

# Personal Taxprep

## Frequently Asked Questions

### 2017 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 2017\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 2017\Filter and Diagnostics\**.

[Download all templates](#)

Publication	Subject/Question	Affected Version	Identifier (to download the client filter and diagnostic template, if applicable)
April 2018	<a href="#">Overview of the changes to eligible capital property</a>	Versions 2017	FT12017-003
March 2018	<a href="#">Filing of Forms T2091, Designation of a Property as a Principal Residence by an Individual (Other than a Personal Trust) (Jump Code: 2091), T1255, Designation of a Property as a Principal Residence by the Legal Representative of a Deceased Individual (Jump Code: 1255) and TP-274, Designation of a Property as a Principal Residence (Jump Code: Q274)</a>	Versions 2017	FT12017-002
March 2018	<a href="#">Canada caregiver amount - Parent or grand-parent</a>	Versions 2017	FT12017-001
March 2016	<a href="#">TaxprepConnect download - Associating slips downloaded from the CRA and RQ</a>	Versions 2015 and later	FT12015-002
July 2015	<a href="#">Watermark when printing Form T1013</a>	Versions 2014 2.0 and later	FT12014-009
February 2015	<a href="#">Help with EFILE error codes</a>	Versions 2.0 and later	<a href="#">FT12014-003</a>
February 2015	<a href="#">InfoConnect functionality</a>	Versions 2014	FT12014-002
Item updated in the week of March 11, 2018 February 2012	<a href="#">The CRA Represent a Client service</a>	Version 2014 1.0	FT12014-001

## Federal

### Question FT12017-003

(Published in April 2018)

#### Overview of the changes to eligible capital property

As a result of the tabling of the March 22, 2016 Federal Budget and Bill C-29, which was given Royal Assent on December 15, 2016, the rules relating to eligible capital property (ECP) set out in section 14 of the *Income Tax Act* (ITA) were repealed and effective January 1, 2017, eligible capital property will now be treated as depreciable property included in new class 14.1 in Schedule II of the *Income Tax Regulations*, and will be subject to the rules relating to recaptured depreciation in section 13 of the ITA.

Under the old system, eligible capital expenditures were added to the cumulative eligible capital (CEC) at a rate of 75% and depreciated at a rate of 7% using the declining balance method.

Under the new system, newly acquired ECPs will be added to class 14.1 at an inclusion rate of 100% and depreciated at a rate of 5% using the declining balance method.

#### QUESTIONS

1. *Why is class 14.1 created during roll forward?*
2. *If I had a CEC balance in 2016, what should I do once the tax return is rolled forward in Personal Taxprep 2017?*
3. *Where do I enter data relating to eligible capital property (ECP) transaction?*
4. *Why is the CCA claimed an amount of \$500 instead of the amount obtained by multiplying the pre-2017 CEC balance by 7%?*

#### ANSWERS

1. *Why is class 14.1 created during roll forward?*

To apply the new measures that relate to the above-described ECP depreciation, when there is a positive CEC balance in the CEC form for a business in a *Personal Taxprep 2016* client file, the program automatically creates a CCA class 14.1 and rolls forward the 2016 CEC closing balance as the opening UCC balance of class 14.1 for 2017.

The roll forward of the CEC balance from 2016 to 2017 will vary depending on whether or not the fiscal period of the business ended on December 31, 2016. For more information on the treatment of a non-calendar fiscal period, see question 2 below.

2. *If I had a CEC balance in 2016, what should I do once the tax return is rolled forward in Personal Taxprep 2017?*

A. **If the fiscal period of the business ended on December 31:** The CEC balance for the business will be rolled forward to the new class 14.1, which is created in Form CCA CLASS during roll forward of the client file. No balance will be rolled forward to the CEC form.

