



# **ProFile 2017-2018 User Guide**

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## About this User Guide

### Why a User Guide?

Simply put, because our customers asked for it! You wanted an easy-to-reference collection of information on ProFile's functionality, organized and simple to use. You also wanted something that you could hand to seasonal hires and employees to help get them started with ProFile, without requiring a lot of coaching.

**For new ProFile customers** you will find a wealth of easy-to-review material that covers the basic functionality of ProFile. You can come back to the User Guide as the tax season progresses and the way you use ProFile changes.

**For returning ProFile customers** you will already know the basic (and even the advanced) functionalities within ProFile. The User Guide puts all the information in one convenient, easy-to-use document that you can review, print, and bookmark for future reference.

### Have More Questions?

If something you need to know is not included in the User Guide, or if you need more information about ProFile and its functions, call us toll-free at **1-800-452-9970**. Our support hours are from Monday to Friday, 9:00 a.m. to 6:00 p.m. EST.

## System Requirements for ProFile

Before installing ProFile, please note the following important points:

- .NET 4.5.2 installation and registration are required.
- Internet connectivity is required for licensing and software updates.
- Windows server software is not supported.
- Network/workstation install UNC path is not supported.
- Apple products are not supported.

**Note:** ProFile supports only Windows 7 with service pack 1, Windows 8/8.1 and Windows 10.

To get the best results from your software, ProFile requires the following minimum configuration:

Processor	1 GHz or faster
Operating System	Windows 7 with Service Pack 1, Windows 8/8.1, or Windows 10
Memory	Minimum 2 GB (recommend 4 GB or higher)
Hard Drive Capacity	Approximately 900MB of free hard drive space for download and 1.5GB for installation
Printer	Windows-compatible printer(s)
Display	<ul style="list-style-type: none"><li>• 16-bit or higher color</li><li>• 1024 x 768 minimum resolution</li></ul>
Internet	<ul style="list-style-type: none"><li>• Internet Explorer 11.0 or higher</li><li>• A high-speed Internet connection is recommended</li></ul>

# Getting Started with ProFile

## Downloading and Installing ProFile

**Please be aware:** an Internet connection is required to download and install ProFile. In addition, you must have administrator rights for the computer on which you wish to install ProFile.

### Download ProFile

Navigate to the ProFile download page:

<http://profile.intuit.ca/professional-tax-software/download.jsp>

Determine if you are a new customer, returning customer, if you require OnePay, or a reinstall of ProFile.

Follow the necessary instructions. In many cases, the requirement will include the download the ProFile installation file (titled “gpsetup.exe”).

Your web browser may ask you to confirm if the file download can proceed...click “Yes” or “OK” when prompted. If prompted to select a location to store the installation file, we recommend your computer’s “Desktop” or “Downloads” folder, or another easy-to-find folder.

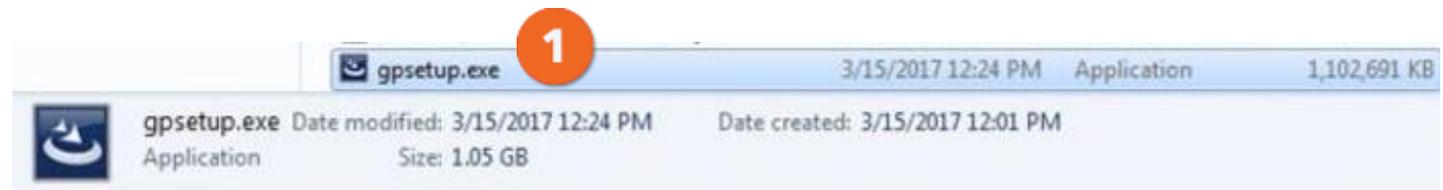
The download may take several minutes.

### Install ProFile

Locate the saved “gpsetup.exe” installation file.

Double-click the file to begin the installation. If you are using Windows 8 or Windows 7, right-click the file and select the “Run as Administrator” option.

Follow the dialogue boxes when prompted to install ProFile.



## Activating ProFile

**Please be aware:** an Internet connection is required to activate ProFile. In addition, you must have administrator rights for the computer on which you wish to install ProFile.

### Activating from ProFile icon

Locate **the ProFile icon** on the computer desktop; it installed there during the download and activation process.

Double-click the ProFile icon.

The **product code prompt displays** when ProFile opens. The product code and license key information is on the purchase receipt.

Enter your “Product Code” and “License Key” and click the “Activate” button.

The product code and license key activate; **ProFile displays a confirmation message.**

Click “Add another license” to add more licenses, if necessary. If you have purchased additional licenses for a module, enter the “Product Code” and “License Key” only once on each additional computer.

Click the “I’m Done” button after all product codes have been entered. Activation may take a few minutes to complete.

ProFile displays a message requesting a check to determine if you are using the most current version of the software. You can skip or delay this check, or click the “OK” button to proceed with the check.

You have successfully activated ProFile.

This screenshot shows the 'ProFile License Activation' window. The title bar reads 'ProFile License Activation'. The main content area has the 'intuit ProFile' logo at the top. Below the logo, it says 'Activate ProFile' and 'To activate ProFile, please enter your Product Code and License Key.' There are two input fields: 'Product Code' and 'License Key', followed by an 'Activate' button. A link 'Where do I find this information?' is visible below the fields. At the bottom, there are three links: 'OnePay customer? >', 'Free Trial Activation >', and '2011 or older license? >'. A red circle with the number '2' is overlaid on the left side of the window.This screenshot shows the 'ProFile License Activation' window after successful activation. The title bar reads 'ProFile License Activation'. The main content area has the 'intuit ProFile' logo at the top. Below the logo, it says 'Activate ProFile' and 'To activate ProFile, please enter your Product Code and License Key.' The input fields now contain '818902' and '2758\*\*\*\*\*' respectively. A green checkmark and the text 'Suite, License, Québec' are displayed to the right of the license key field. A link '+ Add another license' is visible below the fields. At the bottom, there are two buttons: 'I'm Done' and 'Next - Set Up Flexible Licensing'. A red circle with the number '3' is overlaid on the left side of the window.

## QuickStart Menu in ProFile

The QuickStart menu makes getting started with ProFile easier and faster.

### QuickStart menu tabs

Each available module occupies a tab along the top of the QuickStart menu.

Each module tab features a small black arrow that expands to list display previous tax years.

### Actions in the QuickStart menu

Links from the QuickStart window lets preparers easily undertake the following:

- create a new file or return
- open an existing file that was previously saved
- carry forward a file from a previous taxation year to the current taxation year
- open a file that was recently worked on
- access in-product Help, user forums, and more support resources

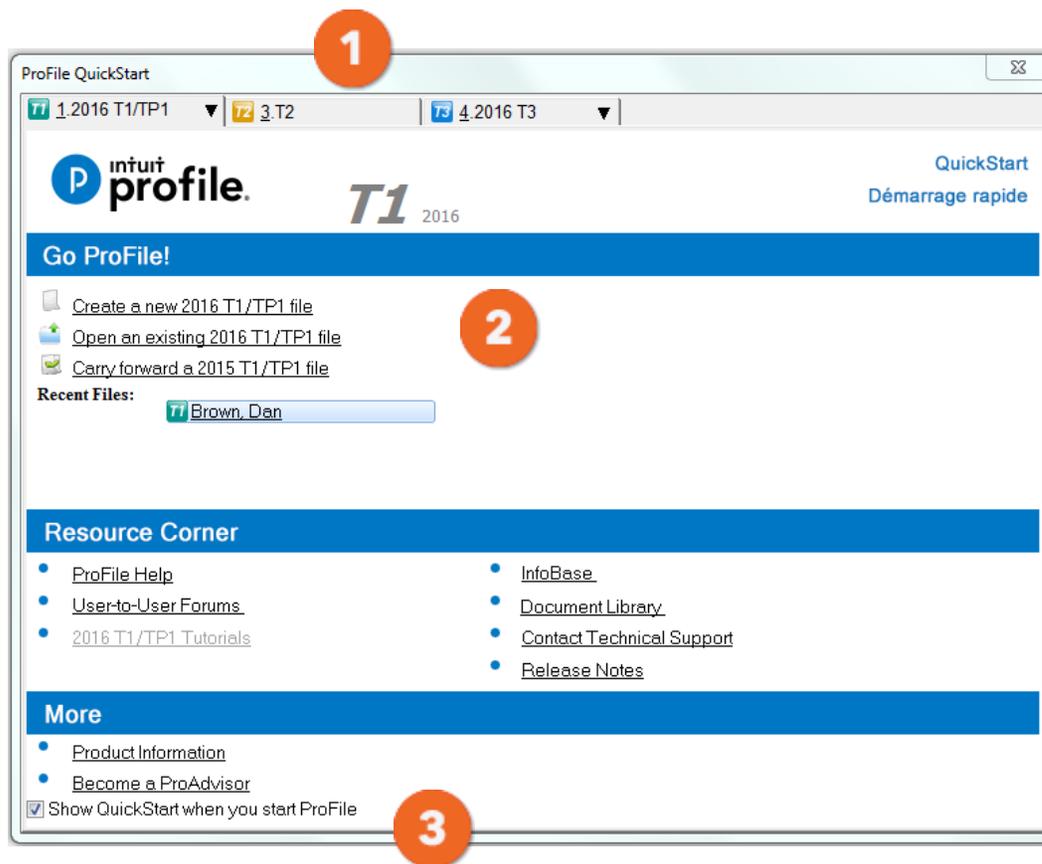
### Turn off the QuickStart menu

The QuickStart menu can be turned off if you prefer not to use its functionality.

