

Personal Taxprep

Troubleshooting

2016 Versions

Client filter and customized diagnostic templates 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 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 2016\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 2016\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 April 16, 2017	TP-1029.BF - Tax relief claimed on line 460 of the TP1 return refused by Revenu Québec when the individual is not eligible for the tax credits respecting the work premium	Version 2016 4.0	Version 2016 5.0 (Planner version)	T12016-013
Week of April 9, 2017	Form DONATIONS - Election to transfer the amount of donations made in the current year by the spouse not retained when this election has been made using an override	Version 2016 4.0	Version 2016 5.0 (Planner version)	T12016-012
Week of April 9, 2017	LOSSC - Display of diagnostic N1563 when no download has been performed with the TaxprepConnect functionality	Version 2016 4.0	Version 2016 5.0 (Planner version)	T12016-011
Week of March 26, 2017	Line 448 of the TP1 return - Health contribution	Versions 2016 2.0 and 2016 3.0	Version 2016 4.0	T12016-010
Week of March 26, 2017	TaxprepConnect Download - Partial download of the CRA and/or RQ data and unable to transfer the downloaded data	Versions 2016 2.0 and 2016 3.0	Version 2016 4.0 (new data download required)	T12016-009
Week of March 19, 2017	TaxprepConnect Download - Differences unreported by diagnostic N1563 when no amount is downloaded for a year and amounts are in Form LOSSC and/or Form T657 for that year	Versions 2016 2.0 and 2016 3.0	Version 2016 4.0	T12016-008
Week of March 12, 2017	T1135 - Form not eligible for electronic transmission purposes because of diagnostic M209 when section 7 in Part B is completed	Versions 2016 2.0 and 2016 3.0	Version 2016 4.0	T12016-007
Week of March 5, 2017	TP-1029.8.66.2 – Tax Credit for the Treatment of Infertility claimed in the return of the taxpayer and the spouse	Version 2016 2.0	Version 2016 3.0	T12016-006

Publication	Problem	Affected Version	Corrected Version	Identifier (to download the client filter and diagnostic template, if applicable)
Week of February 26, 2017	Rolling forward income to the TP-1029.BF form of a dependant whose return is coupled	Versions 2016 1.0 and 2016 2.0	Version 2016 3.0	T12016-005
Week of February 26, 2017	Schedule B - Age amount	Version 2016 2.0	Version 2016 3.0	T12016-004
Week of February 19, 2017	NetFile Québec - Error code TPH00401 (return with no income)	Version 2016 2.0	Version 2016 3.0	T12016-003
Week of February 19, 2017	TP-1000 - Taxpayer's last name missing or different from the name indicated on the ID form	Version 2016 2.0	Version 2016 3.0	T12016-002
Week of January 8, 2017	Customized filters and diagnostics templates – Conversion error	Version 2016 1.0	Version 2016 2.0	T12016-001

Federal

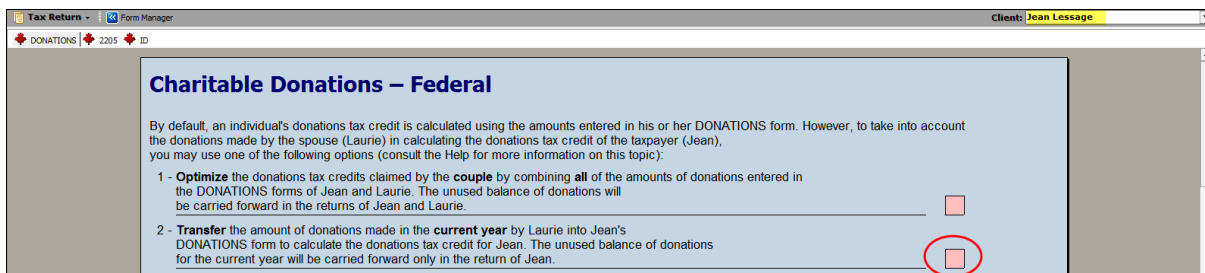
Troubleshooting Memo T12016-012

Form DONATIONS - Election to transfer the amount of donations made in the current year by the spouse not retained when this election has been made using an override

Download the client filter and diagnostic template

Problem:

When the election to transfer the amount of donations made in the current year has been made using an override, this override is not retained when recalculating the spouse’s return or when saving the client file.



Solution:

To bypass this problem, perform the following two overrides: modify the amount on the line *Donations made by the spouse* in the return where the check box relating to the transfer had been initially selected and then modify the amount on the line *Donations transferred to the spouse* in the return of the other taxpayer.

In the above example, the spouse (Laurie) transfers to the taxpayer (Jean) an amount of \$125 in donations made in the current year.

	U.S.	Canada
Total charitable donations	0.00	0.00
Donations made by a graduated rate estate (GRE)	0.00	0.00
Total donations on slips	0.00	0.00
Donations made by the spouse		+ 125.00
Donations transferred to the spouse		0.00
Donations for religious studies (T1)		+ 0.00
Total gifts to the government		+ 0.00
Donations made to prescribed universities outside Canada		+ 0.00
Donations made to the United Nations, its agencies and certain charitable organizations outside Canada		+ 0.00
Ontario Opportunities Fund (for Ontario residents only)		+ 0.00
Total	0.00	= 125.00

	U.S.	Canada
Total charitable donations	0.00	125.00
Donations made by a graduated rate estate (GRE)	0.00	0.00
Total donations on slips	0.00	125.00
Donations made by the spouse		+ 0.00
Donations transferred to the spouse		- 125.00
Donations for religious studies (T1)		+ 0.00
Total gifts to the government		+ 0.00
Donations made to prescribed universities outside Canada		+ 0.00
Donations made to the United Nations, its agencies and certain charitable organizations outside Canada		+ 0.00
Ontario Opportunities Fund (for Ontario residents only)		+ 0.00
Total	0.00	= 0.00

This problem will be corrected in *Personal Taxprep 2017 v.1.0*.

