

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 & efilings
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:

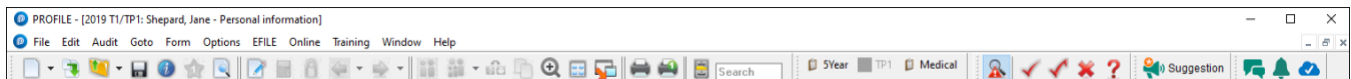
- With phone, email or in-product live chat support, you have year-round access to knowledgeable Canadian technical experts
- With its comprehensive set of forms and schedules, ProFile lets you handle just about every tax scenario in any jurisdiction, including Québec
- With a built-in auditor that runs 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 3: A Tour of ProFile

NAVIGATING IN PROFILE

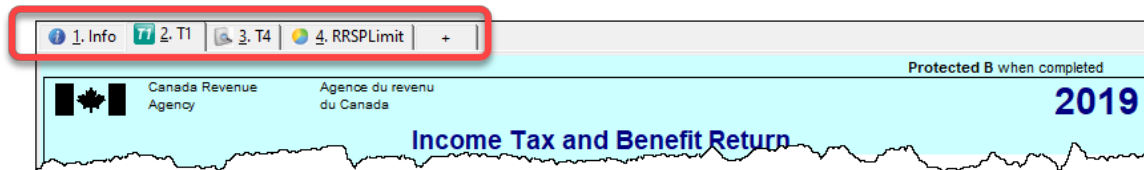
Tabs, Menus and Tools

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.



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

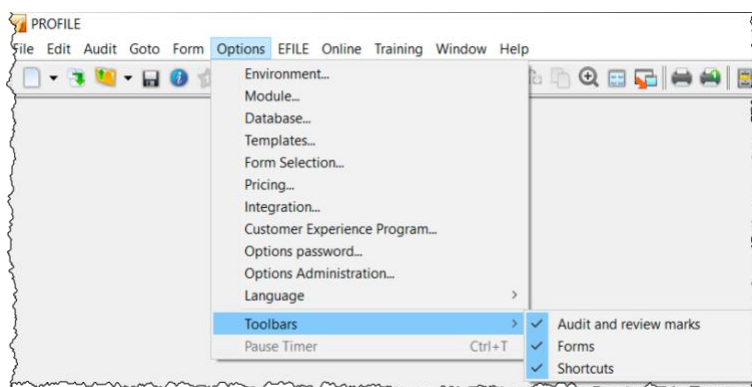
As with all software applications, you can use the *Menu Bar* to navigate in ProFile. Using menus, you can, for example, create or open tax files, setup preferences, arrange windows, and jump to specific areas of a tax file.



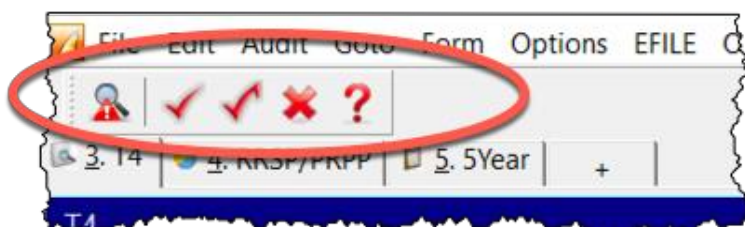
The Toolbars

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*

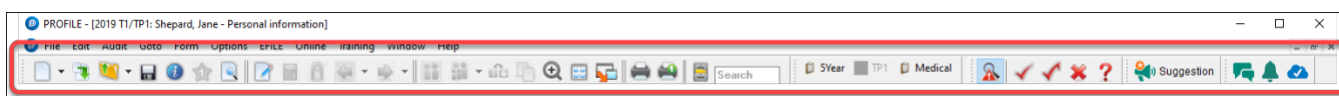
- The three toolbars are: Audit and review marks, Forms and Shortcuts



