Personal Taxprep

Frequently Asked Questions

2016 Versions

Client filter and customized diagnostic templates offered with the Frequently Asked Questions

To assist you in identifying clients that could be affected by the described subjects, a downloadable client filter and customized diagnostic template is associated with certain questions. These templates allow you to display a diagnostic in the returns that have tax situations that were the subject of an FAQ and provide access to a list of clients affected by the problems described.

Installing the client filter and diagnostic template

To find the predefined folder for customized client filters or diagnostics, proceed as follows:

1. Launch *Taxprep*.
2. On the **Tools** menu, click **Options and Settings**.
3. Under **Options**, click **File Locations**.
4. Verify the predefined location for the filters and diagnostics. After the installation, the default location is usually the following: **My Documents\CCH\T1 Taxprep 2016\Filter and Diagnostics**.
5. Copy the downloaded file to this location.
   The client filter will be available in the Client Manager, while the diagnostic will display in the relevant returns.

Note: The table below lists all of the client filter and diagnostic templates, which allows you to download them separately, depending on the troubleshooting memos and FAQs that relate to you. To download all templates in a single operation, click the **Download all templates** button, then copy all zipped files into the folder **My Documents\CCH\T1 Taxprep 2016\Filter and Diagnostics**.

Download all templates

Publication	Subject/Question	Affected Version	Identifier (to download the client filter and diagnostic template, if applicable)
April 2017 (modified version)	Windows 10 Creators Update Installation	Versions 2016	FT12016-003
April 2017	T1163/T1273 – Mandatory Participant Identification Number (PIN) required to EFILE	Versions 2016 and later	FT12016-002
February 2017	EFILE error codes presented without any description	All 2013 versions	FT12016-001
March 2016	TaxprepConnect download – Associating slips downloaded from the CRA and RQ	Versions 2015 and later	FT12015-002
July 2015	Watermark when printing Form T1013	Versions 2014 2.0 and later	FT12014-009
February 2015	Help with EFILE error codes	Versions 2.0 and later	FT12014-003
February 2015	InfoConnect functionality	Versions 2014	FT12014-002
February 2012	The CRA Represent a Client service	Version 2014 1.0	FT12014-001

Federal

Question FT12016-002

T1163/T1273 - Mandatory Participant Identification Number (PIN) required to EFILE

QUESTION

When completing Form T1163 or T1273 (AgriStabilty or AgriInvest), why am I required to enter a PIN in order to EFILE?

ANSWER

CRA now requires that a valid PIN be entered in the Participant Identification section of Form T1163 or T1273 in order to EFILE the return. Unlike in previous years, you can no longer leave this field blank or input 00000000. Doing so now results in a rejection of the return with error code Y80008.

CRA's Error Y80008:

> *Under the Participant Identification section on Form T1163 or T1273, the Participant Identification Number (PIN) entered is invalid or the field is blank. You must enter a valid PIN to file the form electronically.*
>
> *You can find the PIN on the AgriStability or AgriInvest statements.*
>
> *If this is the first year your client is applying for AgriInvest, please call the AgriInvest Administration at 1-866-367-8506 (8 a.m. to 5 p.m., Central standard time, Monday to Friday) or visit agr.gc.ca/agriinvest to find out how to get a PIN.*

Note that all CRA's EFILE errors are listed in Chapter 2 of the Electronic Filers Manual (RC4018) which can be found on CRA's website.

Question FT12016-001

EFILE error codes presented without any description

QUESTION

When filing 2013 tax returns with *Personal Taxprep* 2013, why are certain EFILE error codes presented without description?

ANSWER

The Canada Revenue Agency (CRA) has added this year new error codes that also apply to prior years. Because the description of these error codes had not been integrated in *Personal Taxprep* 2013 (these codes did not yet exist at the time of developing this version), this description does not display.

Below you will find the list of descriptions corresponding to the new errors codes that you could receive without description when filing 2013 returns with *Personal Taxprep* 2013.

