification (mandatory)

By signing Part D below, I declare that the following person or firm is electronically filing the T1 return or the amended T1 return of the person named in Part A. Part D must be signed before the return is electronically transmitted.

Part D - Declaration and authorization (mandatory)

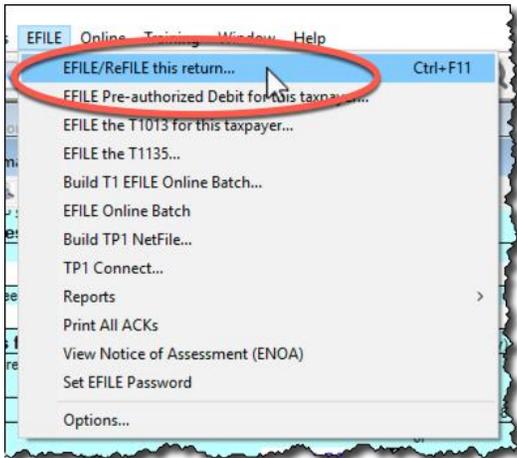
I declare that the information entered in Part A, B and C is correct and complete and fully discloses my income from all sources. I also declare that I have read the information on page 2 of this form, and that the electronic filer identified in Part C is filing my return. I allow this electronic filer to communicate with the CRA to correct any errors or omissions.

Signature (individual identified in Part A or legal representative): | Name and title of legal representative: | 2019/09/24
 Year Month Day

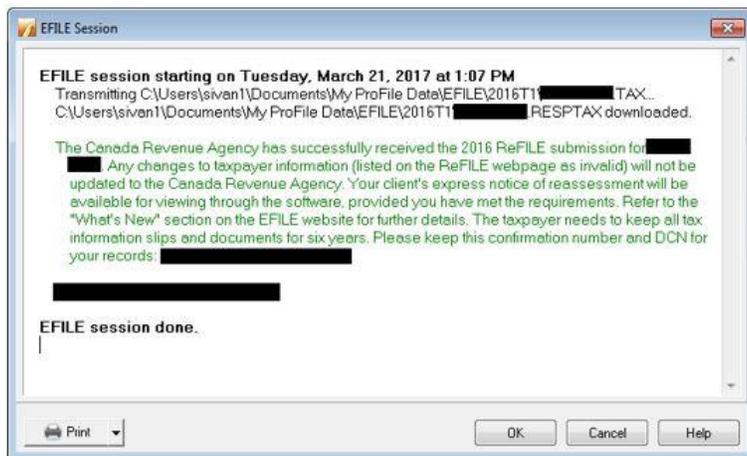
Part E - Document Control number (mandatory)

The document control number generated for my electronic record: |

- 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...

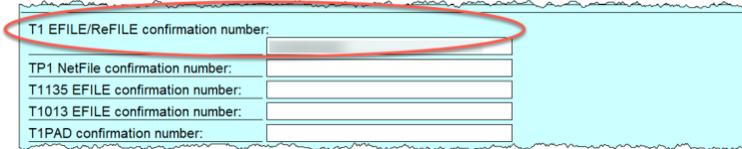


After the ReFILE process is successfully completed, ProFile will display a confirmation window



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.



The screenshot shows a form with the following fields:

- T1 EFILE/ReFILE confirmation number: [Red oval highlights this field]
- 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:

- ProFile ReFile
 - ProFile Review
 - Online backup
 - All the above
-

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

Question 3: The four online icons are:

- Chat, Notifications, Online Settings, and Review
 - Chat, Explorer, Review and Bridge
 - Run, Synchronize, Archive and Bridge
 - None of the above
-

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

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

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

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

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

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

Question 9: What are the ReFile service limits:

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

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