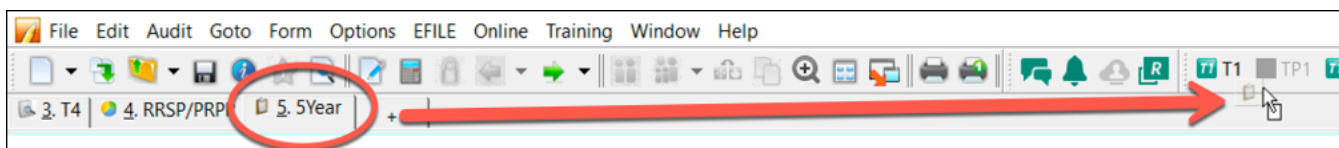
- The *Audit and review marks* toolbar lets a partner or preparer approve or request changes to any line on a tax return. We'll discuss review marks later in this chapter.



- 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



- 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

2019 T1/TP1: Arma, John - T1 jacket

1. Info | 2. T4 | 3. Summary | **4. T1** | 5. S11 | 6. Dependant | 7. T778 | 8. T5

Canada Revenue Agency / Agence du revenu du Canada

Income Tax and 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

Identification		Information about you	
Print your name and address below.		Enter your social insurance number (SIN): 489 984 385	
First name and initial: John		Year/Month/Day: 1976/10/10	
Last name: Arma		Enter your date of birth:	
Mailing address: Apt No. – Street No. Street name: 2331 Main St		Your language of correspondence: English <input checked="" type="checkbox"/> Français <input type="checkbox"/>	
PO Box: RR:		Votre langue de correspondance :	
City: anytown		Is this return for a deceased person? Ensure the SIN information above is for a deceased person. If this return is for the deceased person, enter the date of death: yyyy/mm/dd	
Prov./Terr.: ON			
Postal code: M1A 1A1			

Modified 00:18:55 EFILE: Eligible Balance/Refund (13,443.75)

