

## RELEASE NOTES



Version 2010 NF v.4.0

September 2011

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### Version Presentation

We are very pleased to release version 4.0 of *Cantax FormMaster* 2010 NF.

*Cantax FormMaster* 2010 NF is a whole new forms program. It offers a redesigned interface and renewed functionalities along with an improved print quality. To become familiar with *Cantax FormMaster* 2010 NF and facilitate the transition with *FormMaster*, we invite you to consult the *QuickStart Guide* which has been prepared for users. This guide is available from the **Professional Centre (Goto/Professional Centre command)**.

Please note that *Cantax FormMaster* is now identified by the taxation year that corresponds to the program's primary coverage period. Hence, this version is dated "2010" and the file extension is ".T10." The "NF" suffix, which stands for "new format," has been added to differentiate this year's program from last year's program. The "NF" suffix will disappear next year. Please read the "Forms and Slips Coverage" section below for more details.

*Cantax FormMaster* is one of the most complete electronic libraries of income tax forms in Canada.

The Gold version includes over 360 tax forms and slips, while the Regular version contains more than 180. To view the content of your version, access the **Forms** view (**Goto/Forms** command). A list of the forms included in each version is also available in PDF format on our Web site at [www.cantax.com](http://www.cantax.com), by clicking **Cantax FormMaster** in the "Products" section.

### Installation

Before installing the software, please read the *Installation Procedures* which are included with the software package. This document is also available on the *Cantax* Web site at [www.cantax.com](http://www.cantax.com) by clicking **Cantax FormMaster** under **Products** in the **Support** menu.

If you have just purchased the software, unlock your Gold or Regular version by entering the activation key when prompted. The activation key can be found on the letter included with your package.

If you have not purchased *Cantax FormMaster*, you can install this software as a demonstration version, which will not allow you to enter data or print tax forms. Click **Next** when prompted for the activation key. Should you decide you would like to purchase the software, please contact our Customer Service department to purchase an activation key. You can reach us by any method listed in the "Help" section.

To find out what type of version you have, use the **Help/About** command. You will find the information in the **Additional information** area of the dialog box.

### Forms and Slips Coverage

The slips and summaries found in *Cantax FormMaster* 2010 NF normally apply to the 2010 taxation year. You can nonetheless use them if you need to file a slip for the 2011 taxation year **before** the 2011 versions of the slips are made available by the government authorities.

**Reminder:** The parameters to calculate the contributions to employment insurance, the Canada Pension Plan, the Québec Pension Plan and the Québec Parental Insurance Plan for 2011, for purposes of the T4 and RL-1 slips, are available since the release of version 1.1.

Individual forms can be used until they are updated by the CRA or RQ.

## Carrying Files Forward

You do not have to carry forward files that have already been carried forward with version 1 or 1.1 of *Cantax FormMaster* 2010 NF. Carrying forward files again will result in the loss of data entered after the first carry forward unless the files are saved under new names. Once version 2 is installed, you can simply open the files and continue working with them.

The files that were not carried forward after version 1 or 1.1 was installed may be carried forward with version 2.

To do so, use the **File/Carry forward** command.

*Cantax FormMaster* 2010 NF allows you to carry forward files that were saved with *FormMaster* 2010 or *FormulaTrix* 2010 or which have the .F10 extension.

However, note that the data in the *Identification* forms under the **CORP**, **PERS** and **PART** tabs will be carried forward to the new *Form Client Identification and Other Information (ID)*.

Please also note that the preparer's identification information in the **Preferences** dialog box, under the **Tax Preparer** tab will not be carried over. Instead, complete the preparer profile, which will be carried forward next year when *Cantax FormMaster* 2011 is released. The *Tax Preparer's Profile* is discussed in the *QuickStart Guide*.

### Options and Settings

A number of carryforward options can be configured ahead of time in the **Options and Settings** dialog box (**Tools/Options and Settings** command). These options can also be modified during a carryforward. By default, the program will carry forward your client files in the **Client** folder for the current year (the location of the **Client** folder can be modified from the **Options and Settings** dialog box in the **File Locations** panel of the "Options" section).

For more details on the update, consult the Help or the *QuickStart Guide*.

