Cantax FormMaster

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The Best Value in Professional Tax Software. Period.

RELEASE NOTES

Version 2011 v.4.0 **September 2012**

Contents

Version Presentation

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 of the program by selecting **Goto/Forms**. A list of the forms included in each version is also available in PDF format on our Web site at www.cantax.com, by clicking **Cantax FormMaster** in the “Products” section.

New Form: EFILE INFO, EFILE Information (EFILE INFO)

A new form displaying key information related to the electronic filing of data (EFILE) of the client file has been added to this version of *Cantax FormMaster*. Following the electronic filing of slips or RL slips, the program will automatically update the information displayed on this form. For more information, please consult the note on this topic.

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 by clicking **Cantax FormMaster** under **Products** in the **Support** menu.

Based on the activation key you have entered when installing the program, you will have access to the Gold or Regular version. To find out the type of version you have installed, select **Help/About**. You will find the information in the **Additional information** area of the dialog box.

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, RL slips and summaries found in *Cantax FormMaster* 2011 normally apply to the 2011 taxation year. You can nonetheless use them if you need to file a slip for the 2012 taxation year **before** the 2012 versions of the slips are made available by the government authorities.

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 a previous version of *Cantax FormMaster* 2011. Carrying forward files again would result in losing data entered after the first carry forward unless the files are saved under a new name. Once version 4.0 is installed, you can simply open the files and continue working with them.

The files that were not carried forward after the installation of one of the previous versions of *Cantax FormMaster* 2011 may be carried forward with version 4.0. To do so, use the **File**/**Carry forward** command.

Cantax FormMaster 2011 allows you to carry forward files that were saved with *Cantax FormMaster* 2010 or *Taxprep Forms* 2010, which have the .F10 extension.

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-1 T4ANR (New)	X	X
RL-2 RIF	X	X
RL-2 RSP	X	X
RL-2 T4A (New)	X	X
RL-3	X	X
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 2011 and 2012 taxation years. The CRA does not impose restrictions with regard to the taxation year that can be processed.

Availability of Internet transmission

The CRA will start accepting electronic transmissions on January 9, 2012, while *Revenu Québec* already accepts them.

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).

Forms

Added forms

- CPT30 - Election to Stop Contributing to the Canada Pension Plan, or Revocation of a Prior Election (**CPT30**)
- T5013 Financial - Partnership Financial Return (**T5013FIN**)
- T5013 Schedule 5 - Allocation of Salaries and Wages, and Gross Revenue for Multiple Jurisdictions (**T5013S5**)
- T5013 Schedule 9 - Affiliate Corporations, Partnerships, Partners or Trusts (**T5013S9**)
- EFILE INFO – EFILE Information (**EFILE INFO**)

Updated forms

The table below shows the updates in this release of *Cantax FormMaster* 2011.

Form	Regular	Gold	What's new?
FEDERAL			
CTB9		X	New version issued by the CRA.
GST20		X	New version issued by the CRA.
RC66		X	New version issued by the CRA.
TD1NS		X	New version issued by the CRA.
TD1NS-WS		X	Modification to the base spouse or common-law partner amount and to the amount for an eligible dependant, which are $10,737 starting July 1, 2012.
T1-ADJ	X	X	New version issued by the CRA.
T1-DD(1)		X	New version issued by the CRA.

Removed Forms

The following forms have been removed from *Cantax FormMaster*, because they are no longer applicable:

- T5013 Schedule 19 - Non-resident member information
- T5013 Schedule 25 - Investment in foreign affiliates

Future Forms Updates

During 2012, *Cantax FormMaster* 2011 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 2011	Gold Regular	Gold Regular
Version 1.1	February 2012	Gold Regular	
Version 2.0	March 2012	Gold Regular	Gold Regular
Updates	Between versions 2.0 and 3.0	Gold Regular	
Version 3.0	June 2012	Gold Regular	Gold
Version 4.0	September 2012	Gold Regular	Gold

To download a new version or an update, you can access the *Cantax FormMaster* downloads page on the *Cantax* Web site at 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 one of the previous versions of *Cantax FormMaster* 2011 to install 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 slips – Addition of blank boxes

Blank boxes now replace the notes in the centre of the slips. Such boxes were added in the following slips: RL-1 T4, RL-2 T4A, RL-2 RIF, RL-2 RSP, RL-3, RL-11, RL-18 and RL-25.