334 There is a calculated difference in the entry at 6680, 6708, 6687, 6709, 6691, 6696 6701, or 6703 on Form T2017.

343 British Columbia employee investment tax credits claimed and filing date is more than three years after the end of the taxation year. The claim is statute-barred.

481 Alberta royalty rebate claimed and filing date is more than three years after the end of the taxation year. The claim is statute-barred.

2035 NT risk capital investment credit claimed and filing date is more than three years after the end of the taxation year. The claim is statute-barred.

2123 EI overpayment on a statute-barred refund return.

2184 British Columbia tax credit claimed and filing date is more than three years after the end of the taxation year. The claim is statute-barred.

2199 Manitoba tax credit claimed and filing date is more than three years after the end of the taxation year. The claim is statute-barred.

2222 Yukon small business investment tax credit claimed and filing date is more than three years after the end of the taxation year. The claim is statute-barred.

2323 A non-capital loss was created in the year and there is a claim at field 122, 126, 221, 224, and/or 232, but there are no related entries at field 6782, 6783, 6784, and/or 6786 on Form T691, *Alternative Minimum Tax*.

46703 On Form T2017 a claim was made at either field 6703 or 6704. The claims at these fields are for reserves of capital property disposed **before** November 13, 1981. If the amount is correct, please submit a paper return. The Canada Revenue Agency regrets the inconvenience.

Question FT12014-009

Watermark when printing Form T1013

QUESTION

Why does a “Retain for your records. Do not forward to CRA.” watermark display on my T1013 forms when I print them?

ANSWER

Commencing this year, the Canada Revenue Agency (CRA) requires all software developers supporting the electronic transmission of Form T1013 to include a watermark on this form when it is printed after it is filed electronically. Therefore, this watermark will be affixed to and print on any Form T1013 with an electronic filing status of “Accepted” or “Accepted with conditions.”

This change has been implemented in version 2.0 of *Personal Taxprep* 2014 and has been mentioned in the *Release Notes* that you can consult at the following address:

http://tc.cch.ca/cchservices/download/files/documents/TXP/RNTXPT1201420EN.pdf.

> **Printing of accepted T1013 forms**
>
> As required by the CRA, a watermark will now print on each page of the T1013 form when a hard copy or a PDF copy is printed after having been successfully transmitted and given the "Accepted" or "Accepted with conditions" value for the EFILE T1013 status.

In addition, at the beginning of April, the CRA published the Web page "Information for tax preparers about Form T1013, Authorizing or Cancelling a Representative," on which the same information concerning the watermark can be found.

> **Watermark on Form T1013 sent electronically**
>
> You will now see a watermark on Form T1013 when you print it after you have sent it electronically. The purpose of the watermark is to remind you that you should not send a paper copy of the form because the CRA has received it electronically. If you send the CRA a form with a watermark, it will not process it.

Question FT12014-003

Help with EFILE error codes

Download the client filter and diagnostic template

QUESTION

When EFILE error codes are issued, should I contact the *Taxprep* support team or the CRA EFILE Helpdesk?

ANSWER

In some cases, the *Taxprep* support team will be able to help you correct rejected returns for which EFILE error codes have been issued. However, our support team will not be able to help you with errors relating to information or balances that are available only in CRA records.

Therefore, we recommend that you first contact the CRA EFILE Helpdesk when the following EFILE error codes are issued: 40, 43, 57, 72, 307, 2197, 2250, 2252, and 70127. You can also review your transmission results either in the **EFILE Transmission Results** dialog box under the **Transmission\EFILE** menu or on Form EFILE INFO, *EFILE Information* (Jump Code: **EFILE INFO**).

The CRA EFILE Helpdesk Support contact information and hours of operation are available here: http://www.efile.cra.gc.ca/l-tchsp-eng.html.

Note that you may be able to resolve some of these problems by reviewing your client information available through the *Represent a Client* and *Tax Data Delivery* services.

Question FT12014-001

The CRA Represent a Client service

QUESTION

What are the steps to start using the CRA *Represent a Client* service?