Identify the checkbox in the bottom corner of the QuickStart menu.

Toggle off the checkbox; the QuickStart menu will no longer appear when ProFile starts.

To re-establish the QuickStart menu at a later time, select the “QuickStart” option under the “Help” toolbar menu.



## Using a Trial License in ProFile

A trial license gives preparers the opportunity to try the functionality of ProFile without any cost.

### What is included with a trial license?

A trial includes access to all the modules and features ProFile has to offer, with the exception of filing completed tax returns.

These features include:

- T1/TP1 for Individual tax returns
- T2 for Corporate tax returns
- T3/TP-646 for Trust returns
- FX/FXQ for additional forms (T4/T5, etc.)

### Getting a trial license

Visit the [“free trial” section of the ProFile website](#).

Complete the **information fields on the trial page** and submit.

The temporary license key and product codes are provided via email.

Download ProFile, enter your license key/product codes, and begin your free trial.

1

### Welcome to ProFile!

Just fill in all the fields below and we'll automatically send you an email containing a Product Code, a License Key and a link to download your 3-week trial of ProFile Tax Suite.

Are you a student?  Yes  No

First Name

Last Name

Company Name

Email Address

Phone Number

What tax software do you currently use?

How many personal returns do you prepare annually?

How many business returns do you prepare annually?

[Start My FREE Trial](#)

## Using the Start Screen in ProFile

The ProFile “start screen” contains most of the options and elements required to complete forms and slips. When starting ProFile for the first time, many of the action icons will be “greyed out” or inactive; once forms and slips are created, many will become active for use.

### The top toolbar menu

ProFile’s top toolbar menu contains most options necessary to begin completing and filing client returns:



The “**File**” menu includes many of the functional features for ProFile, including Open a return, Carry Forward, Import Data, and Print.

The “**Goto**” menu activates the ProFile database options of Form Explorer and Client Explorer, as well as Hub.

The “**Form**” menu allows users to open, print, and close forms in ProFile, as well as clear populated forms.

The “**Options**” menu allows preparers to customize the ProFile environment, pricing, module, and database.

The “**EFILE**” menu displays current and archived EFILE returns, as well as the ability to set EFILE options.

The “**Online**” menu connects users to online support materials, the Live Community, and software updates.

The “**Training**” menu lists in-product tutorials for individual tax years and modules.

The “**Window**” menu gives ProFile users the ability to reorient the view of ProFile.

The “**Help**” menu links users to support materials, flexible licensing options, and the in-product Help feature.

## Setting Preparer Information in ProFile

Preparer information can be conveniently entered in ProFile. This allows the “Preparer” section of ProFile “Info” forms to automatically populate whenever a new form is created.

Select the “Environment...” option from the “Options” drop-down menu in the top toolbar.

The **“Environment Options” window displays.**

Select the **“Preparer” tab**; a list of information fields displays.

Complete the necessary fields.

Click the **“OK” button.**

The preparer information saves.

### Automatically updating preparer information changes

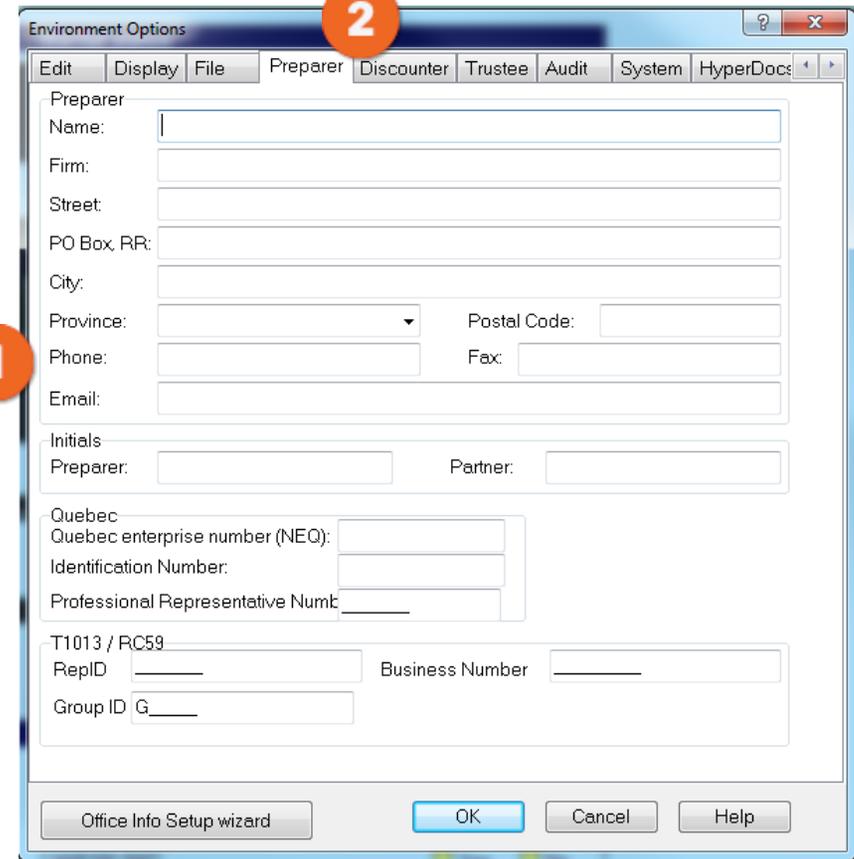
Preparers can set an automatic update for the “Preparer” section of returns when changes are retroactively made to the preparer information. For example, if the name of the preparer’s firm changes, the returns with the firm’s name automatically update to the new name.

Select the “Module...” option from the “Options” drop-down menu.

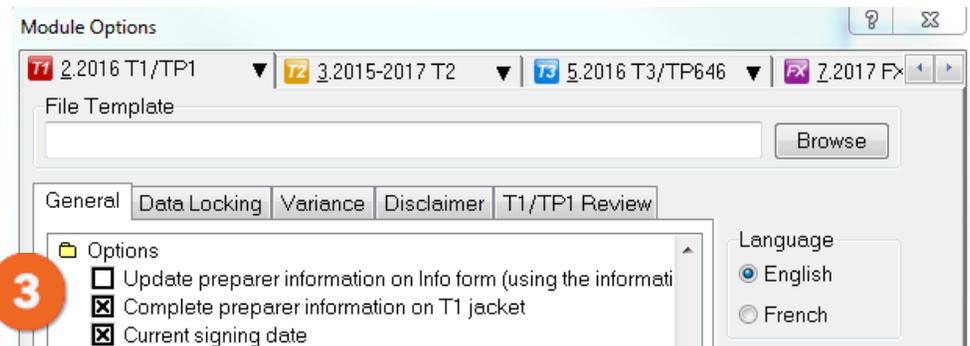
In the “General” tab, scroll down to the “Options” section.

Activate the **“Update preparer information on Info form” checkbox.**

Click the **“OK” button**; the setting saves.



The screenshot shows the "Environment Options" dialog box with the "Preparer" tab selected. The dialog has a menu bar with "Edit", "Display", "File", "Preparer", "Discounter", "Trustee", "Audit", "System", and "HyperDocs". The "Preparer" section includes fields for Name, Firm, Street, PO Box, RR, City, Province (a dropdown menu), Postal Code, Phone, Fax, and Email. Below this is the "Initials" section with fields for Preparer and Partner. The "Quebec" section includes fields for Quebec enterprise number (NEQ), Identification Number, and Professional Representative Number. The "T1013 / RC59" section includes fields for RepID, Business Number, and Group ID. At the bottom, there are buttons for "Office Info Setup wizard", "OK", "Cancel", and "Help". A red circle with the number "2" is positioned above the dialog box.



The screenshot shows the "Module Options" dialog box with the "General" tab selected. The dialog has a menu bar with "File Template" and "Browse". Below this is the "Options" section with a list of checkboxes: "Update preparer information on Info form (using the informati)", "Complete preparer information on T1 jacket", and "Current signing date". The "Language" section has radio buttons for "English" and "French". A red circle with the number "3" is positioned to the left of the "Options" section.

## Setting up for EFILE in ProFile

Prior to using the EFILE function for a return, it is necessary to use the set-up wizard in ProFile.

### Setting up for EFILE:

Select the “Set EFILE Password” option from the “EFILE” drop-down menu in the top toolbar.

The “EFILE Wizard” displays.

Click the “Next” button to proceed.

During the “Set EFILE Password” process, users will require the following:

- EFILE On-Line Number (from CRA)
- EFILE On-Line Password (from CRA)
- NetFile Quebec Number (if applicable, from MRQ)
- NetFile Quebec Password (if applicable, from MRQ)
- EFILE number (from CRA)

Click the “Finish” button when all applicable information is entered.