The CCA CLASS form for class 14.1 will display the “Information relating to class 14.1” section. The information required to correctly calculate all elements of this new class is as follows:

Line G and opening UCC of class 14.1

The CEC balance will be rolled forward to two places, i.e. line G, which indicates the closing 2016 CEC balance and line 1, *UCC (opening)*, because according to the transitional rules, the 2016 CEC closing balance becomes the opening UCC balance on January 1, 2017.

**T2125 Area A – CCA other than classes 10.1 and 13**

Name of business: t2125

- CCA

Class 14.1 Description  Terminal Loss?  Yes  No

Federal Québec

**Information relating to class 14.1**

**Class 14.1 undepreciated capital cost (UCC) on January 1, 2017**  
 Rules relating to eligible capital property stopped being in effect on January 1, 2017. They are replaced by rules relating to capital cost allowance. The cumulative eligible capital (CEC) is calculated and transferred to the new class 14.1 as of January 1, 2017. The beginning UCC of the new class equals the CEC balance on December 31, 2016.

CEC balance on January 1, 2017 (Amount from line F of Form T2125, Cumulative Eligible Capital of 2016)	G	3,903.08	3,903.08
Total CEC deductions applied in prior years that have not been recaptured	I	0.00	0.00
Deemed capital cost of the old cumulative eligible capital (line G plus line I multiplied by 4/3) Amount deemed allowed as a deduction against the capital cost of property in the class under paragraph 13(38)(c) ITA for taxation years ending before January 1, 2017	K	5,204.11	5,204.11
	L	1,301.03	1,301.03
UCC balance in class 14.1 on January 1, 2017 (K-L)	M	3,903.08	3,903.08
Rate applicable to the additional deduction		2.00 %	2.00 %

CCA Rate	5.00	5.00
UCC (opening)	3,903.08	3,903.08 1
ITC (prior year)	0.00	0.00 2
GST/PST rebate	0.00	0.00 3
Adjustments	+/- 0.00	0.00 4
Class 14.1 – UCC adjustments under subsection 13(39) ITA	+ 0.00	0.00
Additions (1/2 year)	+ 0.00	0.00 5

Line I:

Under the transitional rules, the **total deemed cost of the property** (the cost of eligible capital property included in the CEC balance on January 1, 2017) must be determined by **adding** the CEC balance on January 1, 2017, (**line G**) to the total CEC deductions applied in prior years (**line I**).

The amount on the line *Total CEC deductions applied in prior years that have not been recaptured* is not rolled forward because in the cumulative eligible property form of prior years, the *Personal Taxprep* program did not keep track of the account of CEC deduction claimed each year. It is recommended that you determine the total amount of the CEC deductions claimed prior to 2017 and enter it on line I in order to ensure that you have the correct information to calculate any recapture and capital gains in the event of a disposition of the property.

The following diagnostic will prompt you to enter an amount on this line:

*T2125 CCA - Class 14.1 has been created during the taxation year. Indicate the total CEC deductions from income that were claimed in preceding years in order to correctly calculate the deemed total capital cost of the property, the deemed CCA claimed and the UCC balance for this class on January 1, 2017.*

Example: An eligible capital property was acquired in 2008 for \$10,000 and from 2008 to 2016 the maximum CEC deduction of 7% was claimed each year, totalling \$3,596.92, leaving a CEC balance of \$3,903.08 at the end of the 2016 fiscal year.

CEC deductions claimed in prior years:

2008 = \$525.00

2009 = \$488.25

2010 = \$454.07

- 2011 = \$422.29
- 2012 = \$392.73
- 2013 = \$365.24
- 2014 = \$339.67
- 2015 = \$315.89
- 2016 = 293.78 \$
- Total = \$3,596.92**

This amount should be entered on line I of the *Additions and Dispositions Workchart* (Form CCA FA):

