

Taxprep® Forms

Release Notes

Taxprep Forms 2015 v.6.0

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About

Taxprep Forms is the most complete electronic library of income tax forms in Canada. Three versions are available: the Gold version includes more than 475 slips and forms issued by the Canada Revenue Agency (CRA) and *Revenu Québec* (RQ), while the Silver version includes nearly 220 and the Bronze version, nearly 20. To view the content of your version, access the **Forms** view of the program (by selecting **Go/Forms**). A list of the forms included in each version is also available in PDF format. You can consult this list on the *Taxprep Forms Professional Centre*, under the “Documentation” section, or on the *Taxprep* Web site, at www.taxprep.com, by selecting **Products/Taxprep Forms**.

Installation and Versions

Before installing the program, please read the *Installation Procedures* which are included with the software package. This document is also available on the *Taxprep* Web site, at www.taxprep.com, when you select **Support/Products/Taxprep Forms**. Based on the activation key you have entered when installing the program, you will have access to the Gold, Silver or Bronze **version**. To find out the type of version you have installed, select **Help/About Taxprep Forms**. You will find the information in the **Additional Information** area of the dialog box.

Integration with CCH iFirm

Wolters Kluwer Canada is happy to announce that *Taxprep* now integrates with *CCH iFirm*. As a *Taxprep* client, you are entitled to **have CCH iFirm's Contacts and Portal modules FREE until December 1, 2016**. This way, you will be able to create, in a few clicks, your list of contacts in *CCH iFirm* from your **Client Manager** in *Taxprep*. Then, you will be able to synchronize your taxpayers' information in *Taxprep* with the contact information in *CCH iFirm*. This integration will significantly reduce the time required to prepare returns. For more information on the modifications made as a result of this integration, consult the “[Technical Changes](#)” section.

What is CCH iFirm?

CCH iFirm is more than a simple application. It is a system that offers dynamic and integrated cloud solutions designed to simplify and automate firm management. Its integrated management modules — of contacts, jobs & billing, document, portal setup, capacity planning and Intranet — perfectly meet the management requirements of accounting firms. *CCH iFirm* helps you work efficiently, whether you are at the office, at home or visiting clients.

[Click here](#) for more information on *CCH iFirm*.

Rolling Forward Preparer Profiles

Once your preparer profiles from last year are rolled 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.

Improve Your Productivity

T5013 - Automatic income allocation based on the source

This year, to facilitate the preparation of the T5013 slips, we are introducing a functionality allowing for the automatic allocation of partnership income based on territorial origin.

To use this functionality, access Form T5013 Schedule 5, *Allocation of Salaries and Wages, and Gross Revenue for Multiple Jurisdictions* (Jump Code: **T5013S5**) and answer "Yes" to the question *Do you want to use the percentage allocations above to calculate the income on the T5013 slip allocated to the various jurisdictions?* Also indicate the types of income to which you want to apply the automatic allocation. *Taxprep Forms* calculates the percentage allocation relating to each Canadian province and territory. In the event where the partnership receives foreign-source income, you can enter the country or countries from where the income arises to include it in the automatic allocation.

The result of the allocation displays in Form T5013 Worksheet B, *Summary of Amounts to Allocate to Partners* (Jump Code: **T5013WSB**), in the section "Generic boxes with amounts (to be posted to the T5013 slip)." Each amount included in the per-source allocation is then allocated among the partners based on each of their shares. The final result displays in the data entry screen T5013/RL-15, *Partnership Income* (Jump Code: **T5013**). The type of partner determines the box into which the amounts are displayed.

T5013 slip and RL-15 slip - Customizable lists

The *List of T5013 Slips* (Jump Code: **T5013LIST**) as well as the *List of RL-15 Slips* (Jump Code: **RL15LIST**) can now be customized. Therefore, you can choose the boxes to display in each of these lists.

Reminder: Creating a Taxprep Forms file with another Taxprep product

The *Personal Taxprep* 2015, *Corporate Taxprep* 2015 v.2.0, or *Taxprep for Trusts* 2016 programs provide the possibility of exporting the appropriate data in the ID form to the ID form of a new *Taxprep Forms* client file.

