

Personal Taxprep[®]

Troubleshooting

2014 Versions

Client filter and customized diagnostic templates now available 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 now 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\T1 Taxprep 2014\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\T1 Taxprep 2014\Filter and Diagnostics**.

[Download all templates](#)

Publication	Problem	Affected Version	Corrected Version	Identifier (to download the client filter and diagnostic template, if applicable)
Week of September 13, 2015	Schedule 1-A - Family Tax Cut (Jump Code: 1A) - New measure with regard to the unused portion of the tuition, education and textbook tax credits transferred from a spouse or a common-law partner	Versions 2014	Version 2015 1.0	T12014-020
Week of July 12, 2015	T1206 - Tax on Split Income (Jump Code: 1206) - Alberta	Versions 2014	Version 2015 1.0	T12014-019
Week of July 12, 2015	AB 428 - Alberta Tax and Credits (Jump Code: AB 428) - New tax brackets	Versions 2014	Version 2015 1.0	T12014-018
Week of April 12, 2015	Schedule 8, Canada Pension Plan Contributions and Overpayment for 2014 (Jump Code: 8) - Part 5 - Lines 17 and 18 - Discrepancy between the program calculations and the instructions indicated on the latest version of Schedule 8 published by the CRA	Version 2014 4.0 Version 2014 3.0 Version 2014 2.0 Version 2014 1.0	Version 2014 4.1	T12014-017
Week of April 12, 2015	T2209, Federal Foreign Tax Credits (Jump Code: 2209) - Foreign business income earned by a Québec resident	Version 2014 4.0 Version 2014 3.0 Version 2014 2.0	Version 2014 4.1	T12014-016
Week of March 29, 2015	MB479, Manitoba Credits (Jump Code: MB 479) - Display of the field "Enter the amount of Seniors' School Tax Rebate received" in the Xpress tool	Version 2014 4.0	N/A	T12014-015
Week of March 29, 2015	Schedule 8, Canada Pension Plan Contributions and Overpayment for 2014 (Jump Code: 8) - Net self-employment income not subject to CPP contributions from a T5013 slip	Version 2014 3.0 Version 2014 2.0 Version 2014 1.0	Version 2014 4.0	T12014-014
Week of March 22, 2015	Schedule V, Tax Credits for Donations and Gifts (Jump Code: QV) - Amount on line 1 incorrect if a transfer of donations and gifts for the current year is made by the spouse	Version 2014 3.0 Version 2014 2.0 Version 2014 1.0	Version 2014 4.0	T12014-013

Publication	Problem	Affected Version	Corrected Version	Identifier (to download the client filter and diagnostic template, if applicable)
Week of March 15, 2015	Nova Scotia - Calculation problem of the age credit amount - Death occurred in 2015	Version 2014 3.0 Version 2014 2.0 Version 2014 1.0	Version 2014 4.0	T12014-012
Week of March 8, 2015	TaxprepConnect download - T4 - Statement of Remuneration Paid - Amount in box 56 set to zero	Version 2014 3.0 Version 2014 2.0	Version 2014 4.0	T12014-011
Week of March 8, 2015	Schedule 1-A, Family Tax Cut (Jump Code: A1A) - Child born in 2015	Version 2014 3.0 Version 2014 2.0 Version 2014 1.0	Version 2014 4.0	T12014-010
Week of March 8, 2015	Customized letter templates created using predefined templates in version 1 or 2 of Personal Taxprep 2014 - Error message when opening letters with version 3	Version 2014 3.0	Version 2015 1.0	T12014-009
Week of March 8, 2015	T1 version only - MED, Medical Expenses Worksheet - Federal (Jump Code: MED) - Expenses for care in certain types of facilities (e.g. care in a nursing home) and attendant care expenses for care provided in Canada not claimed or not optimized between spouses in coupled returns	Version 2014 3.0 Version 2014 2.0 Version 2014 1.0	Version 2014 4.0	T12014-008
Week of February 22, 2015	Schedule J - Tax Credit for Home-Support Services for Seniors - Net family income calculated without taking the spouse's net income into account	Versions 2014 1.0 and 2.0	Version 2014 3.0	T12014-007
Week of February 15, 2015	TaxprepConnect - TaxprepConnect Download - T4E slip downloaded but not visible	Version 2014 2.0	Version 2014 3.0	T12014-006
Week of February 15, 2015	Manitoba - Problem rolling forward the amount on line 1 of Form T1005	Version 2014 2.0 Version 2014 1.0	Version 2014 3.0	T12014-005
Week of February 15, 2015	Forms AUTO - CCA opening balance - Client files rolled forward with version 1.0 of Personal Taxprep 2014	Version 2014 1.0 and subsequent versions for returns rolled forward with version 2014 1.0	Version 2014 2.0	T12014-004

Publication	Problem	Affected Version	Corrected Version	Identifier (to download the client filter and diagnostic template, if applicable)
Week of February 15, 2015	DONATIONS, Charitable Donations (Jump Code: DONATIONS) - Rolling forward the charitable donations tax credit claimed on line 349 of the 2008 Schedule 1	Version 2014 1.0 and subsequent versions for returns rolled forward with version 2014 1.0	Version 2014 2.0	T12014-003
Week of January 18, 2015	MR-69 - Power of Attorney, Authorization to Communicate Information, or Revocation - Part 1 - Error in the transfer of the name of a deceased person	Version 2014 1.0	Version 2014 2.0	T12014-002
Week of January 4, 2015	Preparer Profiles – Profile and Staff tabs – Incident causing the program to close when deleting a line	Version 2014 1.0	Version 2014 2.0	T12014-001

Federal

Troubleshooting memo T12014-020

Schedule 1-A - Family Tax Cut (Jump Code: 1A) - New measure with regard to the unused portion of the tuition, education and textbook tax credits transferred from a spouse or a common-law partner

[Download the client filter and diagnostic template](#)

Problem:

As announced in the 2015 Federal Budget, the calculation of the Family Tax Cut has been amended for 2014 and subsequent years to allow the unused tuition, textbook and education tax credits transferred from a spouse or common-law partner (line 360 of Schedule 2).

The Canada Revenue Agency (CRA) systems have been updated to reflect the revised calculation. Also, reassessment notices have been sent to taxpayers affected by this change for the 2014 tax year, but only where it was apparent that this change resulted in an increase to the Family Tax Cut.

As Schedule 1-A was not updated in *Personal Taxprep* 2014 to reflect this change, the amount on line 12 of column 1 or 2 in this schedule is incorrect when it includes tuition, education and textbook credits transferred from the spouse or the common-law partner.

The instructions for line 12 of Schedule 1-A should be as follows, as indicated on the new version of the form published by the CRA:

“Enter the amounts transferred from your spouse or common-law partner on line 326 of Schedule 1. If this amount includes transferred tuition, education, or textbook amounts on line 360 of Schedule 2, reduce this amount by the lesser of the amounts on line 326 and line 360.”

The client filter and customized diagnostic templates provided in this troubleshooting memo will help you to target the tax returns that could be affected by the change, so you can check with your clients if the CRA automatically adjusted their tax return or if you must request an adjustment, if applicable. The customized diagnostic will also allow you to identify the tax returns affected by this change when filing 2014 returns in the future.

Solution:

The amount on line 12 in column 1 or 2 of Schedule 1-A must be overridden to exclude the amount of the tuition, education and textbook credits transferred from the spouse or common-law partner.

This problem will be corrected in *Personal Taxprep* 2015, v. 1.0.

