

Taxprep Forms

Release Notes

Taxprep Forms 2016 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.

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 - Retiring Partner

The T5013/RL-15 data entry screen has been enhanced and now has a new section entitled “Retiring partner.” This section allows you to indicate that a partner retired from the partnership and identify the type of interest held by that partner at the time of retirement. Furthermore, fields have been added to the “Adjusted cost base (ACB)” section to allow you to calculate the gain or loss resulting from the partner’s retirement.

T5 slip and RL-3 slip - Customizable lists

The *List of T5 Slips* (Jump Code: **T5LIST**) as well as the *List of RL-3 Slips* (Jump Code: **RL3LIST**) can now be customized. Therefore, you can choose the boxes to display in each of these lists.

List of RL-1 Slips

A list of the RL-1 slips related to the T4 slip has been added to *Taxprep Forms*. Its jump code is **RL1T4LIST**. This list is customizable so you can select the fields to display.

ID Form and Preparer Profile - User-Defined Cells

The “User-defined cells for reporting purposes” section has been modified. “Instruction” fields have been added to this section above each “Description” field.

In addition, Section E has been added in the **Profile** tab of the preparer profiles to allow you to indicate instructions, descriptions, amounts or dates to transfer to the “User-defined cells for reporting purposes” section of Form *Client Identification and Other Information* (Jump Code: **ID**) for all your client files. In order for the information contained in a field of Section E to be transferred, select the check box corresponding to this field. Note that you can select the check boxes for all fields by selecting the box **Select this check box to choose all fields in this section**.

Attached Notes Summary (Jump Code: ATTN)

An option has been added so that attached notes can be deleted using this form. You can either delete all of the attached notes or individually select the notes to be deleted.

Attached Schedule with Total (Jump Code: ATTS)

Form *Attached Schedule with Total* has been modified to allow you to do mathematical operations. In this form you can now select operators from a drop-down list. Note that the calculations are done one at a time, from the first to the last line, and not according to the priority rules of the operations (for example, the formula $1+2*3$ will not result in the same thing as the formula $1+3*2$).

Reminder: Creating a Taxprep Forms file with another Taxprep product

The *Personal Taxprep*, *Corporate Taxprep*, or *Taxprep for Trusts* 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 already available in prior version, saves 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* 2016 normally apply to the 2016 taxation year. You can nonetheless use them if you

need to file a slip for the 2017 taxation year **before** the 2017 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 .T16 extension

Client files with the .T16 extension that have been saved with *Taxprep Forms* 2015 can be opened with *Taxprep Forms* 2016 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 .T16

Client files with a .T13, .T14 or .T15 extension that have been saved with a 2013, 2014 or 2015 version of *Taxprep Forms* can also be opened with *Taxprep Forms* 2016 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 2016 allows you to roll forward client files that were saved with the 2015 version of *Taxprep Forms* or *Cantax FormMaster*, which have the .T15 extension, as well as client files saved with *Taxprep Forms* 2016 or *Cantax FormMaster* 2016 that have the .T16 and .T17 extension.

Taxprep Forms 2016 also allows you to roll forward client files that were saved with a 2013 or 2014 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 2016* allows you to roll forward the files saved with the AvanTax eForms application that have a .T15N extension and the files saved with Intuit’s ProFile FX application that have a .15X extension.

Note: In a rolled-forward file, the taxation year cannot end after December 31, 2017.

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
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

Slip	Version		
	Bronze	Silver	Gold
RL-16		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

Specialized Returns

The returns listed below can also be filed electronically.

Return	Version	
	Silver	Gold
T3D		X
T3GR	X	X
T3M		X
T3P	X	X
T3RI		X
T3S		X
T1061		X
T2000		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, paper filing is accepted.

Taxation years covered

Revenu Québec only accepts electronic transmissions of the RL slips for the 2016 and 2017 taxation years. The CRA does not impose restrictions with regard to the taxation year that can be processed.

Important dates for Internet transmission

Taxprep Forms 2016 complies with the latest Internet transmission requirements issued by government agencies. Files generated with *Taxprep Forms 2016* can therefore be electronically transmitted:

- To the CRA, until mid-December 2017 (approximate time at which the CRA will close its Internet transmission service for update purposes);

- To *Revenu Québec*, until early November 2017 (approximate time at which *Revenu Québec*'s Internet transmission service will be updated).

CRA's Web Access Code

If you already have a Web access code, you can use it to file your information returns for 2016 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* 2016.