However, a diagnostic will be added in *Personal Taxprep 2016 v.5.0* to advise the preparer that the taxpayer's return is affected by the above-mentioned problem. This way, the preparer will be able to correct the taxpayer's return by making the corrections indicated in the diagnostic.

Troubleshooting Memo T12016-011

LOSSC - Display of diagnostic N1563 when no download has been performed with the TaxprepConnect functionality

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

Problem:

Diagnostic N1563 displays as soon as the columns **Unapplied net loss**, **Net loss applied from prior year** and/or **Net loss applied from subsequent year** of Form *Continuity of Capital Losses Carryforward - Federal* (Jump Code: LOSSC) contain data.

This problem occurs, because the program compares data of Form *Continuity of Capital Losses Carryforward - Federal* with data of Form *TaxprepConnect Download* (Jump Code: CONNECT) even before a tax data download is performed.

For information purposes, here is the diagnostic in question:

“N1563 - TaxprepConnect (LOSSC) - There is one or more differences between data in the return and data downloaded from the CRA Auto-fill T1 Return service. Consider transferring the downloaded CRA data to the return.”

Solution:

Do not take this diagnostic into account if you are not performing a download with the **TaxprepConnect** functionality. If you decide to use this functionality, the display conditions of diagnostic N1563 will be complied with; you will then have to take this diagnostic into account if it displays.

This problem will be corrected in *Personal Taxprep 2016 v.5.0* (Planner version).

Troubleshooting T12016-007

T1135 - Form not eligible for electronic transmission purposes because of diagnostic M209 when section 7 in Part B is completed

Problem:

When the choice to complete Part B has been made and Section 7 in Part B is completed, diagnostic M209, "T1135 - Complete Part B.", displays, which is incorrect. This problem makes Form T1135 not eligible for electronic transmission purposes.

Check (X) the appropriate box that applies for the taxation year:

If the total cost of all specified foreign property held at any time during the year exceeds \$100,000 but was less than \$250,000, you are required to complete either Part A or Part B.

If the total cost of all specified foreign property held at any time during the year was \$250,000 or more, you are required to complete Part B.

Part B: Detailed reporting method
Categories of specified foreign property

In each of the tables below, provide the required details of each specified foreign property held at any time during the particular tax year. If you need additional space, please attach a separate sheet of paper using the same format as the tables.

A taxpayer who held specified foreign property with a Canadian registered securities dealer or a Canadian trust company is permitted to report the aggregate amount, on a country-by-country basis, of all such property in Category 7, *Property held in an account with a Canadian registered securities dealer or a Canadian trust company*. See attached instructions for Category 7 for details as to how to report under this method.

Transfer to Form T1135

It is possible to request more than one transfer to Form T1135 from various forms in the program (T776, Schedule 3, Foreign, T5008 and ACB) for the same specified foreign property. The program will create a separate line in Form T1135 for each transfer requested. You should therefore ensure that any property that could be transferred from more than one form is only included once in the appropriate category on Form T1135.

1. **Funds held outside Canada**

Name of bank/other entity holding the funds	Country code	Maximum funds held during the year	Funds held at year end	Income
	---	0	0	0
		Total	0	0

Diagnostic M209 - T1135 - Complete Part B.

7. Property held in an account with a Canadian registered securities dealer or a Canadian trust company

Name of registered security dealer/Canadian trust company	Country code	Maximum fair market value during the year	Fair market value at year end	Income	Gain (loss) on disposition
Dealer 1	USA	10	10	10	10
Dealer 2	USA	1	90,000	1	1
Dealer 3	USA	300,000	300,000	300,000	300,000
Dealer 4	USA	90	90	90	90
		Total	390,100	300,101	300,101

Solution:

To correct this problem, first make sure that only diagnostic M209 makes the form not eligible for transmission purposes. Then, select the check box **None of the CRA's error conditions are applicable to this form**, using an override. This will make Form T1135 eligible for electronic transmission purposes.

Electronic filing date

* Form T1135 will be applicable and data can be transmitted, if:

- the answer to the question *Did the taxpayer own or hold foreign property at any time in 2016 with a total cost amount of more than CAN\$100,000?* is **Yes**;
- the check box **Your firm has not been engaged to prepare and/or transmit Form T1135** is not selected; and
- the check box **Form T1135 will be transmitted or paper-filed at a later date (no later than the filing deadline for the income tax return)**, is not selected.

OR

- The check box **If this is an amended return check this box**, is selected.

Electronic Filing

Select this form for **electronic filing**

None of the CRA's **exclusion** criteria are applicable to this form

None of the CRA's **error** conditions are applicable to this form

Form T1135 applicable

T1135 electronic filing status **Eligible**

This problem will be corrected in *Personal Taxprep 2016 v.4.0*.

Québec

Troubleshooting T12016-013

TP-1029.BF - Tax relief claimed on line 460 of the TP1 return refused by Revenu Québec when the individual is not eligible for the tax credits respecting the work premium

Download the client filter and diagnostic template <http://tc.cch.ca/cchservices/dow>

Problem:

When an individual is eligible for the tax credits respecting the work premium, but because of his or her income, no credit amount is calculated on line 90 of Schedule P, *Tax Credits Respecting the Work Premium* (Jump Code: **QP**), the data relating to this schedule is neither transmitted electronically nor updated to the *Keying Summary for the Income Tax Return* (Jump Code: **TPF1W**).

