

RELEASE NOTES

Version 2013 v.4.0

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Version Presentation

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

The Gold version includes over 450 tax forms and slips, while the Regular version contains more than 260. 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.

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.

Carrying Forward Preparer Profiles

Once your preparer profile from last year is carried forward to the current year, it is important to verify that the options defined with respect to your clients always correspond to your situation for the current season. For more information on the new options offered in the *Tax Preparer’s Profile* form of the program’s current version, please refer to the “[Tax Changes](#)” section.

Improve Your Productivity

Once again this year, *Cantax FormMaster* contains several enhancements and new features that have been added as per your suggestions. They are intended to optimize the time that you spend preparing tax returns.

Summary Forms – Adding a box for the automatic transfer of notes

A box has been added to the summaries of the different slips or RL slips (except for the T3 Summary (**T3Sum**)) to allow you to automatically transfer notes to all related slips and/or RL slips in a single operation. For example, if you select the check box **Select this box to transfer the notes to all T4 slips** in Form T4 Summary, the notes entered will be instantly transferred to all T4 slips.

Forms and Slips Coverage

The slips, RL slips and summaries found in *Cantax FormMaster* 2013 normally apply to the 2013 taxation year. You can nonetheless use them if you need to file a slip for the 2014 taxation year **before** the 2014 versions of the slips are made available by the government authorities.

Individual forms can be used until they are updated by the CRA or *Revenu Québec*.

Carrying Files Forward

After having installed *Cantax FormMaster* 2013, remember that you have to carry forward last year's files before entering new data. To do so, select **File/Carry forward**.

Cantax FormMaster 2013 allows you to carry forward files that were saved with *Cantax FormMaster* 2012 or *Taxprep Forms* 2012, which have the T12 extension.

Carrying forward client files of 2013 versions

Cantax FormMaster 2013 allows you to carry forward client files saved with *Cantax FormMaster* 2013 or *Taxprep Forms* 2013 that have the T13 and T14 extension.

Electronic Filing

Cantax FormMaster enables you to electronically transmit data from the T5013 return and 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
T5013 Slip	X	X
T5013 Return	X	X
T5018	X	X
RRSP		X
RL-1 T4	X	X
RL-1 T4A	X	X

Slips	Version	
	Regular	Gold
RL-1 T4ANR	X	X
RL-2 RIF	X	X
RL-2 RSP	X	X
RL-2 T4A	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 paper format is accepted.

Taxation years covered

Revenu Québec only accepts electronic transmission related to the 2013 and 2014 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 6, 2014, while *Revenu Québec* has been accepting them since November 11, 2013.

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).

Web Access Code - Receipt of the new Web access code

You no longer need to wait for the CRA to mail you a letter giving you a new Web Access Code to file your T4, T5, or other information returns electronically. The code you used to file your 2012 information return is the same code you will use to file your returns for 2013 and subsequent years. This is the last year that you will receive a Web Access Code letter.

Modifications Made to Version 4.0

This version includes the form changes listed in the table below.

Form	Version		What's new?
	Regular	Gold	
FÉDÉRAL			
T30N	X	X	Implementation of the 2014 budget changes (i.e. addition of a new tax bracket).
T1135	X	X	New version issued by the CRA.
T1261	X	X	New version issued by the CRA.
T2054	X	X	New version issued by the CRA.
GST111		X	Minor text correction.
RC7291		X	Minor text correction.
GST189		X	New version issued by the CRA.
GST507		X	New version issued by the CRA.
GST523-1		X	Minor calculation correction in Part D.
RC59	X	X	New version issued by the CRA.
RC64		X	New version issued by the CRA.
RC66		X	New version issued by the CRA.
RC66 SCH		X	New version issued by the CRA.

Modifications Made to Version 3.0

Forms

For more details with respect to updated forms, consult the [Web site](#).

Modifications Made to Version 2.0

Forms

No form has been added or deleted in this version. For more details with respect to updated forms, consult the [Web site](#).