Information relating to class 14.1			
<b>Class 14.1 undepreciated capital cost (UCC) on January 1, 2017</b>			
Rules relating to eligible capital property stopped being in effect on January 1, 2017. They are replaced by rules relating to capital cost allowance.			
The cumulative eligible capital (CEC) is calculated and transferred to the new class 14.1 as of January 1, 2017.			
The beginning UCC of the new class equals the CEC balance on December 31, 2016.			
CEC balance on January 1, 2017			
(Amount from line F of Form T2125, <i>Cumulative Eligible Capital</i> of 2016)			
G	3,903.08		3,903.08
Total CEC deductions applied in prior years that have not been recaptured	I	3,596.92	3,596.92
Deemed capital cost of the old cumulative eligible capital (line G plus line I multiplied by 4/3)	K	10,000.00	10,000.00
Amount deemed allowed as a deduction against the capital cost of property in the class under paragraph 13(38)(c) ITA for taxation years ending before January 1, 2017	L	6,096.92	6,096.92
UCC balance in class 14.1 on January 1, 2017 (K-L)	M	3,903.08	3,903.08
Rate applicable to the additional deduction		2.00 %	2.00 %

Cost of the eligible capital property in the additions and disposition history:

Once the amount on line I has been determined and entered, the **total deemed cost of the property** (the cost of eligible capital property included in the CEC balance on January 1, 2017) will be **automatically calculated on line K**.

The following diagnostic will prompt you to complete the *Additions and Dispositions Workchart* of Form CCA FA to indicate the acquisition date and the capital cost amount of each property included in the total **deemed** capital cost calculated on line K.

*T2125 CCA - Class 14.1 has been created during the taxation year and the deemed total capital cost is greater than the total of all acquisition costs in the copies of Form T2125 CCA WORKCHART ADD. Verify if the creation of a copy for goodwill for this business, with an acquisition cost of \$10,000.00 is required*

In the example above, the cost of the eligible capital property was \$10,000, as calculated on line K and the property was acquired in 2008:

Additions	
Acquisition date	2008-02-02
Original cost	10,000.00
Government assistance	- 0.00
Investment tax credit	- 0.00
Other adjustments	+/- 0.00
Adjustment to the acquisition cost under clause 13(38)(d)(iv)(B) ITA	- 0.00
<b>Adjusted cost base before partial dispositions</b>	<b>= 10,000.00</b>
Adjusted cost base of partial dispositions in prior years	- 0.00
<b>Adjusted cost base</b>	<b>= 10,000.00</b>

By recording this information, *Taxprep* will be able to automatically calculate the UCC adjustment that would be applicable to ensure that any recapture is calculated correctly in the event of a disposition of the property.



Where a class 14.1 property is disposed of, the capital gain that could result from the disposition will have to be entered in Schedule 3.

4. *Why is the CCA claimed an amount of \$500 instead of the amount obtained by multiplying the pre-2017 CEC balance by 7%?*

If the total of the additional CCA of 2% and the eligible CCA for the year otherwise calculated is not more than \$500, the additional CCA can be increased to allow for a total CCA claim of the lesser of \$500 or the UCC balance of class 14.1 as at January 1, 2017 (reduced by any CCA deductions claimed in a tax year after 2016 relating to this balance), not to exceed the remaining UCC in class 14.1.

Effectively, if there are no additions or dispositions of class 14.1 property, the pre-2017 CEC balance can be written off at a rate of \$500 per year until the balance reaches zero.

For example, if the CEC balance at December 31, 2016, was \$1,100 and there were no subsequent additions or dispositions of class 14.1 property, the business would be able to claim CCA for class 14.1 as follows:

2017: \$500

2018: \$500

2019: \$100

## Question FT12017-002

*(Published in March 2018)*

[Filing of Forms T2091, Designation of a Property as a Principal Residence by an Individual \(Other than a Personal Trust\) \(Jump Code: 2091\)](#), [T1255, Designation of a Property as a Principal Residence by the Legal Representative of a Deceased Individual \(Jump Code: 1255\)](#) and [TP-274, Designation of a Property as a Principal Residence \(Jump Code: Q274\)](#)

### QUESTION

What are the instructions for filing the designation of a property as a principal residence forms (T2091, T1255 and TP-274)?