Troubleshooting memo T12014-017

Schedule 8, Canada Pension Plan Contributions and Overpayment for 2014 (Jump Code: 8) - Part 5 - Lines 17 and 18 - Discrepancy between the program calculations and the instructions indicated on the latest version of Schedule 8 published by the CRA

[Download the client filter and diagnostic template](#)

Problem:

In the most recent update of this form, the instructions for the calculation of lines 17 and 18 in Part 5 have been modified. Because of that, the instructions provided for those lines in *Personal Taxprep* no longer correspond to the instructions in Schedule 8 published by the government. The modifications to the calculation instructions included in this version can cause the amount of CPP contributions payable on self-employment and other earnings calculated by *Personal Taxprep* to be less than the amount that will be calculated by the CRA during assessment of the return. Note that this problem does not affect the calculations on Schedule 8 QC, which already comply with the instructions given on the latest version of the schedule published by the CRA.

In the program, the instructions on lines 17 and 18 in Part 5 are the following:

If the amount on line 2 of Part 3 is less than the amount on line 4 of Part 3, complete lines 17 to 19. Otherwise, enter "0" on line 19 and continue on line 20.			
Enter the amount from line 4 of Part 3.		0.00	17
Enter the amount from line 2 of Part 3.		0.00	18
Line 17 minus line 18 (if negative, enter "0")		0.00	▶ 0.00 19

According to the latest version of Schedule 8 published by the CRA, the instructions on lines 17 and 18 in Part 5 should be the following:

If the amount on line 2 of Part 3 is less than the amount on line 4 of Part 3, complete lines 17 to 19. Otherwise, enter "0" on line 19 and continue on line 20.			
Line 4 of Part 3 minus line 2 of Part 3			17
Line 4 minus line 13 (if negative, enter "0")	-		18
Line 17 minus line 18 (if negative, enter "0")	=	▶	- 19

In order for lines 17 and 18 of Part 5 to be calculated and have an impact on the amount of CPP contributions payable on self-employment, the taxpayer must be in the following situation:

- reside outside Québec;
- have employment income of less than \$3,500 (i.e. the CPP basic exemption); and
- have self-employment income in excess of \$49,000.

Solution:

In this situation, the amounts on lines 17 and 18 must be overridden as follows:

Line 17 = Line 4 in Part 3 minus line 2 in Part 3

Line 18 = Line 4 in Part 5 minus line 13 in Part 5 (if the result is negative, enter "0")

This problem will be corrected in version 4.1 (planner version) of *Personal Taxprep*, which will be available mid-June.

Troubleshooting memo T12014-016

T2209, Federal Foreign Tax Credits (Jump Code: 2209) - Foreign business income earned by a Québec resident[Download the client filter and diagnostic template](#)**Problem:**

In the most recent update of this form, the instruction “and enter the result at line 431” has been removed from the text in note 2 of instruction (e), which results in a modification to the calculations compared to the previous version of the form, i.e. the version included in *Personal Taxprep*. Therefore, certain data calculated in Form T2209 is incorrect when the taxpayer is a Québec resident and earned foreign business income.

Here is instruction (e) of the CRA form that is currently into force:

(e) Business income tax paid to a foreign country

(see note 1 below)

Total of business income or profits tax you paid to a country or a political subdivision of a country for the year (see note 2 below). It does not include any part of the business income tax that can be reasonably attributed to an amount that any other person or partnership has received or is entitled to receive from a country, or that was payable on income that was exempt from tax under a tax treaty between Canada and that country.

Note 1

Any amount of tax you paid to a foreign government in excess of the amount you had to pay according to a tax treaty is considered a voluntary contribution and does not qualify as foreign taxes paid.

Note 2

If you were a resident of Quebec, multiply this amount by 55%.

The version of Form T2209 included in the program contains the instruction “and enter the result at line 431.” Here is instruction (e) included in the *Taxprep* form:

(e) Business income tax paid to a foreign country
(see note 1 below)

Total of business income or profits tax you paid to a country or a political subdivision of a country for the year (see note 2 below). It does not include any part of the business income tax that can be reasonably attributed to an amount that any other person or partnership has received or is entitled to receive from a country, or that was payable on income that was exempt from tax under a tax treaty between Canada and that country.

Note 1
Any amount of tax you paid to a foreign government in excess of the amount you had to pay according to a tax treaty is considered a voluntary contribution and does not qualify as foreign taxes paid.

Note 2
If you were a resident of Quebec, multiply this amount by 55% and enter the result at line 431.

The program calculations take this instruction into account. Therefore, the program includes the net foreign business income (field 439) in the net non-business foreign income (field 433), the amount of business income tax paid to a foreign country (field 434) in the amount of non-business income tax paid to a foreign country (field 431), the amount on line 5 in the amount on line 2 and the amount on line 11 in the amount on line 3.

Federal non-business foreign tax credit

Non-business income tax paid to a foreign country^(a) **431** 0|00 • 1

Net foreign non-business income^(b) **433** 0|00 X Basic federal tax^(c) 0|00 = 0|00 2

Divided by: net income^(c) 0|00

Enter the amount from line 1 or line 2, whichever is less. **Federal non-business foreign tax credit** 0|00 3

The amount on line 3 should not be more than the amount on line 429 of your Schedule 1.

Federal business foreign tax credit

Business income tax paid to a foreign country^(a) for the year, plus any unused foreign tax credits for that country for the ten^(b) years before, and the three years after this year **434** 0|00 • 4

Net foreign business income^(d) **439** 0|00 X Basic federal tax^(c) 0|00 = 0|00 5

Divided by: net income^(c) 0|00

Federal surtax on income you earned outside Canada: amount from line 10 of Part 2 of Form T2203, *Provincial and Territorial Taxes for 2014 – Multiple Jurisdictions*, or 48% of the amount from line 429 of Schedule 1. Enter the amount that applies to the country or countries that you have identified at the top of this page. 0|00 6

Add lines 5 and 6 0|00 7

Add basic federal tax^(c) and the amount from line 6 0|00 8

Enter the amount from line 3, if any 0|00 9

Line 8 minus line 9 0|00 10

Enter the amount from line 4, 7, or 10, whichever is less. **Federal business foreign tax credit** 0|00 11

Solution:

To offset this problem, corrections must be made in Form T2209, as well as in Form EFILE SUM, if the return is EFILED.

If you have already filed the return, you will have to prepare a T1-ADJ form manually to modify the values on lines 431, 433, 434 and 439.

Corrections to be made in Form T2209 using overrides

Modify the amount in field 433 to subtract from this amount the net business income indicated in the **Total** column of Form FTC SUM, then, on line 439, enter the net business income indicated in the **Total** column of Form FTC SUM.

Modify the amount in field 431 to subtract from this amount the business income tax paid indicated in the **Total** column of Form FTC SUM, then, in field 434, enter the net business income indicated in the **Total** column of Form FTC SUM.

Modify the amount on line 3 to subtract from this amount the amount of federal business foreign tax credit (T2209) indicated in the **Total** column of Form FTC SUM, then, on line 11, enter the amount of federal business foreign tax credit (T2209) indicated in the **Total** column of Form FTC SUM.

Foreign Tax Credits and Deductions Summary – Federal				
Country name	États-Unis	Total		
Net foreign business income and tax paid on this income				
Net business income	12,500 00	12,500 00	0 00	0 00
Tax paid				
Current year	1,375 00	1,375 00	0 00	0 00
Unused – previous years	0 00	0 00	0 00	0 00
Business income tax	1,375 00	1,375 00	0 00	0 00
Tax credits and deductions summary				
Tax credits				
Federal non-business foreign tax credit (T2209)	0 00	0 00	0 00	0 00
Federal business foreign tax credit (T2209)	1,269 95	1,269 95	0 00	0 00
Provincial or territorial non-business foreign tax credit (T2036)	0 00	0 00	0 00	0 00
Special credit (if minimum tax applies)				0 00
Deductions				
Deduction under ss. 20(11)	0 00	0 00	0 00	0 00
Deduction under ss. 20(12)	0 00	0 00	0 00	0 00

On line 2, enter the amount from line 2 of Form T2209 C.