Modifications Made to Version 1.0.1

Version 1.0.1 of *Cantax FormMaster* 2013 corrects the following problem:

Carryforward of a client file saved with *Cantax FormMaster* 2012 (extension T12) is not performed when the taxation year entered in Form Identification (ID) is ending before December 31, 2012. The following message displays in *Cantax FormMaster* 2013 v.1.0: *Cannot do the carry forward because the operation would create a client file that contains a return with a taxation year that is not covered by this version of the program. Consult the "Version Coverage" help topic for more information on the periods covered by the different versions of the program.*

Note that *Cantax FormMaster* 2013 carries forward T12 client files whose taxation year is ending in the period between January 1, 2012, and December 31, 2013. The above message will display if the taxation year is not included in this period.

Modifications Made to Version 1.0

Forms under review

The TP-600 return is under review. This return includes the following forms:

- TP600 - Partnership Information Return
- TP600 Schedule A - Partner's Interests and At-Risk amounts
- TP600 Schedule B - Capital Cost Allowance (CCA)
- TP600 Schedule C - Incorporeal Capital Property
- TP600 Schedule D - Member Corporations' Shares of the Paid-Up Capital
- TP600 Schedule E - Summary of Certain Information Entered on RL-15 Slips
- TP600 Schedule F - Net Income (or Net Loss) Used to Calculate Income Tax

Form Removed

Because CD/DVD transmission by Revenu Québec has been abolished, Form ED-400 has been removed.

Tax Changes

ID - Client Identification and Other Information (ID)

In the "Authorized person" section, the check box **Do you want to use the same information as the information indicated above?** is also used, for an individual, to update the individual's first name and last name to the appropriate field, in order for this information to be updated to all forms that require the individual's signature.

In the Preparer Profile and in Form Identification (ID) we have added a disclaimer for the T3RET, T3M and T3P returns. This disclaimer will print on the last page of each of these forms.

Partnerships (Forms T5013 and TP-600)

T5013 Data entry screen - Partnership Income (T5013)

- Although the calculations for the adjusted cost base (ACB) and the at-risk amount (ARA) have been removed from Forms T5013 Schedule 50 and TP-600 Schedule A (if applicable), the sections "Adjusted cost base (ACB)," "At-risk amount," and "Adjusted at-risk amount" in Form T5013 Data entry screen have been kept, because certain items in those sections are still used by these two forms. In addition, the ACB and the ARA are used in the calculation of several boxes in the T5013 slip and the RL-15 slip (if applicable).
- A new box has been added to Form T5013 Data entry screen to allow you to cancel the ACB and ARA calculations for each partner.
- Two new boxes have been added to the "Adjusted cost base (ACB)" section. These boxes allow you to control the creation of an entry for a partner in Form T5013 Schedule 50/TP-600 Schedule A. The values in these boxes are calculated by the program.
- As a result of the change in the rate of dividends other than eligible dividends for 2014, a new line has been added to Forms T5013 Data entry screen and T5013 Worksheet B. This new line allows you to enter the amount of dividends other than eligible dividends received in 2014 in order to calculate the values in boxes 130 and 131 of the T5013 slip and boxes 6b-1 and 40 of the RL-15 slip (if applicable) for a partnership whose fiscal period straddles 2013 and 2014.
- Some changes have been made to the "Other amounts and information (T5013)" section of Form T5013 Data entry screen and to the "Generic boxes with amounts (to be posted to the T5013 slip)" section of Form T5013 Worksheet B in order

for the *Amount* generic boxes to only be used to split the amounts to allocate between several jurisdictions, if applicable.

T5013 slip - Statement of Partnership Income (T5013SUPP) and T5013 Summary - Summary of Partnership Income (T5013SUM)

The T5013 slip and summary underwent major changes. The box numbering has been completely modified and these forms have been redesigned. The T5013A slip is now obsolete and the information that was previously reported on it is now on the T5013 slip.

The official T5013 slip, available on the CRA Web site, now has more generic boxes than fixed boxes (only four fixed boxes). In addition, this slip now has two slips per page, 12 generic boxes and four text boxes for entering additional text information. However, the T5013 slip generated by our program, and approved by the CRA, has one slip per page, 24 generic boxes and 10 text boxes allowing you to enter additional information in order to cover all possible situations.

It is now possible to display, at the top of the T5013 slip, the references "ADDITIONAL," for additional slips, and "DUPLICATE," for a duplicate slip, by selecting the appropriate boxes in the "Filing details" section of Form T5013 Data entry screen.

A section has been added to the T5013 Summary form to allow you to enter information relating to a nominee or an agent, if applicable. This information will be used to supplement the tax filer information with regards to the T5013 slips filed electronically (Internet) or paper-filed by a nominee or an agent.