### ANSWER

#### 1. Instructions to follow regarding the filing of a federal return

*Forms T2091 and T1255*

Since 2017, Forms T2091 and T1255 must always be filed when a property that generates a capital gain and is designated as a principal residence is disposed of. If the property is designated for all years during which the taxpayer owned it (box 1 of line 179 in Schedule 3, *Summary of Dispositions - Capital Gains (or Losses) in 2017*) (Jump Code: 3), you only have to enter the "Proceeds of disposition" and complete the "Description of property" and "Designation" sections. The other sections of the form do not have to be completed, because the capital gain is totally exempt in this situation.

If you ticked box 1 at line 179 of Schedule 3, you only need to complete the first page of this form. You do not need to report any gain amount on Schedule 3 for this property.

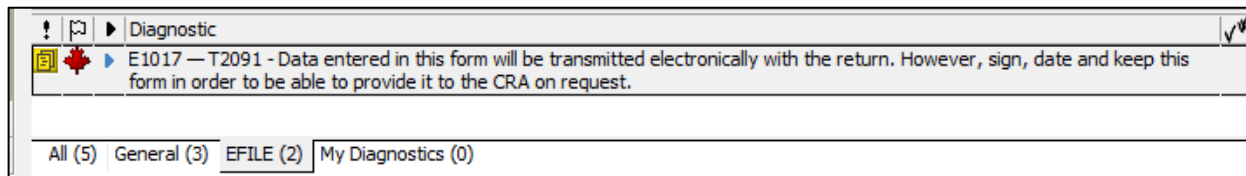
#### 1.1 If the return is transmitted electronically

*Forms T2091 and T1255*

Data in Forms T2091 and T1255 is transmitted electronically with the T1 return. Form SFD - T2091 or T1255, *Selected Financial Data Record* (Jump Code: **SFD T2091**), has been added in *Personal Taxprep 2017* to allow you to review the data transmitted for these forms. Forms T2091 and T1255 are transmitted to the CRA as selected financial data (SFD). Therefore, more than one copy of Forms T2091 and T1255 can be transmitted electronically should there be more than one designation of principal residence in the year.

Note that even if the data in Forms T2091 and T1255 is now transmitted electronically, you must continue printing these forms and have them signed when they are applicable. However, you no longer need to send a hard copy of these forms to a tax centre when the return is filed electronically.

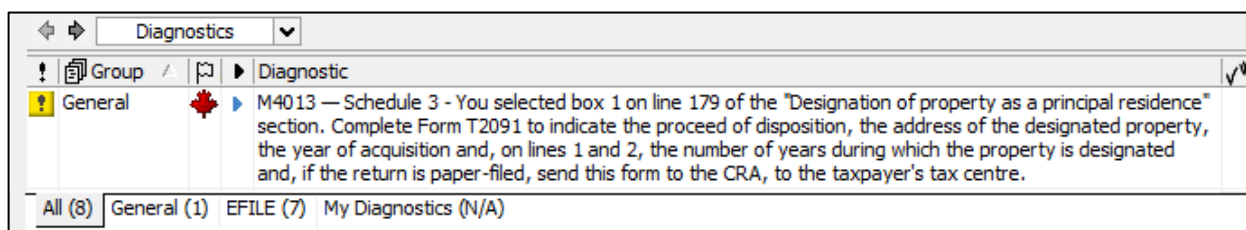
The diagnostics and client letters of *Personal Taxprep* have been adjusted accordingly to guide you.



## 1.2 If the return is mailed

### Forms T2091 and T1255

Starting in 2017, if the taxpayer disposed of a principal residence for which he or she claims a total or partial exemption, Form T2091 or Form T1255, if the taxpayer is deceased, must be enclosed with the return and mailed to the CRA even if no capital gain is taxed in the return.