Net foreign non-business income*	0 00	X	Basic federal tax	5,079 80	=	0 00	2
Divided by: net income	50,000 00						

On line 5, enter the amount from line 7 of Form T2209 C.

Net foreign business income*	12,500 00	X	Basic federal tax	5,079 80	=	1,269 95	7
Divided by: net income	50,000 00						

On line 7, enter the amount from line 9 of Form T2209 C.

Add lines 7 and 8					=	1,269 95	9
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Here is Form T2209 before corrections:

Country or countries for which you are making this claim: United States	
Federal non-business foreign tax credit	
Non-business income tax paid to a foreign country ^(a)	431 1,375.00 • 1
Net foreign non-business income ^(b)	433 12,500.00
Divided by: net income ^(c)	50,000.00
Basic federal tax ^(d)	5,079.80
Enter the amount from line 1 or line 2, whichever is less.	Federal non-business foreign tax credit 1,269.95 3
The amount on line 3 should not be more than the amount on line 429 of your Schedule 1.	
Federal business foreign tax credit	
Business income tax paid to a foreign country ^(a) for the year, plus any unused foreign tax credits for that country for the ten ^(b) years before, and the three years after this year	434 0.00 • 4
Net foreign business income ^(d)	439 0.00
Divided by: net income ^(c)	50,000.00
Basic federal tax ^(e)	5,079.80
Federal surtax on income you earned outside Canada: amount from line 10 of Part 2 of Form T2203, <i>Provincial and Territorial Taxes for 2014 – Multiple Jurisdictions</i> , or 48% of the amount from line 429 of Schedule 1. Enter the amount that applies to the country or countries that you have identified at the top of this page.	0.00 6
Add lines 5 and 6	0.00 7
Add basic federal tax ^(f) and the amount from line 6	5,079.80 8
Enter the amount from line 3, if any	1,269.95 9
Line 8 minus line 9	3,809.85 10
Enter the amount from line 4, 7, or 10, whichever is less.	Federal business foreign tax credit 0.00 11
Federal foreign tax credit	
Add lines 3 and 11.	Federal foreign tax credit 1,269.95 12
The amount on line 12 should not be more than the amount on line 429 of your Schedule 1. Enter the amount from line 12 on line 405 of your Schedule 1.	

Here is Form T2209 corrected based on the above explanations:

Country or countries for which you are making this claim: United States	
Federal non-business foreign tax credit	
Non-business income tax paid to a foreign country ^(a)	431 0.00 • 1
Net foreign non-business income ^(b)	433 0.00
Divided by: net income ^(c)	50,000.00
Basic federal tax ^(d)	5,079.80
Enter the amount from line 1 or line 2, whichever is less.	Federal non-business foreign tax credit 0.00 3
The amount on line 3 should not be more than the amount on line 429 of your Schedule 1.	
Federal business foreign tax credit	
Business income tax paid to a foreign country ^(a) for the year, plus any unused foreign tax credits for that country for the ten ^(b) years before, and the three years after this year	434 1,375.00 • 4
Net foreign business income ^(d)	439 12,500.00
Divided by: net income ^(c)	50,000.00
Basic federal tax ^(e)	5,079.80
Federal surtax on income you earned outside Canada: amount from line 10 of Part 2 of Form T2203, <i>Provincial and Territorial Taxes for 2014 – Multiple Jurisdictions</i> , or 48% of the amount from line 429 of Schedule 1. Enter the amount that applies to the country or countries that you have identified at the top of this page.	0.00 6
Add lines 5 and 6	1,269.95 7
Add basic federal tax ^(f) and the amount from line 6	5,079.80 8
Enter the amount from line 3, if any	0.00 9
Line 8 minus line 9	5,079.80 10
Enter the amount from line 4, 7, or 10, whichever is less.	Federal business foreign tax credit 1,269.95 11
Federal foreign tax credit	
Add lines 3 and 11.	Federal foreign tax credit 1,269.95 12
The amount on line 12 should not be more than the amount on line 429 of your Schedule 1. Enter the amount from line 12 on line 405 of your Schedule 1.	

Corrections required in Form EFILE SUM using overrides

If you are EFILEING the return, you will have to make corrections in the “T2209” section of the EFILE SUM form. The number of corrections required will depend on the number of countries where business income has been earned.

T2209			
431	▶ 0 00	433	▶ 0
5277	▶ 0 00	5273	▶ 0
5278	▶ 0 00	5274	▶ 0
5279	▶ 0 00	5275	▶ 0
434	▶ 0 00	439	▶ 0
5276	▶ 0 00	5280	▶ 0
5283	▶ 0 00	5281	▶ 0
5284	▶ 0 00	5282	▶ 0

You will have to modify the amount in field 5277 (as well as the amount in field 5278, if there is a second country, and the amount in field 5279, if there is a third country) to subtract from this amount the amount of business income tax paid indicated in Form FTC SUM for the country concerned. In addition, you will have to enter, in field 5276 (as well as in field 5283, if there is a second country, and in field 5284, if there is a third country) the amount of business income tax paid of the country concerned indicated in Form FTC SUM.

You will have to modify the amount in field 5273 (as well as the amount in field 5274, if there is a second country, and the amount in field 5275, if there is a third country) to subtract from this amount the amount of net business income indicated in Form FTC SUM for the country concerned. In addition, you will have to enter, in field 5280 (as well as in field 5281, if there is a second country, and in field 5282, if there is a third country) the amount of net business income of the first country indicated in Form FTC SUM.

Note that the amounts in fields 431, 433, 434 and 439 will be adjusted automatically once the corrections are made in Form T2209.

Foreign Tax Credits and Deductions Summary – Federal				
Country name	▶ United State	▶ Total	▶	▶
Net foreign business income and tax paid on this income				
Net business income	12,500 00	12,500 00	0 00	0 00
Tax paid				
Current year	1,375 00	1,375 00	0 00	0 00
Unused – previous years	+ 0 00	0 00	0 00	0 00
Business income tax	= 1,375 00	1,375 00	0 00	0 00

Here is the EFILE SUM form before corrections:

T2209			
431	▶ 0 00	433	▶ 0
5277	▶ 1,375 00	5273	▶ 12,500
5278	▶ 0 00	5274	▶ 0
5279	▶ 0 00	5275	▶ 0
434	▶ 1,375 00	439	▶ 12,500
5276	▶ 0 00	5280	▶ 0
5283	▶ 0 00	5281	▶ 0
5284	▶ 0 00	5282	▶ 0

Here is the EFILE SUM form corrected based on the above explanations:

T2209			
431	▶ 0 00	433	▶ 0
5277	▶ 0 00	5273	▶ 0
5278	▶ 0 00	5274	▶ 0
5279	▶ 0 00	5275	▶ 0
434	▶ 1,375 00	439	▶ 12,500
5276	▶ 1,375 00	5280	▶ 12,500
5283	▶ 0 00	5281	▶ 0
5284	▶ 0 00	5282	▶ 0

This problem will be corrected in version 4.1 (planner version) of *Personal Taxprep*, which will be available mid-June.