**Note:** if you are using an Options Package, you need to save the options package after entering in the new EFILE information



## Creating a New File in ProFile

Creating a new file or return in ProFile is quick and convenient.

**Note:** only tax modules that have been purchased can be created in ProFile. However, previous tax years are made available for the purchased tax module.

### Creating a new file

Open ProFile.

Select the “New” option from the “File” drop-down menu in the top toolbar.

A list of available modules displays in the menu.

Select the desired module; a new return opens in ProFile.

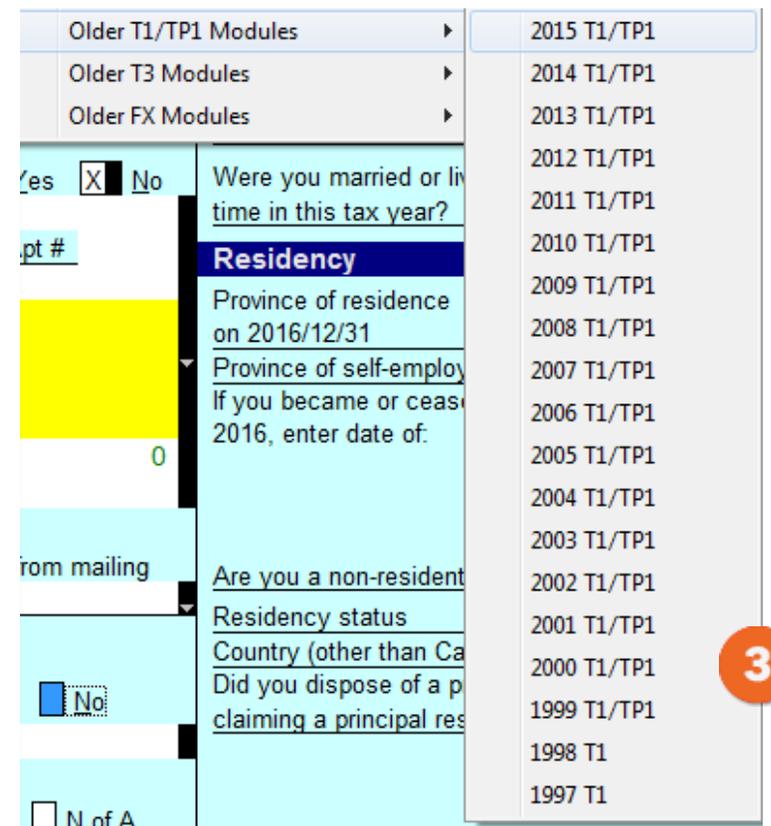
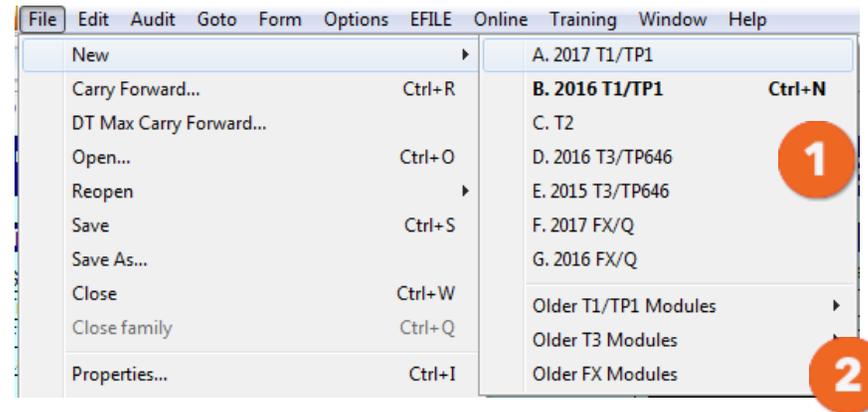
### Creating Older Files

There are **three options under the “New” option** in the “File” drop-down menu for older modules:

- Older T1/TP1 Modules
- Older T3 Modules
- Older FX Modules

Select the applicable option for creating an older module (e.g., T1/TP1); a **list of previous tax years supported by ProFile displays**.

Select the desired module; a new return opens in ProFile.



## Fast Reopening of Files

ProFile lets preparers quickly reopen returns that they have recently worked on.

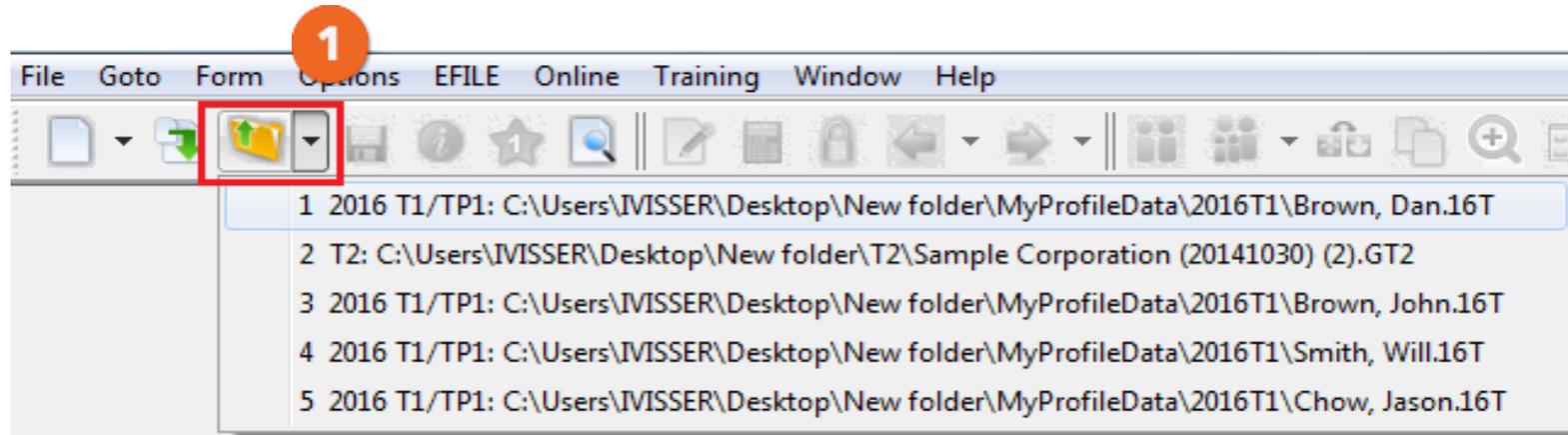
### Fast reopen of returns

Click the **arrow next to the file folder icon** in the top ProFile toolbar.

A list of recently opened returns displays.

Select the return to continue working on; the return opens.

**Note:** preparers can also review a list of recently opened returns under the “File” menu in the top ProFile toolbar.



## Using Form Explorer in ProFile

The “Form Explorer” feature allows preparers to locate individual forms, lines, and details within a client’s return. In addition, preparers can print forms from the Form Explorer and determine when it was last updated.

### Starting the Form Explorer

Open ProFile.

Open a return (e.g., a T1).

Select the “Form Explorer” option from the “Goto” drop-down menu in the top toolbar.

The **Form Explorer opens**; the client’s name displays in the top-left corner.

### Using the Form Explorer

Select a view option from the top-right menu buttons.

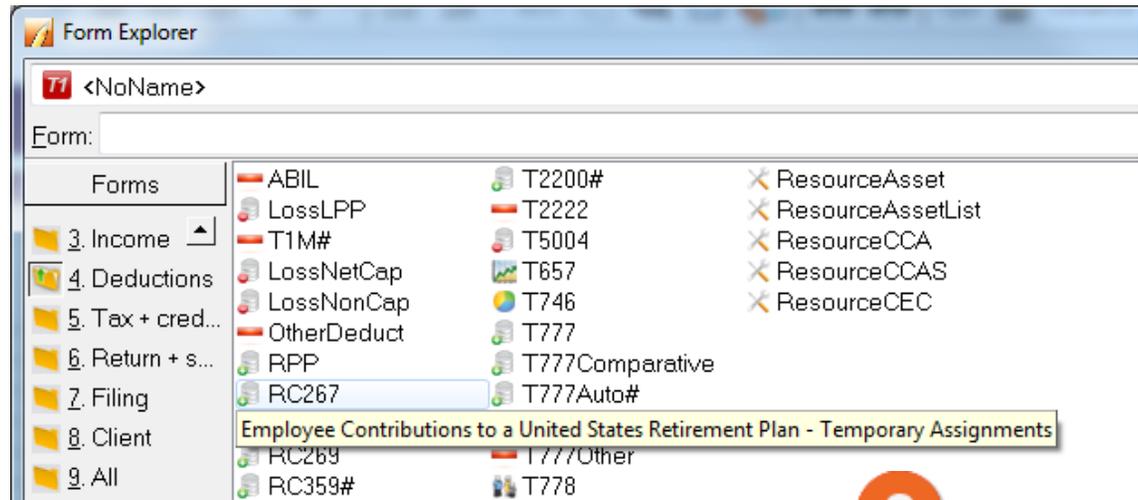
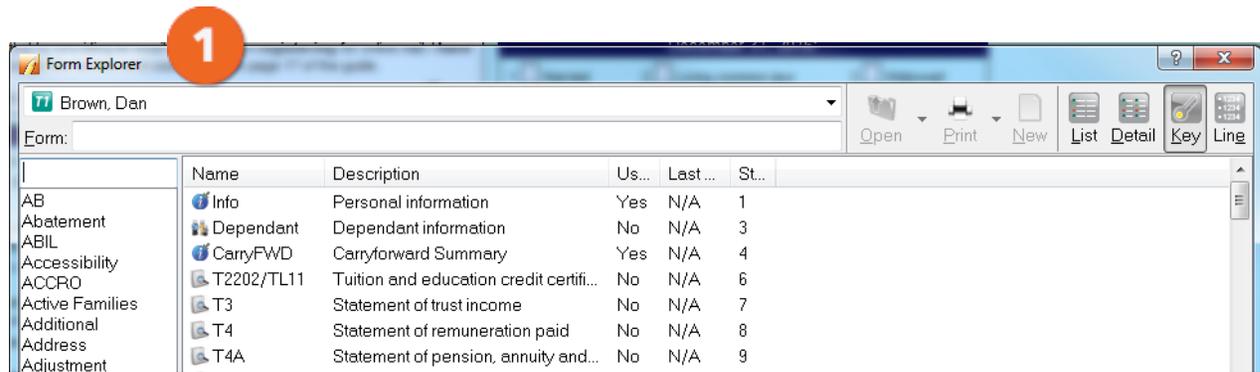
View options include:

- “List” displays all forms in the return
- “Detail” displays details and/or status about all forms in the return
- “Key” searches the return for key words (e.g., “RRSP”)
- “Line” displays each line in every form in the return.

**Tip:** hover the mouse over each form to see a full title.

Double-click any form listed in the Forms Explorer; the form opens in ProFile.

Click the “Print” button to print any form from the Form Explorer.



## Carry Forward Files in ProFile

Carry forward is a ProFile service that allows existing client information from previous year's files to be "carried forward" into a new file, saving time and effort for preparers. Preparers can also carry forward a previous year's ProFile file or a file prepared using a competitor's product, as well as multiple files at one time.

### Carry forward files in ProFile

Select the "Carry Forward..." option from the "File" drop-down menu in the top toolbar.

The carry forward window displays.

Select the module (e.g., T1) and tax year of the file to carry forward from the drop-down list.

**A list of applicable files displays.**

**Select the specific file to carry forward.**

Click the "Carry forward" button.

The selected file carries forward.

### Carry forward competitor files

ProFile supports the carry forward of files for the following competitors: Taxprep, Cantax, and DTMax.

#### 2016-2017 TaxPrep-to-ProFile carry forward preview (T1)

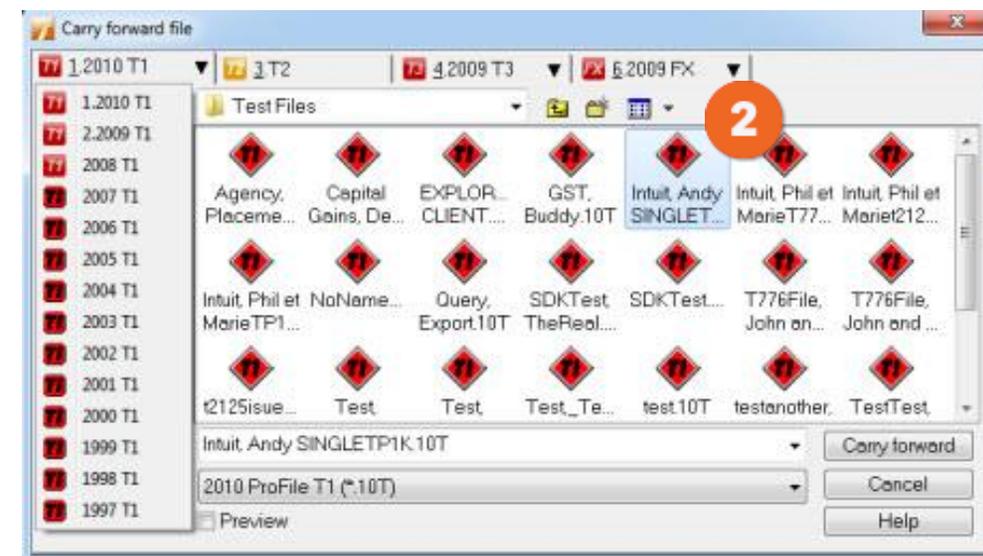
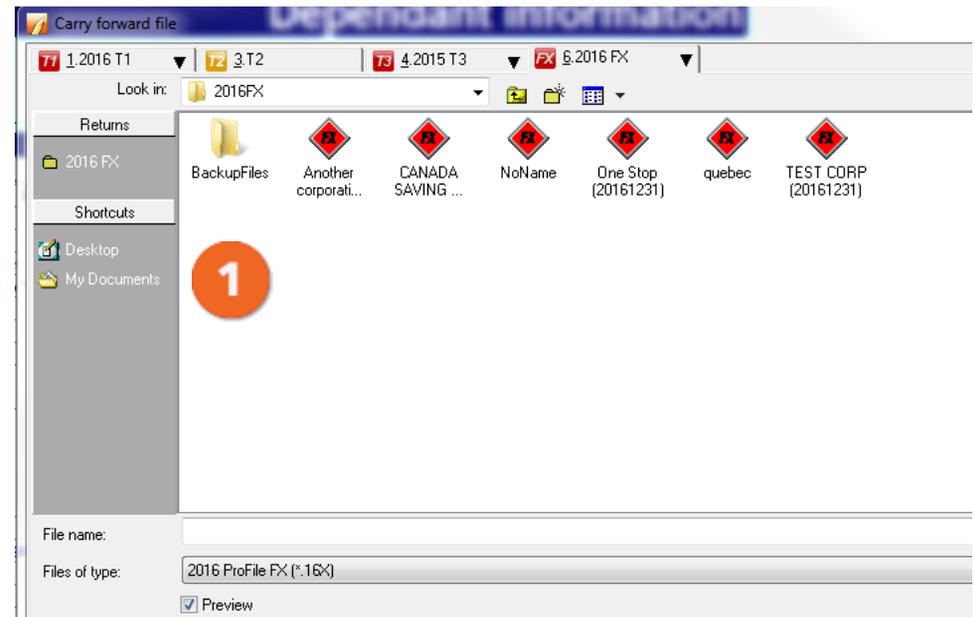
Supported TaxPrep versions include 2016.v1.0, 2016.v2.0, 2016.v3.0, 2016.v4.0, and 2016.v5.0.

#### 2016-2017 Cantax-to-ProFile carry forward preview (T1)

Supported Cantax versions include 16.1.303.100, 16.2.303.107, 16.3.303.111, 16.5.303.119, and 16.6.303.124.

#### 2016-2017 DTMax-to-ProFile carry forward preview (T1)

The current version of the ProFile T1 allows carry forward of a DTMax T1 file.



## Carry Forward Files in ProFile (continued...)

### Carrying forward multiple files using the Client Explorer database

#### If the preparer used ProFile in the previous tax year...

Select the “Client Explorer” option from the “Goto” drop-down menu in the top toolbar.

The Client Explorer displays a list of last year's files.

**Click on the “Filter” button;** the filter option window displays.

Use the filter options to identify which files to carry forward. For example, if you only want to carry forward T1 files from the year 2016, you would select the “T1” module tab, then the “2016” year designation.