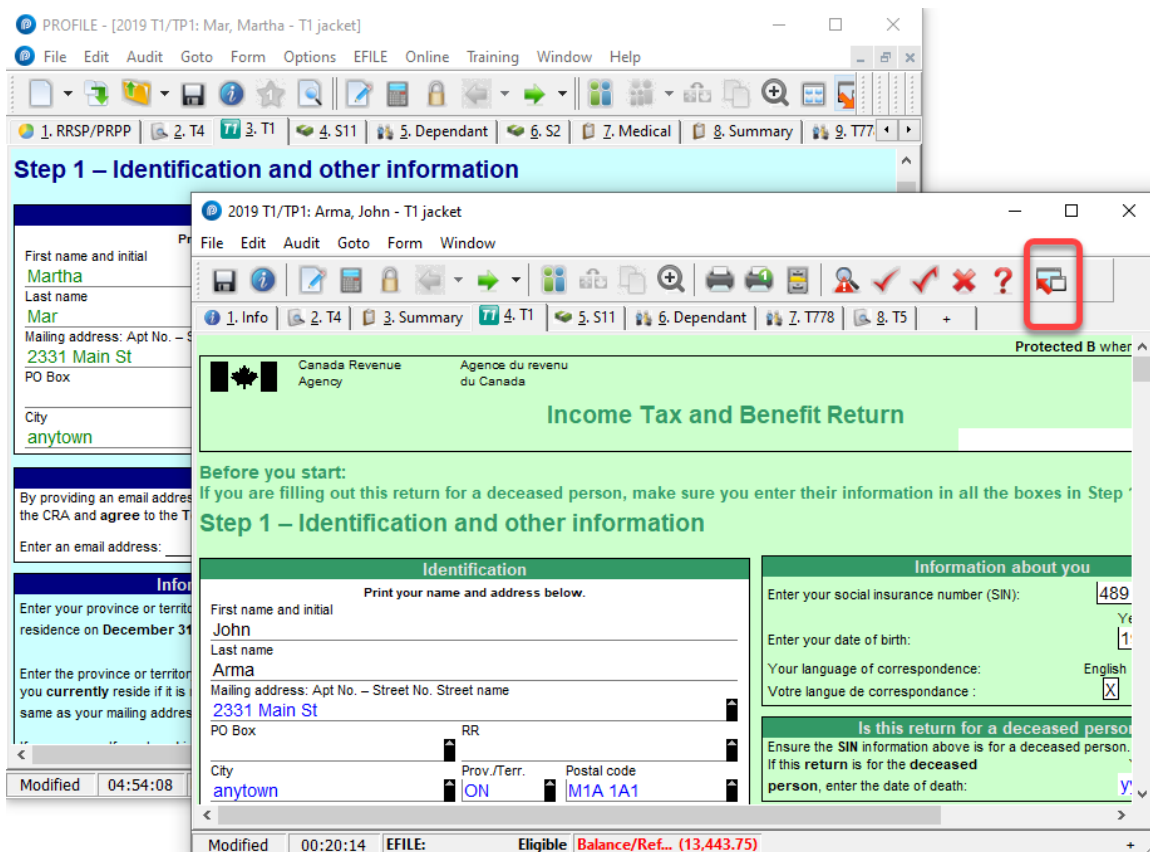
2019 T1/TP1: Mar, Martha - T1 jacket

1. RRSP/PRPP | 2. T4 | **3. T1** | 4. S11 | 5. Dependant | 6. S2 | 7. Medical | 8. Summary | 9. T778 | Donations

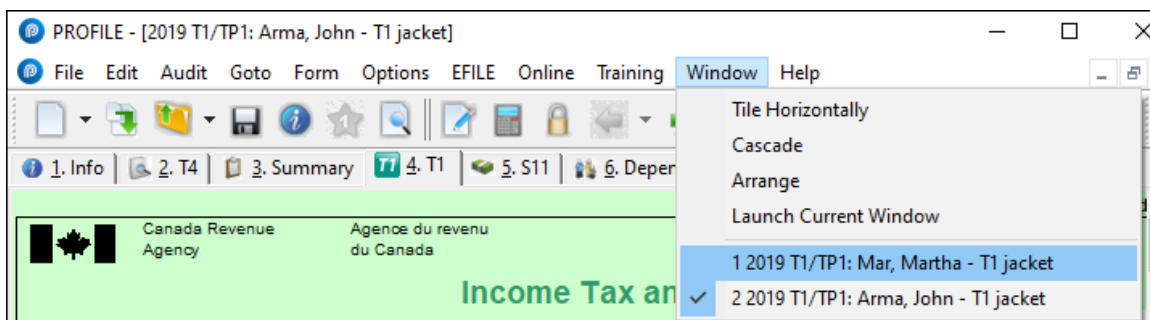
Step 1 – Identification and other information

Identification		Information about you	
Print your name and address below.		Enter your social insurance number (SIN): 111 111 118	
First name and initial: Martha		Year/Month/Day: 1977/12/12	
Last name: Mar		Enter your date of birth:	
Mailing address: Apt No. – Street No. Street name: 2331 Main St		Your language of correspondence: English <input checked="" type="checkbox"/> Français <input type="checkbox"/>	
PO Box: RR:		Votre langue de correspondance :	
City: anytown		Is this return for a deceased person? Ensure the SIN information above is for a deceased person. If this return is for the deceased person, enter the date of death: yyyy/mm/dd	
Prov./Terr.: ON			
Postal code: M1A 1A1			

- 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



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



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.


T4 Slip						
Statement of Remuneration Paid						
	Box	Slip #1	Slip #2	Slip #3	Slip #4	Total
Description		ABC Inc				
Province of employment	10	Ontario				
Employment income	14	61,000.00	0.00	0.00	0.00	61,000.00
Employee's contributions	16	2,222.00	T4 Box 16 (CPP premiums) may be incorrect. CRA's formula suggests \$2,748.90. Please check.			2,222.00
	17	0.00			0.00	0.00
	18	850.00	0.00	0.00	0.00	850.00
	55	0.00	0.00	0.00	0.00	0.00
Exempt	28	No	No	No	No	
		No	No	No	No	
		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	24,000.00	0.00	0.00	0.00	24,000.00
EI insurable earnings	24	53,100.00	0.00	0.00	0.00	53,100.00
CPP/QPP pensionable earnings	26	57,400.00	0.00	0.00	0.00	57,400.00
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