EFILE INFO, EFILE Information (EFILE INFO)

This new form displays key EFILE data from the EFILE Log. It provides easy access to the EFILE transmission information (including the name of the slip or the RL slip eligible for EFILE, the type of data, the transmission date, the number of slips or RL slips and the confirmation number) from within the client file, regardless of who transmitted the return. The program automatically updates the information on this form when the following three actions are carried out:

1. A slip or an RL slip is filed;
2. A confirmation number is entered by the user before the government's portal is closed (for more information, consult the "Electronic transmission of slips") section;
3. The transfer of the confirmation number to the client file(s) is confirmed by the user.

Preprinted RL-1 and RL-3 slips

The RL-1 and RL-3 slips, whose format was 8 ½ in. x 11 in., are now available in the following format: 8 ½ in. x 14 in. Moreover, on copy 1 of these slips, the address now appears in a different location than the address on copies 2 and 3. Only the data entered on line *1st line* in the "Address" section of the data entry screens is updated to the field "Rue, case postale" on copy 1 of the preprinted RL-1 and RL-3 slip.

Partnerships

The Canada Revenue Agency made several changes with respect to partnerships. Certain schedules have been removed while others were added.

Information with respect to the partnership's identification is now required in the *Partnership Financial Return* (**T5013FIN**). Several of these items of information previously had to be provided in the T5013 Summary. This summary now groups data with respect to the partnership's income.

Form T5013 Schedule 5 allows you to indicate if, during the fiscal year, the partnership had permanent establishments in more than one jurisdiction.

As for Form T5013 Schedule 9, it allows you to indicate if, during the fiscal year, the partnership was affiliated to another entity.

GIFI forms

Forms G1599 to G9998 have been added as a supplement to Schedules 100, 125, 140 and 141.

In the Form Manager, under Schedule 100 (**G100**), you can find several forms in which are displayed the GIFI items listed according to the different sections that can appear in a balance sheet: current assets, capital assets, intangible assets, etc. For example, Form *GIFI 1599 – Current Assets* (**G1599**) contains items 1000 to 1599 of the GIFI that can appear in the current assets of the partnership's balance sheet.

Most of the fields in Schedule 100 allow you to access those forms using the **Expand** command available in the **Forms** menu. However, certain fields do not expand to another form. For this reason, we suggest that you begin entering data in Schedule 100 and access the attached forms, if applicable.

The GIFI items are displayed in each copy of Schedule 125 and are listed according to the different sections that can appear in an income statement: income, cost of sales, operating expenses, etc. For example, Form *GIFI 8299 – Revenue* (**G8299**) contains items 8000 to 8299 of the GIFI that can appear in the income listed in the partnership's balance sheet.

Most of the fields in Schedule 125 allow you to access those forms using the **Expand** command.

Program Enhancements

New field type – Improvement to the search

The following field type  has been created, among other things, to facilitate the selection of the North American Industry Classification System (NAICS) codes. You can display a search box by clicking the ellipsis points or by using the Alt+Down arrow shortcut. You may also enter the appropriate code directly in the field. This new field type is also used in Form T106.

Options and Settings – Default folder

The panel used to indicate the default folders and the various templates has been redesigned in order to make it easier to configure these locations while giving you the possibility of customizing the folders for saving the templates. In particular, you will be able to configure a parent folder to which all template folders will be moved.

The configuration of the above mentioned locations is also possible during the program's installation.

Attach the return in PDF format for carryforward purposes

When printing in PDF format, you may now attach the generated PDF file to the corresponding return using the new command **Attach to client file**.

Therefore, once the return is carried forward, if you had chosen to retain the attached PDF file at the time of carryforward, you will quickly have access to the previously prepared return, directly under the **Attached Files** tab in the properties dialog box, without having to install several versions of the program.

For more information on this new functionality, please consult the "Attach the Prior Year Return in PDF format" Help topic.

Printing slips in PDF format

When you print slips in PDF format from the **Forms** view, you can now choose to print all the copies of a same slip to a single PDF file, or to print the copies intended for a recipient to separate PDF files.

You can make this choice at the time of printing. This choice can also be configured in the options and settings to be applied to each time slips are printed from the **Forms** view. Various options are offered to allow you to configure the syntax that will be used when naming the PDF files intended for recipients.

For more information, consult the "Print Copies for Recipients to Separate PDF Files" Help topic.

Print settings – Preprinted

Changes were made to the structure of the preprinted forms so you may easily adjust the margin settings based on the selected printer. From now on, you don't have to modify the margins on all copies of a given slip.