Troubleshooting memo T12014-014

Schedule 8, Canada Pension Plan Contributions and Overpayment for 2014 (Jump Code: 8) - Net self-employment income not subject to CPP contributions from a T5013 slip

Download the client filter and diagnostic template

Problem:

The T5013 slip data entry screen contains a box used to indicate the net self-employment income for a retired partner not subject to CPP.

from Canadian tax due to a tax convention or agreement (included in box 116)	119	0.00	0.00	0.00	0.00	0.00
Net professional income (loss)	120	76,052.00	76,052.00	1.4*	76,052.00	76,052.00
Net self-employment income for a retired partner not subject to CPP		76,052.00	76,052.00			76,052.00
Gross professional income	121	0.00		14.4	0.00	0.00

When an amount is entered in this box, it is carried to Schedule 8 and must be subtracted from pensionable net self-employment earnings. However, in Schedule 8, a problem has been detected on line 1 in Part 4 and on line 1 in Part 5: on those lines, the net self-employment income not subject to CPP contributions from a T5013 slip is not subtracted from pensionable net self-employment earnings.

Part 4 – CPP contributions on self-employment and other earnings ONLY (no employment income)	
Pensionable net self-employment earnings	112,543.00
Pre-bankruptcy return	0.00
Minus : Net self-employment income not subject to CPP contributions (T5013)	76,052.00
Pensionable net self-employment earnings* (amounts from line 122 and lines 135 to 143 of your return)	112,543.00 1
Employment earnings not shown on a T4 slip on which you elect to pay additional CPP contributions (attach Form CPT20)	375 0.00 2
Add lines 1 and 2 (if negative enter "0")	CPP pensionable earnings (maximum \$52,500)* 52,500.00 3
Basic exemption (maximum \$3,500)*	3,500.00 4
Line 3 minus line 4 (maximum \$49,000)	49,000.00 5
CPP rate	9.9 % 6
CPP contributions payable on self-employment and other earnings: Multiply line 5 by line 6. Enter this amount on line 421 of your return.	4,851.00 7
Deduction and tax credit for CPP contributions on self-employment and other earnings: Multiply the amount from line 7 by 50%.	2,425.50 8

Solution:

The amount entered on line 1 in Part 4 or on line 1 in Part 5 (depending on the section of Schedule 8 that is applicable) must be modified using an override.

The override amount is the difference between the pensionable net self-employment earnings and the net self-employment income not subject to CPP contributions from a T5013 slip.

This problem has been corrected in *Personal Taxprep* 2014 v.4.0.

Troubleshooting memo T12014-010

Schedule 1-A, Family Tax Cut (Jump Code: A1A) - Child born in 2015[Download the client filter and diagnostic template](#)**Problem:**

The family tax cut is calculated by error in the returns where only one child under the age of 18 is identified in the *Family Profile* (Jump Code: FAM) and this child was born in 2015.

Solution:

Use an override to select the box **No**, on the line *You are eligible for the family tax cut* in Schedule 1-A of the taxpayer and in Schedule 1-A of the spouse, if the spouse's return is coupled.

This problem will be corrected in *Personal Taxprep 2014 v.4.0*.

Troubleshooting memo T12014-008

T1 version only - MED, Medical Expenses Worksheet - Federal (Jump Code: MED) - Expenses for care in certain types of facilities (e.g. care in a nursing home) and attendant care expenses for care provided in Canada not claimed or not optimized between spouses in coupled returns[Download the client filter and diagnostic template](#)**Problem:**

Note that this problem only affects returns prepared with version T1 of *Personal Taxprep*.

When the returns of the taxpayer and the spouse are coupled, the data entered in the Sections "Expenses for care in certain types of facilities (e.g. care in a nursing home)" and "Attendant care expenses for care provided in Canada" is not transferred into the return of the other spouse. This problem can cause the following problems:

- if the expenses for care in a nursing home and/or attendant care expenses have been entered in the *Medical Expenses Worksheet* of the spouse, no credit is claimed with regards to these expenses, whether the tax credit for medical expenses is claimed in the return of the taxpayer or in the return of the spouse (see example 1);
- if the expenses for care in a nursing home and/or attendant care expenses have been entered in the *Medical Expenses Worksheet* of the taxpayer, the optimization of the credit for medical expenses between spouses may give rise to an incorrect result, because the total medical expenses taken into account for calculation purposes differs from one spouse to the other (see example 2).

Example 1:

John and Mary are married and their tax returns are coupled. John has an income of \$50,000 and Mary has an income of \$3,000. Mary is eligible for the disability amount.

Data with respect to expenses for care in certain types of facilities (e.g. care in a nursing home) has been entered in *Mary's Medical Expenses Worksheet*:

Expenses for care in certain types of facilities (e.g. care in a nursing home)

The types of expenses that can be claimed in this section are those indicated on lines 1, 2 and 4 in the table related to this topic in the Help.

1 - Name of the patient for whom the care expenses were incurred:

The patient is eligible for the disability amount (Form T2201):

The patient does not qualify for the disability amount, but a medical practitioner certified that the patient is dependent on others and requires full-time care because of his or her impairment:

Care expenses paid to	Amount paid
	14,000 00
	0 00
	0 00
Total care expenses paid	14,000 00

This data is not automatically copied in the “Expenses for care in certain types of facilities (e.g. care in a nursing home)” section of *John's Medical Expenses Worksheet*:

Expenses for care in certain types of facilities (e.g. care in a nursing home)

The types of expenses that can be claimed in this section are those indicated on lines 1, 2 and 4 in the table related to this topic in the Help.

1 - Name of the patient for whom the care expenses were incurred:

The patient is eligible for the disability amount (Form T2201):

The patient does not qualify for the disability amount, but a medical practitioner certified that the patient is dependent on others and requires full-time care because of his or her impairment:

Care expenses paid to	Amount paid
	0 00
	0 00
	0 00
Total care expenses paid	0 00

The optimization calculation of the medical expenses ensures that the tax credit for medical expenses should normally be claimed by John. However, because no amount of expenses for care in certain types of facilities (e.g. care in a nursing home) is entered in his *Medical Expenses Worksheet*, no tax credit for medical expenses is claimed in his return. In addition, if you try claiming the tax credit for medical expenses in Mary's return, by selecting the check box **You wish to claim medical expenses**, using an override, no tax credit for medical expenses is claimed with regards to expenses for care in certain types of facilities (e.g. care in a nursing home) and the section below does not display or only displays partially in *Mary's Medical Expenses Worksheet*:

Summary of expenses for care in certain types of facilities (e.g. care in a nursing home)

Name of the patient	Expenses paid	Expenses claimed (Schedule 1)	Expenses claimed (form 428)	Claim the care expenses paid instead of the disability amount	Claim the disability amount instead of the care expenses paid
Mary	14,000 00	14,000 00	14,000 00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Other care expenses
 The expenses relating to care in a group home in Canada (line 5 of the table in the Help) and care or training and care in a school, a facility or another place (line 6 of the table in the Help) must be entered with the other general medical expenses in the first table of this form.

Example 2:

John and Mary are married and their tax returns are coupled. John has an income of \$4,000 and is eligible for the disability amount. Mary has an income of \$50,000.

Data with respect to expenses for care in certain types of facilities (e.g. care in a nursing home) has been entered in John’s *Medical Expenses Worksheet*:

Expenses for care in certain types of facilities (e.g. care in a nursing home)

The types of expenses that can be claimed in this section are those indicated on lines 1, 2 and 4 in the table related to this topic in the Help.