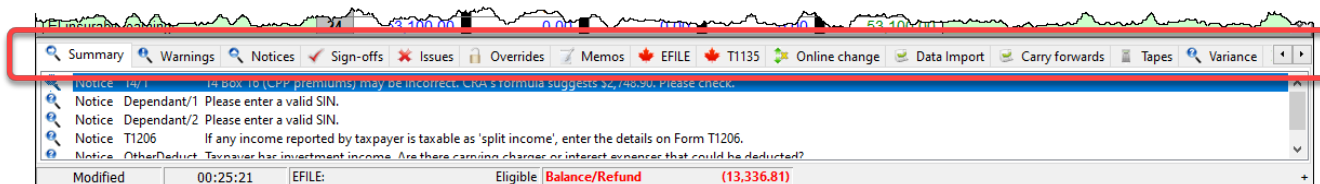
Other examples of ProFile's *Passive Audit* messages include:

- 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 EFILEING 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

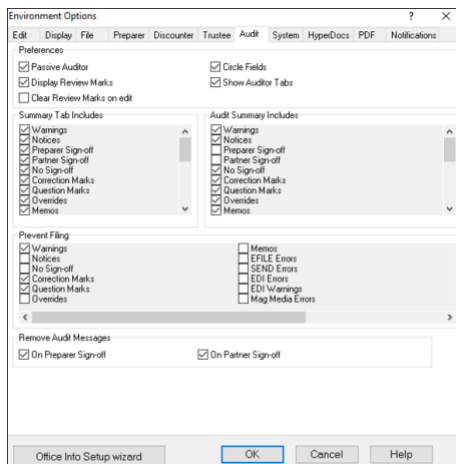
- To act on an audit message, double click that message.
- ProFile will open the applicable form, circle the item, and add a yellow background to the field

Box	Slip #1	Slip #2	Slip #3	Slip #4	Total
10	Ontario				
16	2,222.00	0.00	0.00	0.00	61,000.00
17	0.00	0.00	0.00	0.00	2,222.00
18	850.00	0.00	0.00	0.00	850.00
55	0.00	0.00	0.00	0.00	0.00
28	No	No	No	No	
29	No	No	No	No	
20	0.00	0.00	0.00	0.00	0.00
52	0.00	0.00	0.00	0.00	0.00
22	24,000.00	0.00	0.00	0.00	24,000.00
24	53,100.00	0.00	0.00	0.00	53,100.00

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:



- 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 EFILEING a return
- Remove audit messages on partner or preparer sign-off