Form	Version			What's new?
	Bronze	Silver	Gold	
FEDERAL				
CPT30		X	X	Form updated
CTB9			X	Form updated
GST29			X	Form updated
NR5			X	Form updated
PD24			X	Form updated
RC4607			X	Form updated
RC473		X	X	Form updated
RC59		X	X	Form updated
RC64			X	Form updated
RC66			X	Form updated
RC66 SCH			X	Form updated
TD1SK			X	Form updated
TD1SK-WS			X	Form updated
TD1-IN			X	Form updated
TD4		X	X	Form updated
T137		X	X	Form updated
T184			X	Form deleted
T1079			X	Form updated
T2055			X	Form updated

Form	Version			What's new?
	Bronze	Silver	Gold	
T2057		X	X	Form updated
T2059		X	X	Form updated
T2205		X	X	Form updated
T626		X	X	Form deleted
T657			X	Form deleted
T661			X	Form updated
T746		X	X	Form updated
T778			X	Form deleted
QUÉBEC				
CO-1029.8.36.CI			X	Form updated
CO-786			X	Form updated
FP-2287			X	Form updated
LE-34.1.12	X	X	X	Form updated
TP-1179.S		X	X	Form updated
TP-726.7.S		X	X	Form deleted

Comments and Precisions

T2055 - Election in Respect of a Capital Gains Dividend Under Subsection 131(1) (Jump Code: T2055)

In the "Late-filing penalty" section, fields to enter the due date and the filing deadline have been added in order for amount N to be calculated automatically. This amount is used to determine the number of months between the filing deadline and the date on which the election is made, for purposes of calculating the penalty payable.

RC4607 - GST/HST Pension Entity Rebate Application and Election (Jump Code: RC4607)

In Part B of the form, additional information is now requested to better identify the pension entity and to indicate the name of the master pension entity if the pension entity was a designated or a specified entity.

In addition, Schedule B has been added to the form. This schedule will have to be completed in the case of a designated pension entity of a pension plan, to calculate the amount of tax deemed to have been paid

by the pension entity. This result will be used to calculate the pension rebate amount in Part C.

Diagnostics have been added to prevent the PRPP contribution percentage calculated on line 3 of Schedule A or the master pension factor calculated on line 6 of Schedule B from being greater than 100%.

If you had completed this form in a prior version of the program, verify that the data entered is still correct.

TP-1179.S - Partnership Income from Logging Operations (Jump Code: TP1179S)

To take into account the addition of a check box allowing you to specify the unit of measure used in column B of Section 3.3 of the form, a new diagnostic now displays in the situation where amounts were entered in both columns of this section. The quantities indicated for a given logging product must be expressed using a single unit of measure.

Reminder: Version 5.0 Content

Updates, Modifications and Additions

For more information on the content of version 5.0, consult our [Web site](#).

Reminder: Version 4.0 Content

Updates, Modifications and Additions

For more information on the content of version 4.0, consult our [Web site](#).

Reminder: Version 3.0 Content

Updates, Modifications and Additions

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

Reminder: Version 2.0 Content

Forms

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

Reminder: Version 1.1 Content

Forms

For more details with respect to the content of version 1.1, consult our [Web site](#).

Reminder: Version 1.0 Content

Forms

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

Future Updates

During 2017, *Taxprep Forms 2016* 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.

Version	Release	Download	CD-ROM
Version 1.0	December 2016	Bronze Silver Gold	Bronze Silver Gold
Version 2.0	February 2017	Bronze Silver Gold	
Version 3.0	March 2017	Bronze Silver Gold	Silver Gold
Version 4.0	May 2017	Bronze Silver Gold	
Version 5.0	June 2017	Bronze Silver Gold	Gold
Version 6.0	September 2017	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 not required to install one of the previous versions of *Taxprep Forms 2016* 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

Customizing the syntax of the PDF filenames

You can customize the syntax of the PDF filenames for returns and forms to avoid having to rename them when you create a PDF file. To do so, access the **PDF Files** pane in the “Print” section of the options and settings. In the “Syntax of the PDF filenames” section, click in the **Syntax** column, on the line relating to the type of document (based on print formats or forms and slips) for which you want to customize the syntax of the PDF filenames. Then click , and select the items that you want to display in the PDF filenames.

Note that you can edit the name of the “Customized” items by clicking **Edit custom items**, and enter the desired text.

Finally, you can now automatically replace the spaces with underscores in the name of the PDF files. To do so, select the check box **Replace spaces with underscores**.

Taxprep Registration

Certain fields in the box **Taxprep Registration** have been modified. In addition, during the registration process, the user is now prompted to provide his or her e-mail address and indicate if a partner in the firm has a valid CPA title.

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. In the **Support** menu, select **Taxprep e-Bulletin**. Click **My e-Bulletin** in the “Taxprep 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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