T5013 LIST - List of T5013 slips - Statement of partnership income (T5013LIST)

- Boxes 107, *Limited partner's rental income (loss)*, and 110, *Net Canadian and foreign income (or loss) of the T5013 slip*, are now presented on the same column, i.e. column **107/110 Canadian and foreign net rental income (loss)**, in Form T5013 LIST.
- Form T5013A LIST has been eliminated as a result of the removal of the T5013A slip. However, the table in Form T5013A LIST has been transferred to Form T5013 LIST. When a partnership is a tax shelter or it renounced Canadian exploration and development expenses, a new Section "Renounced Canadian exploration and development expenses and tax shelter information" displays on the screen and when printing Form T5013 LIST.

T5013 Financial - Partnership Financial Return (T5013FIN)

Lines 002 to 005 and the references relating to the nominees or agents have been removed from the "Identification" section in Form T5013 Financial.

A new section has been added to Form T5013 Financial. This section displays the steps to follow to prepare the partnership financial return. If you do not want to display this section for the active client file, select the appropriate box directly in the form. You can also select the corresponding box in the preparer profile to choose not to display this section for all client files.

A new question has been added to Form T5013 Financial. This question displays when the partnership is a limited liability partnership (code 03 of line 086). The partnership must indicate whether or not it is a professional partnership (as defined in subsection 40(3.111) of the ITA). In fact, the negative adjusted cost base (ACB) special rule will be applied to all partners in this professional partnership. The negative ACB at the end of the preceding fiscal period will therefore be nil. In addition, if the ACB at the end of the current fiscal period is negative, a note indicating a deemed capital gain will display.

A partnership that transmits its partnership information return electronically does not have to send notes to the financial statements to the CRA. These notes must be kept by the partnership to be provided to the CRA for future review, if applicable.

T5013 Schedule 2 - Charitable Donations, Gifts, and Political Contributions (T5013S2)

The CRA has added two new parts to Form T5013 Schedule 2:

Part 7 - Gifts of medicine: The CRA has added Part 7 in order for partnerships to be able to report any gifts of medicine they made in the fiscal period.

Part 8 - Municipal political contributions: The CRA has added Part 8 in order for partnerships to be able to report any political contributions they made in the fiscal period.

T5013 Schedule 10 - Calculations Relating to Cumulative Eligible Capital (T5013S10)

The deduction for cumulative eligible capital (CEC) is now prorated based on the number of days in the fiscal period divided by 365.

T5013 Schedule 50 - Partner's Ownership and Account Activity (T5013S50)

The CRA has made important changes to Schedule 50 since the nominees or agents are no

longer required to file the form and, considering that partnerships may not always have the information needed to calculate the adjusted cost base (ACB) and the at-risk amount (ARA) for their partners.

The CRA has eliminated the following columns:

- 360, **ACB at the end of the fiscal period (add columns (1) to (6))****;
- 400, **Ss 96(2.3) adjusted ACB or the amount from column 7**;
- 440, **ARA at the end of the fiscal period (add columns (10) to (13))****.

The title "Part 1 - Complete this part for all partners who are members of the partnership at the end of the fiscal period," has also been eliminated.

Part 2, "Complete this part for all partners who disposed of all, or part of, their partnership interest during the fiscal period (including partners who joined or retired during the fiscal period)," has been eliminated and replaced by a new column, i.e. column 110, **Did the partner dispose of an interest during the fiscal period?**

Box 300 no longer represents the adjusted cost base (ACB) for the previous fiscal period. Instead, it represents the cost of the shares acquired in the prior fiscal periods. This cost must not include the amount in box 310.

T5013 CCA - Summary of Capital Cost Allowance (T5013CCA) and TP-600 CCA) - Summary of Capital Cost Allowance (TP600CCA)

A new diagnostic has been added to advise the preparer that a CCA relating to a rental property is claimed while the partnership is incurring a rental loss on Form T5013 Schedule 1 and/or Form TP-600 Schedule F.

T5013 General CCA - General CCA classes (T5013CCAR)

Class numbers 41.1 and 41.2 have been added to the list of CCA classes in the T5013 General CCA classes form.