Since *Revenu Québec* does not have access to the information included in Schedule P, the Tax Relief cannot be calculated. Therefore, this credit is refused during the processing of the return by *Revenu Québec*.

Solution:

A filter and several diagnostics are provided with this troubleshooting memo. Use the filter to identify the client files affected by this problem, then use the diagnostics to review the corrections that must be made, according to the situation.

- 1- **If the TP1 return has already been transmitted and an assessment has already been made respecting that return**
 Prepare Form TP-1.R, *Request for an Adjustment to an Income Tax Return* (Jump Code: **QTP1R**), and enclose Schedule P as well as Form TP-1029.BF, in order for *Revenu Québec* to be able to take into account the information entered in those forms.

- 2- **If the return has not already been prepared and will have to be paper filed**
 Manually print Schedule P and enclose it with the documents that you are mailing to *Revenu Québec*.

- 3- **If the return has not already been prepared and will be transmitted electronically**
 Complete the different lines in the “Schedule P” section of the QEFILE SUM form, using an override, according to the taxpayer’s situation:
 - a) Individual eligible for the work premium, without a spouse
 Access Schedule P and note the percentage on line 74 as well as the amount on line 76:

	1 Work premium	2 Adapted work premium
Individual without a spouse on December 31, 2016		
Amount from line 29	64 20,000 00	64 0 00
	66 10,464 00	66 13,366 00
Amount from line 64 or line 66, whichever is less	68 10,464 00	68 0 00
Subtract line 70 from line 68. If the result is negative, enter 0.	- 70 2,400 00	- 70 1,200 00
If you designated a dependent child on line 50, enter 30%. Otherwise, enter 9%.	= 72 8,064 00	= 72 0 00
If you designated a dependent child on line 50, enter 25%. Otherwise, enter 11%.	x 74 9 %	x 75 0 %
Multiply line 72 by line 74 or line 75 (as applicable).	= 76 725 76	= 76 0 00

Then, access the section relating to Schedule P in the QFILE SUM form. Enter the percentage in field P74 by adding two zeros, using an override, and enter the amount in field P761, using an override:

Schedule P			
P5	0	P54	0 00
P10	0 00	P57	0
P13	0 00	P58	0
P14	0 00	P661	0 00
P15	0 00	P662	0 00
P22	0 00	P701	0 00
P29	0 00	P74	900
		P75	0
		P761	725 76
		P762	0 00
		P801	0 00
		P802	0 00
		P831	0 00
		P832	0 00
		P841	0 00
		P842	0 00
		P85	0 00
		P87	0 00
		P90	0 00

- b) Individual eligible for the adapted work premium, without a spouse

Access Schedule P and note the percentage on line 75 as well as the amount on line 76:

Individual without a spouse on December 31, 2016	1 Work premium	2 Adapted work premium
Amount from line 29	64 28,000 00	64 28,000 00
	66 10,464 00	66 13,366 00
Amount from line 64 or line 66, whichever is less	68 10,464 00	68 13,366 00
	70 2,400 00	70 1,200 00
Subtract line 70 from line 68. If the result is negative, enter 0.	= 72 8,064 00	= 72 12,166 00
If you designated a dependent child on line 50, enter 30%. Otherwise, enter 9%.	x 74 9 %	x 75 11 %
If you designated a dependent child on line 50, enter 25%. Otherwise, enter 11%.		
Multiply line 72 by line 74 or line 75 (as applicable).	= 76 725 76	= 76 1,338 26

Then, access the section relating to Schedule P in the QFILE SUM form. Enter the percentage in field P75, by adding two zeros, using an override, and enter the amount in field P762, using an override:

Schedule P			
P5	0	P54	0 00
P10	0 00	P57	0
P13	0 00	P58	0
P14	0 00	P661	0 00
P15	0 00	P662	0 00
P22	0 00	P701	0 00
P29	0 00	P74	0
		P75	1,100
		P761	0 00
		P762	1,338 26
		P801	0 00
		P802	0 00
		P831	0 00
		P832	0 00
		P841	0 00
		P842	0 00
		P85	0 00
		P87	0 00
		P90	0 00

- c) Individual eligible for the work premium, with a spouse, and Tax Relief claimed by only one of the spouses

Access Schedule P and note the percentage on line 74 as well as the amount on line 76:

Individual with a spouse on December 31, 2016	1 Work premium	2 Adapted work premium
Add lines 29 and 49.	64 29,000 00	64 0 00
	66 16,190 00	66 19,444 00
Amount from line 64 or line 66, whichever is less	68 16,190 00	68 0 00
	70 3,600 00	70 1,200 00
Subtract line 70 from line 68. If the result is negative, enter 0.	= 72 12,590 00	= 72 0 00
If you designated a dependent child on line 50, enter 25%. Otherwise, enter 9%.	x 74 9 %	x 75 0 %
If you designated a dependent child on line 50, enter 20%. Otherwise, enter 11%.		
Multiply line 72 by line 74 or line 75 (as applicable).	= 76 1,133 10	= 76 0 00

Then, access the section relating to Schedule P in the QFILE SUM form of the individual who is claiming the Tax Relief. Enter the percentage in field P74 by adding two zeros, using an override, and enter the amount in field P761, using an override:

Schedule P			
P5	0	P54	0 00
P10	0 00	P57	0
P13	0 00	P58	0
P14	0 00	P661	0 00
P15	0 00	P662	0 00
P22	0 00	P701	0 00
P29	0 00	P74	900
		P75	0
		P761	1,333 10
		P762	0 00
		P801	0 00
		P802	0 00
		P831	0 00
		P832	0 00
		P841	0 00
		P842	0 00
		P85	0 00
		P87	0 00
		P90	0 00

- d) Individual eligible for the adapted work premium, with a spouse, and the Tax Relief is claimed by only one of the spouses