This functionality, which was introduced last year, will save you time by preventing you from having to re-enter the data in the ID form into a new *Taxprep Forms* client file.

Forms and Slips Coverage

The slips, RL slips and summaries included in *Taxprep Forms* 2015 normally apply to the 2015 taxation year. You can nonetheless use them if you need to file a slip for the 2016 taxation year **before** the 2016 versions of the slips are made available by government authorities. Individual forms can be used until they are updated by the CRA or RQ. Note that the **Taxprep e-Bulletin** notifies you each time an updated or new form is made available in a program update.

Opening Files and Rolling Files Forward

Client files with the .T15 extension

Client files with the .T15 extension that have been saved with *Taxprep Forms* 2014 can be opened with *Taxprep Forms* 2015 without having been rolled forward first. 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).

Client files with an extension other than .T15

Client files with a .T12, .T13 or .T14 extension that have been saved with a 2012, 2013 or 2014 version of *Taxprep Forms* can also be opened with *Taxprep Forms* 2015 without having been rolled forward first. To open such a file, access the **Open** dialog box (**File/Open** command). Using the **Look in:** drop-down list, select the directory where the client file has been saved. Then, enter "*" in the "File name:" box and press Enter to display the list of client files. You can then select and open the client file you want to access. When opening the client 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).

Rolling forward client files

To roll files forward with *Taxprep Forms*, select **File/Roll Forward**.

Taxprep Forms 2015 allows you to roll forward client files that were saved with the 2014 version of *Taxprep Forms* or *Cantax FormMaster*, which have the .T14 extension, as well as client files saved with *Taxprep Forms* 2015 or *Cantax FormMaster* 2015 that have the .T15 and .T16 extension.

Taxprep Forms 2015 also allows you to roll forward client files that were saved with a 2012 or 2013 version of *Taxprep Forms* or *Cantax FormMaster*. To do so, access the **Roll Forward** dialog box (**File/Roll Forward** command). Using the **Look in:** drop-down list, select the directory where the client file has been saved. Then, select "CCH Forms (*.T??)" in the "Files of type:" box to display the list of client files. You can then select and roll forward a client file.

Furthermore, *Taxprep Forms* 2015 allows you to roll forward the files saved with the *AvanTax eForms* application that have a .T14N extension.

Attached notes

Note that the attached notes are rolled forward, unless this option is disabled in the data roll forward options.

Electronic Filing

Taxprep Forms enables you to electronically transmit data from the T5013 return (Silver and Gold versions) and the following slips and RL slips:

Slip	Version		
	Bronze	Silver	Gold
NR4		X	X
T3		X	X
T4	X	X	X
T4A	X	X	X
T4A-NR		X	X
T4RIF		X	X
T4RSP		X	X
T5	X	X	X
T5008		X	X
T5013		X	X
T5018		X	X
RRSP			X
RL-1 T4	X	X	X
RL-1 T4A	X	X	X
RL-1 T4ANR	X	X	X

Slip	Version		
	Bronze	Silver	Gold
RL-2 RIF		X	X
RL-2 RSP		X	X
RL-2 T4A		X	X
RL-3	X	X	X
RL-7		X	X
RL-8		X	X
RL-11		X	X
RL-15		X	X
RL-16		X	X
RL-17		X	X
RL-18		X	X
RL-22		X	X
RL-24		X	X
RL-25		X	X
RL-27		X	X
RL-30		X	X
RL-31	X	X	X

T3M and T3P Returns

The T3M and T3P returns can now be electronically filed. See the "Technical Changes" section for more information.

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 is accepted.

Taxation years covered

Revenu Québec only accepts electronic transmissions of the RL slips for the 2015 and 2016 taxation years. The CRA does not impose restrictions with regard to the taxation year that can be processed.

Important dates for Internet transmission

The CRA has been accepting electronic transmissions since January 11, 2016, while *Revenu Québec* has been accepting them since November 2, 2015.

CRA's Web Access Code

If you already have a Web access code, you can use it to file your information returns for 2015 and subsequent years.

Version 6.0 Content

Updates, Modifications and Additions

The table below shows the updates, modifications and additions contained in version 6.0 of *Taxprep Forms* 2015.