1 – Name of the patient for whom the care expenses were incurred: John

The patient is eligible for the disability amount (Form T2201):

The patient does not qualify for the disability amount, but a medical practitioner certified that the patient is dependent on others and requires full-time care because of his or her impairment:

Care expenses paid to	Amount paid
	15,000.00
	0.00
	0.00
Total care expenses paid	15,000.00

Because this data is not automatically copied in Mary’s *Medical Expenses Worksheet*, the optimization calculation of the credit for medical expenses between spouses gives rise to an incorrect result, and the credit with regards to expenses for care in certain types of facilities (e.g. care in a nursing home) is claimed in John’s return, which is not advantageous for the couple.

Solution:

You must enter data from the “Expenses for care in certain types of facilities (e.g. care in a nursing home)” and “Attendant care expenses for care provided in Canada” sections in both the taxpayer and the spouse’s *Medical Expenses Worksheet*.

This problem will be corrected in *Personal Taxprep 2014 v.4.0*.

Troubleshooting Memo T12014-004

Forms AUTO - CCA opening balance - Client files rolled forward with version 1.0 of Personal Taxprep 2014

[Download the client filter and diagnostic template](#)

Problem:

In the following Auto forms, the CCA opening balance rolled forward on line 1 of Chart D is incorrect if version 1.0 of *Personal Taxprep 2014* has been used to roll forward a 2013 client file that contained a CCA opening balance on line 9 of Chart D:

- T2042 AUTO;
- T2121 AUTO;
- T2125 AUTO;
- T1163 AUTO;
- T1273 AUTO;
- T776 AUTO.

Example:

2013 client file

Chart D – Capital Cost Allowance			
	Vehicle no. 1	Vehicle no. 2	Vehicle no. 3
Final loss (class 10 only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost before GST and PST	19,850.00	0.00	0.00
GST and PST	0.00	0.00	0.00
Class	10	10	10
UCC at the beginning of the year	10,000.00	0.00	0.00
Cost of acquisition	+ 0.00	0.00	0.00
GST/PST rebate	- 0.00	0.00	0.00
Proceeds of disposition	- 0.00	0.00	0.00
(Line 2 - line 3 - line 4) x 1/2	- 0.00	0.00	0.00
Base amount for CCA	= 10,000.00	0.00	0.00
Rate	30.00	30.00	30.00
Line 6 multiplied by the rate on line 7	CCA - 3,000.00	0.00	0.00
Closing balance	= 7,000.00	0.00	0.00
Percentage of business use	25.00 %	0.00 %	0.00 %
Business part of CCA	▶ 750.00	▶ 0.00	▶ 0.00
Sole owner – Total CCA related to motor vehicles			= 750.00
Partnership – Total CCA related to motor vehicles			= 0.00

Client file rolled forward with version 2014 1.0

Chart D – Capital Cost Allowance			
	Vehicle no. 1	Vehicle no. 2	Vehicle no. 3
Final loss (class 10 only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost before GST and PST	19,850.00	0.00	0.00
GST and PST	0.00	0.00	0.00
Class	10	10	10
UCC at the beginning of the year	9,250.00	0.00	0.00
Cost of acquisition	+ 0.00	0.00	0.00
GST/PST rebate	- 0.00	0.00	0.00
Proceeds of disposition	- 0.00	0.00	0.00
(Line 2 - line 3 - line 4) x 1/2	- 0.00	0.00	0.00
Base amount for CCA (Note 1)	= 9,250.00	0.00	0.00
Rate	30.00	30.00	30.00
Line 6 multiplied by the rate on line 7	CCA - 2,775.00	0.00	0.00
Closing balance	= 6,475.00	0.00	0.00
Percentage of business use	0.00 %	0.00 %	0.00 %
Business part of CCA	▶ 0.00	▶ 0.00	▶ 0.00
Sole owner – Total CCA related to motor vehicles			= 0.00
Partnership – Total CCA related to motor vehicles			= 0.00

In this example, the CCA opening balance in 2014 after the client file has been rolled forward should be \$7,000, but the opening balance is \$9,250 instead (\$10,000 minus \$750, i.e. the business part of the CCA), which is incorrect.

Important: Only the client files rolled forward with version 2014 1.0 are affected by this problem, because the roll forward calculations have been corrected in *Personal Taxprep* 2014 v.2.0. Therefore, the CCA opening balance will be correctly rolled forward if you are using *Personal Taxprep* 2014 v.2.0.

Solution:

As this is a roll forward problem, there are two possible solutions.

1. With version 2.0, roll forward client files with a “Rolled forward” status again

For client files rolled forward with version 2014 1.0 and with a status value of “Rolled forward” (i.e. no data has been entered in the client file for the current year), it is preferable to roll forward the 2013 client file again with version 2014 2.0. The CCA opening balance will then be correctly rolled forward.

It is important to note that opening the client file with version 2014 2.0 does not correct the problem as this is a roll forward problem.

To help you identify your clients that might be affected by this problem, we have made available client filters and customized diagnostic templates that will allow you to quickly access a list of those clients and will display a diagnostic in the applicable returns.

Each of the client filters and customized diagnostics allow you to identify client files with a CCA opening balance in the AUTO form for a particular type of business or rental income. The forms covered by the client filters are the following:

- T776 AUTO (client filter and diagnostic T1201410-004 - T776 AUTO);
- T1163 AUTO (client filter and diagnostic T1201410-004 - T1163 AUTO);
- T1273 AUTO (client filter and diagnostic T1201410-004 - T1273 AUTO);
- T2042 AUTO (client filter and diagnostic T1201410-004 - T2042 AUTO);
- T2121 AUTO (client filter and diagnostic T1201410-004 - T2121 AUTO);
- T2125 AUTO (client filter and diagnostic T1201410-004 - T2125 AUTO).

Each of the client filters will have to be applied individually to all client files from the Client Manager.

2. Solution for the situation where the client file cannot be rolled forward again

In the case where the client file cannot be rolled forward again, modify the CCA opening balance on line 1 in Part D of the related AUTO form and replace it by the CCA closing balance on line 9 in Part D of the 2013 AUTO form.

This problem has been corrected in *Personal Taxprep* 2014 v.2.0. Therefore, the CCA opening balances will be correctly rolled forward with version 2.0 and future versions.

Troubleshooting Memo T12014-003**DONATIONS, Charitable Donations (Jump Code: DONATIONS) - Rolling forward the charitable donations tax credit claimed on line 349 of the 2008 Schedule 1**

[Download the client filter and diagnostic template](#)

Problem:

For the purpose of the First-Time Donor’s Super Credit (FDSC), an individual will be considered a “first-time donor” if neither the individual nor the individual’s spouse or common-law partner (if applicable) have claimed a charitable donations tax credit for any year after 2007.

A history of the donations tax credit amounts claimed on line 349 of Schedule 1 for prior years (rolled forward from prior years) is presented in the top portion of the DONATIONS form. These amounts have no impact on the 2014 return, but they allow the preparer to determine if the client is considered a first-time donor and if the client is eligible for the FDSC. However, the donations tax credit amount claimed on line 349 of the 2008 Schedule 1 is missing in this history.

Important: When a donations tax credit amount has been entered for any of the years between 2009 and 2013, the individual is no longer eligible for the FDSC. Therefore, you are not required to take this problem into account.