## Essential Information About the program

### Where to find help

Several options are available to you if you have questions regarding the installation or the use of the program. Refer to the *QuickStart Guide* for tips and

useful information on how to use the program. This guide is available in the **Professional Centre** for quick reference. Press F1, if you are in the program and need help.

### Tax Preparer's Profile

*Cantax FormMaster* 2010 NF provides you with a preparer profile. To access and complete it, select the **Preparer Profile** view (**Goto/Preparer Profile** command). The preparer profile replaces the **Tax Preparer** tab that was in the *FormMaster Preferences* dialog box.

### Client letter

*Cantax FormMaster* 2010 NF offers you a client letter which you can easily customize. For example, you can choose to print the firm's address and the client's address. You can also add an introduction or a closing paragraph. To access the client letter, select the **Letters and Labels** view (**Goto/Letters and Labels** command).

### Labels

*Cantax FormMaster* 2010 NF allows you to create and print labels with the name and address of the accounting firm, the client or the tax authorities where the forms must be sent. Access the *Label Worksheet (Labels)* to view the possibilities offered.

A customizable template is provided for you in the **Letter and Labels** view (**Goto/Letters and Labels** command). For more details, please consult the Help or the *QuickStart Guide*.

Moreover, it is still possible to print labels for the following slips: T4/RL-1, T4A/RL-1/RL-2, T5/RL-3 and T5013/RL-15 for recipients. To that effect, use the **File/Print Labels** command. The labels' print settings can be modified from the **Options and Settings** dialog box (**Tools/Options and Settings** command), in the **Template** and **Settings** panels of the "Labels" section.

### Print Formats

A client file is printed based on a print format. A print format contains the print settings for each form included in the client file, such as the number of copies printed, the choice of when to print a form, and which printer will be used. The program provides some predefined print formats that you can use to create customized formats. The print formats are accessible and created from the **Print Formats** view (**Goto/Print Formats** command).

To modify a print format, highlight it and click **Open**.

Predefined print formats cannot be modified; however, you have the option to create a copy of the print format so you can customize it.

Here is a list of the available predefined print formats:

1. **GOVT**

This print format includes all the forms required by the tax authorities for processing. The slips and RL-slips are printed in facsimile format.

2. **GOVT-PRE**

This print format includes all the forms required by the tax authorities for processing. The T4, T4A and T5 slips as well as the RL-1 and RL-3 slips are printed on preprinted forms.

For more information on preprinted forms, consult the FAQ on the [Cantax FormMaster Web site](#), in the Section “Using Preprinted Forms.”

3. **CLIENTS**

This print format includes the “Govt” print format contents, i.e. all the forms required by the tax authorities for processing, to which is added the client letter, the T4 slips adjustment reports and the automobile benefits summary.

4. **OFFICE**

This print format includes certain forms and tools for verification such as the lists of slips and RL-slips, the automobile benefits summary, the T4 adjustments reconciliation form and the list of diagnostics.

## Electronic Filing

*Cantax FormMaster* enables you to electronically transmit data from the following slips:

Slips	Version	
	Regular	Gold
NR4	X	X
T3	X	X
T4	X	X
T4A	X	X
T4A-NR	X	X
T4RIF	X	X
T4RSP	X	X
T5	X	X
T5008	X	X
T5018	X	X
RRSP		X
RL-1 T4	X	X
RL-1 T4A	X	X
RL-2 RIF	X	X
RL-2 RSP	X	X
RL-3	X	X

Slips	Version	
	Regular	Gold
RL-8	X	X
RL-11	X	X
RL-15	X	X
RL-18	X	X
RL-25	X	X

### Government requirements

At the federal level (since January 2010) and in Québec (since January 2011), any filer filing **more than 50 information slips** of a same type **must file the data electronically by Internet**. Below that threshold, submission on CD or DVD or paper format is accepted. However, note that diskette filing is no longer available.

### Taxation years covered

*Revenu Québec* only accepts electronic transmission related to the 2010 and 2011 taxation years. The CRA does not impose restrictions with regard to the taxation year that can be processed.

### Availability of Internet transmission

The CRA has been accepting electronic transmissions since January 10, 2011. *Revenu Québec* has been accepting them since November 16, 2010.

### Important: Options and Settings

The **Options and Settings** dialog box (Tools/Options and Settings command), is discussed in the *QuickStart Guide*, but we insist on its importance, especially if you are using the electronic filing for slips and RL-slips. The **Identification and Slip Numbers** panels in the “Electronic Services” section of the **Options and Settings** dialog box **must be completed** before you can transmit.