Access Schedule P and note the percentage on line 75 as well as the amount on line 76:

Individual with a spouse on December 31, 2016		1 Work premium		2 Adapted work premium	
Add lines 29 and 49.		64	41,000 00	64	41,000 00
		66	16,190 00	66	19,444 00
Amount from line 64 or line 66, whichever is less		68	16,190 00	68	19,444 00
		70	3,600 00	70	1,200 00
Subtract line 70 from line 68. If the result is negative, enter 0.		= 72	12,590 00	= 72	18,244 00
If you designated a dependent child on line 50, enter 25%. Otherwise, enter 9%.		x 74	9 %	x 75	11 %
If you designated a dependent child on line 50, enter 20%. Otherwise, enter 11%.					
Multiply line 72 by line 74 or line 75 (as applicable).		= 76	1,133 10	= 76	2,006 84

Then, access the section relating to Schedule P in the QEFILE SUM form of the individual who is claiming the Tax Relief. Enter the percentage in field P75 by adding two zeros, using an override, and enter the amount in field P762, using an override:

Schedule P					
P5	0	P54	0 00	P75	1.100
P10	0 00	P57	0	P761	0 00
P13	0 00	P58	0	P762	2,006 84
P14	0 00	P661	0 00	P801	0 00
P15	0 00	P662	0 00	P802	0 00
P22	0 00	P701	0 00	P831	0 00
P29	0 00	P74	0	P832	0 00
				P841	0 00
				P842	0 00
				P85	0 00
				P87	0 00
				P90	0 00

- e) Individual eligible for the work premium, with a spouse, and the Tax Relief is claimed by both spouses

Access Schedule P and note the percentage on line 74 as well as the amount on line 76:

Individual with a spouse on December 31, 2016		1 Work premium		2 Adapted work premium	
Add lines 29 and 49.		64	29,000 00	64	0 00
		66	16,190 00	66	19,444 00
Amount from line 64 or line 66, whichever is less		68	16,190 00	68	0 00
		70	3,600 00	70	1,200 00
Subtract line 70 from line 68. If the result is negative, enter 0.		= 72	12,590 00	= 72	0 00
If you designated a dependent child on line 50, enter 25%. Otherwise, enter 9%.		x 74	9 %	x 75	0 %
If you designated a dependent child on line 50, enter 20%. Otherwise, enter 11%.					
Multiply line 72 by line 74 or line 75 (as applicable).		= 76	1,133 10	= 76	0 00

Then, access the QEFILE SUM form of each of the spouses. On each of the forms, enter the percentage in field P74, by adding two zeros, using an override, and enter the amount in field P761, using an override:

Taxpayer:

Schedule P					
P5	0	P54	0 00	P75	0
P10	0 00	P57	0	P761	1,133 10
P13	0 00	P58	0	P762	0 00
P14	0 00	P661	0 00	P801	0 00
P15	0 00	P662	0 00	P802	0 00
P22	0 00	P701	0 00	P831	0 00
P29	0 00	P74	900	P832	0 00
				P841	0 00
				P842	0 00
				P85	0 00
				P87	0 00
				P90	0 00

Spouse:

Schedule P							
P5	0	P54	0 00	P75	0	P841	0 00
P10	0 00	P57	0	P761	1,133 10	P842	0 00
P13	0 00	P58	0	P762	0 00	P85	0 00
P14	0 00	P661	0 00	P801	0 00	P87	0 00
P15	0 00	P662	0 00	P802	0 00	P90	0 00
P22	0 00	P701	0 00	P831	0 00		
P29	0 00	P74	900	P832	0 00		

- f) Individual eligible for the adapted work premium, with a spouse, and the Tax Relief is claimed by both spouses

Access Schedule P and note the percentage on line 75 as well as the amount on line 76:

Individual with a spouse on December 31, 2016		1 Work premium		2 Adapted work premium	
Add lines 29 and 49.		64	41,000 00	64	41,000 00
Amount from line 64 or line 66, whichever is less		66	16,190 00	66	19,444 00
Subtract line 70 from line 68. If the result is negative, enter 0.		68	16,190 00	68	19,444 00
If you designated a dependent child on line 50, enter 25%. Otherwise, enter 9%.		70	3,600 00	70	1,200 00
If you designated a dependent child on line 50, enter 20%. Otherwise, enter 11%.		= 72	12,590 00	= 72	18,244 00
Multiply line 72 by line 74 or line 75 (as applicable).		x 74	9 %	x 75	11 %
		= 76	1,133 10	= 76	2,006 84

Then, access the section relating to Schedule P in the QEFILE SUM form of each of the spouses. On each of the forms, enter the percentage in field P75, by adding two zeros, using an override, and enter the amount in field P762, using an override:

Taxpayer:

Schedule P							
P5	0	P54	0 00	P75	1,100	P841	0 00
P10	0 00	P57	0	P761	0 00	P842	0 00
P13	0 00	P58	0	P762	2,006 84	P85	0 00
P14	0 00	P661	0 00	P801	0 00	P87	0 00
P15	0 00	P662	0 00	P802	0 00	P90	0 00
P22	0 00	P701	0 00	P831	0 00		
P29	0 00	P74	0	P832	0 00		

Spouse:

Schedule P							
P5	0	P54	0 00	P75	1,100	P841	0 00
P10	0 00	P57	0	P761	0 00	P842	0 00
P13	0 00	P58	0	P762	2,006 84	P85	0 00
P14	0 00	P661	0 00	P801	0 00	P87	0 00
P15	0 00	P662	0 00	P802	0 00	P90	0 00
P22	0 00	P701	0 00	P831	0 00		
P29	0 00	P74	0	P832	0 00		

This problem will be corrected in *Personal Taxprep 2016 v.5.0*.