TP-600 - Partnership Information Return (TP600)

Please note that at the time *Cantax FormMaster* 2013 v.1.0 was released, the final version of the TP-600 return and related schedules was not available. Therefore, the TP-600 forms cannot be filed with this version of the program. Filing of the forms will be possible with the next version of *Cantax FormMaster*, which is scheduled to be released at the beginning of February 2014.

TP-600 Schedule A - Partners' Interests and At-Risk Amounts (TP600SA)

Revenu Québec made changes to Form TP-600 Schedule A to harmonize it with federal Form T5013 Schedule 50. The ACB and ARA calculations have been eliminated, but the items used for their calculation have been retained. In addition, the title "1 – Information about the partners who are members of the partnership at the end of the fiscal period" has also been removed. Part 2, "Information about the partners who disposed of all or a part of their interest during the fiscal period" has been removed and replaced by a new box, i.e. box G, **If the partner disposed of all or a part of the interest during the fiscal period, select the following box.**

TP-600 Schedule E - Summary of Certain Information to Enter on RL-15 Slips (TP600SE)

The values in boxes 28, 29, 30, 31, 35-28, 35-29 and 35-30 of Part 1, "Resources expenses incurred by the operating partnership" of Form TP-600 Schedule E are now calculated automatically using the values in boxes 150, 250, 350, 455, 160, 260 and 360 of Form T5013 Schedule 12.

New filing requirements for partnershipsNominees and agents

Every person who holds an interest in a partnership as a nominee or agent for another person has to complete and file with the CRA a separate T5013SUM form, and the related T5013 information slips for each partnership in which an interest is held for another person. Filing of Forms T5013 FIN, *Partnership Financial Return* and T5013 SCH 50, *Partner's Ownership and Account Activity* is no longer required. For more information, consult the Guide T4068, *Guide for the Partnership Information Return (T5013 Forms)*.

Exemption for family farm partnerships from filing T5013 Partnership Information Return

For the 2013 and 2014 fiscal years, family farm partnerships formed of individuals (those who file T1 income tax and benefit returns) do not have to file a T5013 return. However, a farm partnership that includes a trust or a corporation is still required to file a T5013 return. This information has been published on the CRA Web site.

Slips/RL SlipsRemoval of copy 3 in RL slips

This year, *Revenu Québec* removed copy 3 in the RL slips. For example, last year *Cantax FormMaster* 2012 was printing the following copies when preparing a paper RL-1 slip: copy 1, to enclose with Form RLZ-1.S, copy 2, for the individual (to keep), copy 3, for the individual (to keep), and copy 4, for the employer or payer. This year, *Cantax FormMaster* 2013 prints the following copies for the RL-1 slip: copy 1, to enclose with Form RLZ-1.S, copy 2, for the individual, and copy 3, for the employer or payer.

Abolishment of the CD or DVD transmission for Québec RL slips

Starting with this version of the program, transmission of Québec RL slips on electronic media (CD or DVD) is no longer permitted. Because *Revenu Québec* no longer accepts these transmission modes, you now only have two options to file your slips: by mail on paper, or via the Internet.

Enhancement of the Print Slips dialog box

The **Print Slips** dialog box has been enhanced to facilitate your task as a preparer. Starting with this version, when you are in a form related to a slip (e.g. the T4ASUM or T4ALIST form) or in the slip's data entry screen (e.g. the T4A slip data entry screen) and you use the **Print Slips** (CTRL+L) command, the slip will automatically be selected in the **Print Slips** dialog box.

T10 Data entry screen - Pension Adjustment Reversal (PAR) (T10)

The plan registration number that should display on the federal T10 slip, *Pension Adjustment Reversal (PAR) (T10SUPP)*, of each employee now originates from federal Form T10 Summary, *Summary of Pension Adjustment Reversals (PARs) (T10SUM)*, and no longer from Form T10 Data entry screen, *Pension Adjustment Reversal (PAR) (T10)*, specific to each employee. Hence, this number only has to be entered once.

T5018 Data entry screen - Contract Payments (T5018)

In Form T5018 Data entry screen, *Contract Payments (T5018)*, the fields available to enter RT and RZ account numbers have been moved from the "Other than an individual" subsection so they could also be available for recipients who are individuals.

T5/RL-3 Data entry screen - Investment Income (T5)

The amounts in boxes A1 and A2 of Form T5/RL-3 Data entry screen, *Investment Income (T5)*, are now automatically posted to boxes E-1 and E-2 respectively.