### Important: Creation of the .XML file to transmit

Please note that it is no longer possible to include multiple client files when creating the .XML file that is transmitted to tax authorities. Each .XML file created with *Cantax FormMaster* can include **only one client file** (one T-slip or RL-slip issuer).

For more information on electronic transmission, consult the FAQ on the [Cantax FormMaster Web site](#), in the Section “XML Files for Electronic Transmission.”

## What's New in this Release

### Updated forms

The table below shows the updates in this release of *Cantax FormMaster* 2010 NF.

Forms	Version		What's new?
	Regular	Gold	
<b>FEDERAL</b>			
CPT100	X	X	New version issued by the CRA.
GST22		X	New version issued by the CRA.
RC7066SCH		X	New form.
TD1X		X	New version issued by the CRA.
T106	X	X	New version issued by the CRA.
T106SUM	X	X	New version issued by the CRA.
T929	X	X	New version issued by the CRA.
T1044	X	X	New version issued by the CRA.
T2092		X	New version issued by the CRA.
T2093		X	New version issued by the CRA.
T2222		X	New version issued by the CRA.
T5001		X	New version issued by the CRA.

## Future Forms Updates

The *CCH Instant Update* functionality no longer exists. However, in 2011, *Cantax FormMaster* 2010 NF will be the subject of many updates which you will be able to download from the Internet or install from a CD-ROM. The following table provides you with an overview of the delivery methods for this version and future updates.

Version	Release	Download	CD-ROM
Version 1.0	December 2010	Gold Regular	Gold Regular
Update	Between versions 1.0 and 2.0	Gold Regular	
Version 2.0	February 2011	Gold Regular	Gold Regular
Update	Between versions 2.0 and 3.0	Gold Regular	
Version 3.0	June 2011	Gold Regular	Gold
Version 4.0	September 2011	Gold Regular	Gold

To proceed with a download, you can access the *Cantax FormMaster* downloads page on the *Cantax* Web site at [www.cantax.com](http://www.cantax.com). You can also access the downloadable products from the *Cantax FormMaster* Professional Centre (Goto/Professional Centre command). To benefit from this option, enter your user name and password in the Professional Centre panel in the "Electronic Services" section of the Options and Settings dialog box (Tools/Options and Settings command).

Please note that you are no longer required to install version 1.0 to be able to get updates and subsequent versions. Also, when launching the installation, any prior version will be detected, if appropriate. With a prior version installed, updating *Cantax FormMaster* will be performed more rapidly.

**Note:** By subscribing to [Cantax Direct/Cantax FormMaster](#), you will be informed each time a program update is available and downloadable.

## Tax Changes

### RL-15 slip

The RL-15 slip as well as the instructions for the partners have been updated and are now printed on legal size paper (8.5 x 14). Also note that the RL-15 slip now includes 28 general boxes. These boxes are completed based on data entered in the T5013 Worksheet B and in the T5013/T5013A/RL-15 data entry screen.

### T5013/T5013A/RL-15 data entry screen

Since the electronic transmission of RL-15 slips is now allowed, the identification fields in the T5013/T5013A/RL-15 data entry screen have been modified. The data entry screen now has separate fields to allow you to identify individual partners and partners other than individuals. Data carried forward from last year (name and identification number) displays in two fields at the top of the form. However, you must reenter the data again in the appropriate fields.

On the other hand, if you rolled forward your files after having installed version 1.1, the data items are posted to the new fields based on the type of recipient indicated for each partner. Verify the accuracy of the roll forward, in particular with regard to the name and first name of an individual partner.

### Charity returns

The CRA and *Revenu Québec* have respectively updated their charity return. These returns integrate the changes announced in the March 4, 2010 Federal Budget and are applicable to the taxation years ending after March 3, 2010. Note that the federal return is now numbered T3010-1.

**Note:** The initial information received by the CRA was that the new T3010-1 return would only apply to taxation years ending after November 30, 2010. This was mentioned in the *Release Notes* of version 1.0. However, the CRA reviewed the application of the years and, as a result, the new T3010-1 now applies to taxation years ending after March 3, 2010.