## 2. Instructions to follow regarding the filing of a TP1 return (Québec)

### Form TP-274

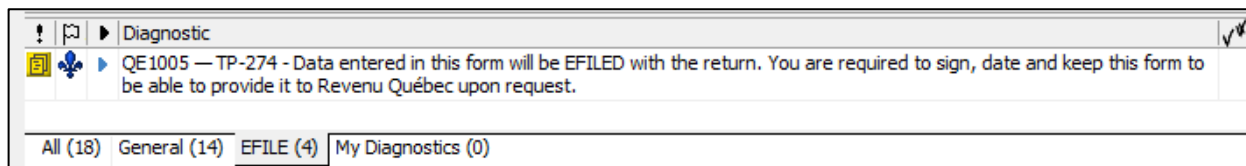
To designate a property as a principal residence, complete Form TP-274.

If the designation covers all the years during which you owned or co-owned the property or if it covers the year during which a servitude encumbering the property was established, you have no capital gain to calculate. In that case, you only need to complete Parts 1 and 2.

### 2.1 If the return is transmitted electronically

As federal Forms T2091 and T1255, provincial Form TP-274 is now also included in the electronic transmission. Therefore, when the TP1 return is filed electronically (NetFile Québec), you are no longer required to mail a hard copy of Form TP-274 to *Revenu Québec* accompanied, among other things, by the federal documents mentioned in Form TP-274. If you want to review the data transmitted for these forms, you can consult the TP-274 section of Form QC EFILE SUM, *Summary of EFILE Data Fields - Québec* (Jump Code: **QEFILSUM**).

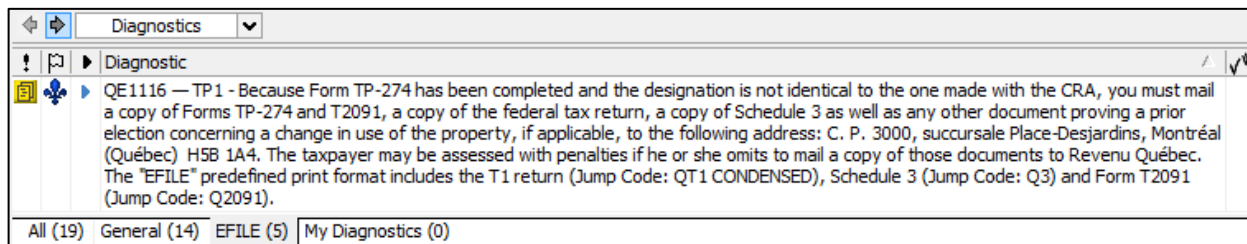
Like Form T2091, you must continue printing Form TP-274 and have it signed when it is applicable.



Unlike the CRA, *Revenu Québec* only allows the electronic transmission of a single copy of Form TP-274. Should there be more than one disposition in the year, you will have to print all applicable copies of Form TP-274 and have them signed. You will still be able to electronically file the TP1 return. *Revenu Québec* confirmed that in this case, you do not have to mail them the TP-274 forms that are not part of the electronic transmission. Keep them so that you can provide them to *Revenu Québec* if so requested.

However, there is one exception. Where the Québec designation is not identical to the one made at the federal level, *Revenu Québec* wants to receive hard copies of Form TP-274 accompanied by the federal forms (T2091, Schedule 3, T1 return) mentioned in Form TP-274 regardless of the fact that the return is filed electronically.

The diagnostics and client letters also guide you in this situation.

