

Cantax[®] FormMaster

Release Notes

Version 2015 v.6.0

September 2016

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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 375 tax forms and slips, while the Regular version contains more than 175.

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. You can consult this list on the *Cantax* FormMaster Professional Centre, under the "Documentation" section, or on the *Cantax* 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.

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.

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 (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.

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

Forms and Slips Coverage

The slips, RL slips and summaries included in *Cantax FormMaster 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 the government authorities.

Individual forms can be used until they are updated by the CRA or RQ. Note that 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 with the .T15 extension

Files with the .T15 extension that have been saved with *Cantax FormMaster 2014* can be opened with *Cantax FormMaster 2015* without having been previously carried forward. 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).

Files with an extension other than .T15

Files with a .T12, .T13 or .T14 extension that have been saved with a 2012, 2013 or 2014 version of *Cantax FormMaster* can also be opened with *Cantax FormMaster 2015* without having been previously carried forward. 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 file has been saved. Then, enter "*" in the "File name:" box and press Enter to display the list of files.

You can then select and open the file you want to access. 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).

Carrying forward files

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

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

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

Finally, *Cantax FormMaster 2015* allows you to carry forward files saved with the *AvanTax eForms* application that have a .T14N extension.

Attached Notes

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

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

Slips	Version	
	Regular	Gold
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
RL-31	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 format is accepted.

Taxation years covered

Revenu Québec only accepts electronic transmission related to the 2015 and 2016 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 11, 2016, while *Revenu Québec* has been accepting them since November 2, 2015.

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 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 *Cantax* FormMaster 2015.

Form	Version		What's new?
	FM	FM Gold	
FEDERAL			
T3 RET	X	X	Diagnostics added with respect to graduated rate estates.
T3ON	X	X	Correction to the tax calculation for the 2016 taxation year for trusts other than GREs (code 903) and QDTs (code 900).
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?
	FM	FM 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.
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>Cantax</i> FormMaster.

Form	Version		What's new?
	FM	FM Gold	
NR302	X	X	Form added to <i>Cantax</i> FormMaster.
NR303	X	X	Form added to <i>Cantax</i> FormMaster.
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>Cantax</i> FormMaster.

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 Forms Updates

In 2016, *Cantax* FormMaster 2015 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.

Please note that program versions are now numbered from 1.0 to 6.0. However, release dates remain approximately the same.

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

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

- You can access the downloadable products directly from the *Cantax FormMaster 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 (Tools/Options and Settings command).
- You can access the *Cantax* FormMaster downloads page on the *Cantax* Web site at www.cantax.com.

Please note that you are no longer required to install one of the previous versions of *Cantax* FormMaster 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 *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

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 *Cantax*.

Transmitting T3M and T3P returns

Cantax FormMaster 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 toolbar menu.

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, you can now display, for each note, the name of the author as well as the date on which the note has been added. This information is also included in the attached notes hover message and will be kept during carry 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 *Cantax* FormMaster or a future version.

Updating the different viewers integrated with *Cantax* FormMaster 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 *Cantax* FormMaster.

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."

How to Reach Us

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