Troubleshooting T12016-010

Line 448 of the TP1 return - Health contribution

Download the client filter and diagnostic template <http://tc.cch.ca/cchservices/dow>

Problem:

The year 2016 was to be the last year for which a health contribution was due and payable, the government having announced, in its October 2016 update of the Québec Economic Plan, that this contribution would be abolished starting in 2017 to lighten the tax burden of individuals.

However, in its March 28, 2017 Budget, the Québec government announced that the health contribution was abolished retroactively beginning with 2016 for all individuals 18 years of age or older whose income, for that year, did not exceed \$134,095. Individuals whose income for 2016 was more than \$134,095 will have to pay, unless exempt, a health contribution equal to the lesser of the following amounts: \$1,000 or 4% of the excess of their income on \$134,095.

Solution:

If an amount is entered on line 9 of Form TP1 Line 448 (Jump Code: **Q448**), proceed in the appropriate manner among the following:

- where the taxpayer’s net income (line 275 of the Québec tax return) is not more than \$41,265, enter \$0 on line 8 of column A using an override;
- where the taxpayer’s net income (line 275 of the Québec tax return) is more than \$41,265, but does not exceed \$134,095, enter \$0 on line 8 of column B using an override;
- where the taxpayer’s net income (line 275 of the Québec tax return) is more than \$134,095, enter \$0 on line 7 of column C using an override.

C - Work chart - health contribution

Net income (line 275 of your return). If you are an Indian, see the guide. 148,870.00 1

If your net income on line 1 above

- is \$41,265 or less, enter it on line 2 of column A;
- is more than \$41,265 but not more than \$134,095, enter it on line 2 of column B;
- is more than \$134,095, enter it on line 2 of column C.

	A	B	C	
Net income (see the instructions above)	0.00	0.00	148,870.00	2
–	18,570.00	41,265.00	134,095.00	3
=	0.00	0.00	14,775.00	4
x	5 %	5 %	4 %	5
=	0.00	0.00	591.00	6
+	0.00	0.00	0.00	7
	Maximum \$50	Maximum \$175	Maximum \$1,000	
=	0.00	0.00	591.00	8
Carry the result to line 448 of your return.	Health contribution			591.00 9

You do not have to make an amendment request for returns that already have been filed; a new assessment notice for 2016 will be transmitted, no later than June 30, 2017, to all taxpayers with regards to which *Revenu Québec* had already determined, on the date of the Budget Speech, the health contribution amount payable for the year.

This problem will be corrected in *Personal Taxprep* 2016 v.4.0.

Troubleshooting T12016-006

TP-1029.8.66.2 – Tax Credit for the Treatment of Infertility claimed in the return of the taxpayer and the spouse

Download the client filter and diagnostic template <http://tc.cch.ca/cchservices/dow>

Problem:

In a client file in which the returns of the taxpayer and the spouse are coupled, the tax credit for the treatment of infertility is always claimed **entirely** by the taxpayer **and** the spouse.

If Form TP-1029.8.66.2 is completed in the taxpayer’s return, the full tax credit amount will be claimed on line 20 of that form, and the same amount will be claimed on line 20 of the spouse’s Form TP-1029.8.66.2, which is an error.

Solution:

Important note:

If the client file has been created or rolled forward with version 1.0, when opening this file with version 2.0, line 19 of the spouse’s form will be calculated. In that situation, if an amount should be entered on line 19 of the spouse’s form, it will have to be overridden.

If the client file has been created or rolled forward with version 2.0, line 19 of the spouse’s form will be an input line.

SITUATION No. 1

The taxpayer or the spouse claims the entire tax credit.

If you want to claim the total amount of the tax credit in the return of only one of the taxpayers, enter the amount of this credit on line 19 of Form TP-1029.8.66.2 of the **spouse for whom the tax credit should not be claimed.**

Example:

If a tax credit of \$8,000 can be claimed and the taxpayer wants to claim the entire credit, the following input will have to be made in Form TP-1029.8.66.2 **of the spouse.**

Form TP-1029.8.66.2 of the spouse:

2.2 Tax credit for the treatment of infertility			
Expenses paid for an in vitro fertilization activity carried out by a physician	4		10,000 00
Expenses paid for an assessment	+ 5		0 00
Cost of drugs that are prescribed by a physician and whose purchase is registered by a pharmacist	+ 6		0 00
Travel expenses	+ 7		0 00
Lodging expenses	+ 8		0 00
Add the amounts on lines 4 through 8 (maximum \$20,000).		Total expenses	= 9 10,000 00
Rate based on your family situation and family income (see the tables in the Help)	× 15		80 %
Multiply line 9 by line 15.	= 16		8,000 00
Tax credit claimed by your spouse on line 462 of his or her income tax return		→ 19	8,000 00
Subtract line 19 from line 16.			
Enter the result on line 462 of your income tax return.			
		Tax credit for the treatment of infertility	= 20 0 00

SITUATION No. 2

The taxpayer and the spouse split the tax credit.

If the taxpayer and the spouse split the tax credit, inputs will have to be made in Form TP-1029.8.66.2 of both the taxpayer and the spouse:

Example:

If a tax credit of \$8,000 can be claimed and the taxpayer wants to claim \$5,000 in his or her return and the spouse wants to claim \$3,000 in his or her return, the following inputs will have to be performed in Form TP-1029.8.66.2 of the taxpayer and the spouse.