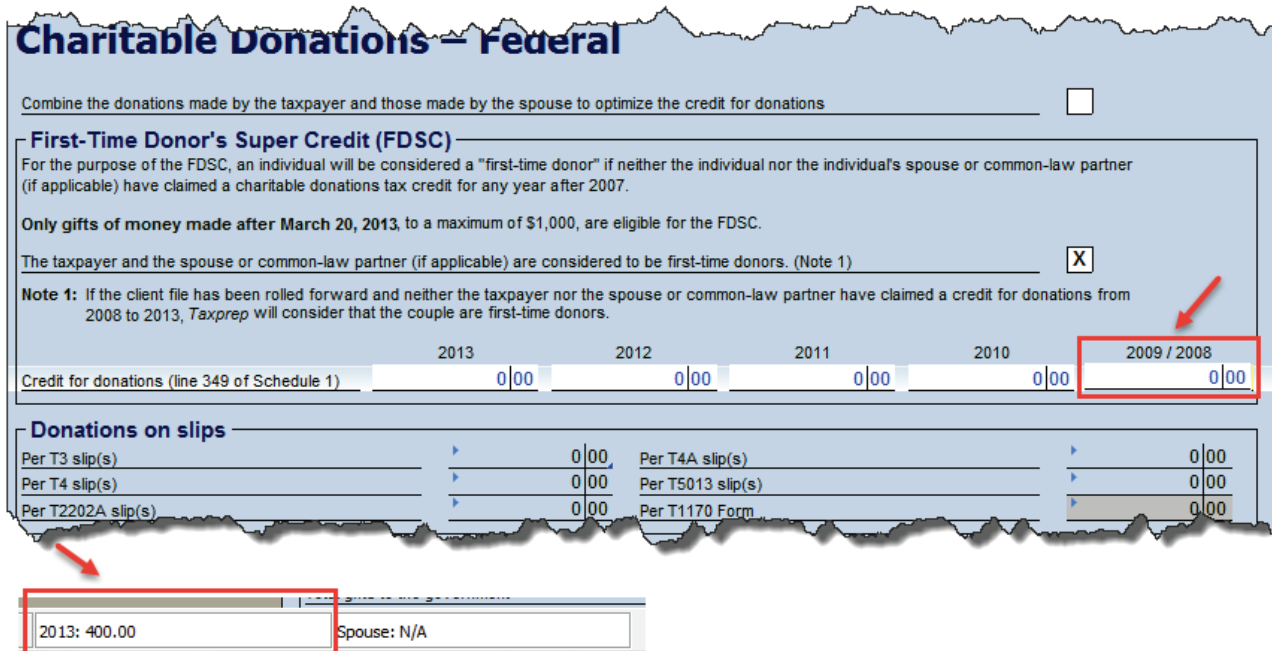
Solution:

If the tax return has not been rolled forward, or if it was rolled forward with version 1.0, but you have not yet begun preparing the 2014 return:

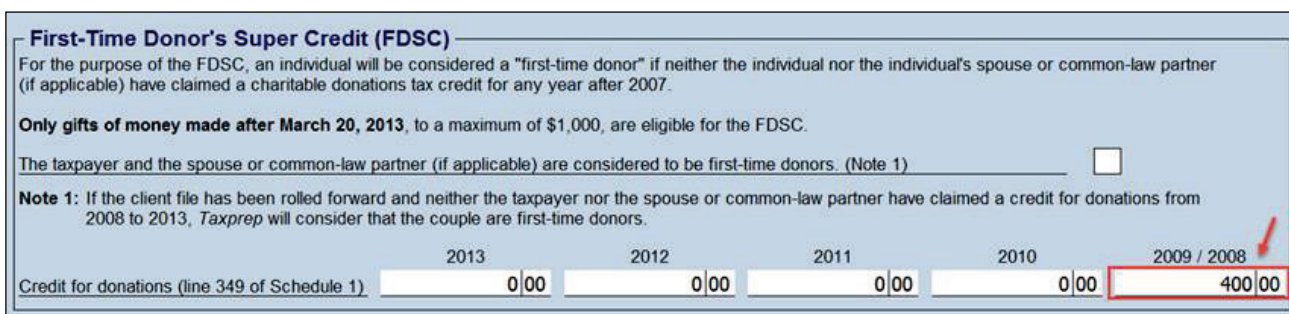
1. Roll forward the 2013 client file with *Personal Taxprep* 2014 v.2.0.
2. The donations tax credit amount claimed on line 349 of the 2008 Schedule 1 will be rolled forward correctly in the “First-Time Donor’s Super Credit (FTSC)” section in the top portion of the DONATIONS form.

If the tax return has already been rolled forward with version 1.0 and you have begun preparing the 2014 return:

1. You can view the prior-year value by positioning your cursor on the cell in the capture below. (The amount will be displayed on the status bar.)



2. If yes, enter this amount in version 2014, in the following location at the beginning of the DONATIONS form:



This problem has been corrected in version 2014 2.0 of *Personal Taxprep*.

Québec

Troubleshooting Memo T12014-013

Schedule V, Tax Credits for Donations and Gifts (Jump Code: QV) - Amount on line 1 incorrect if a transfer of donations and gifts for the current year is made by the spouse[Download the client filter and diagnostic template](#)**Problem:**

The amount on line 1 of Section 1 in Part A of Schedule V is incorrect when this schedule is applicable and the taxpayer is claiming a current year tax credit for donations and gifts made by the spouse or common-law partner, because the amount of the donations made by the spouse is then not included on this line.

Schedule V is applicable in the following situations:

- the amount on line 1 includes an amount of donations and gifts carried forward from prior years;
- a donations and gifts amount is entered on one or more of lines 2 to 13 of Section 1, “Charitable donations and gifts,” in Part A of Schedule V;
- a donations and gifts amount is entered on one or more of lines 21 to 30 of Section 2, “Gifts of cultural property, ecological gifts and gifts of musical instruments,” in Part A of Schedule V;
- a tax credit for donations and gifts is indicated in Part B, “Additional tax credit for a large cultural donation,” of Schedule V;
- a tax credit for donations and gifts is entered in Part C, “Tax credit for cultural patronage,” of Schedule V.

Solution:

To correct this problem, use an override to enter on line 1 of Schedule V, the result obtained in the manner described below.

Add the following amounts of Form *Charitable Donations* (Jump Code: **QDONATIONS**):

- the donations and gifts made to a registered charity, a registered amateur athletic association or a recognized political education organization (column **U.S.** and **Canada**);
- the donations made by the spouse; and
- the total donations and gifts carried forward from prior years;

then, subtract the donations transferred to the spouse.

Summary of donations for the current year

In the current return, claim any charitable donations entered in the "List of charitable donations" section of the spouse's QC Donations Form and any donations reported on the spouse's slips. X

	U.S.	Canada
Donations and gifts made to a registered charity, a registered amateur athletic association or a recognized political education organization	250 00	1,775 00
Donations made by the spouse		+ 127 00
Donations transferred to the spouse		- 0 00
Donations and gifts made to the government of Canada, Québec or another province, to a Canadian municipality or to a municipal or public body performing a function of government in Canada		+ 0 00
Donations and gifts made to a registered museum or a registered cultural or communications organization	0 00 x 1.25	+ 0 00
Donations and gifts made to the United Nations or one of its agencies, to the Organisation internationale de la Francophonie or one of its subsidiary bodies or to a prescribed foreign university		+ 0 00
Gift of a public art work eligible for the 50% increase	0 00 x 1.50	+ 0 00
Gift of a public art work eligible for the 25% increase	0 00 x 1.25	+ 0 00
Gift of an art work to a Québec museum	0 00 x 1.25	+ 0 00
Gift of a building situated in Québec for cultural purposes	0 00 x 1.25	+ 0 00
Total	250 00	= 1,902 00

Charitable donations and gifts (Section 1 in Part A of Schedule V)

	U.S.	Canada	Total
Net income	0 00	48,890 00	
Net income x 75%	0 00	36,667 50 A	
Increase in the limit relating to net income (if capital property donation)			
Gifts of depreciable property		0 00	
Taxable capital gains		0 00	
Capital gains deduction		0 00	
Subtotal		0 00	
Subtotal x 25%		+ 0 00 B	
U.S. claim		- 0 00 C	
Line A plus line B minus line C	Annual limit	= 36,667 50	
Donations for the current year	+ 250 00	1,902 00	2,152 00
Donations carried forward from prior years	+ 0 00	100 00	100 00
Total donations	= 250 00	2,002 00	2,252 00
Donations for which the credit is claimed (line 33 of Schedule V)	- 0 00	2,002 00	2,002 00 D
Subtotal	= 250 00	0 00	250 00
Donations expired in the year	- 0 00	0 00	0 00
Balance to carryforward	= 250 00	0 00	250 00

This problem will be corrected in *Personal Taxprep* 2014 v.4.0.