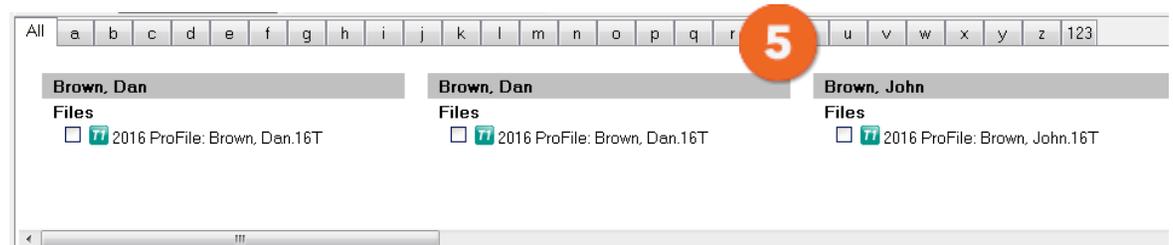
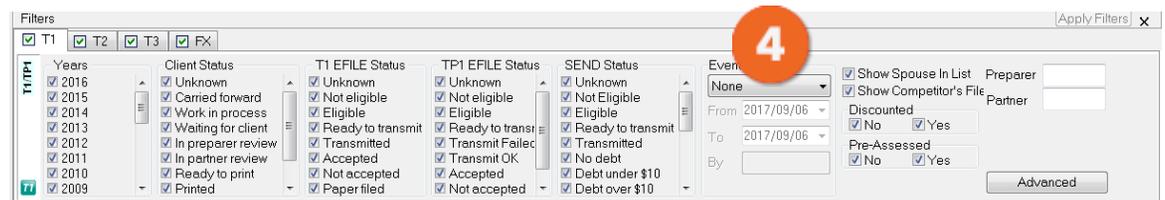
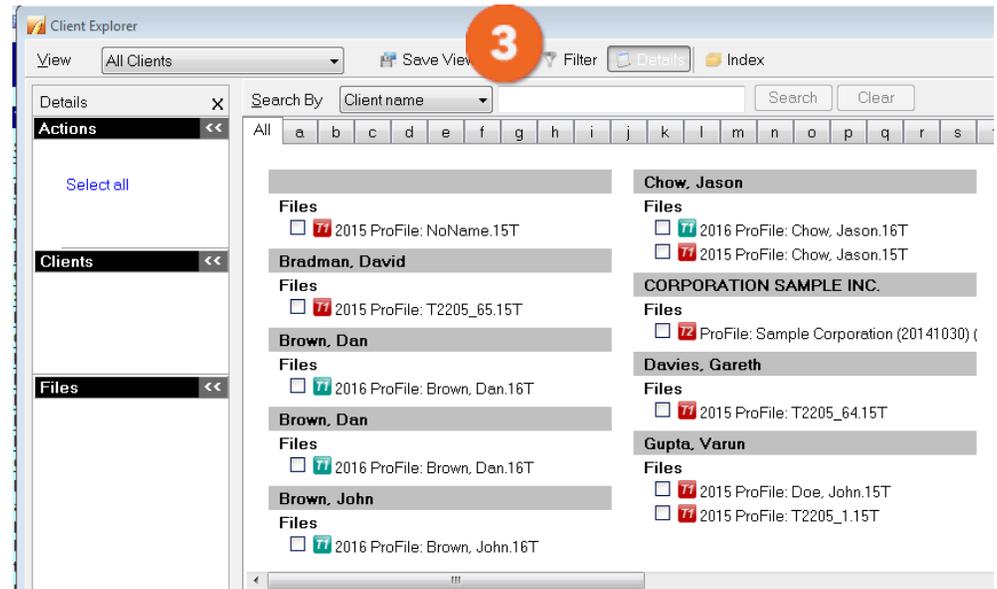
Click the “Apply Filters” button. **The files matching the selected filter options display.**

Select the files to carry forward. To select all files, right-click in the window and select “Select All” from the pop-up menu; all files highlight.

Right-click on the selected file(s) and select the “Carry Forward Files” option from the menu.

The file(s) carry forward.

**Related Article:** [Carry forward files using the Client Explorer database](#)



## Checking Version of ProFile

ProFile is constantly undergoing improvements and adding to its features to benefit customers. It is important for preparers to have the latest version to ensure the full functionality of ProFile is available.

In addition, knowing where and how to check the version of ProFile is helpful in the case of a support call; ProFile's Care representatives will often ask which version of the software is in use when troubleshooting an issue.

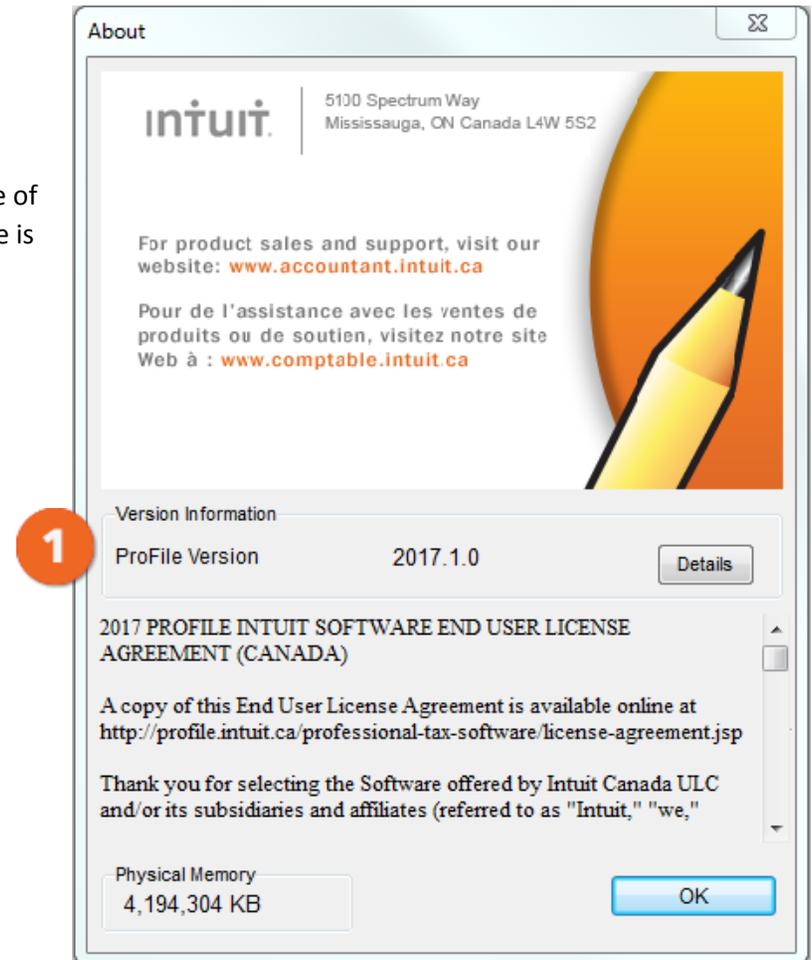
### Checking ProFile version

Open ProFile.

Select the "About" option from the "Help" drop-down menu in the top toolbar.

The "About" window displays.

Review **the ProFile version number** (e.g. "2017.1.0").



## Updating ProFile to the Latest Version

During the tax season, ProFile is often updated with new CRA information, tax rates, forms, and more. It is important to keep ProFile up to date to ensure compliance with the latest CRA requirements. The recommendation is to check - at the very minimum - once per week.

ProFile can be updated two different ways:

- manually, where the user manual checks to see if any updates are available
- automatically, where the user allows ProFile to check itself if updates are available

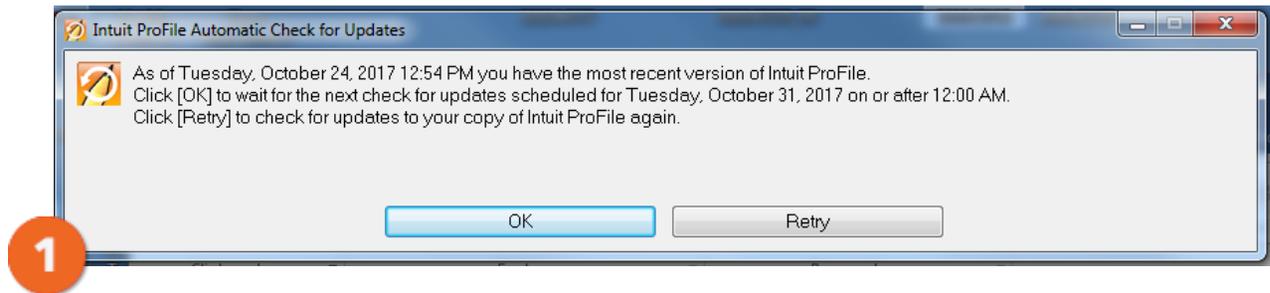
### Manually updating ProFile

Open ProFile.

Select the “Check for Updates...” option from the “Online” drop-down menu in the top toolbar.

ProFile connects to the Internet to see if there are any available updates. If there are, you are prompted to download and install the newest update.

If **no updates are available**, click the “OK” button to close the window.



### Automatically updating ProFile

Open ProFile.

Select the “Environment...” option from the “Options” drop-down menu in the top toolbar; the “Environment Options” window displays

Select the “System” tab.

In the “Automatic Check for Updates” section, put a checkmark in the “Enable automatic check for updates” box.

You can choose:

- how frequently ProFile will check for updates
- what time ProFile will check for updates
- whether you would like to be notified before connecting to the Internet
- whether you would like to be notified before downloading an update to your system

## Using ProFile Notification Services

The ProFile notification service provides timely and important information directly to customers. This may include CRA announcements, ProFile releases and patches, or critical issues.