#### **T5 slip on preprinted forms**

At the time we completed the development of version 4.0 of *Cantax FormMaster* 2010 NF, only the 2009 version of the preprinted T5 slips provided by the CRA was available. If you want to use preprinted T5 slips, please use the 2009 version of those preprinted slips in order for the data to be displayed correctly. The CRA accepts the use of the 2009 version of the preprinted T5 slips for the 2010 taxation year.

#### **Reminder: ID screen**

The Form *Client Identification and Other Information (ID)* replaces the CORP, PERS and PART screens. If you are beginning preparation of a new file, we suggest you complete this form first, because several data items are posted to other forms. If you open a file carried forward from last year, carefully verify the data that displays and, where required, enter the missing data.

Check boxes that were found in most of the *FormMaster* forms and that used to indicate where the identification information would come from (CORP, PERS or PART screen) have been removed from *Cantax FormMaster* NF. The carryover of data from the *Client Identification and Other Information* form is now automatic.

For more information on filing slips when the taxation year entered in the ID screen differs from the calendar year, consult the *Troubleshooting Memo* on the [Cantax FormMaster Web site](#), in the Section “Taxation Year and Slips.”

#### **Reminder: Increase of data entry space**

With *Cantax FormMaster* 2010 NF, many forms offer you more data entry space. It is the case, in particular, of the rollover forms (T2057, T2058 and T2059) and the charity worksheets (T1235 and T1236). Moreover, certain forms are now available in multiple copies, such as the rollover forms (T2057, T2058 and T2059) and Form T776, *Statement of Real Estate Rentals*.

### Program Enhancements

#### **Files attached to returns**

From the **Attached Files** tab in the **Properties** dialog box (**File/Properties** command), it is possible to select attached files to be carried forward next year by selecting the box located to the right of each file in the **To carry forward** column.

Moreover, files attached to a client file can be opened inside the client file and modified throughout the processing process.

For more information on any of these subjects, consult the **Modify an Attached File** help topic.

#### **Merging the return and attached PDF files into a single PDF**

In a print format, following the list of included forms, you may now choose to include all PDF files attached to the return. In this case, the PDF print option must be selected and the following options cannot be modified: **Copies, Printer and Paper Source**.

For more information on this subject, consult the **About Print Formats** help topic.

#### **Notes attached to cells**

Notes attached to cells can now be selected for carry forward by selecting the **Keep this note when carrying forward the file** check box in the **Note** dialog box. However, note that the carry forward will only be effective as of version 1.0 2011.

For more information on these subjects, consult the **Attached Notes and Schedules** help topic.

#### **Customer Experience Improvement Program**

When starting *Cantax*, after you have agreed to register the program, a new dialog box will display to invite you to participate in the Customer Experience Improvement Program. When you participate in the Customer Experience Improvement Program, CCH collects information relating to your use of *Cantax* without interrupting your work in any way. Because of this information, CCH will be able to improve the *Cantax* functionalities in order to offer better products and services. The Customer Experience Improvement Program is completely anonymous. No confidential data or information will be collected. For more information on this program, click the hyperlink in the dialog box for participating in the program. Also, this choice can be modified at any time by accessing the **Tools/Options and Settings** menu, then by selecting **Options/Improvement program**.

### Cantax FormMaster Webinars

Attend a Webinar to learn about the new upgraded *Cantax FormMaster* and interact with our experienced trainers without leaving your office! This Web-based software training will be of value to both experienced and new users as our trainers will demonstrate the enhancements available and the most commonly used standard features. To register to a *Cantax FormMaster* Webinar, click the following link: [www.cch.ca/FormMasterTraining](http://www.cch.ca/FormMasterTraining).

### Information by E-mail

Please note that you can receive information about *Cantax FormMaster* and other *Cantax* products by subscribing to *Cantax Direct*, a free automatic e-mail announcement service.

The easiest way to subscribe to this service is to go to our Web site and click **Subscribe Now!** under “*Cantax Direct*.”

### Help

**Support Centre:**

Telephone: 1-888-829-7848  
Fax: 1-877-802-4487  
E-mail: [support@cch.ca](mailto:support@cch.ca)

**Customer Service:**

Telephone: 1-800-268-4522  
Fax: 1-800-461-4131  
E-mail: [cservice@cch.ca](mailto:cservice@cch.ca)

**Web Site:** [www.cantax.com](http://www.cantax.com)