

## Release Notes

Version 2014 v.4.0

September 2015

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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 380 tax forms and slips, while the Regular version contains more than 190.

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](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.

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 time spent preparing slips and forms.

#### Invoice form

Cantax FormMaster now offers you a form used to generate an invoice for services rendered to your clients.

To facilitate your work, you can select various settings applicable to all your files by accessing the **Bill** tab of the preparer profiles. You can also modify certain options for each of your files by accessing the **Invoice** form. In addition, you can create a customized invoice template from the **Letters and Labels** view.

For more details, consult the Help.

#### Client letters

Cantax FormMaster offers you a brand new functionality allowing you to generate, for your clients, a letter with filing instructions, an engagement letter and a notice to reader. You can also prepare other types of letters using one of the seven additional letter templates. In addition, configuration options applicable to all your files are available in the preparer profiles, under the **Letter** tab.

For more details, consult the Help.

## Lists of slips to customize

You can now choose the content of the T4 and T4A lists of slips. Access the *List of T4 slips - Statement of remuneration paid (T4LIST)* or the *List of T4 slips - Statement of pension, retirement, annuity, and other income (T4ALIST)*. Each column has a drop-down menu allowing you to choose the boxes whose content will display on the list. A sort mechanism allows you to choose the order in which you want recipients to be listed.

### ID - Client Identification and Other Information (ID)

The following changes have been made to Form Identification, *Client Identification and Other Information (ID)*:

- for purposes of implementing the client letters functionality, a field allowing you to enter a form of address has been added in the “Client Identification - Individual” section;
- fields allowing you to enter the postal box (PO box) and the rural mail delivery route (RR) have been added in the “Address” section;
- the telephone numbers and the e-mail address now constitute a separate section; in addition, you can now enter a work telephone number, a cellular telephone number and a foreign phone number;
- in the “Authorized person” section, the first name and the last name now constitute separate input fields and you can now indicate a form of address; the building number and the street name also constitute separate input fields and you can now enter a work telephone number, a cellular telephone number and a foreign phone number.

**Note:** After having carried forward last year’s files, verify the data in the “Authorized person” section.

## Forms and Slips Coverage

The slips, RL slips and summaries found in Cantax FormMaster 2014 normally apply to the 2014 taxation year. You can nonetheless use them if you need to file a slip for the 2015 taxation year **before** the 2015 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*. The **Cantax Direct** e-Bulletin notifies you each time an updated or new form is made available in a program update.

## Opening Files and Carrying Files Forward

### Files saved with Cantax FormMaster 2013

Cantax FormMaster 2014 allows you to open, without previously carrying forward, a file with the .T14 extension that has been saved with Cantax FormMaster 2013. When opening that file, a dialog box displays and asks you if you want to recalculate the file with the current version. By answering yes, you can simply continue working in the file. If you answer no, the data in the file will be locked. It can be unlocked at a later date using the **Properties** dialog box (**File/Properties** command).

Cantax FormMaster 2014 also allows you to open, without previously carrying forward, a file with the .T13 extension that has been saved with Cantax FormMaster 2013. However, the file will only be accessible in read-only.

### Carrying forward files prepared with versions 2013 and 2014

To carry files forward with Cantax FormMaster, select **File/Carry forward**.

Cantax FormMaster 2014 allows you to carry forward files that were saved with Cantax FormMaster 2013 or *Taxprep Forms* 2013, which have the .T13 extension. Cantax FormMaster 2014 also allows you to carry forward files saved with Cantax FormMaster 2014 or *Taxprep Forms* 2014 that have the .T14 and .T15 extension. Finally, Cantax FormMaster 2014 allows you to carry forward files saved with the *AvanTax eForms* application that have a .T13N 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

Slips	Version	
	Regular	Gold
T5	X	X
T5008	X	X
T5013	X	X
T5018	X	X
RRSP		X
RL-1 T4	X	X
RL-1 T4A	X	X
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 and in Québec, 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.

Note that starting in January 2015, the CRA will no longer accept CD/DVD filing. Any electronic transmission will have to be done over the Internet.

### Taxation years covered

*Revenu Québec* only accepts electronic transmission related to the 2014 and 2015 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 5, 2015, while *Revenu Québec* has been accepting them since November 17, 2014.

### Creation of the .XML file to transmit

Please note that it is not possible to include multiple files when creating the .XML file that is transmitted to tax authorities. Each .XML file created with Cantax FormMaster **can include only one file** (one T-slip or RL-slip issuer).

### CRA's Web Access Code

If the CRA has given you a Web Access Code in 2012 or 2013, you can use it to file your information returns for 2014 and subsequent years.

