

Personal Taxprep

Troubleshooting

2018 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 *Personal Taxprep Classic*.
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 2018\Filter and Diagnostics**.
5. Copy the downloaded file to this location.
The client filter will be available in the Client Manager, while the diagnostic will display in the relevant returns.

Note: The table below lists all of the client filter templates and diagnostics, which allows you to download them separately, depending on the troubleshooting memos and FAQs that relate to you. To download all templates in a single operation, click the **Download all templates** button, then copy all zipped files into the folder **My Documents\CCH\T1 Taxprep 2018\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 July 21, 2019	T1229 - April 10, 2019, update	Version 2018 4.0 Version 2018 5.0	Version 2019 1.0	T12018-014
Week of April 21, 2019	Multiple jurisdiction - Tax on split income calculation - Québec	Version 2018 1.0 Version 2018 2.0 Version 2018 3.0 Version 2018 3.1 Version 2018 4.0	Version 2019 1.0	T12018-013
Week of April 14, 2019	TaxprepConnect Download - Proceeds of disposition multiplied by 0 in Schedule 3 as a result of the investment accounts transfer from the T5008 Slips Reconciliation form	Version 2018 2.0 Version 2018 3.0 Version 2018 3.1 Version 2018 4.0	Version 2018 5.0	T12018-012
Week of April 21, 2019	Multiple jurisdictions - Calculation of the amounts transferred from the spouse or common-law common-law partner - Spouse or common-law partner with split income	Version 2018 3.0 Version 2018 3.1 Version 2018 4.0	Version 2019 1.0	T12018-011
Week of April 21, 2019	Multiple jurisdiction - Tax on split income calculation - Residents of a province or territory outside Québec	Version 2018 1.0 Version 2018 2.0 Version 2018 3.0 Version 2018 3.1 Version 2018 4.0	Version 2019 1.0	T12018-010
Week of April 14, 2019	Calculation of Ontario tax on pension income slip - Multiple jurisdictions	Version 2018 1.0 Version 2018 2.0 Version 2018 3.0 Version 2018 3.1 Version 2018 4.0	Version 2019 1.0	T12018-009
Week of April 14, 2019	The split of the RénoVert Tax Credit (Form TP-1029.RV) between spouses is not retained in certain situations	Version 2018 1.0 Version 2018 2.0 Version 2018 3.0 Version 2018 3.1 Version 2018 4.0	Version 2019 1.0	T12018-008
Week of April 14, 2019	The transfer of the RénoVert Tax Credit (Form TP-1029.RV) between spouses is not retained in certain situations	Version 2018 1.0 Version 2018 2.0 Version 2018 3.0 Version 2018 3.1 Version 2018 4.0	Version 2019 1.0	T12018-007
Week of March 24, 2019	T2038 WS - Prior years - 2016 balance not rolled forward	Version 2018 1.0 Version 2018 2.0 Version 2018 3.0 Version 2018 3.1	Version 2018 4.0	T12018-006

Publication	Problem	Affected Version	Corrected Version	Identifier (to download the client filter and diagnostic template, if applicable)
Week of March 24, 2019	RénoVert Tax Credit - The amount paid in 2016 is rolled forward into field 36, "Amount paid in 2018" of Form TP-1029.RV	Version 2018 1.0 Version 2018 2.0 Version 2018 3.0 Version 2018 3.1	Version 2019 1.0	T12018-005
Week of March 24, 2019	RénoVert Tax Credit - The balance is not rolled forward if this credit claimed in 2016 was less than the maximum amount of \$10,000 per dwelling and if no credit was claimed for this dwelling in 2017	Version 2018 1.0 Version 2018 2.0 Version 2018 3.0 Version 2018 3.1	Version 2018 4.0	T12017-014 (Note that this identifier is associated with the <i>Troubleshooting Memo T12018-004</i>).
Week of March 10, 2019	TaxprepConnect Download - Problem downloading the year and the amount in box O of the RL-5 slip	Version 2018 3.0 Version 2018 3.1	Version 2018 4.0	T12018-003
Week of March 10, 2019	Tax shield calculation	Version 2018 1.0 Version 2018 2.0 Version 2018 3.0 Version 2018 3.1	Version 2018 4.0	T12018-002
Week of December 16, 2018	Rolling forward child care expenses for a 16-year old child on December 31, 2017, or a child deceased in 2017	Version 2018 1.0	Version 2018 2.0	T12017-013 (Note that this identifier is associated with the <i>Troubleshooting Memo T12018-001</i>).