Form TP-1029.8.66.2 of the taxpayer:

2.2 Tax credit for the treatment of infertility			
Expenses paid for an in vitro fertilization activity carried out by a physician		4	10,000 00
Expenses paid for an assessment	+	5	0 00
Cost of drugs that are prescribed by a physician and whose purchase is registered by a pharmacist	+	6	0 00
Travel expenses	+	7	0 00
Lodging expenses	+	8	0 00
Add the amounts on lines 4 through 8 (maximum \$20,000).		9	10,000 00
Rate based on your family situation and family income (see the tables in the Help)	x	15	80 %
Multiply line 9 by line 15.	=	16	8,000 00
Tax credit claimed by your spouse on line 462 of his or her income tax return	-	19	3,000 00
Subtract line 19 from line 16. Enter the result on line 462 of your income tax return.			
Tax credit for the treatment of infertility	=	20	5,000 00

Enter the amount claimed by the spouse

Form TP-1029.8.66.2 of the spouse:

2.2 Tax credit for the treatment of infertility			
Expenses paid for an in vitro fertilization activity carried out by a physician		4	10,000 00
Expenses paid for an assessment	+	5	0 00
Cost of drugs that are prescribed by a physician and whose purchase is registered by a pharmacist	+	6	0 00
Travel expenses	+	7	0 00
Lodging expenses	+	8	0 00
Add the amounts on lines 4 through 8 (maximum \$20,000).		9	10,000 00
Rate based on your family situation and family income (see the tables in the Help)	x	15	80 %
Multiply line 9 by line 15.	=	16	8,000 00
Tax credit claimed by your spouse on line 462 of his or her income tax return	-	19	5,000 00
Subtract line 19 from line 16. Enter the result on line 462 of your income tax return.			
Tax credit for the treatment of infertility	=	20	3,000 00

Enter the amount claimed by the taxpayer

Note: It is important that the total of the amounts entered on line 19 of Forms TP-1029.8.66.2 of both the taxpayer and the spouse does not exceed the total tax credit amount that can be claimed.

This problem will be corrected in *Personal Taxprep 2016 v.3.0*.

Troubleshooting T12016-005

Rolling forward income to the TP-1029.BF form of a dependant whose return is coupled

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

Problem:

No amount is rolled forward to lines 20 to 24 and to line 56 in Form TP-1029.BF of dependants whose return is coupled, even if the dependant is eligible for the Tax Relief and these amounts are required to calculate this credit. To be eligible for the tax relief, a person must qualify, for 2016, for one of the following credits:

- the tax credit respecting the work premium (Schedule P);
- the tax credit for childcare expenses (Schedule C).

Note that the following persons are not eligible for the tax credit respecting the work premium:

- persons who are not Canadian citizens;
- persons under the age of 18 who are not the parents of a child and who do not have a spouse;
- full-time students.

Solution:

To correct this problem, proceed in one of the following manners:

- manually complete lines 20 to 24 and 56 of Form TP-1029.BF using the values from the dependant's 2015 return; or
- wait for the release of version 2016 3.0, and roll forward the client file with this version.

This problem will be corrected in *Personal Taxprep 2016 v.3.0*.

Troubleshooting T12016-004

Schedule B - Age amount

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

Problem:

For the 2016 taxation year, *Revenu Québec* had increased to 66 years old the age from which the age amount could be claimed, which resulted in the fact that only taxpayers born before January 1, 1951, were eligible for this amount.

However, on February 22, 2017, the Minister of Finances of Québec announced that the age of eligibility for the age amount would be maintained at 65 years old for the 2016 taxation year. This change applies retroactively, coming into force on January 1, 2016.

For more information on this measure, consult the following *Revenu Québec* announcement:

<http://www.revenuquebec.ca/en/salle-de-presse/actualites/2017/2017-02-23.aspx?PromoActu23fev2017=BPAccueil>

Solution:

If the taxpayer was born in 1951, enter an amount of \$2,485 on line 22 of Schedule B, using an override. If the spouse was born in 1951, enter this amount on line 23 of Schedule B, using an override.

Where the returns of the taxpayer and the spouse are coupled, these overrides must be performed in Schedule B of each of the spouses.

Exceptions:

No override should be performed in the following situations:

- the taxpayer died in 2016, before reaching the age of 65;
- the return is a pre-bankruptcy return, and the taxpayer has not reached the age of 65 before the day of the bankruptcy.

You do not have to make amendment requests for returns that already have been filed, because *Revenu Québec* will automatically make the required corrections in the returns affected by this change.

This problem will be corrected in *Personal Taxprep 2016 v.3.0*.


Troubleshooting T12016-003

NetFile Québec - Error code TPH00401 (return with no income)

Download the client filter and diagnostic template

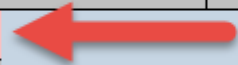
Problem:

I am trying to file a TP1 return with no income, but it is rejected by NetFile Québec, and the error code TPH00401 is issued.

	TP1	Rejected	DCN: B402422428116
Error code: TPH00401 Since you entered taxable income on line 299, you must determine the income tax payable and enter the result on line 401, unless you have transmitted the indicator confirming that the income tax payable is \$0.			

Solution:

In the QEFILe SUM form, enter code 1 in the field 401A, using an override, to confirm to *Revenu Québec* that the income tax totalizes \$0 on line 401.

TP1 Return – Income tax and contributions payable			
401	▶	0 00	
401A	▶	1	
403	▶	0	
TP221	▶	0 00	
424	▶	0 00	
f413	▶	0 00	
425	▶	0 00	
430	▶	-2,310 00	

This problem will be corrected in *Personal Taxprep 2016 v.3.0*.

Troubleshooting T12016-002

TP-1000 - Taxpayer's last name missing or different from the name indicated on the ID form

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

Problem:

In a client file rolled forward or created with version 2.0, the field containing the taxpayer's last name is empty in Form TP-1000, even if a last name is defined in the ID form.