Form	Version			What's new?
	Bronze	Silver	Gold	
FEDERAL				
T1-M		X	X	New version issued by the CRA.
T123		X	X	New version issued by the CRA.
T137		X	X	New version issued by the CRA.
T183			X	New version issued by the CRA.
T550		X	X	New version issued by the CRA.
T1004			X	New version issued by the CRA.
T1006			X	New version issued by the CRA.
T1007			X	New version issued by the CRA.
T1024			X	New version issued by the CRA.
T1036		X	X	New version issued by the CRA.
T1043			X	New version issued by the CRA.
T1090			X	New version issued by the CRA.
T1105			X	New version issued by the CRA.
T1132			X	New version issued by the CRA.
T1135		X	X	New version issued by the CRA.
T1139			X	New version issued by the CRA.
T1153			X	Form removed.
T1161			X	New version issued by the CRA.

Form	Version			What's new?
	Bronze	Silver	Gold	
T1170			X	New version issued by the CRA.
T1171			X	New version issued by the CRA.
T1174			X	New version issued by the CRA.
T1213			X	New version issued by the CRA.
T1223		X	X	New version issued by the CRA.
T1243		X	X	New version issued by the CRA.
T1244		X	X	New version issued by the CRA.
T1263			X	New version issued by the CRA.
T2000			X	New version issued by the CRA.
T2062		X	X	New version issued by the CRA.
T2062A		X	X	New version issued by the CRA.
T2107			X	New version issued by the CRA.
T2205		X	X	New version issued by the CRA.
T5013 GIFL Forms		X	X	Correction to the printing condition of the disclaimer.
T5013 WSA		X	X	Correction to diagnostic M31: Carrying charges incurred in Québec will now be taken into account to determine if this diagnostic should display.
T5013 FIN		X	X	Correction to diagnostic F14: this diagnostic will no longer display when slips are filed electronically.
RC4616			X	New version issued by the CRA.
RC7066SCH			X	New version issued by the CRA.

Form	Version			What's new?
	Bronze	Silver	Gold	
RC7190-WS			X	New version issued by the CRA.
GST59			X	New version issued by the CRA.
GST506			X	New version issued by the CRA.
GST524			X	New version issued by the CRA.
CPT100		X	X	New version issued by the CRA.
CTB9			X	New version issued by the CRA.
NR5			X	New version issued by the CRA.
NR7-R			X	New version issued by the CRA.
NR301		X	X	Form added to <i>Taxprep Forms</i> .
NR302		X	X	Form added to <i>Taxprep Forms</i> .
NR303		X	X	Form added to <i>Taxprep Forms</i> .
RC1B		X	X	New version issued by the CRA.
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.
RC66SCH			X	New version issued by the CRA.
RC96			X	New version issued by the CRA.
RC145		X	X	New version issued by the CRA.
RC473		X	X	Form added to <i>Taxprep Forms</i> .
QUÉBEC				
FP-524			X	Calculation correction in Part 4.
FPZ-558			X	New version issued by <i>Revenu Québec</i> .

Form	Version			What's new?
	Bronze	Silver	Gold	
MR-93.1.1		X	X	New version issued by <i>Revenu Québec</i> .
TP-614		X	X	Calculation correction in Part 4.
TP-931.1		X	X	New version issued by <i>Revenu Québec</i> .
TP-1016			X	New version issued by <i>Revenu Québec</i> .

Reminder: Version 5.0 Content

For more details with respect to the content of version 5.0, consult our [Web site](#).

Reminder: Version 4.0 Content

For more details with respect to the content of version 4.0, consult our [Web site](#).

Reminder: Version 3.0 Content

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

Reminder: Version 2.0 Content

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

Reminder: Version 1.0 Content

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

Future Updates

During 2016, *Taxprep Forms 2015* will be the subject of several form updates which you will be able to download from the Internet or obtain on CD-ROM. The following table provides you with an overview of the delivery methods for this version and future updates.

Note: The versions are now numbered from 1.0 to 6.0. However, the release dates remain approximately the same.