ANSWER

An increasing number of firms use the CRA *Represent a Client* service as part of the T1 tax return preparation process. This secure service provides online access to tax information on behalf of individuals that you represent.

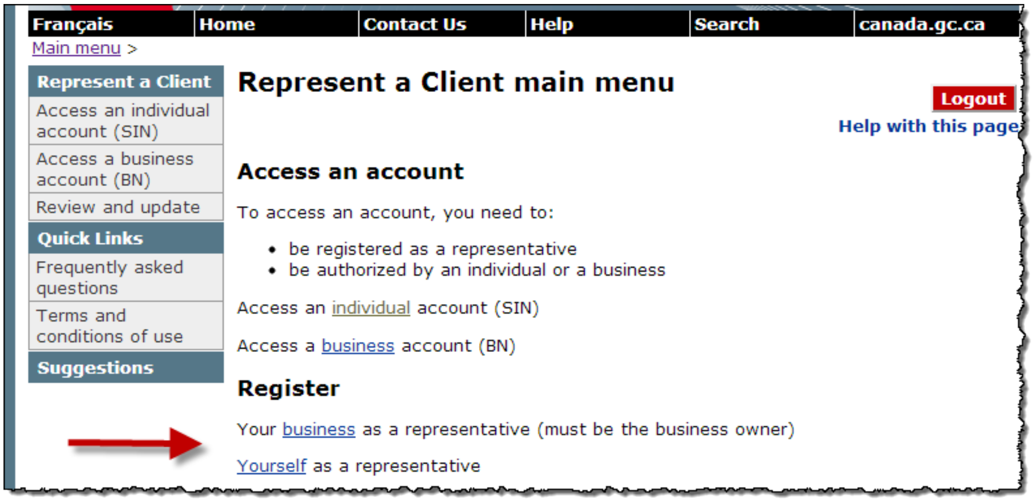
Detailed information is available, including the following:

Tax information slips	T4, T4A, T4A(P), T4A(OAS), T4E
Returns	Detailed assessment for all available tax years
Carryover amounts	Capital gains and losses, capital gains deduction, losses other than capital losses, tuition fees, education and textbook amounts
Accounts and payments	Instalments, account balance and statement of accounts
Benefits and credits	GST/HST credit, disability tax credit, Canada Child Tax Benefit, Universal Child Care Benefit, Working Income Tax Benefit
RRSPs and savings plans	RRSP deduction limit, unused RRSP contributions, Home Buyers' Plan, Lifelong Learning Plan, tax-free savings account (TFSA)
Notice of assessment	Latest notice of changes and summary of assessment or re-assessment.

The steps to start using this service are as follows:

1. On the CRA Web site, click **Register** to create your own CRA user ID and password for using the *Represent a Client* service.
   - To validate your identity, you will need to enter your access code from your notice of assessment as well as your postal code.
   - The next step is to create your security questions and answers.
   - You will be able to log on to the CRA *Represent a Client* service immediately after this process is complete.