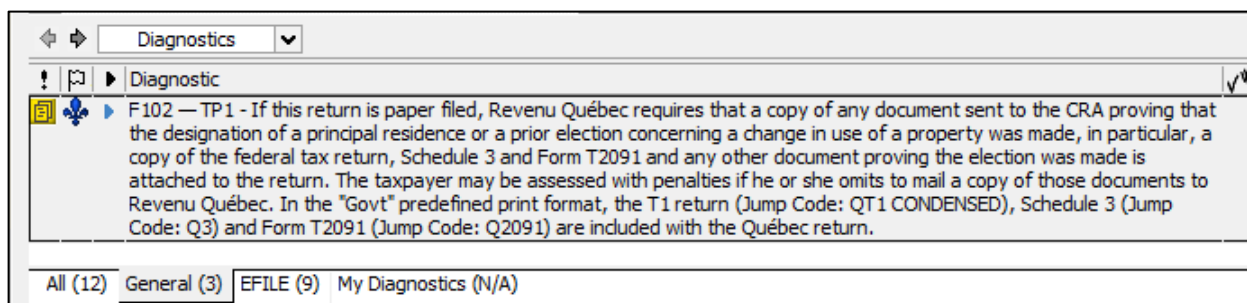


## 2.2 If the return is mailed

### Form TP-274

For years ending after October 2, 2016, the taxpayer must designate the property as a principal residence with the CRA to be able to make the designation for purposes of applying the Québec income tax.

When paper-filing the return, Form TP-274 must always be accompanied by the T1 return, Schedule 3 and Form T2091 or Form T1255, if the taxpayer is deceased.



## Question FT12017-001

(Published in March 2018)

### Canada caregiver amount - Parent or grand-parent

#### QUESTION

In prior years, an individual could claim the caregiver tax credit, on line 315 of Schedule 1, in respect of a parent or grand-parent aged 65 or over who resided with the individual and who had no impairment in mental or physical functions. Can this amount still be claimed in 2017?

#### ANSWER

No, this amount can no longer be claimed on Schedule 1 in 2017.

#### Modifications made to the federal legislation in 2017:

Before 2017, the Canadian tax regime allowed caregivers to claim the following non-refundable tax credits in federal Schedule 1:

- the credit for an infirm dependant (line 306);
- the credit for caregivers (for home care provided to a relative) (line 315);
- the credit for family caregivers.

For the 2017 and subsequent taxation years, these three credits have been replaced by the Canada Caregiver Credit (CCC). An individual can claim the CCC in respect of a spouse or common-law partner, a minor child or an eligible relative dependent on the individual during the year because of a mental or physical disability. **However, you can no longer claim a credit in respect of a parent or grand-parent who does not have an impairment in mental or physical functions, who is over the age of 65 and resides with his or her child or grand-child (the caregiver).**

The CCC includes the following two components:

CCC - Amount that can be claimed on lines 303, 305 and/or 367

A maximum base amount of \$2,150 (which corresponds to the former family caregiver credit) is established for a dependant with an impairment in mental or physical functions. This amount is included in the following amounts (in federal Schedule 1):

- the spouse or common-law partner amount (line 303);
- the amount for an eligible dependant (line 305);
- the amount for an infirm dependant under the age of 18 (line 367).

CCC - Amount that can be claimed on lines 304 and/or 307

An additional maximum amount of \$6,883 (in 2017) can be claimed by a caregiver in respect of each dependant who has an impairment in mental or physical functions who is an eligible relative. This amount is reduced by the dependant's income in excess of \$16,163 (in 2017). The caregiver does not have to live with the dependant to claim the credit. Where an individual claims an amount in respect of a person with an impairment, either his or her spouse or common-law partner, or an eligible dependant, the individual must claim the base amount of CCC, which is maximum \$2,150 for 2017. Where this results in less tax relief than would be available if the additional CCC amount, which is maximum \$6,883 for 2017, had been claimed instead (if the individual would be eligible for this amount), a supplement is provided to offset the difference. This calculation is performed on line 304. Note that the supplement is not applicable for an eligible dependant under the age of 18 at the end of the year.

**Idiosyncrasies at the provincial level:**

The change made to the 2017 federal legislation has also been adopted by the Yukon Territory.