### Start-Up Notifications

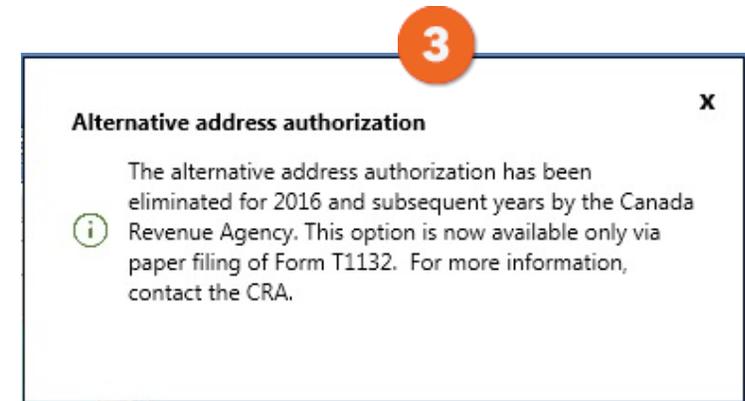
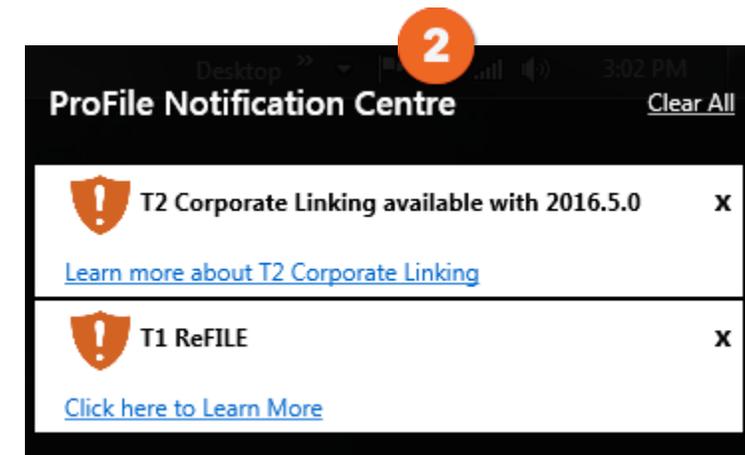
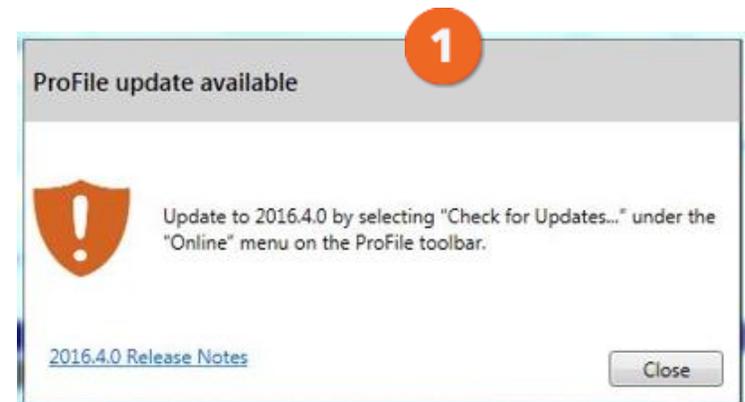
**Start-Up notifications** display when ProFile starts; they are often urgent messages that affect most or all preparers. They may include reminders of recent software updates, CRA changes, or notices of service interruptions.

### ProFile in-application Notification Centre

The in-application **Notification Centre displays** within the ProFile application, usually on the right side of the ProFile window. It lists recent notifications in the sequence they arrive. Each can be deleted if the information is no longer relevant the preparer. Preparers can also turn the in-application Notification Centre to “off” status to no longer see notifications in the application.

### Information Call-out

The **Information Call-out** highlights general, non-emergency information for ProFile customers. The call-out displays temporarily then removes itself from view.



# Using Options in Profile

## Setting Environment Options in ProFile

ProFile users can set options for their ProFile working environment. This includes PDF settings, form settings, reminders, security, and more. Select the “Environment...” option from the “Options” drop-down menu in ProFiel.

### Edit tab

The “Edit” tab includes options for common tasks, such as allowing predictive typing, date stamping, SIN validation, and capitalization.

### Display tab

The “Display” tab includes options for the display of ProFile, including font scaling, tab icons, and page breaks.

### File tab

The “File” tab includes options for setting file directories, managing recently used files, and auto-saving files.

### Preparer tab

The “Preparer” tab allows preparers to insert their personal and firm information, including RepID, Group ID, and initials.

### Discounter tab

The “Discounter” tab allows a discounter to insert their personal and firm information, including “Discounter Registration Number”.

### Trustee tab

The “Trustee” tab allows trustees to insert their personal and firm information.

### Audit tab

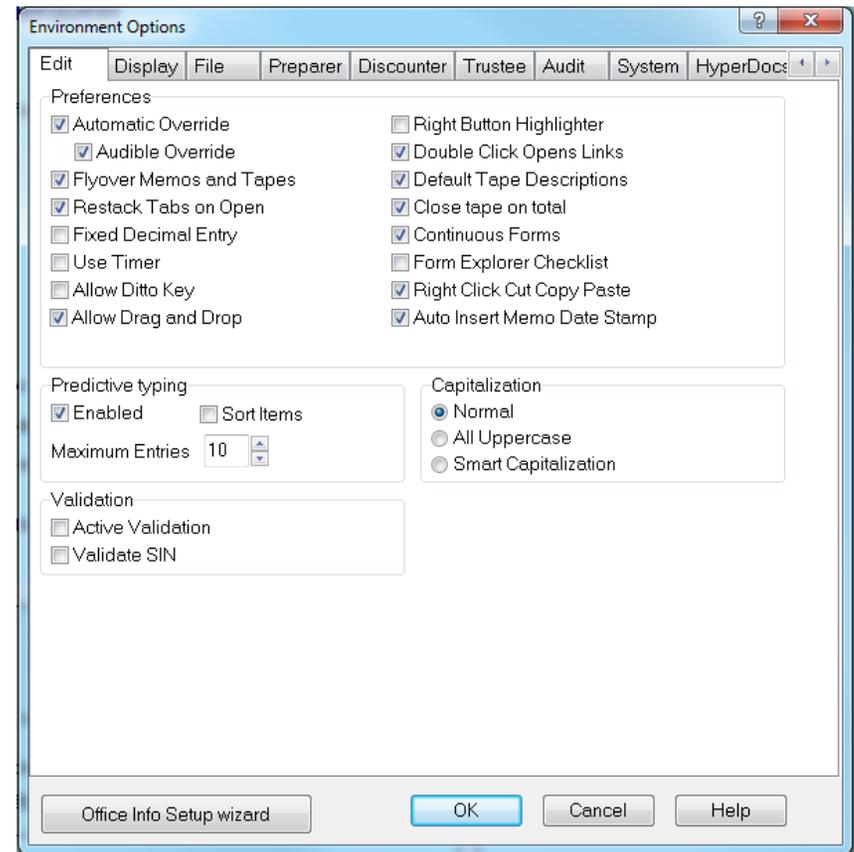
The “Audit” tab allows preparers set audit and/or error styles, as well as establish standards to prevent a return from being prematurely filed.

### System tab

The “System” tab includes options for setting shared folders, checking for software updates, and utilizing online features.

### PDF tab

The “PDF” tab allows preparers specify PDF characteristics for printed returns, PDF archive directories, and PDF security.



# Using File Pathing in ProFile

## About file pathing

ProFile users can set where their client's returns are stored. The file path can be changed or locked to prevent deletion or copying.

## Managing file paths

Select the "Environment..." option from the "Options" drop-down menu in the toolbar.

Select the "File" tab in the "Environment Options" window.

Files paths display under the "File Directories" section of the window.

Files in the file path display in the corresponding directory in Explorer.

Click the "Lock" checkbox to lock the file path; the lock feature will default back to this file directory but can be changed even when locked.

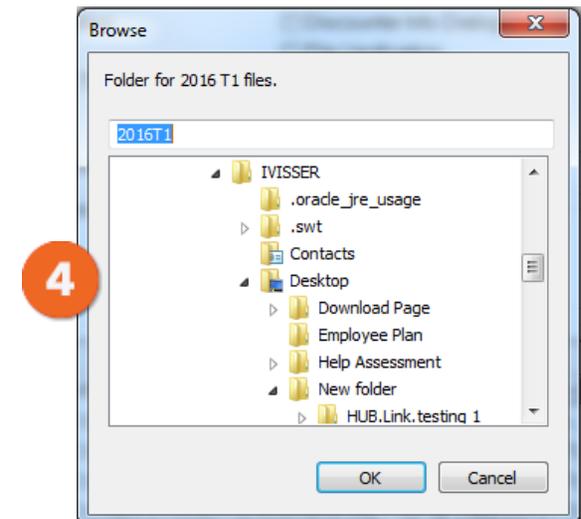
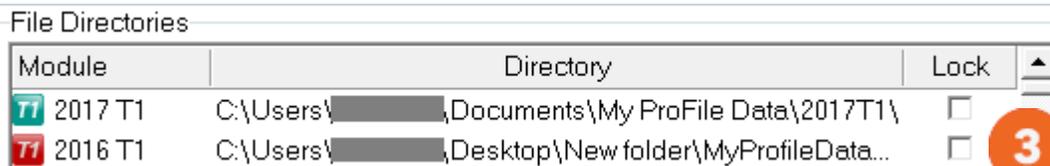
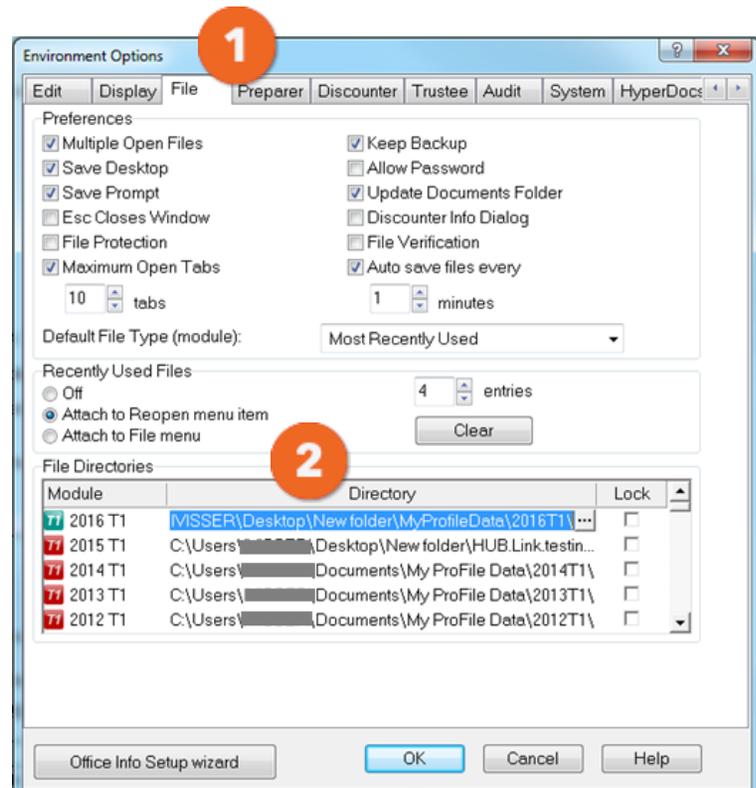
## Changing file path