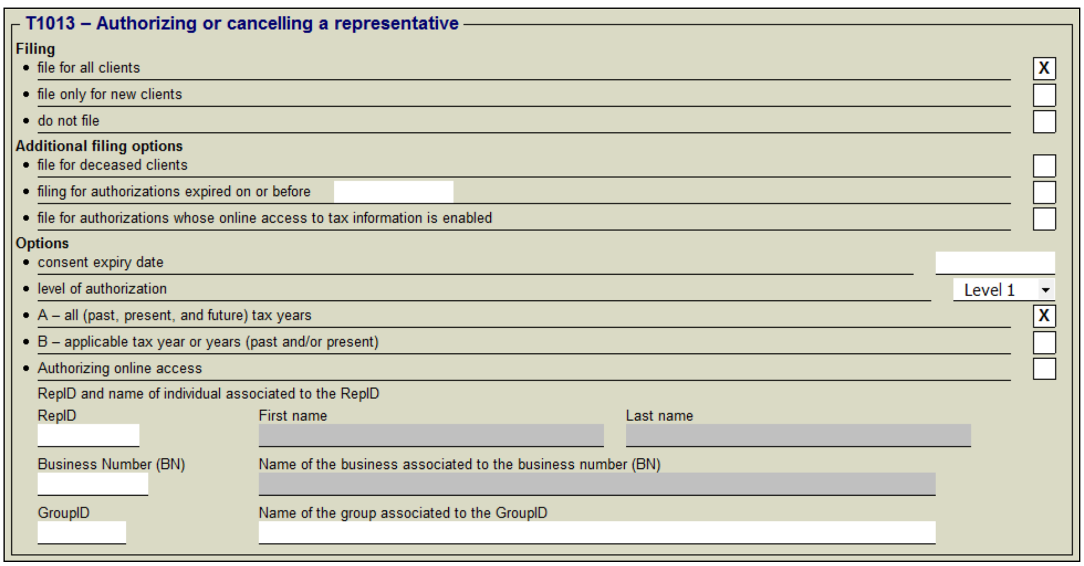
2. On the CRA Web site, log on to the *Represent a Client* service, using your CRA user ID and password, then register your firm (using your business number), or yourself, to receive a GroupID or a RepID.



Note: If you want any of your employees to also have online access to client information, those employees will also need to obtain a RepID from the CRA as explained in step 1.

3. Obtain authorization from your clients

- In *Personal Taxprep*, complete the **AUTHORIZATION FORMS** tab of the chosen preparer profiles by selecting the **Authorizing online access** check box and entering your Business Number, GroupID or RepID. Then, verify that Form T1013 is applicable for printing and eligible for electronic filing.



- To obtain online access to your clients' data before preparing their tax return, you can print and have them sign Form T1013 when they bring their source documents to your office. If you want to print Form T1013 for several clients at a time, you can create a print format used solely to print this form. You can then select, from the Client Manager, the files or clients for which you want to print Form T1013, and use the previously created print format.

- Use the **Transmission/T1013** command in *Personal Taxprep* to transmit Form T1013 once it has been signed. This can also be done for several clients at the same time using the Client Manager.

Additional info

- The best practice for a firm to request authorization via Form T1013 is to do it based on the Business Number(or GroupID), instead of an individual RepID. This prevents having to get a new authorization should the employee using the RepID leave your firm. This also allows your firm to easily create groups of employees so you can better control who has access to your client information.

- The CRA recently announced that starting in February, the approval process for Form T1013 will be immediate when using this electronic transmission process.
- Furthermore, the CRA announced that after this tax season, it will be possible to submit post-assessment requested support documents (such as medical or donation receipts) via the *Represent a Client* service.

For more details on using this service, go to:

http://www.cra-arc.gc.ca/esrvc-srvce/tx/rprsnttvs/hwts-eng.html

Windows 10 Creators Update

Question FT12016-003

Windows 10 Creators Update Installation

QUESTION

The major Windows 10 update, Creators Update, has been available since April 11, 2017. Should I install it?

ANSWER (modified) – April 27, 2017

After having installed the Windows 10 Creators Update, several clients have reported experiencing random crashes with error code 0xC0000005 when using *Personal Taxprep*.

Microsoft has released a new cumulative update, i.e. update **KB4016240**, which fixes these crashes. Therefore, if you have installed the Windows 10 Creators Update, we recommend that you install this cumulative update as well.

ANSWER – April 20, 2017

After having installed the Windows 10 Creators Update, several clients have reported experiencing random crashes with error code 0xC0000005 when using *Personal Taxprep*.

Therefore, until further notice, we recommend that you do not install this update. We are currently working on a solution to correct this issue.