REVENU QUÉBEC TP-1000.TE-V 2016-11

Online Filing of the Personal Income Tax Return by an Accredited Person

This form is for use by any individual who has his or her personal income tax return filed online by an accredited person (hereinafter "preparer"). The individual must provide the preparer with a copy of this form to confirm that the information transmitted on the individual's behalf is accurate and fully discloses all of his or her income.

The individual must **complete and sign** two copies of this form. The preparer identified in Part 1 and the individual must each keep a copy for at least six years after the end of the taxation year covered by this form. **Do not send us this form unless we ask for it.**

Taxation year

Information from the Preparer Profile

Return authorized for EFILE Yes No

Note: This option only applies to the active client-file. To modify this option for all client-files, modify the Tax Preparer's Profile used by default.

1 Identification of individual and preparer

Last name of individual	First name of individual	Social insurance number
<input type="text"/>	Francis	223 223 223

If the client file has been rolled forward or created with version 1.0, the field for the taxpayer's last name will contain the value defined in the ID form. However, if the last name is then modified on the ID form with version 2.0 of the program, this change will not be reflected on Form TP-1000.

Solution:

1. If the field for the last name is empty, enter the last name manually on Form TP-1000.
2. If the field for the last name is completed by *Taxprep*, but the value in that field differs from the value entered on the ID form, modify the last name on Form TP-1000, using an override.

You can use the client filter and diagnostics template provided to be advised when the taxpayer's last name is missing on Form TP-1000 or when it differs from the name indicated on the ID form.

This problem will be corrected in *Personal Taxprep* 2016 v.3.0.

Templates

Troubleshooting T12016-001

Customized filters and diagnostics templates – Conversion error

Problem:

During conversion of customized filters, diagnostics or filters and diagnostics, *Personal Taxprep* displays an error message indicating that the customized element contains an invalid condition.

If, after you verified the validity of the customized filter, diagnostic or filter and diagnostic, *Personal Taxprep* still displays this error message, this problem is caused by the "SEND Status" function. This function was available in *Personal Taxprep* 2015, but because the SEND service has been abolished in 2016, it is no

longer supported in *Personal Taxprep 2016*. However, this function is still present in the functions available for the customized diagnostics, filters and filters and diagnostics, although it should not be.

Solution:

The correction to make is different depending on whether it is a customized diagnostic, filter or filter and diagnostic. Make sure that you use the appropriate solution.

Diagnostics

Solution 1

Delete the “SEND Status” function. To do so, modify the type of template by selecting **Filter** at step 1 of the Filters and Diagnostics Wizard.

- Filter and diagnostic
- Filter**
- Diagnostic

Then, go to step 3 of the Wizard and delete the “SEND Status” function by pressing the Delete key on your keyboard.

- 8 TP 1 EFILE status
- 9 T1013 EFILE Status
- 10 T1135 EFILE Status
- 11 **The GetSENDStatus function no longer exists. Please select and delete it by pressing Delete.**
- 12 Time Modified

Before saving these changes, go back to step 1 of the Wizard to select **Diagnostic**.

- Filter and diagnostic
- Filter
- Diagnostic**

Solution 2

You can also convert your diagnostics again using *Personal Taxprep 2016 v.2.0*, which is scheduled to be released in mid-February.

Filters

Solution 1

Access step 3 of the Filters and Diagnostics Wizard and delete the “SEND Status” function by pressing the Delete key on your keyboard.

- 8 TP 1 EFILE status
- 9 T1013 EFILE Status
- 10 T1135 EFILE Status
- 11 **The GetSENDStatus function no longer exists. Please select and delete it by pressing Delete.**
- 12 Time Modified

Then, save these changes.

Solution 2

You can also convert your filters again using *Personal Taxprep 2016 v.2.0*, which is scheduled to be released in mid-February.

Filters and diagnostics

To correct this problem for a filter and diagnostic, you have to apply one of the solutions proposed for the filters.

The problem affecting the conversion of these elements will be corrected in *Personal Taxprep 2016 v.2.0*.

TaxprepConnect

Troubleshooting T12016-009

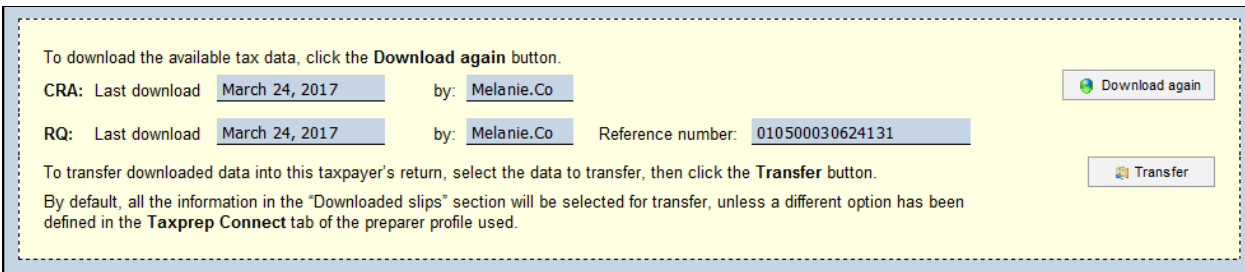
TaxprepConnect Download - Partial download of the CRA and/or RQ data and unable to transfer the downloaded data

Download the client filter and diagnostic template

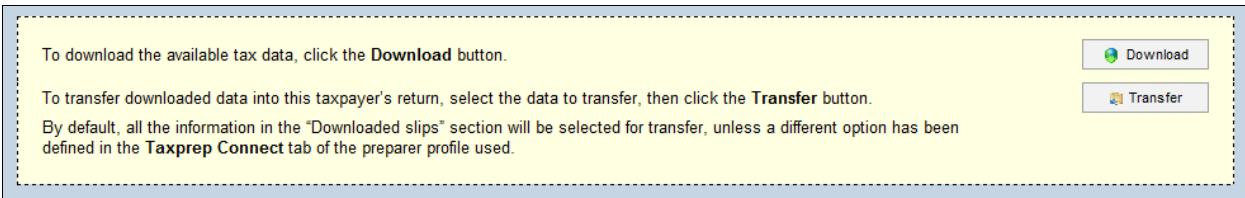
Problem:

Some clients have reported problems arising from a partial download of the tax data. In these situations, the download is not fully completed, which prevents the data from being transferred to the tax return.

