

Cantax FormMaster

Release Notes

Version 2016 v.6.0

September 2017

Contents

Version Presentation.....	1
Installation.....	1
Carrying Forward Preparer Profiles	1
Improve Your Productivity	1
Forms and Slips Coverage	2
Opening Files and Carrying Files Forward.....	2
Electronic Filing	3
Version 6.0 Content	4
Reminder: Version 5.0 Content	4
Reminder: Version 4.0 Content	5
Reminder: Version 3.0 Content	5
Reminder: Version 2.0 Content	5
Reminder: Version 1.1 Content	5
Reminder: Version 1.0 Content	5
Future Forms Updates	5
Technical Information	5
Program Enhancements	5
Information by E-mail.....	6
How to Reach Us.....	6

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 - 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* (T5LIST) as well as the *List of RL-3 Slips* (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 *Cantax FormMaster*. 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 to the preparer profile 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 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 $1+3*2$).

Forms and Slips Coverage

The slips, RL slips and summaries included in *Cantax FormMaster 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 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 .T16 extension

Files with the .T16 extension that have been saved with *Cantax FormMaster 2015* can be opened with *Cantax FormMaster 2016* 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 .T16

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

Cantax FormMaster 2016 also allows you to carry forward files that were saved with a 2013 or 2014 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 2016* allows you to carry forward 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 carried-forward file, the taxation year cannot end after December 31, 2017.

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
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

Specialized Returns

The returns listed below can also be filed electronically.

Return	Version	
	Regular	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 transmission related to 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

Cantax FormMaster 2016 complies with the latest Internet transmission requirements issued by government agencies. Files generated with Cantax FormMaster 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).

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 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 *Cantax FormMaster 2016*.

Form	Version		What's new?
	FM	FM 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
TD1-IN		X	Form updated
TD1SK		X	Form updated
TD1SK-WS		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
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

Form	Version		What's new?
	FM	FM Gold	
T746	X	X	Form updated
T778		X	Form deleted
QUÉBEC			
LE-34.1.12	X	X	Form updated

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.

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 Forms Updates

In 2017, *Cantax FormMaster 2016* 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 2016	Gold Regular	Gold Regular
Version 2.0	February 2017	Gold Regular	
Version 3.0	March 2017	Gold Regular	Gold Regular

Version	Release	Download	CD-ROM
Version 4.0	May 2017	Gold Regular	
Version 5.0	June 2017	Gold Regular	Gold
Version 6.0	September 2017	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 not required to install one of the previous versions of *Cantax FormMaster 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 *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

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**.

Cantax Registration

Certain fields in the box **Cantax 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.

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 www.cantax.com. In the **Support** menu, click **Subscribe Now!** under “Cantax Direct.”

How to Reach Us

E-mail

Customer Service:

cservice@wolterskluwer.com

Tax and Technical support:

csupport@wolterskluwer.com

Telephone

1-800-268-4522

Web Site

www.cantax.com