Version	Release	Download	CD-ROM
Version 1.0	December 2015	Bronze Silver Gold	Bronze Silver Gold
Version 2.0	February 2016	Bronze Silver Gold	
Version 3.0	March 2016	Bronze Silver Gold	Silver Gold
Version 4.0	April 2016	Bronze Silver Gold	
Version 5.0	June 2016	Bronze Silver Gold	Gold
Version 6.0	September 2016	Bronze Silver Gold	Gold

Each time a new version or update becomes available for download, a notification is shown on the *Taxprep Forms Professional Centre*. You then have two options:

- You can access the downloadable products directly from the *Taxprep Forms Professional Centre*. 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.
- You can access the *Taxprep Forms* downloads page on the *Taxprep* Web site at www.taxprep.com.

Please note that you are no longer required to install one of the previous versions of *Taxprep Forms 2015* 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 *Taxprep Forms* will be performed more rapidly.

Note: The [Taxprep e-Bulletin](#) of *Taxprep Forms*, informs you each time a program update is available for download.

Technical Information

Technical Changes

Change relating to the information required for the integration of CCH Document On-Premise

For integration purposes between *Taxprep* and *CCH Document On-Premise*, you are no longer required to indicate the identification information for *CCH Document On-Premise* in the *Taxprep* options and settings.

If the Windows (Active Directory) connection information is used to login to *CCH Document On-Premise*, no additional identification is required to move PDF documents to *CCH Document On-Premise*.

If you are using the *Smart Client* tool, you will have to provide your credentials only the first time you login to *CCH Document On-Premise*. To provide this information, click the **Smart Client** icon minimized in the taskbar to enter your account number, your user ID and your password.

Enhancement of the integration with the CCH iFirm Contacts module

To facilitate the integration with the *CCH iFirm Contacts* module, the visual presentation of the **Synchronizing data** box has been enhanced. This box now allows you to synchronize the data of a taxpayer with those of a contact in *CCH iFirm* more intuitively. In addition, the box that was used to confirm the creation of the links no longer displays when the synchronization is requested via the **Synchronize** command of the **CCH iFirm** menu.

Furthermore, a visual indicator has been added to allow you to quickly know if an action related to *CCH iFirm* can be performed. This visual indicator displays to the left of the **CCH iFirm** menu title (in the **Advanced** tool bar) and of the applicable item of this menu. Consult the Help to obtain the list of the various indicators and review their significance.

Finally, the *CCH iFirm* authentication box no longer displays when a client file is opened by a user who is not logged in.

Removal of the Practitioner's Collection

IntelliConnect is Wolters Kluwer's new generation tax research platform. As this platform replaces the *Practitioner's Collection*, we have terminated the integration between the latter and *Taxprep*.

Client Identification and Other Information (Jump Code: ID)

The “CCH iFirm” section has been added for integration purposes between *Taxprep Forms* and *CCH iFirm*. This new section includes fields displaying additional information from the *CCH iFirm* linked contact; the content of these fields is synchronized with the *CCH iFirm* contact information. The field “Client code,” in which you can enter the client code allocated to the taxpayer is part of these fields. It will be used to search for corresponding contacts and for creating contacts in *CCH iFirm*. However, it is possible to configure another field for searching and creating contacts to use in cases where no value is shown in the “Client code” field.

In addition, the box **Portal activated** has been added to the “CCH iFirm” section to indicate if a portal is activated for the taxpayer in *CCH iFirm*. *Taxprep* has access to that information only when the return is linked with a contact in *CCH iFirm*. You can use this box in a customized filter, in order to identify all of your clients for whom a portal is activated.

For more information, consult the Help.

Configuring the integration with CCH iFirm

To enable the integration between *Taxprep* and *CCH iFirm*, the **CCH iFirm** pane has been added in the **Options and Settings** dialog box. In particular, the “General” section allows you to enter the address of your firm’s *CCH iFirm* Web site required to configure the integration.

Consult the Help to view the entire list options available for this dialog box.