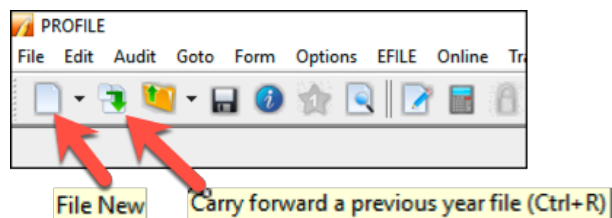
PUTTING IT ALL TOGETHER

Getting Started

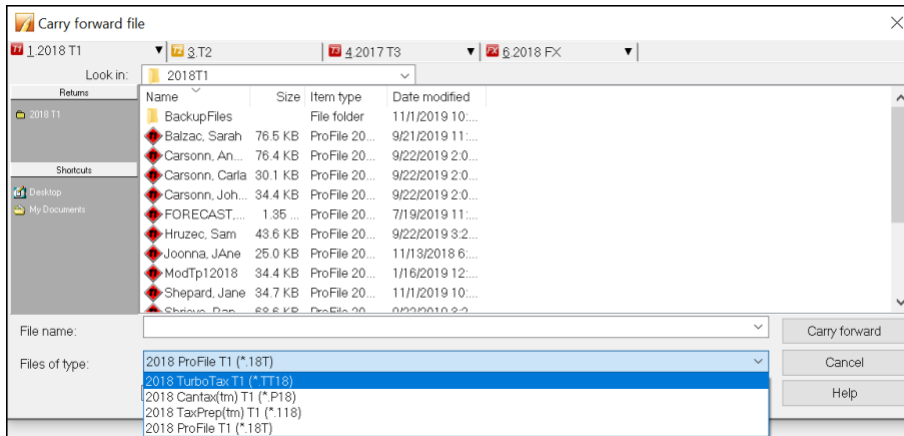
Up to this point, you learned about ProFile's set-up options, and you also read about ProFile's overall features and functions. In this section, we'll tie all that information together and show you how those features help you become an effective and efficient tax preparer.

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*



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

Info		2019 Personal information	
Taxpayer personal information		Marital status	
SIN		Indicate your marital status on December 31, 2019	
Title		1 <input type="checkbox"/> Married 2 <input type="checkbox"/> Living common-law 3 <input type="checkbox"/> Widowed	
First name		4 <input type="checkbox"/> Divorced 5 <input type="checkbox"/> Separated 6 <input checked="" type="checkbox"/> Single	
Last name		If status changed in 2019, enter date of change mm/dd	
Last name changed in 2019?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Were you married or living common-law at any time in this tax year? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Do you want to change your address?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Residency	
Care of		Province of residence on 2019/12/31 Ontario	
Street address		Province of self-employment	
P.O. Box		If you became or ceased to be a Canadian resident in 2019, enter date of: entry mm/dd or departure mm/dd	
Apt #		Are you a non-resident? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
R.R.		Residency status Resident	
City		Country (other than Canada)	
Province		Did you dispose of a property (or properties) in 2019 for which you are claiming a principal residence exemption? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Postal code		Use preparer address for: <input checked="" type="checkbox"/> Nothing <input type="checkbox"/> Notice of Assessment and Refund <input type="checkbox"/> N of A	
Primary phone () -		<input type="checkbox"/> I1 mailing address	
Birth date yyyy/mm/dd	Age 0		
Date of Death yyyy/mm/dd			
Gender <input type="checkbox"/> Male <input type="checkbox"/> Female			
Province or territory where taxpayer resides if different from mailing address:			
CRA online mail: <input type="checkbox"/> Already registered <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.			

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
Description	1	ABC INC				
Province of employment	10	Ontario				
Employment income	14	65,999.00	0.00	0.00	0.00	65,999.00
Employee's contributions	CPP	2,593.00	0.00	0.00	0.00	2,593.00
	QPP	0.00	0.00	0.00	0.00	0.00
	EI premiums	858.00	0.00	0.00	0.00	858.00
	PPIP	0.00	0.00	0.00	0.00	0.00
Exempt	CPP/QPP	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	12,500.00	0.00	0.00	0.00	12,500.00
EI insurable earnings	24	52,000.00	0.00	0.00	0.00	51,700.00
CPP/QPP pensionable earnings	26	55,900.00	0.00	0.00	0.00	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?						
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 ¹
- Black fonts are for direct data entry ²
- Red fonts mean that you overrode a calculated field ³
- Blue fonts indicate a field calculated by ProFile ⁴
- Green fonts denote a locked field ⁵

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 Canadian resident in 2019, enter date of: British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, Québec, New Brunswick

Are you a non-resident? Resident

Residency status: Resident

- 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

Attach only the documents (schedules, information slips, forms, or receipts) requested to support any claim or deduction. Keep all other supporting documents.

Step 2 - Total income

As a resident of Canada, you have to report your income from all sources both inside and outside Canada. The Income Tax and Benefit Guide may have additional information for certain lines.