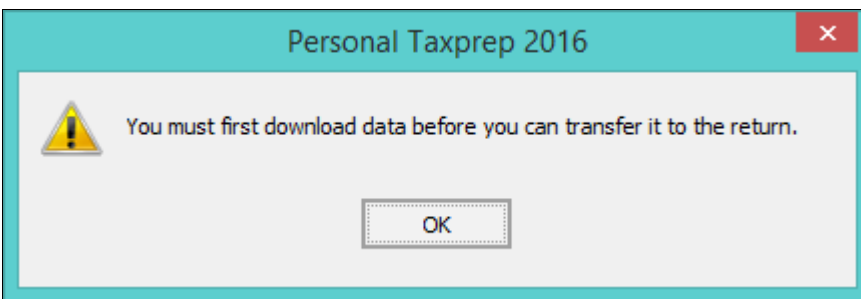
Normally, after a download, the following data is displayed in Form *TaxprepConnect Download* (Jump Code: **CONNECT**):



However, when the download is incomplete, the data relating to the download does not displays in the form:



In addition, when clicking the **Transfer** button, the following message appears:



Finally, if you attempt to download again, the new download will also be incomplete.

Solution:

Install version 2016 4.0 of *Personal Taxprep*, which will be available at the beginning of the week of April 2, and re-download the tax data from the CRA and RRQ, if applicable.

Troubleshooting T12016-008

TaxprepConnect Download - Differences unreported by diagnostic N1563 when no amount is downloaded for a year and amounts are in Form LOSSC and/or Form T657 for that year

Download the client filter and diagnostic template

Problem:

When, for a given year, no amount is downloaded from the CRA, but there are amounts in Form *Continuity of Capital Losses Carryforward - Federal* (Jump Code: LOSSC) or Form *Calculation of Capital Gains Deduction for 2016* (Jump Code: 657), the line of that year is not included in the tables of Form *TaxprepConnect Download* (Jump Code: CONNECT), and diagnostic N1563 does not display to indicate that there are differences.

Form CONNECT

Capital gains and losses

Note: In 2013, the *Continuity of Capital Losses Carryforward* (Jump Code: LOSSC) in *Personal Taxprep* was modified to show a year-by-year breakdown of the losses carried forward to more easily reconcile this information with the loss information available from the Canada Revenue Agency (CRA). If this information has not already been reconciled, there could be discrepancies between the history of net capital losses carried forward in *Taxprep* and the tax data downloaded from the CRA.

Select or deselect all

CRA					LOSSC form					
Year	Line 127	Unapplied net loss	Net loss applied from prior year	Net loss applied from subsequent year	Line 127	Unapplied net loss	Net loss applied from prior year	Net loss applied from subsequent year	Transfer (x)	Date (yy-mm-dd)
2015	0	697	0	0	0	697	0	0		17-03-20
2006	2,215	0	0	0	2,215	0	0	0		17-03-20
2005	524	0	0	0	524	0	0	0		17-03-20
2004	630	0	0	0	630	0	0	0		17-03-20
2003	176	0	0	0	176	0	0	0		17-03-20

Form LOSSC

Continuity of Capital Losses Carryforward – Federal

TaxprepConnect Download

Last download 2017-03-21 Last transfer 2017-03-21

Capital gains and losses carryover history

Year	Inclusion rate (%)	Line 127	Unapplied net loss	Net loss applied from prior year	Net loss applied from subsequent year	Net loss deducted in the current year	Net loss deducted in prior or subsequent years	Available net capital loss balance
2016	50.0000	40,023.00	0.00	820.00	0.00	0.00	0.00	0
2015	50.0000	0.00	697.00	0.00	0.00	697.00	0.00	0
2014	50.0000	0.00	0.00	0.00	0.00	0.00	0.00	0
2013	50.0000	0.00	0.00	0.00	0.00	0.00	0.00	0
2012	50.0000	0.00	123.00	0.00	0.00	123.00	0.00	0
2011	50.0000	0.00	0.00	0.00	0.00	0.00	0.00	0
2010	50.0000	0.00	0.00	0.00	0.00	0.00	0.00	0
2009	50.0000	0.00	0.00	0.00	0.00	0.00	0.00	0
2008	50.0000	0.00	0.00	0.00	0.00	0.00	0.00	0
2007	50.0000	0.00	0.00	0.00	0.00	0.00	0.00	0
2006	50.0000	2,215.00	0.00	0.00	0.00	0.00	0.00	0
2005	50.0000	524.00	0.00	0.00	0.00	0.00	0.00	0
2004	50.0000	630.00	0.00	0.00	0.00	0.00	0.00	0
2003	50.0000	176.00	0.00	0.00	0.00	0.00	0.00	0

Solution:

Verify if there are differences between the data that is downloaded from the CRA and the data in Forms *Continuity of Capital Losses Carryforward - Federal* and *Calculation of Capital Gains Deduction for 2016*. If applicable, adjust the data in the return.

This problem will be corrected in *Personal Taxprep 2016 v.4.0*.