Federal

Troubleshooting Memo T12018-001

Rolling forward child care expenses for a 16-year old child on December 31, 2017, or a child deceased in 2017

Note: Please note that the filter associated with this troubleshooting memo must be installed with the other filters of version 2017 of *Personal Taxprep* (default folder: **My documents\CCH\T1 Taxprep 2017\Filter and Diagnostics**).

Download the client filters and diagnostic templates

Problem:

When rolling forward the following two types of *Taxprep* 2017 client files, the program stops working and the affected client files are not rolled forward:

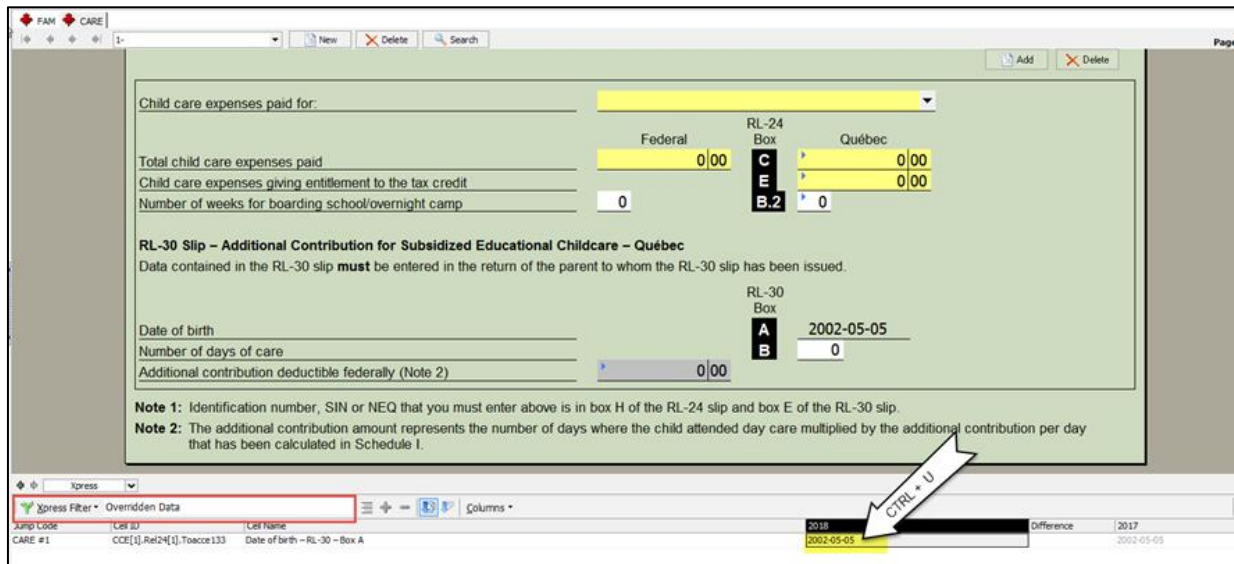
1. Client file containing child care expenses for a child born in 2001 and who is not disabled

2. Client file containing child care expenses for a child deceased in 2017

Solution

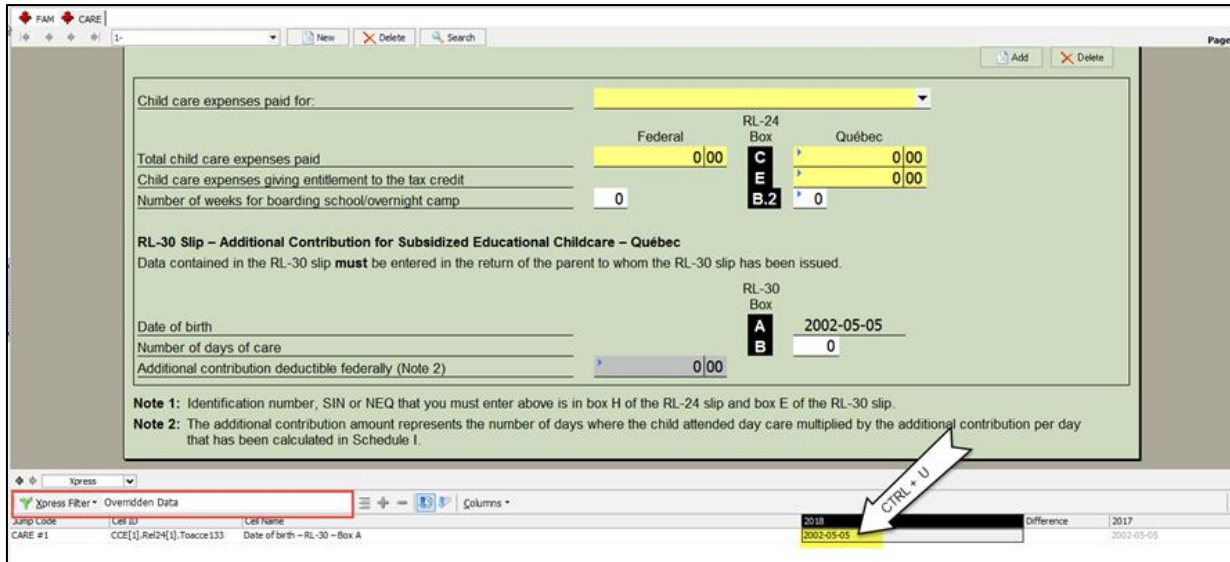
Client file containing child care expenses for a child born in 2001 and who is not disabled:

- Bring forward the child’s date of birth by one year (year of birth: 2002 instead of 2001) in the *Taxprep* 2017 client file. Save the client file and roll it forward.
- After the roll forward, in the *Taxprep* 2018 client file and in the *Taxprep* 2017 client file, re-enter the correct year of birth for the child in the FAM form.
- **For clients using the TP1 version:** In the 2018 client file, display the Xpress tool (filter: *Overridden data*) and delete the override in the field for box A of the RL-30 slip by pressing Ctrl+ U. The override is in the taxpayer’s or the spouse’s return in which the child care expenses have been entered in 2017.



Client file containing child care expenses for a child deceased in 2017:

- Delete the child’s date of death in the *Taxprep* 2017 client file. Save the client file and roll it forward.
- After the roll forward, in the *Taxprep* 2018 client file, delete the FAM form of the child deceased in 2017 and, in the *Taxprep* 2017 client file, re-enter the child’s date of death in the FAM form.
- **For clients using the TP1 version:** In the 2018 client file, display the Xpress tool (filter: *Overridden data*) and delete the override in the field for box A of the RL-30 slip by pressing Ctrl+ U. The override is in the taxpayer’s or the spouse’s return in which the child care expenses have been entered in 2017.



Other solution for the two types of client files:

Wait for version 2.0 of *Personal Taxprep Classic* 2018.

If you want to roll forward your other client files with version 1.0 of *Personal Taxprep Classic* 2018 but want to wait for version 2.0 to roll forward the client files affected by the roll forward problem, you can temporarily move these client files to another folder. You can then select all other client files and roll them forward in batch without the program stopping. Once version 2.0 is installed, you will only have to roll forward the client files affected by the problem. This can be particularly useful if many of your client files are affected by the problem.

Note: To help you identify the *Personal Taxprep* 2017 client files affected by this roll forward problem, we have created and made available to you a client filter template to include in *Personal Taxprep* 2017.

This problem will be corrected in version 2.0 of *Personal Taxprep Classic* 2018, which is scheduled to be released mid-February 2019.

Québec

Troubleshooting Memo T12018-002

Tax shield calculation

[Download the client filters and diagnostic templates](#)

Problem:

The tax shield is not calculated for a taxpayer without a coupled spouse, if the amount of eligible work income rolled forward from the preceding year is \$0.00 on lines 20 to 24 in Section 3 of Form TP-1029.BF.

Solution

Enter 0.00 on line 20 in Section 3 of Form TP-1029.BF (Jump Code: **Q1029.BF**) in the taxpayer’s return in order for the Tax shield to be calculated.

Note: You can use the provided client filters and diagnostic template to identify the *Personal Taxprep* 2018 client files (versions 1.0, 2.0, 3.0 and 3.1) that were rolled forward and that are affected by this problem.

This problem will be corrected in version 4.0 of *Personal Taxprep* 2018.

TaxprepConnect Download

Troubleshooting Memo T12018-003

TaxprepConnect Download - Problem downloading the year and the amount in box O of the RL-5 slip

Download the client filters and diagnostic templates

Problem:

When downloading tax data from *Revenu Québec*, the adjustment for indemnities received for previous years as well as the year covered are not downloaded into the return.

Solution:

To make sure that all data on the RL-5 slip shows in the return, verify if an amount is entered in box O of the RL-5 slip:

- on the paper copy of your client's RL-5 slip;
- on your client's electronic RL-5 slip available on the *Revenu Québec* Web site, if you are a PRO+ representative.

If an amount is in fact entered in box O of the RL-5 slip, manually enter this amount in box O of Form T5007, *Statement of Benefits* (Jump Code: **T5007**).

You can also wait for version 4.0 of *Personal Taxprep 2018* and download tax data from *Revenu Québec* again.

Note: You can use the client filter and diagnostic template provided to identify the *Personal Taxprep 2018* client files affected by this problem.

This problem will be corrected in version 4.0 of *Personal Taxprep 2018*.