Employment income (box 14 of all T4 slips): 10100 90,000.00

Tax-exempt income for emergency services volunteers (See line 10105 in the guide.): 10105 0.00

Commissions included on line 10100 (box 42 of all T4 slips): 10120 0.00

Wage loss replacement contributions (See line 10130 in the guide.): 10130 0.00

Other employment income: T4 Statement of Remuneration Paid

Old age security pension (box 20): T4 Slip

CPP or QPP benefits (box 20):

Disability benefits included on T4 Slip:

Other pensions and superannuation (See line 31400 in the Worksheet):

Elected split-pension amount:

Universal child care benefit:

UCCB amount designated to:

Employment insurance and other benefits (See line 31400 in the Worksheet):

Employment insurance material:

Box	Slip #1	Slip #2	Slip #3	Slip #4	Total
Description	Parker Enterprises				
Province of employment	10 Ontario				
Employment income	14 90,000.00	0.00	0.00	0.00	90,000.00
Employee's contributions	16 2,748.00	0.00	0.00	0.00	2,748.00
CPP	17 0.00	0.00	0.00	0.00	0.00
QPP	18 860.00	0.00	0.00	0.00	860.00
EI premiums	55 0.00	0.00	0.00	0.00	0.00
PPIP	28 No	No	No	No	
Exempt	28 No	No	No	No	
CPP/QPP	28 No	No	No	No	
EI	28 No	No	No	No	
PPIP	28 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
EI insurable earnings	24 53,100.00	0.00	0.00	0.00	53,100.00
CPP/QPP pensionable earnings	26 57,400.00	0.00	0.00	0.00	57,400.00
PPIP insurable earnings	56 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
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
	EI premiums	18	858.00
	PPIP	55	0.00
Exempt	CPP/QPP	28	No
	EI		No
	PPIP		No
Employment code		29	
RPP contributions		20	0.00
Pension adjustment		52	0.00
Income tax deducted		22	12,500.00
EI insurable earnings		24	52,000.00
CPP/QPP pensionable earnings		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

Memo

Ask client to confirm this amount

☐ Carry-forward to next year

Insert Date Stamp

Review Mark

☒ None
☐ Preparer
☐ Error

☐ Partner
☐ Question

OK

Cancel

Clear

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

Tape ? X

Jan		120.00
Feb		144.00
Mar		148.00
Apr		141.00
	+/=	0.00

☒ Descriptions
 ☒ Post
 Decimals: 2

☐ Carry-forward descriptions

Ok Cancel Clear

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

III - Carrying charges and interest expenses	
Accounting fees	0.00
Management or safe custody fees	0.00
Investment counsel fees	0.00
Reported on T5013 slips	0.00
	0.00
Legal fees paid to collect, establish or increase the amount of support payments	0.00
Interest on money borrowed to earn interest, dividend, and royalty income	55.00
Interest on money borrowed to acquire an interest in a limited partnership or a partnership in which you are not an active partner:	
Tax shelter	0.00
Rental and leasing property	0.00
Resource property	0.00
	0.00
	0.00

Enter this amount on line 221 of your return.

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.

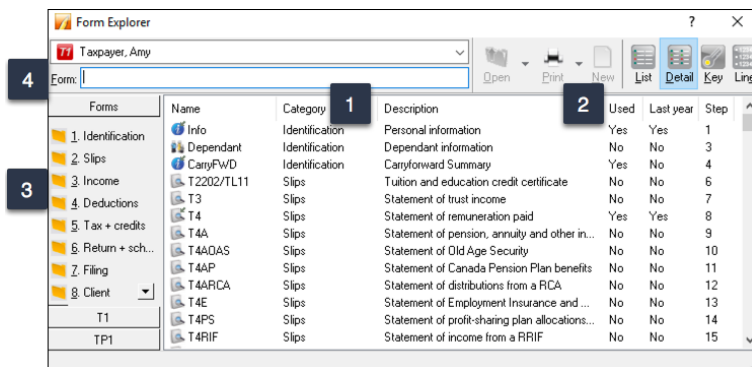


Though ProFile's toolbar includes a *Search* field that lets you enter the name of the form or schedule that you need, you may want a little more horsepower than that. You may indeed want to use *The Form Explorer*.