Troubleshooting Memo T12014-007

Schedule J - Tax Credit for Home-Support Services for Seniors - Net family income calculated without taking the spouse's net income into account

[Download the client filter and diagnostic template](#)

Problem:

The calculation in Section C, "Net family income," should take into account the net family income of the spouse on December 31, 2014, when this spouse was under the age of 70 on December 31, 2014. Currently, *Taxprep* does not take this amount into account in this situation. Therefore, the calculation in Section D, "Tax credit for home-support services for seniors," might be incorrect.

Solution:

Override line 81 of Schedule J with the amount on line 275 of the return of the spouse on December 31, 2014, when this spouse was under the age of 70 on December 31, 2014.

This problem will be corrected in *Personal Taxprep* 2014 v.3.0.

Troubleshooting Memo T12014-002

MR-69 - Power of Attorney, Authorization to Communicate Information, or Revocation - Part 1 - Error in the transfer of the street name of a deceased person

[Download the client filter and diagnostic template](#)

Problem:

The name of the street in the address of a deceased person is not transferred correctly to Part 1, "Identification of the person about whom Revenu Québec holds confidential information or documents," of this form. The value that is currently transferred corresponds to the value indicated on page 1 of the TP1 return.

This value differs from the value indicated in Form ID, *Identification and Other Client Information* (Jump Code: ID) of the deceased taxpayer, if, in Form Deceased, *Income Tax Return for Deceased Persons* (Jump Code: DECEASED), it is indicated to use the address of the legal representative on page 1 of the TP1 return.

Solution:

If the value differs, use an override to indicate the street name and the postal box in Part 1 of Form MR-69. This problem will be corrected in version 2014 2.0 of *Personal Taxprep*.

Alberta

Troubleshooting Memo T12014-019

T1206 - Tax on Split Income (Jump Code: 1206) - Alberta

[Download the client filter and diagnostic template](#)

Problem:

In Alberta's Bill 2, which received Royal Assent on June 29, 2015, the provincial tax rate that an individual with split income must pay has been modified, increasing from 10% to 11.25% for the taxation year ending on December 31, 2015. The provincial tax payable calculated for such an individual is therefore incorrect for Alberta residents, because this modification is not taken into account in versions 2014 of *Personal Taxprep*.

Solution:

To bypass this problem, enter the new 11.25% rate on line 20 in Part 2 of Form T1206 using an override.

Part 2 – Provincial/territorial tax payable by an individual with split income	
Provincial/territorial tax on split income	
Total split income from line 4	0 00 19
Enter the tax rate that applies to your province or territory from column 2 in the chart on the next page.	11.25 % 20
Multiply the amount on line 19 by the tax rate you entered on line 20.	
Enter this amount on the line of your Form 428 shown in column 3 in the chart on the next page.	0 00 21

This problem will be corrected in *Personal Taxprep* 2015 v.1.0.

Troubleshooting Memo T12014-018

AB 428 – Alberta Tax and Credits (Jump Code: AB 428) - New tax brackets

[Download the client filter and diagnostic template](#)

Problem:

In Alberta's Bill 2, which received Royal Assent on June 29, 2015, new tax rates and brackets have been introduced for the taxation year ending on December 31, 2015:

- The current 10% tax rate will now apply to taxable income of \$125,000 or less.
- A new 10.5% tax rate will apply to taxable income more than \$125,000 but not more than \$150,000.
- A new 10.75% tax rate will apply to taxable income more than \$150,000 but not more than \$200,000.
- A new 11% tax rate will apply to taxable income more than \$200,000 but not more than \$300,000.
- A new 11.25% tax rate will apply to taxable income of more than \$300,000.

The provincial tax on income tax payable calculated in Planner Mode is incorrect if the taxpayer has taxable income of more than \$125,000, because these new tax rates and brackets are not taken into account in versions 2014 of *Personal Taxprep*.

Solution:

The provincial tax on income tax payable must be calculated manually and the adjusted amount of tax must be entered on line 41 of Form AB 428 using an override. Note that the adjusted amount of tax must take into account the total of the tax credits indicated on line 40 of Form AB 428.

This problem will be corrected in *Personal Taxprep* 2015 v.1.0.

Manitoba

Troubleshooting memo T12014-015

MB479, Manitoba Credits (Jump Code: MB 479) - Display of the field "Enter the amount of Seniors' School Tax Rebate received" in the Xpress tool

Problem:

Since the integration of the latest update of Form MB479 received from the CRA, the field "Enter the amount of Seniors' School Tax Rebate received" displays in the Xpress tool with a value of "0.00," regardless of the individual's province of residence.

This problem occurs for all client files that have been rolled forward or created with a version prior to version 4.0 and that were then reopened with version 4.0.

Note that the presence of this field in the Xpress tool has no impact on the return.

Solution:

To remove this data from the Xpress tool, you must either right-click on the "0.00" value in the Xpress tool and select "Delete," or right-click on field 6149 of Form MB479 and select "Delete."

If you do not apply this solution in version 4.0 of 2014, when rolling forward the client file with the 2015 version, the data will display in the **2014** column of the Xpress tool.

Troubleshooting Memo T12014-005

Manitoba - Problem rolling forward the amount on line 1 of Form T1005

[Download the client filter and diagnostic template](#)

Problem:

During roll forward of a 2013 client file, the amount on line 1 (cumulative tuition fees according you notice of assessment) does not roll forward.

Solution:

To correct this problem, you can roll forward the affected client files with version 3.0.

If you have already begun working in the returns and you do not want to roll forward the client files again, you can view the value that should have been rolled forward to line 1 of Form T1005 by positioning your cursor on line 6 of this form. The value in this field for 2013 will then be displayed in the status bar, and you will not have to consult the 2013 return. Note that this data will be available only if you have rolled forward the client file from a 2013 *Taxprep* client file.

A client filter and customized diagnostic template is included to help you identify those situations.

Part 2 – Manitoba tuition fee income tax rebate for 2014			
Enter the cumulative tuition fees from your 2013 notice of assessment or notice of reassessment.		0.00	1
Eligible tuition fees paid after December 31, 2003, that you have not claimed on a previous Form T1005, related to the year of graduation entered on line 6084	6087	0.00	2
Add lines 1 and 2.		0.00	3
Applicable rate		10 %	4
Multiply line 3 by line 4.	(annual maximum \$2,500)	0.00	5
Enter the amount from line 3.		0.00	6
Applicable rate		60 %	7
Multiply line 6 by line 7.	(lifetime maximum \$25,000)	0.00	8
Enter the cumulative Manitoba tuition fee income tax rebate from your 2013 notice of assessment or notice of reassessment.	2,150.00		9
Enter the cumulative Manitoba advance tuition fee income tax rebate from your 2013 notice of assessment or notice of reassessment.	93.64		10
Line 9 plus line 10	2,243.64	2,243.64	11
Line 8 minus line 11	Total tuition rebate available	0.00	12
Enter the amount from line 67 of Form MB428, <i>Manitoba Tax</i> . If you have to pay tax to more than one jurisdiction, enter the amount from line 44 in Part 4, Section MB428MJ, of Form T2203, <i>Provincial and Territorial Taxes for 2014 – Multiple Jurisdictions</i> .		0.00	13

2013: 8,950.00 Spouse: 0.00 No data downloaded

This problem will be corrected in *Personal Taxprep* 2014 v.3.0.