InfoConnect

Question FT12014-002

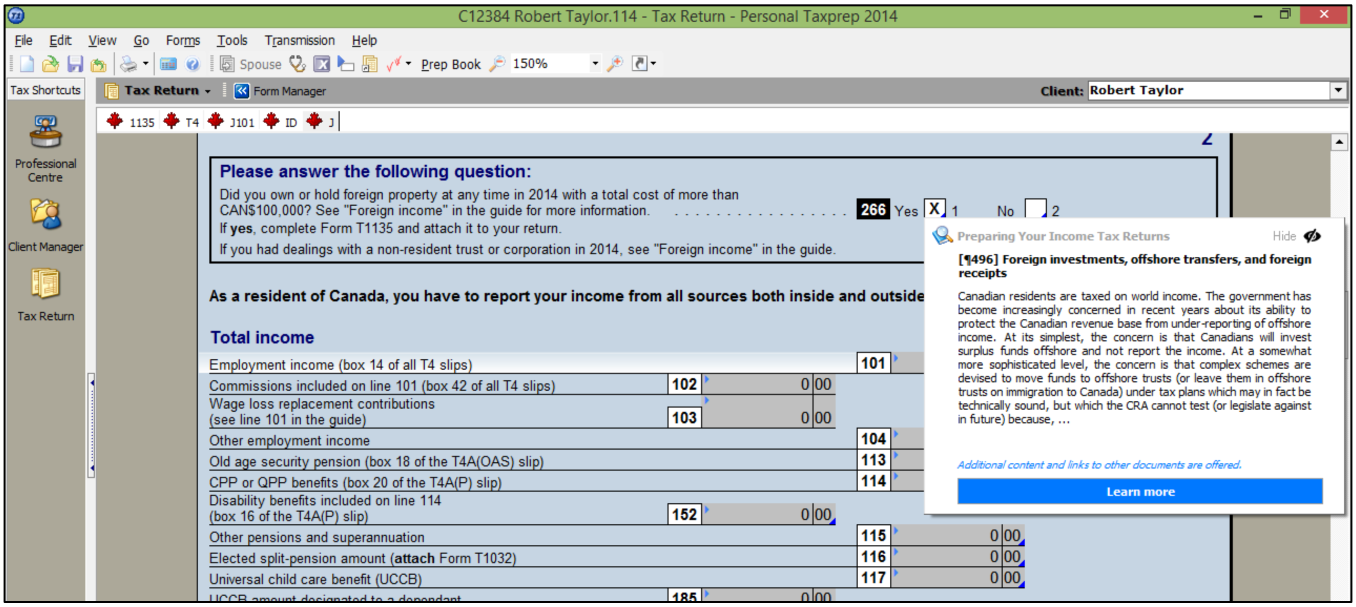
InfoConnect functionality

QUESTION

What is **InfoConnect?**

ANSWER

InfoConnect is a functionality that displays, for the current field or form in *Taxprep,* an excerpt of the *Income Tax Act* or Wolters Kluwer's tax research material, such as *Preparing Your Income Tax Returns*, available from the *IntelliConnect* platform:



Click the **InfoConnect** insight to instantly access your subscriptions in *IntelliConnect* using your Web browser.

Free 15-day trial of IntelliConnect

If you are not already a subscriber, complete the sign-up form that displays after clicking the **InfoConnect** insight. You will then receive a confirmation e-mail with an activation link that will allow you to benefit from a free trial of *IntelliConnect*.

See the video (1:02)

Already an IntelliConnect subscriber?

To access your *IntelliConnect* subscriptions from the **InfoConnect** insight, proceed as follows:

1. In *Taxprep*, select **Tools/Options and Settings/Options/Tax Research**.
2. Clear the **Free trial** check box.
3. Enter your *IntelliConnect* User ID and Password.

See the video (0:38)