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.

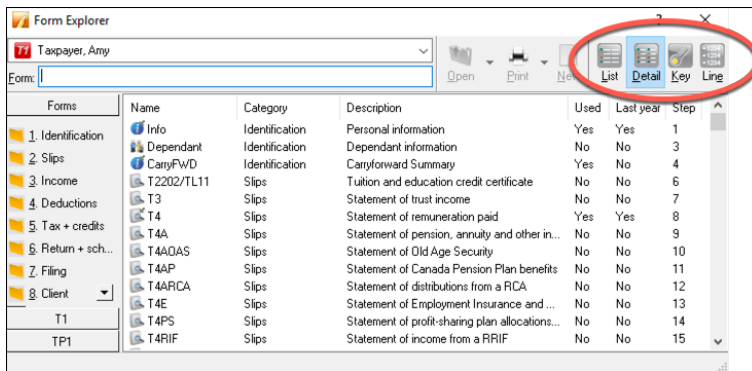
- To open the Form Explorer, click on the *Filing Cabinet* icon, or just press your keyboard's *F4* key



- If you use *Windows Explorer*TM, 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 **1**
- Notice too, for carried forward files, the *Form Explorer* indicates whether a form was used in the current or prior year **2**
- In the left pane, you'll find folders that let you filter which forms to display **3**
- To find a form, just type its name in the search field **4**

Form Explorer Icons

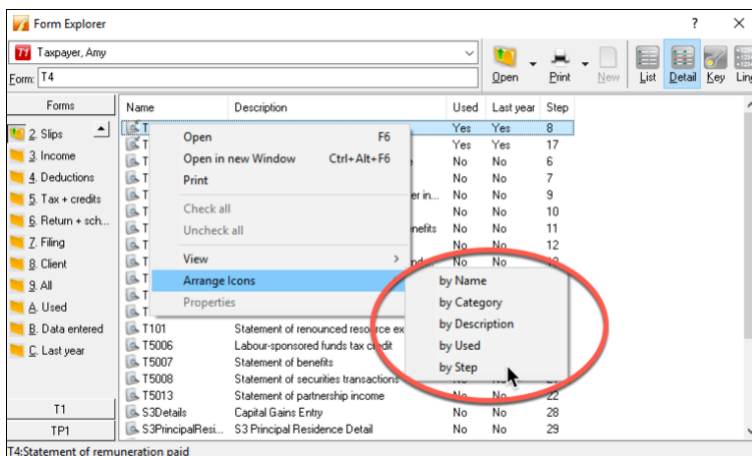
There are four icons at the top right of the *Form Explorer* window. These icons provide different view options. The bullets below explain each icon's purpose:



- 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]

File Edit Audit Goto Form Options EFILE Online Training Window Help

1. Info 2. T1 3. T4 4. RRSPLimit +

Identification

Print your name and address below.

First name and initial
Jane

Last name
Shepard

Mailing address: Apt No. - Street No. Street name
1010 Main St

PO Box RR

City
Vancouver

Prov./Terr.
BC

Postal code
V0A 1A1

Information about you

Enter your social insurance number (SIN): 000 000 000

Enter your date of birth: Year/Month/Day 1980/12/29

Your language of correspondence: English ☒ Français ☐

Votre langue de correspondance : ☒ ☐

Is this return for a deceased person?

Ensure the SIN information above is for a deceased person.

If this return is for the deceased person, enter the date of death: Year/Month/Day 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:

Information about your residence

Enter your province or territory of residence on December 31, 2019: British Columbia

Marital status

Tick the box that applies to your marital status on December 31, 2019:

1 ☐ Married 2 ☐ Living common-law 3 ☐ Widowed
4 ☐ Divorced 5 ☐ Separated 6 ☒ Single

Information about your spouse or common-law partner (if you ticked box 1 or 2 above)

Enter their SIN:

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: Shepard, Jane - T1 jacket]