Click on the file directory to change.

Click the "show path"  button.

The "Browse" window explorer displays.

Select a new location from the "Browse" window; click the "OK" button.



# Using Module Options in ProFile

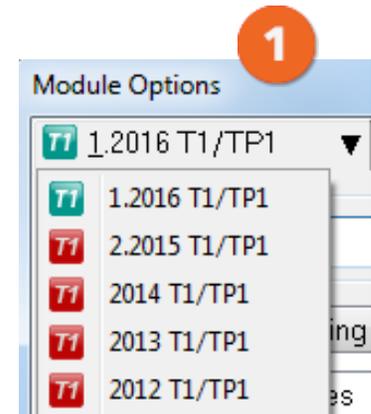
## Module options overview

ProFile users can set options for each tax module (e.g., T1, T2, etc.) for which they are preparing returns.

Select the “Module...” option from the “Options” drop-down menu in the top toolbar.

## Setting module options

Each module tab **includes an active “down” arrow**; click the arrow to display the available tax years for the module display.



## General tab

The “General” tab includes options for carry-forward, individual forms, access, and more.

## Data Locking tab

The “Data Locking” tab allows preparers to set the criteria for locking a file. For instance, if the file carries forward or is transmitted.

## Variance tab

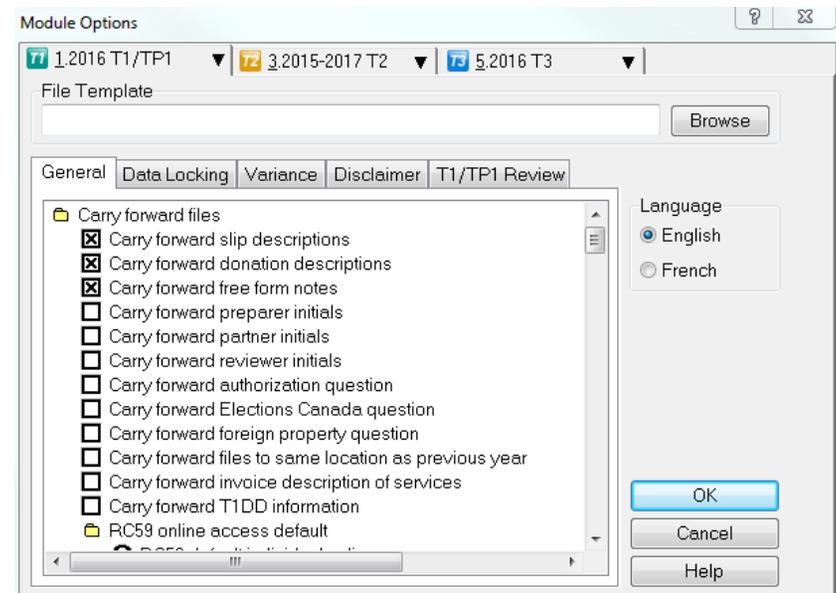
The “Variance” tab allows the setting of the “Minimum Variance”, using the criteria of “Dollar” and/or “Percentage”.

## Disclaimer tab

The “Disclaimer” tab includes the option to include a standard disclaimer on all prepared forms.

## T1/TP1 Review tab

The “T1/TP1 Review” tab allows the setting of the “Variance Thresholds”, using the criteria of “Dollar” and/or “Percentage”.



## Using Template in ProFile

Templates allow preparers to save time and effort by creating commonly used communications that can be sent to one or more clients.

### Selecting templates

Select the “Templates” option from the “Options” drop-down menu in the top toolbar.

The “**Template Editor**” window displays.

### Using templates

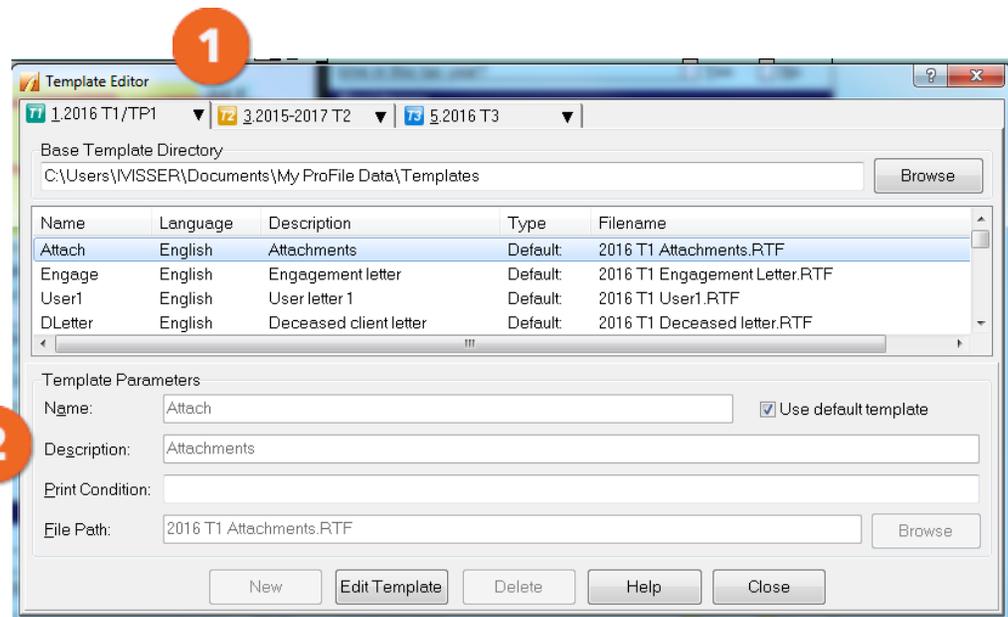
The **template list** includes the most-common communications required by preparers including engagement letters, client invoices, and payment emails.

Both French and English templates are provided.

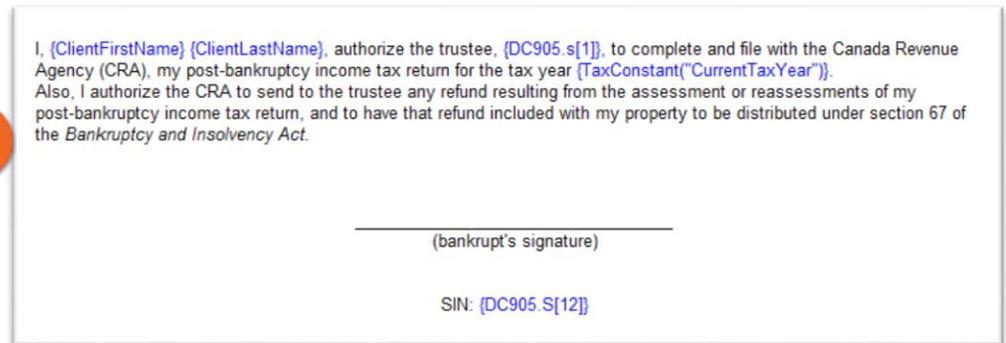
Double-click any template; the template opens in the editor pane.