Nova Scotia

Troubleshooting memo T12014-012

Nova Scotia - Calculation problem of the age credit amount - Death occurred in 2015

[Download the client filter and diagnostic template](#)

Problem:

When a date of death in 2015 is entered in Form ID, *Identification and Other Client Information* (Jump Code: ID), and the return being prepared is a 2014 return, the age credit amount is not calculated on line 79 of Form NS428, *Nova Scotia Tax and Credits* (Jump Code: NS 428), even if the taxpayer was 65 or older at the end of the taxation year.

Solution:

To correct this problem, enter \$1,000 on line 79 of Form NS428, using an override, if the taxpayer meets all of the eligibility criteria for the age credit amount.

This problem will be corrected in *Personal Taxprep* 2014 v.4.0.

TaxprepConnect

Troubleshooting memo T12014-011

TaxprepConnect download - T4 - Statement of Remuneration Paid - Amount in box 56 set to zero

[Download the client filter and diagnostic template](#)

Problem:

When data is downloaded and box 56 of the T4 slip should be empty, the amount “\$0.00” is provided by the CRA for this box. If this amount is transferred into the return, it replaces the value initially calculated by *Taxprep* in box 56 of Form T4, *Statement of Remuneration Paid* (Jump Code: T4). As a result, the credit for the Québec Parental Insurance Plan (QPIP) is not calculated on line 375 of Schedule 1, *Federal Tax* (Jump Code: 1).

Solution:

To correct this problem, reset the value initially calculated by *Personal Taxprep* by selecting box 56 of Form T4, *Statement of Remuneration Paid* (Jump Code: T4), and using the Ctrl+U shortcut key. In *Taxprep*, the amount in box 56 typically corresponds to the amount in box 14, but is limited to the insurable ceiling for the year (\$69,000).

This problem will be corrected in *Personal Taxprep* 2014 v.4.0.

Troubleshooting Memo T12014-006

TaxprepConnect -TaxprepConnect Download - T4E slip downloaded but not visible

Download the client filter and diagnostic template

Problem:

The T4E slip downloaded through the Canada Revenue Agency (CRA) *Tax Data Delivery* service is not visible in Form TaxprepConnect, *TaxprepConnect Download* (Jump Code: **CONNECT**). However, data in this slip will still be transferred to the return when you press the **Transfer** button.

Solution:

If the data has already been transferred, verify this data in Form T4E, *Statement of Employment Insurance and Other Benefits* (Jump Code: **T4E**).

If you do not want to transfer data from this slip, clear the **Select all slips** check box at the top of the "Downloaded slips" section, then select only the slips to transfer.

This problem will be corrected in *Personal Taxprep 2014 v.3.0*.

Templates

Troubleshooting memo T12014-009

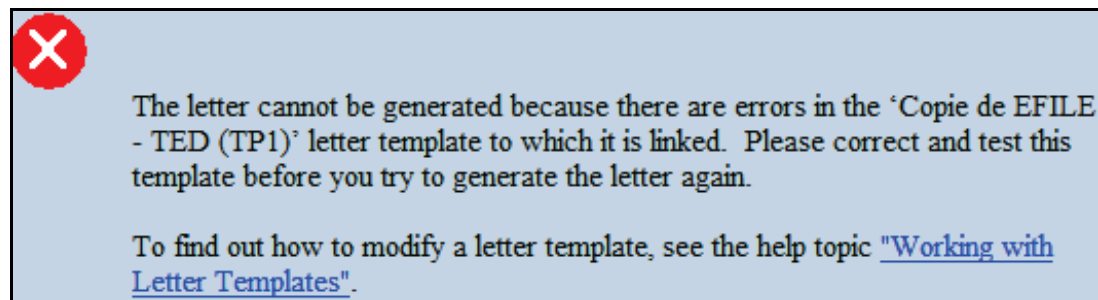
Customized letter templates created using predefined templates in version 1 or 2 of Personal Taxprep 2014 - Error message when opening letters with version 3

Problem

A problem occurs in version 3 when opening certain letters generated using the customized letter templates. This problem affects only the customized letter templates that were created in version 1 or 2 of *Personal Taxprep* using one of the following predefined formats:

- **LETTER TEMPLATES RELATING TO THE FEDERAL RETURN (T1)**
 - "Paper - Papier"
 - "Simplified - Simplifiée"
 - "Abbreviated - Abrégée"
 - "Abbreviated letter CPL - Lettre abrégée CPL"
 - "EFILE - TED"
- **LETTER TEMPLATES RELATING TO THE QUÉBEC RETURN (TP1)**
 - "Paper - Papier (TP1)"
 - "Simplified - Simplifiée (TP1)"
 - "Abbreviated - Abrégée (TP1)"
 - "Abbreviated letter CPL - Lettre abrégée CPL (TP1)"
 - "EFILE - TED (TP1)"

When opening such letters from the Form Manager in version 3, the following error message displays:



This problem is caused because a check box indicating whether Forms SC-ISP-3025 and SC-ISP-3026 are applicable has been removed in version 3.

Solution

To correct this problem, delete the paragraphs relating to Forms SC-ISP-3025 and SC-ISP-3026 in the relevant customized letter templates.

The conditions of the paragraphs that cause the error are displayed in red when these letter templates are viewed in the Letter Editor.

{ SECTION 10 - SC ISP-3025 - SC ISP-3026 }

[IF ((SC ISP-3025, SC ISP-3026)] = "Yes" AND [Complete this form using data from the Income Tax and Benefit Return (T1)] = "Yes") THEN]

Also enclosed is Form SC ISP-3025, *Application for the guaranteed income supplement or statement of income for the allowance or allowance for the survivor*. Please sign and mail this form to the Canada Service office in the attached pre-addressed envelope.

[END]

[IF ((SC ISP-3025, SC ISP-3026)] = "Yes" AND [Complete this form using data from the Income Tax and Benefit Return (T1)] = "Yes") THEN]

Also enclosed is Form SC ISP-3026, *Application for renewal of the guaranteed income supplement or the allowance or allowance for the survivor*. Please sign and mail this form to the Canada Service office in the attached pre-addressed envelope.

[END]

Once you have deleted the paragraphs causing the error, the error message will no longer display and the customized letter can then be viewed and printed again.

This problem will be corrected in *Personal Taxprep* 2015 v.1.0.

Troubleshooting Memo T12014-001

Preparer Profiles – Profile and Staff tabs – Incident causing the program to close when deleting a line

Problem:

An incident can cause *Personal Taxprep* 2014 to close when the user deletes a line with the **Delete** button in the following tabs of a preparer profile:

- **Profile** tab, section “Trustees”; and
- **Staff** tab.

Solution:

To prevent the program from abruptly closing, which could cause the loss of unsaved data, do not use the **Delete** button in the tab identified above. If data must be deleted in the **Staff** tab or in the “Trustees” section of the **Profile** tab, manually delete this data without deleting the line.

This problem will be corrected in version 2014 2.0 of *Personal Taxprep*.