Ontario modified its legislation to eliminate the amount for infirm dependants aged 18 or older (line 5820 of the 2016 Form ON428) and the caregiver amount (line 5840 of the 2016 Form ON428). These two amounts have been replaced by the Ontario caregiver amount claimed on line 5819 of the 2017 Form ON428. **This amount cannot be claimed in respect of a parent or grand-parent who is aged 65 or over and does not have an impairment in mental or physical functions.**

In all other provinces, except for Québec, the caregiver amount can still be claimed by an individual in 2017, in respect of a parent or grand-parent who is 65 or over, has no impairment in mental or physical functions and resides with the individual. This amount is claimed on line 5840 of Form 428.

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**Question FT12014-009**

*(Published in July 2015)*

**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

(Published in February 2015)

#### 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

(Published in February 2012 - Item updated in the week of March 11, 2018)

## 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.

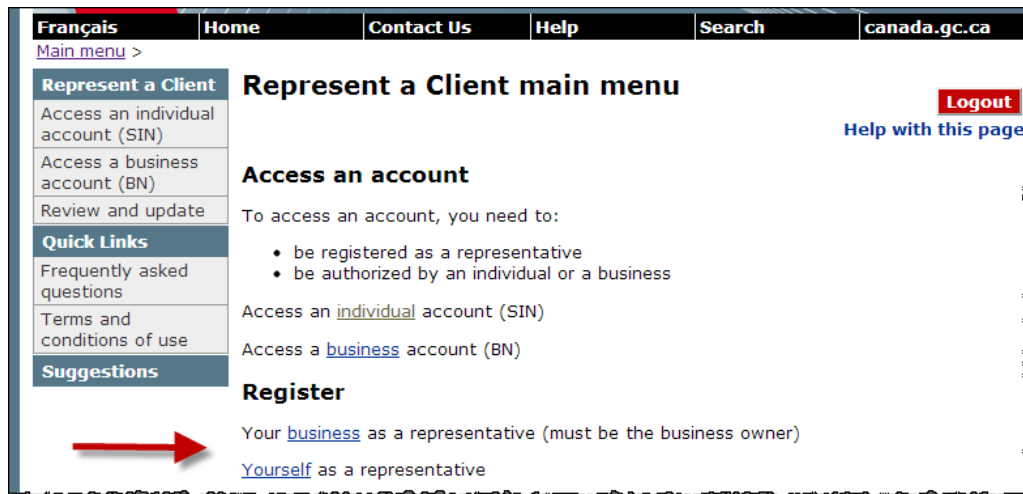
Detailed information is available, including the following:

Tax information slips	T3, T4, T4A, T4A(P), T4A(OAS), T4E, T4RIF, T4RSP, T5, T5007, T5008, T5013, T1204, RC62, RC210 and RRSP/PRPP contribution receipts
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 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.

- 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 ReplD.



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

- 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 ReplD. Then, verify that Form T1013 is applicable for printing and eligible for electronic filing.

### Profile – Authorization Forms

**T1013 – Authorizing or cancelling a representative**

**Filing**

- file for clients for whom you do not have the authorization or whose authorization is expired
- file only for new clients (files not rolled forward)
- the name of the representative or the business has changed and the T1013 form must be filed again for all client files

**Important :** Do not file new requests for your clients if you already have a valid authorization to access their information. Use this option only if a modification to the representative's information is required and you must file the form again. This option will apply to all your clients and will make the form applicable regardless of the filing history, unless the option **Cancel the printing of this form** is selected.

- do not file

**Additional filing options**

- file for deceased clients
- filing for authorizations expired on or before
- file for clients with regards to which access to the CRA's *Represent a Client* service has already been given to you

**Options**

- Authorize online access (Part 2A, CRA's *Represent a Client* service)

Representative information

ReplD	First name	Last name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Business Number (BN)	Name of the business associated to the business number (BN)	
<input type="text"/>	<input type="text"/>	
GroupID	Name of the group associated to the GroupID	
<input type="text"/>	<input type="text"/>	

- Authorize access by telephone and in writing (Part 2B)

- 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.
- When electronically submitting Form T1013, immediate online access to your clients' accounts will be granted, once the authorization is updated to the taxpayer's file.
- It is 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:

<https://www.canada.ca/en/revenue-agency/services/e-services/represent-a-client/use-service.html>

## InfoConnect

### Question FT12014-002

(Published in February 2015)

### 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:

The screenshot shows the Personal Taxprep 2014 interface for client Robert Taylor. The main window displays a tax return form with the following content:

**Please answer the following question:**  
 Did you own or hold foreign property at any time in 2014 with a total cost of more than CAN\$100,000? See "Foreign income" in the guide for more information. . . . . 266 Yes  1 No  2  
 If yes, complete Form T1135 and attach it to your return.  
 If you had dealings with a non-resident trust or corporation in 2014, see "Foreign income" in the guide.

**As a resident of Canada, you have to report your income from all sources both inside and outside**

**Total income**

Employment income (box 14 of all T4 slips)		101	
Commissions included on line 101 (box 42 of all T4 slips)	102		0.00
Wage loss replacement contributions (see line 101 in the guide)	103		0.00
Other employment income		104	
Old age security pension (box 18 of the T4(OAS) slip)		113	
CPP or QPP benefits (box 20 of the T4(P) slip)		114	
Disability benefits included on line 114 (box 16 of the T4A(P) slip)	152		0.00
Other pensions and superannuation		115	0.00
Elected split-pension amount (attach Form T1032)		116	0.00
Universal child care benefit (UCCB)		117	0.00
UCCB amount designated to a dependent	185		0.00

An InfoConnect insight window is open, titled "Preparing Your Income Tax Returns" and "Foreign investments, offshore transfers, and foreign receipts". The text in the window discusses Canadian residents being taxed on world income and the government's concern about offshore reporting. A "Learn more" button is visible at the bottom of the window.

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

(Published in March 2016)

### 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.

CRA – T5 slip	RQ – RL-3 slip	T5 form			
ABC Trust ▶ ABC Trust	8 - ABC Trust ▶ 8 - ABC Trust	Source: Rolled forward data 6 - ABC Trust ▶ 6 - ABC Trust			
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">                             Type 7                              Box 24 0.00                              Box 10 0.00                              Box 13 0.00                              Box 18 4,351.70                         </td> <td style="width: 33%;">                             Type 7                              Box A1 0.00                              Box A2 0.00                              Box D 0.00                              Box I 4,351.70                         </td> <td style="width: 33%;">                             Type                              Box A1 0.00                              Box A2 0.00                              Box D 0.00                              Box I 0.00                         </td> </tr> </table>			Type 7 Box 24 0.00 Box 10 0.00 Box 13 0.00 Box 18 4,351.70	Type 7 Box A1 0.00 Box A2 0.00 Box D 0.00 Box I 4,351.70	Type Box A1 0.00 Box A2 0.00 Box D 0.00 Box I 0.00
Type 7 Box 24 0.00 Box 10 0.00 Box 13 0.00 Box 18 4,351.70	Type 7 Box A1 0.00 Box A2 0.00 Box D 0.00 Box I 4,351.70	Type Box A1 0.00 Box A2 0.00 Box D 0.00 Box I 0.00			

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:

CRA – T5 slip	RQ – RL-3 slip	T5 form
ABC Trust Box 24 0 00 Box 10 0 00 Box 13 0 00 Box 18 4,351 70	8 - ABC Trust Type 7 Box A1 0 00 Box A2 0 00 Box D 0 00 Box I 4,351 70	Source: Rolled forward data 6 - ABC Trust 1 CIBC 2 CIBC 3 ABC Trust 4 ABC Trust 5 ABC Trust 6 ABC Trust 7 ABC Trust New copy
ABC Trust Box 24 0 00 Box 10 10 10 Box 13 0 00 Box 18 0 00	None 1 CIBC 2 CIBC 3 CIBC 4 BMO 5 CIBC 6 CIBC 7 ABC Trust 8 ABC Trust	Source: None New copy Type Box A1 0 00 Box A2 0 00 Box D 0 00 Box I 0 00