T4PS Slip - Statement of Employees Profit Sharing Plan Allocations and Payments (T4PSSUPP)

The employer's address entered in Forms T4PS Summary (**T4PSSUM**) is now automatically updated to Forms T4PS Slip (**T4PSSUPP**) in the *Employer's name* box.

Printing of Québec forms enhanced

In the past, you had to enter "Québec" as the province in the Identification form in order for the **Québec** box to be automatically selected in the **Print based on print formats** dialog box. Now, with *Cantax FormMaster 2013*, no matter the province entered in the Identification form, the **Québec** box will be selected as soon as a Québec form becomes applicable.

T2200 - Declaration of conditions of Employment (T2200)

Form T2200 Data entry screen - *Conditions of Employment* has been deleted. You must now complete federal Form T2200, *Declaration of Conditions of Employment (T2200)*. Note that the jump code for federal Form T2200 previously was **T2200SUPP**.

AUTOTAX - Personal Use of Employer's Automobile (AUTOTAX)

A new entry has been added to the Form Manager to facilitate access to Form AUTOTAX, *Personal Use of Employer's Automobile (AUTOTAX)*. This entry brings you to the "Information to report - Remuneration, source withholdings and adjustments" section of Form T4/RL-1 Data entry screen, *Employment Income (T4)*, which includes an expand link to the AUTOTAX form.

T661 - Scientific Research and Experimental Development (SR&ED) Expenditures Claim (T661)

In Part 2, "Project information," of Form T661, former sections B and C have been merged so that all claimants must now answer the same three questions. However, the order of these questions has been changed. Lines 240, 242 and 244 have been respectively renumbered 242, 244 and 246, while lines 250 and 252 have been removed. In addition, the wording on lines 242 and 244 has been modified and line 240 has been replaced by the new line 246, which has a different wording. As for lines 223, 224, 226, 228, 229, 230, 232, 235, 236, 237 and 238, they have been removed.

When carrying forward a client file prepared with *Cantax FormMaster 2012*, the description of the work will be retained as follows:

- the description on line 240 will be retained on new line 246;
- the description on lines 242 and 244 will be retained on those same lines;
- the description on line 250 will be retained on line 246; and
- the description on line 252 will be retained on line 244.

However, we invite you to carefully review the work description for each of those lines to ensure it corresponds to the new wording on lines 242, 244 and 246. Note that when the corporation incurred expenditures related to Basic or Applied research activities, line 242 also has to be completed.

Part 5 - Calculation of Prescribed Proxy Amount (PPA)

The year's maximum pensionable earnings giving entitlement to the Canada pension plan for the 2014 fiscal year (i.e. \$52,500) has been updated. This amount is used to determine the specified employees' salary or wages when the proxy method is selected to calculate the SR&ED expenditures.

In Part 7 of the form, two new lines have been added for statistical purposes, i.e. line 620 *Basic or Applied research* and line 622, *Experimental development*.

Moreover, new instructions have been added with regards to lines 340, 345, 350, 355, 370, 390, 504, 510, 514, 516, 518, 532, 535, 540, 543 and 546 in order to take into account the new rules relating to the acquisition or the rental of capital property applicable as of January 1, 2014. Under these rules, no amount for purchasing or leasing capital property can be included for contract expenditures made after 2013.

A new Part 9, entitled "Claim preparer information" has been added to take into account the legislative modifications that will come into force in January 2014. The information requested, such as the preparer's name, Business Number (BN), billing arrangement, billing rate and the total fees paid or estimated, have to be provided for each claim preparer that helped and participated in preparing the claim for SR&ED expenditures. If you do not file all the information with the form, a \$1,000 penalty may apply. Note that because of the addition of this part, former Part 9 now corresponds to Part 10.