TaxprepConnect

Question FT12015-002

TaxprepConnect Download – Associating slips downloaded from the CRA and RQ

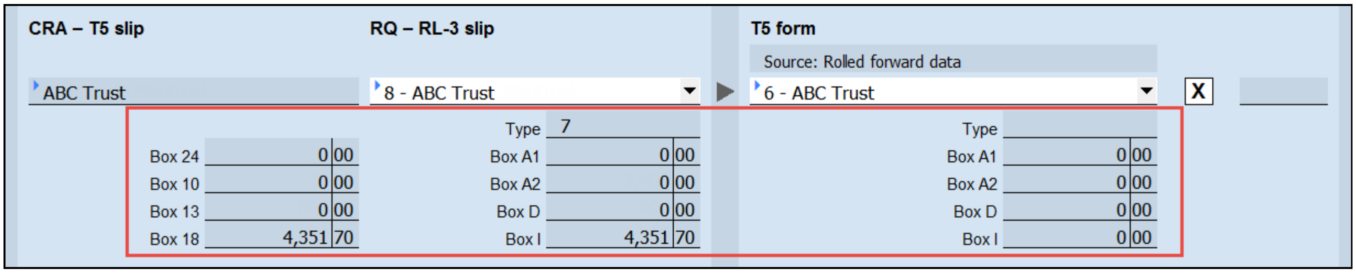
QUESTION

How do I make sure that no duplicate data from slips is transferred into the return following the download of tax data with the **TaxprepConnect** functionality?

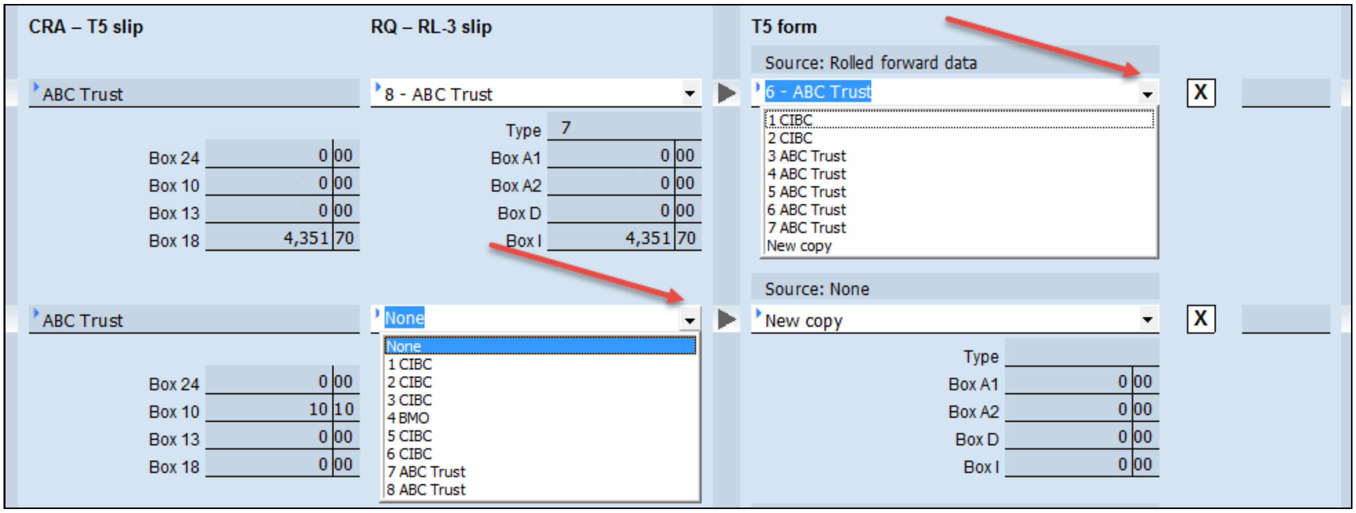
ANSWER

Personal Taxprep pre-associates slips downloaded from the Canada Revenue Agency (CRA) and those downloaded from *Revenu Québec* (RQ), as well as data on those slips and data already in the return, as applicable (following a roll forward, a data import with *CCH Scan*, etc.). However, it is strongly recommended to verify the matches before transferring data, because the program is not always able to make all of the required associations.

The values in certain predefined boxes of the slip are displayed under the issuer's name to help you make this verification. In addition, you can always access the complete content of the downloaded slip using the expand in the field of the issuer's name.



To modify the association suggested by the program or to create a new one, select the slip or the desired copy in the drop-down list provided, as depicted below:



Note that if you download a second time, all manually created associations will be lost, because each download includes all available slips, and not only the new slips.