Addition for the integration with CCH iFirm

The **CCH iFirm** menu has been added to the **Advanced** toolbar. This new menu is available in the **Tax Return** and **Client Manager** views and allows you to perform the following operations:

- Link a taxpayer to a contact in *CCH iFirm*;
- Synchronize a taxpayer with a *CCH iFirm* contact;
- Delete the link between a taxpayer and a *CCH iFirm* contact;
- Access a contact or the list of contacts in *CCH iFirm*;
- Login to firm’s *CCH iFirm* Web site.

In addition, two diagnostics have been added to facilitate the integration. The first displays when a return contains enough data so it is possible to launch the search for a contact to link. The second displays when a taxpayer is linked with a contact and *Taxprep* detects data to synchronize.

Finally the *CCH iFirm* filter has been added to the **Client Manager** to allow you to quickly know whether or not a taxpayer is linked with a contact in *CCH iFirm*.

Integration with the CCH iFirm Portal

The *CCH iFirm* **Portal** module is a secure space that allows you to communicate with your clients online, and securely exchange documents, data and reports. Note that this module is available for free to all *Taxprep* clients until December 1, 2016.

The integration between *Taxprep* and the *CCH iFirm* **Portal** module allows you to send income tax returns, forms or letters in PDF format to all *CCH iFirm* contacts, for whom a portal is activated, directly from *Taxprep*.

CCH iFirm Portal configuration

To enable the publication of PDF files on the portal of *CCH iFirm* contact, the “Portal” section has been added to the **CCH iFirm** pane in the **Options and Settings** dialog box. This new section allows you to enter the destination folder for the publication of PDF files on *CCH iFirm* portals.

Consult the Help to view the complete list of options available in that dialog box.

Transmitting T3M and T3P returns

Taxprep Forms now allows you to electronically transmit the T3M, *Environmental Trust Income Tax Return*, and T3P, *Employees’ Pension Plan Income Tax Return* returns to the CRA. To transmit these returns, make sure that EFILE is authorized in the “EFILE information” section of the preparer profile being used. Enter the transmitter’s identification information in the **Identification** pane of the “Electronic Services” section of the **Options and Settings** dialog box.

To transmit one of these returns, select **Transmission/Specialized Returns** from the **Client Manager** or the **Forms** view.

For more information on this new functionality, consult the Help.

Use the screen resolution for PDF printing

The check box **Use the screen resolution for PDF printing** has been added to the **Advanced** pane of the “Options” section in the **Options and settings** dialog box. This box is selected by default and enables the use of the screen resolution when printing PDF files rather than the resolution defined for the printer. This change has been made to correct the problem that caused the generated PDF files to sometimes be of a smaller dimension than what was expected (e.g. the file was sometimes printed in the upper left portion of the page).

Identify the author of an attached note

To facilitate the review of returns, Form *Attached Notes Summary* (Jump Code: **ATTN**) now displays, for each note, the name of the author as well as the date on which the note has been added to the form. This information is also included in the attached notes hover message and will be kept during roll forward if the check box **Keep this note when rolling forward the file** is selected. This information will only be available for notes created or modified with the current version of *Taxprep* or a future version.

Updating the different viewers integrated with Taxprep for tax research

IntelliConnect is Wolters Kluwer's new generation research platform. Because this platform replaces the *CCH Online* platform, we have ended the integration of *CCH Online* with *Taxprep Forms*.

Enhancement of the performance for operations on client files requiring opening or saving

In Windows Server 2012 Terminal Services environments where the *Fair Share* policy is enabled, the performances of the program during operations requiring the opening or the saving of one or more client files (e.g. a batch recalculation from the **Client Manager**) has been enhanced significantly.

Taxprep e-Bulletin

For your convenience, you are automatically subscribed to **Taxprep e-Bulletin**, a free e-mail service that ensures you receive up-to-date information about the latest version of *Taxprep Forms*. If you wish to review your subscription to **Taxprep e-Bulletin**, visit www.taxprep.com and click **My e-Bulletin** in the "e-Bulletin" section. You can also send an e-mail to cservice@wolterskluwer.com to indicate the products for which you wish to receive general information or information on our CCH software (*Personal Taxprep*, *Corporate Taxprep*, *Taxprep for Trusts*, *Taxprep Forms* or *CCH Accountants' Suite*).

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