Corrected Calculations

The following problems have been resolved in this release:

- T5013/RL-15 Data entry screen - Partnership Income - Incorrect amounts calculated on lines “Assistance amounts and incentive payments for CEE, CDE and COGPE” and “Specified expenditures related to resources (CEE, CDE, COGPE and FEDE)” in Section “Adjusted cost base (ACB)”
- T4/RL-1 Data entry screen – Employment Income - The adjustment mechanism for employee contributions to CPP/QPP, EI and QPIP

Future Forms Updates

During 2014, *Cantax FormMaster* 2013 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 2013	Gold Regular	Gold Regular
Version 1.1	February 2014	Gold Regular	
Version 2.0	March 2014	Gold Regular	Gold Regular
Version 2.1	April 2014	Gold Regular	
Version 3.0	June 2014	Gold Regular	Gold
Version 4.0	September 2014	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* 2013 to be able 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

Technical Information

Program Enhancements

Transmission of T5013 returns and slips

Starting with this version of the program, you will be able to electronically transmit T5013 returns and slips by selecting the **T5013** command in the **Transmission** menu. In addition, the T5013 transmission will be offered through Web pages. The CRA prefers that you transmit the return and the slips at the same time, but you may still transmit them separately, if required. As for the transmission of the other slips, the T5013 transmission is performed for a single type of data at a time. Once the desired data is generated in *Cantax FormMaster* and transmitted to the CRA, you will receive a confirmation number that you can save in the client file. The different identification numbers to use to electronically transmit T5013 returns and slips are the same as those used to transmit slips. See the FAQ *What identification numbers do I need to be able to file slips electronically?* in the Professional Centre for further details concerning this topic.

EFILE statuses specific to T5013 returns and T5013 slips have been added and the EFILE Log as well as the EFILE INFO form have been reviewed accordingly. For more information, consult the Help.

Note that the electronic transmission of T5013 returns and slips prepared with *Cantax FormMaster* 2013 is not mandatory for the 2013 and 2014 taxation years. In addition, the CRA prefers Internet filing when you file more than 50 T5013 slips, but does not require it.

Integration of IntelliConnect

IntelliConnect is the new tax research platform to which will be migrated, one by one, the products offered via *CCH Online*. In order for you to be able to access your research products as soon as they are available in *IntelliConnect*, we have added this choice of viewer in the **Tax Research** panel in the “Options” section of the **Options and Settings** dialog box.

Enhancement Searching in the Form Manager

The search tool available in the Form Manager has been redesigned and enhanced to allow you to better filter the contents of the Form Manager, which will make your searches easier.

To use the new search field (Ctrl+F), simply enter the desired search term(s) and the search will be done automatically. If you were used to searching for forms using their jump code, just enter a code and the search tool will identify the associated form.

Incidentally, there are three options allowing you to customize the search tool:

- Keep the focus in the Search field - If you select this option, the focus will already be in the search field when you revert back to the Form Manager after a first search; you can therefore make a new search right away.
- Highlight results found - This option ensures that the words entered in the search tool are highlighted in the search results. This option is selected by default, but you can turn off the highlight or change the highlight colour.
- Use approximate search - When selecting this option, you can increase the number of results found by ignoring certain possible errors. For example, if you enter “Installements” as your search text, the program will also list all of the forms that include the word “installements” in the description. Therefore the highlight of these approximate matches will be lighter than when it is an exact match.

These three options are available in the **Search Settings** panel in the “Options” section of the **Options and Settings** dialog box.

Carrying forward client files created with the current version to the next year

Starting with this version, it is possible to carry forward client files created with the current version of *Cantax FormMaster* 2013. Therefore, you can carry forward a 2013 file to create a 2014 file in *Cantax FormMaster* 2013. This functionality will allow you, for example, to start preparing client files earlier for next tax season, before the release of *Cantax FormMaster* 2014.

As an integral part of this modification, starting with *Cantax FormMaster* 2013, file extensions will be associated with the taxation year. Therefore, with this new version, you can open files with the T13 or T14 extension. In addition, client files saved with *Cantax FormMaster* 2013 and subsequent versions will be centralized in a single directory, named **Cantax FormMaster**, which will replace the different client files directories related to the taxation year.

Access to client files created with a prior version

Starting with version 2014 of *Cantax FormMaster* (which is scheduled to be released in December 2014), you will be able to open a 2014 file that was saved in *Cantax FormMaster* 2013. When using *Cantax FormMaster* 2014, you can simply open your 2014 files and continue working on them.

Carrying forward the cell “Assigned to” field

An option has been added to the **Data Options** panel in the “Carry Forward” section of the **Options and Settings** dialog box, which allows you to choose whether or not to carry forward the name entered in the “Assigned to” field of Form *Client Identification and Other Information (ID)*. Note that this option is selected by default.

Carry Forward

Attached Notes

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

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

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