

# Taxprep Forms

## Troubleshooting

### 2018 Versions

#### Client filter and customized diagnostic templates offered with the Troubleshooting Memos

To assist you in identifying clients that could be affected by the described problems, a downloadable client filter and customized diagnostic template is associated with most *Troubleshooting Memos*. These templates allow you to display a diagnostic in the returns that have tax situations that were the subject of a *Troubleshooting Memo* 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\ Taxprep Forms 2018\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 templates and diagnostics, 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\ Taxprep Forms 2018\Filter and Diagnostics\**.

[Download all templates](#)

| Publication                                                                  | Problem                                                                                                  | Affected Version | Corrected Version | Identifier<br>(to download the client filter and diagnostic template, if applicable) |
|------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|------------------|-------------------|--------------------------------------------------------------------------------------|
| <b>Solution updated on February 4, 2019</b><br><br>Week of December 16, 2018 | <a href="#">Transmission to Revenu Québec - The "Provenance" tag is missing when creating XML files.</a> | Version 2018 1.0 | Version 2018 2.0  | TF2018-001                                                                           |

## Electronic transmission

Note that the solution to the following problem was modified on February 4, 2019.

(Note published on December 20, 2018)

### Troubleshooting memo TF2018-001

#### Transmission to Revenu Québec - The “Provenance” tag is missing when creating XML files.

##### Problem:

When the user electronically transmits to *Revenu Québec*, the XML file is incomplete. The following information for the source of RL slips is missing from the XML file:

- The “Provenance” tag

No warning displays in *Taxprep* or on the *Revenu Québec* portal to inform you that the XML file is incomplete. The file is uploaded normally and the incomplete XML file is sent to *Revenu Québec*. After having validated data in the XML file, *Revenu Québec* contacts you to ask you to retransmit the XML files. Note that the problem occurs with all transmissions for Québec.

##### Solution:

To solve the problem, proceed as follows:

1. In the **Tools** menu, select **Options and Settings**.
2. Under **Electronic Services**, click **Identification**.
3. Click the **Québec** button.
4. Modify the value in the **Source of RL slips** drop-down list.
5. Click the **Apply** button.
6. Select the desired value from the drop-down list.
7. Click the **Apply** button.
8. Click **OK** in the **Options and Settings** dialog box.

The screenshot shows the 'Options and Settings' dialog box with the 'Identification' tab selected. The 'Jurisdiction' section has 'Québec' selected. A yellow warning box states: 'Enter additional information required by Revenu Québec for transmission.' The 'Source of RL slips' dropdown is set to 'OBTAINED FROM REVENU QUÉB'. The 'OK' button is highlighted with a red rectangle.

| Identification                   |                                                                                                                                                                                                                                                                                                                                                                                              |  |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| General                          |                                                                                                                                                                                                                                                                                                                                                                                              |  |
| Transmitter:                     | <input type="text"/>                                                                                                                                                                                                                                                                                                                                                                         |  |
| Resource person (technical):     | <input type="text"/>                                                                                                                                                                                                                                                                                                                                                                         |  |
| Resource person (accounting):    | <input type="text"/>                                                                                                                                                                                                                                                                                                                                                                         |  |
| Jurisdiction                     |                                                                                                                                                                                                                                                                                                                                                                                              |  |
| Federal                          | <div>Enter additional information required by Revenu Québec for transmission.</div> <div>Transmitter number: <input type="text" value="NP"/></div> <div>NEQ: <input type="text"/></div> <div>Identification number: <input type="text"/></div> <div>File number: <input type="text" value="RS"/></div> <div>Source of RL slips: <input type="text" value="OBTAINED FROM REVENU QUÉB"/></div> |  |
| Québec                           |                                                                                                                                                                                                                                                                                                                                                                                              |  |
|                                  |                                                                                                                                                                                                                                                                                                                                                                                              |  |
|                                  |                                                                                                                                                                                                                                                                                                                                                                                              |  |
|                                  |                                                                                                                                                                                                                                                                                                                                                                                              |  |
| Buttons: OK, Cancel, Apply, Help |                                                                                                                                                                                                                                                                                                                                                                                              |  |

These steps allow the program to correctly use the information relating to the source of RL slips and include it in the XML file to transmit.

**Additional notes:**

If you have already transmitted XML files, you can contact *Revenu Québec* to confirm that your XML file is complete. Otherwise, ask *Revenu Québec* to cancel the transmission. Then recreate and retransmit your XML files. The confirmation number for the initial transmission will be required when you call *Revenu Québec*.

The problem will be corrected in *Taxprep Forms 2018 v.2.0*.