File Edit Audit Goto Form Options EFILE Online Training Window Help

1. Info 2. T1 3. T4 4. RRSPLimit +

Taxable capital gains (Complete Schedule 3.)		12700	000
Support payments received	Total 12799	000	Taxable amount 12800
RRSP income (from all T4RSP slips)		12900	000
Other income	Specify:	13000	000
Taxable scholarship, fellowships, bursaries, and artists' project grants		13010	000
Self-employment income			
Business income	Gross 13499	000	Net 13500
Professional income	Gross 13699	000	Net 13700
Commission income	Gross 13899	000	Net 13900
Farming income	Gross 14099	000	Net 14100
Fishing income	Gross 14299	000	Net 14300
Workers' compensation benefits (box 10 of the T5007 slip)		14400	000
Social assistance payments		14500	000
Net federal supplements (box 21 of the T4A(OAS) slip)		14600	000
Add lines 14400, 14500, and 14600. (See line 25000 in Step 4.)			14700
Add lines 10100, 10400 to 11400, 11500 to 11700, 11900, 12000, 12100 to 12500, 12600, 12700, 12800, 12900 to 13010, 13500, 13700, 13900, 14100, 14300, and 14700.			
This is your total income .		15000	90,000.00

Protected B when completed

Step 3 - Net income

Modified 01:52:16 EFILE: Not eligible Balance/Refund (339.60) T1:15000: Total in... 90,000.00 +

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*

The Income Tax and Benefit Guide may have additional information for certain lines.

Employment income (box 14 of all T4 slips)			
Tax-exempt income for emergency services volunteers (See line 10100 in the guide.)	10105	0.00	
Commissions included on line 10100 (box 42 of all T4 slips)	10120	0.00	
Wage loss replacement contributions (See line 10100 in the guide.)	10130	0.00	
Other employment income			
Old age security pension (box 16 of the T4A(OAS) slip)			
CPP or QPP benefits (box 20 of the T4A(P) slip)			
Disability benefits included on line 11400 (box 16 of the T4A(P) slip)	11410	0.00	
Other pensions and superannuation (See line 11500 in the guide and complete line 31400 in the Worksheet for the return.)			
Elected split-pension amount (Get and complete Form T1032)			
Universal child care benefit. (See the RC62 slip.)			
UCCB amount designated to a dependant	11701	0.00	
Employment insurance and other benefits (box 14 of the T4E slip)			
Employment insurance maternity and parental benefits		0.00	
Amounts from box 36 of T4E		0.00	
Exempt PPP benefits (included in T4E box 36) and/or EI maternity and parental benefits under the Indian Act (T90)		0.00	
Employment insurance maternity and parental benefits and provincial parental insurance plan benefits	11905	0.00	
Taxable amount of dividends (eligible and other than eligible) from taxable Canadian corporations. (Complete the Worksheet for the return.)			
Taxable amount of dividends other than eligible dividends, included on line 12000, from taxable Canadian corporations	12010	0.00	
Interest and other investment income. (Complete the Worksheet for the return.)			
Net partnership income: limited or non-active partners only			
Registered disability savings plan income (box 131 of the T4A slip)			
Rental income	Gross 12599	0.00	Net
Taxable capital gains. (Complete Schedule 3.)			
Support payments received	Total 12799	0.00	Taxable amount
RRSP income (from all T4RSP slips)			
Other income	Specify:		
Taxable scholarship, fellowship, bursary, artists' grants			

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

Description		ABC INC	
Province of employment	10	Ontario	
Employment income	14	65,999.00	0.0
Employee's contributions	16	2,199.00	0.0
	17	0.00	0.0
	18	858.22	0.0
	55	0.00	0.0
Exempt	28	No	No
		No	No
		No	No
Employment code	29		
RPP contributions	20	0.00	0.0
Pension adjustment	52	0.00	0.0

- 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*

Box	Slip #1
	ABC INC
10	Ontario
14	65,999.00
16	2,199.00
17	0.00
18	858.22
55	0.00
28	No
	No
	No

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
-

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

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
-

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

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

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
-

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

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

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
-

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