## Version 4.0 Content

### Forms

#### Forms updated

This version includes the form updates and corrections listed in the table below.

Form	Version		What's new?
	Regular	Gold	
<b>FEDERAL</b>			
T3AB	X	X	New rates applicable to the 2015 taxation year, as per Alberta Bill 2, which was tabled on June 18, 2015, and received Royal Assent on June 29, 2015.
T1261	X	X	New version issued by the CRA.
T2010		X	New version issued by the CRA.
T2012		X	New version issued by the CRA.
T2073		X	New version issued by the CRA.
T5001		X	New version issued by the CRA.
GST10		X	New version issued by the CRA.
GST17		X	New version issued by the CRA.
GST24		X	New version issued by the CRA.
GST44		X	New version issued by the CRA.
GST60		X	New version issued by the CRA.
GST70		X	New version issued by the CRA.
GST145		X	New version issued by the CRA.
CPT30	X	X	New version issued by the CRA.
CPT100	X	X	New version issued by the CRA.
NR7-R		X	New version issued by the CRA.
RC66		X	New version issued by the CRA.
RC66 SCH		X	New version issued by the CRA.

Form	Version		What's new?
	Regular	Gold	
RC145	X	X	New version issued by the CRA.
RC366		X	New version issued by the CRA.
RC4288	X	X	New version issued by the CRA.
RC7294		X	Correction to the printing of line M9/Q3 in English and modification to the entry fields in columns 1 and 2 of Part F in order to allow for the entry of a percentage that contains up to six decimals places.
TL11A		X	New version issued by the CRA.
TL11D		X	New version issued by the CRA.
<b>QUÉBEC</b>			
RL-1 Summary	X	X	New version issued by <i>Revenu Québec</i> .
LM-15	X	X	<i>Voluntary Disclosure Application</i> . Form added to Cantax FormMaster.

## Version 3.0 Content

### Forms

For more details with respect to the content of version 3.0, consult our [Web site](#).

## Version 2.0 Content

### Forms

For more details with respect to the content of version 2.0, consult our [Web site](#).

## Version 1.0 Content (Reminder)

### Forms

#### Forms updated

Note that the TP-600 return and related schedules have not been updated by *Revenu Québec* this year. Therefore, they remain available in version 2013-10.

For more details with respect to the content of version 1.0, consult our [Web site](#).

### Tax Changes

#### RL-1 slip (T4)

The additional information code L-6 has been removed. Two new codes have been added: L-9 (Security option deduction under section 725.2 of the Taxation Act (line 297)) and L-10 (Security option deduction under section 725.3 of the Taxation Act (line 297)).

#### Summary 1 (T4)

This form includes a new section allowing you to calculate the reduction in the employer contribution to the health services fund for the creation of specialized jobs. This calculation is made in new Form LE-34.1.12, *Reduction of the Contribution to the Health Services Fund: Creation of Specialized Jobs*.

Note that to make it easier for you to enter the data required to calculate this reduction, we have added certain fields on the T4/RL-1 data entry screen (T4). These fields are grouped under the title "Information with respect to Form LE-34.1.12."

#### RL-2 slip (T4A, T4RIF and T4RSP)

The source code for VRSP income has been added. It must be selected when the RL-2 slip is used to report payments from a voluntary retirement savings plan.

#### RL-11 slip

The following additional information codes have been added:

- D-1 (Québec exploration expenses that give entitlement to an additional deduction of 10%);
- D-2 (Québec exploration expenses that give entitlement to an additional deduction of 25%);
- E-1 (Québec surface mining exploration expenses or oil and gas exploration expenses that give entitlement to an additional deduction of 10%);
- E-2 (Québec surface mining exploration expenses or oil and gas exploration expenses that give entitlement to an additional deduction of 25%).

## Future Forms Updates

During 2015, Cantax FormMaster 2014 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 2014	Gold Regular	Gold Regular
Version 1.1	February 2015	Gold Regular	
Version 2.0	March 2015	Gold Regular	Gold Regular
Version 2.1	April 2015	Gold Regular	
Version 3.0	June 2015	Gold Regular	Gold
Version 4.0	September 2015	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](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 one of the previous versions of Cantax FormMaster 2014 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

#### Use of a shortcut key to attach a note to a cell

The Alt+F10 shortcut key now allows you to attach a note to a selected cell or access that note if it already exists.

### 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

#### Support Centre:

Telephone:

1-888-829-7848

E-mail:

[csupport@wolterskluwer.com](mailto:csupport@wolterskluwer.com)

#### Customer Service:

Telephone:

1-800-268-4522

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#### Web Site:

[www.cantax.com](http://www.cantax.com)