The appearance of the **Preprinted** panel has been modified in the **Options and Settings** dialog box: the display in this panel has been simplified to make it more user friendly.

Electronic transmission of slips

The process for transmitting slips electronically has been improved to ensure optimal productivity.

At the time of transmission, *Cantax FormMaster* now displays a pane to the left of the tax authority's portal. This pane includes various useful information for the purpose of transmitting slips. Therefore, you will have access, in the same window as the government's portal, to your various credentials, as long as they were entered in the **Identification** pane in the "Electronic Services" section of the options and settings. The location of the last XML file generated by *Cantax FormMaster* will also be displayed in this window.

In particular, you will be able to enter the confirmation number issued by the tax authority in a new field for that purpose. At the time of quitting the transmission pane, you will be prompted to transfer this confirmation number to the appropriate client files.

Note that once transferred to the client files, this number will show on the EFILE INFO form. You will notice that a new type of transaction has been added to the EFILE Log to allow you to see which files were transmitted. Those are "Confirmation" type transactions, for example "NR4 – Confirmation," that are recorded once the files are transmitted to the tax authority and that a confirmation is received for them.

Furthermore, to avoid any confusion, the encrypted file extension has been modified from .xml to .enc. This change will allow you to differentiate the file to transmit from the encrypted file more easily.

Finally, the links to access the slip transmission services for the Canada Revenue Agency and *Revenu Québec* were added to the *Cantax FormMaster* **Professional Centre**, under the **Links** tab.

Default display on start up

You may now select the default view that displays when you launch the program. To do so, open the **Options and Settings** dialog box and select the desired view in the **General** pane. The views that can be selected are the following: **Forms**, **Professional Centre** and **EFILE Log**.

Carry Forward

Second year of Cantax FormMaster

The platform used by *Cantax FormMaster* offers users many functions used to facilitate the annual update of client files. Therefore, this year, you might want to use these functions to update your files from last year. Here's an overview of the functions made available to you.

The first time you launch a locally installed version, you may retrieve certain settings that were configured last year, such as those saved in the options and settings.

You may also retrieve the configuration of a network version.

When using the carryforward of files functionality, the prior year client files are automatically detected for carryforward purposes, unless those client files were moved to a location other than the one configured last year or the one by default.

Starting this year, it will be possible to carryforward various customized templates from last year in order to use them in the current version. The following templates may be carried forward:

- the print formats;
- the letters and labels;
- the groups (Form Manager);
- the preparer profile.

Finally, you now have access to several options in the "Carry Forward" section of the options and settings. For more information on these options, consult the Help.

Please note that you will no longer be able to carry forward client files created on the old platform (FormMaster).

Carry forward – T4TimeSaver

Please note that you may now carry forward business slips prepared with T4TimeSaver (*.TxxN) to *Cantax FormMaster*.

Carry forward - NAICS codes

The fields with NAICS codes are not carried forward this year, because the NAICS list of codes has changed. It is now more complete and a search box has been added to quicken the selection of the appropriate code. Therefore, you will have to manually enter the NAICS codes after carryforward.

Here are the forms affected by the change to the NAICS list of codes:

- T106 - T106 Slip
- T106 Summary - Information Return of Non-Arm's Length Transactions With Non-Residents
- T2125 - Statement of Business or Professional Activities
- T1163 - Statement A - AgriStability and AgriInvest Programs Information and Statement of Farming Activities for Individuals
- T5013 Financial - Partnership's Financial Return
- T2042 - Statement of Farming Activities
- T2121 - Statement of Fishing Activities

Attached Notes

The attached notes are carried forward, except if this option is cleared in the carry forward data options.

New Slip Printing Service

Do you have client files with a large number of recipients (more than 500) that require massive printing of slips? If so, the new Slip Printing Service by CCH Canadian may be a significant time and cost saver for your firm.

With this service, you'll receive:

1. One ready-to-mail envelope for each recipient of your client file. The envelope is prepaid, and your firm's address is printed as the return address
2. The envelope contains the slip (Copy 2 & 3) specific to each recipient
3. The printed summaries (Copy 4) of all the slips, provided for your records.

The service can also include e-filing on your behalf and importing client data from an external source such as Excel. Let CCH perform these tasks while your staff is assigned to high-value work. For more information about the Slip Printing Service, please contact your account manager.

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
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Customer Service:

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