**Edit the template** required and save for future use or additional editing and customization.

**Tip:** press “F1” on any field in the Template Editor to **learn more about** its function.

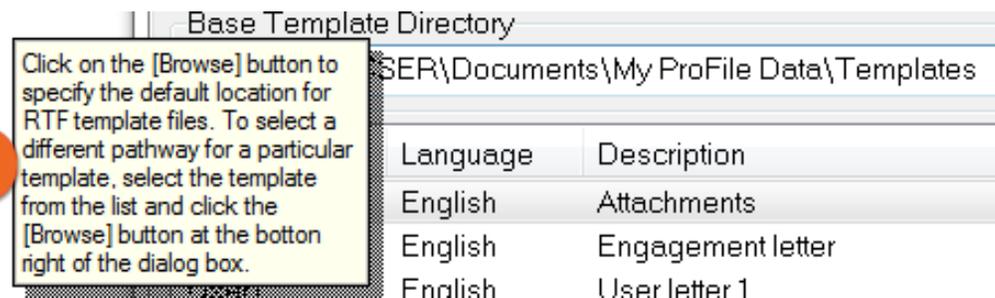


2



3

4



# Using Form Selection in ProFile

## Form selection overview

The “Form Selection” menu allows preparers to set print options for forms.

## Selecting templates

Select the “Form Selection” option from the “Options” drop-down toolbar menu.

The “Form Selection” menu displays.

## Using form selection

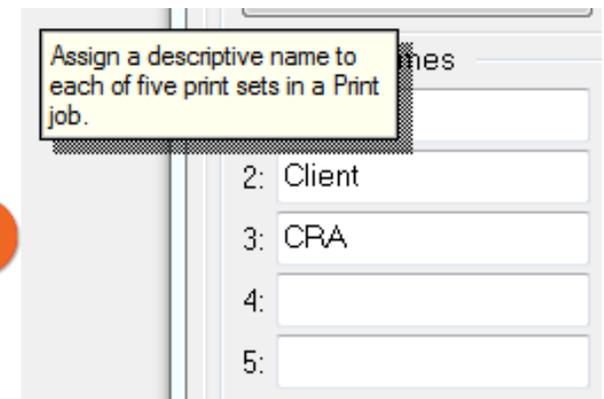
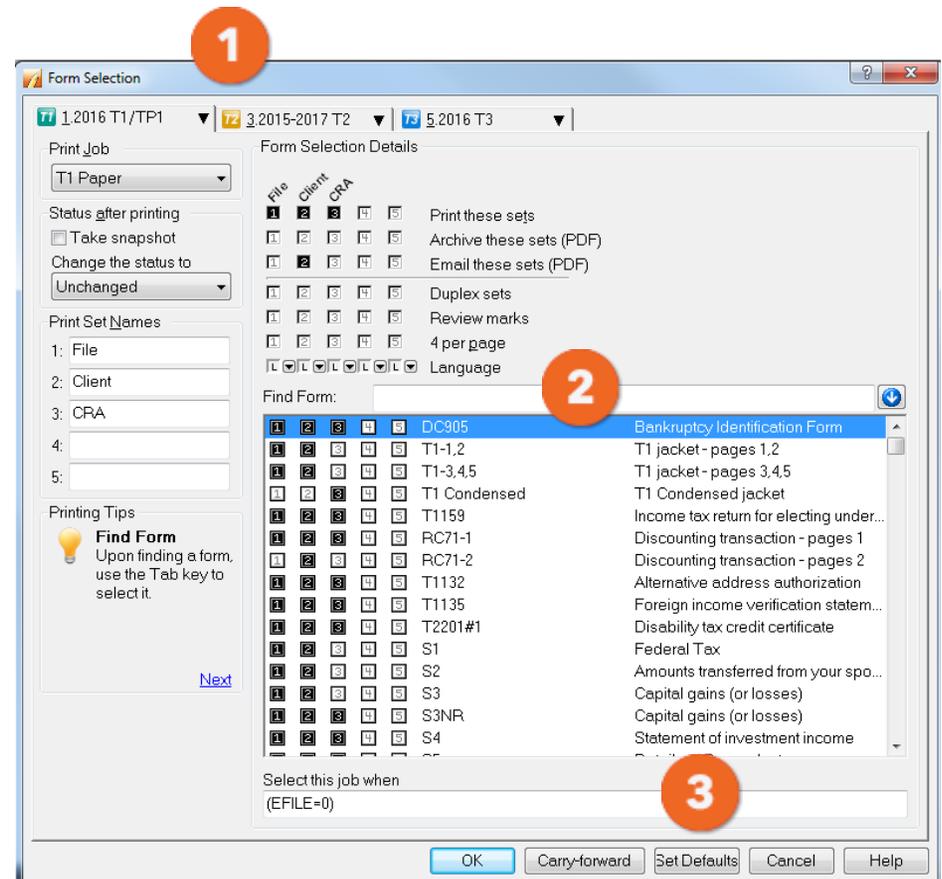
A list of print options displays in the “Form Selection” menu.

This list includes the ability to set the print options for “File”, “Client”, and “CRA”. Individual forms are listed, including the option for setting language.

Toggle any box to activate a print option for the particular form.

At any time, you can restore your defaults by clicking the “Set Defaults” button.

**Tip:** press “F1” on any field to learn more about its functionality.



## Setting Pricing in ProFile

The ProFile pricing feature provides a convenient method for preparers to set costs and bill clients for services.

### Getting started with pricing

Select the “Pricing...” option from the “Options” drop-down menu in the top toolbar.

The “Pricing Schedule” window displays.

### Pricing options

Select the **module** for which to set pricing options for (e.g., T1)...the current and previous tax year pricing displays.

Enter **information** for the GST registration number, invoice number, and GST/HST/PST rate.

Select the **invoice type**: “Detailed”, or “Brief”.

Select the **invoice methodology**: by “Schedule” or “Hour”.

Insert **costs for services** (e.g., basic charge, capital gains, etc.)

Click the “OK” button to save the pricing information.

### Carry forward pricing

ProFile lets preparers carry forward pricing from previous tax year’s to the current tax year.

Select the previous tax year (e.g. 2015 T1/TP1).

Review the pricing for services.

If the same pricing is to apply to the current tax year, click the **“Carry Forward” button**.

Click “OK” when asked to carry forward prices to the current tax year.

The previous tax year pricing displays in the current tax year. It can be changed at any time.

The screenshot shows the 'Pricing Schedule' window in ProFile. It contains the following elements:

- 1**: Title bar of the window.
- 2**: Tax year selection tabs at the top of the list (1. 2016 T1/TP1, 2. 2015 T1/TP1, 3. 2014 T1/TP1, 4. 2013 T1/TP1, 5. 2012 T1/TP1, 6. 2011 T1/TP1).
- 3**: Input fields for 'GST/HST rate' (0.0) and 'PST rate' (0.000).
- 4**: 'Invoice type' section with 'Detailed' selected.
- 5**: 'Invoice by' section with 'Schedule' selected.
- 6**: A list of services with their respective rates and methodologies.
- 7**: The 'Carry Forward' button at the bottom.

Module	Service	Methodology	Rate
T1	Basic charge	paper filed	0.00
T1	Basic charge	electronically filed	0.00
S1	Federal tax calculation	per schedule	0.00
S2	Amounts transferred from your spouse	per schedule	0.00
S3	Capital gains (or losses)	per schedule	5.00
S3	Capital gains (or losses)	per item	0.00
S4	Statement of investment income	per schedule	0.00
S4	Statement of investment income	per item	0.00
S5	Eligible / infirm dep / caregiver amounts	per schedule	0.00
S5	Amount for an eligible dependant	per claim	0.00
S5	Amounts for infirm dependants	per claim	0.00
S5	Caregiver amount	per claim	0.00

## Using Flexible Licensing in ProFile

Flexible licensing temporarily suspends a ProFile license on one computer in order for the license to be activated on another computer... without having to delete the license or purchase an additional seat.

For example, you can suspend your Profile license on an office computer and activate the same Profile license on a laptop in order to meet with clients in the field. When you return to the office, simply suspend the license on the laptop and resume the license on your office computer.

### **What is a "Seat"?**

The number of seats determines the maximum amount of users that can be activated on the Product Code and License Key combination: when you purchase a base license, you get one seat. When you purchase additional licenses, you get an increase to the number of seats that can be activated on your license.

### **What is required to use Flexible Licensing?**

Flexible licensing requires

- Tax year 2016 or later license (earlier tax years are not supported at this time)
- ProFile version 2016.0.3 or later
- Internet connection during activation and suspension of license

### **Can I still work offline?**

Yes. Once you have activated your license you can use ProFile without an Internet connection. Features like "Auto-fill my return" and EFILE will still require an Internet connection to work.

### **What does Flexible Licensing Cost?**

There is no cost for flexible licensing. The feature is included as part of your license purchase.

### **How many machines can I install ProFile on?**

Unlimited. ProFile is a free download, but the licensing determines what can be done with the program. You can add your licenses to as many computers as you wish with flexible licensing, but you can only have the number of licenses that you paid for active at the same time.

### **Is Flexible Licensing going to be "ON" by default?**

No. The flexible licensing option is activated manually.

## Flexible Licensing: Enable during Activation

Flexible Licensing can be enabled during the ProFile activation sequence, for preparers who want to start using the feature right away.

### Enabling Flexible License during Activation:

Enter your product code and license key during activation.

Click the “Next - Setup Flexible Licensing” button.

The “**Flexible Licensing Settings**” window displays.

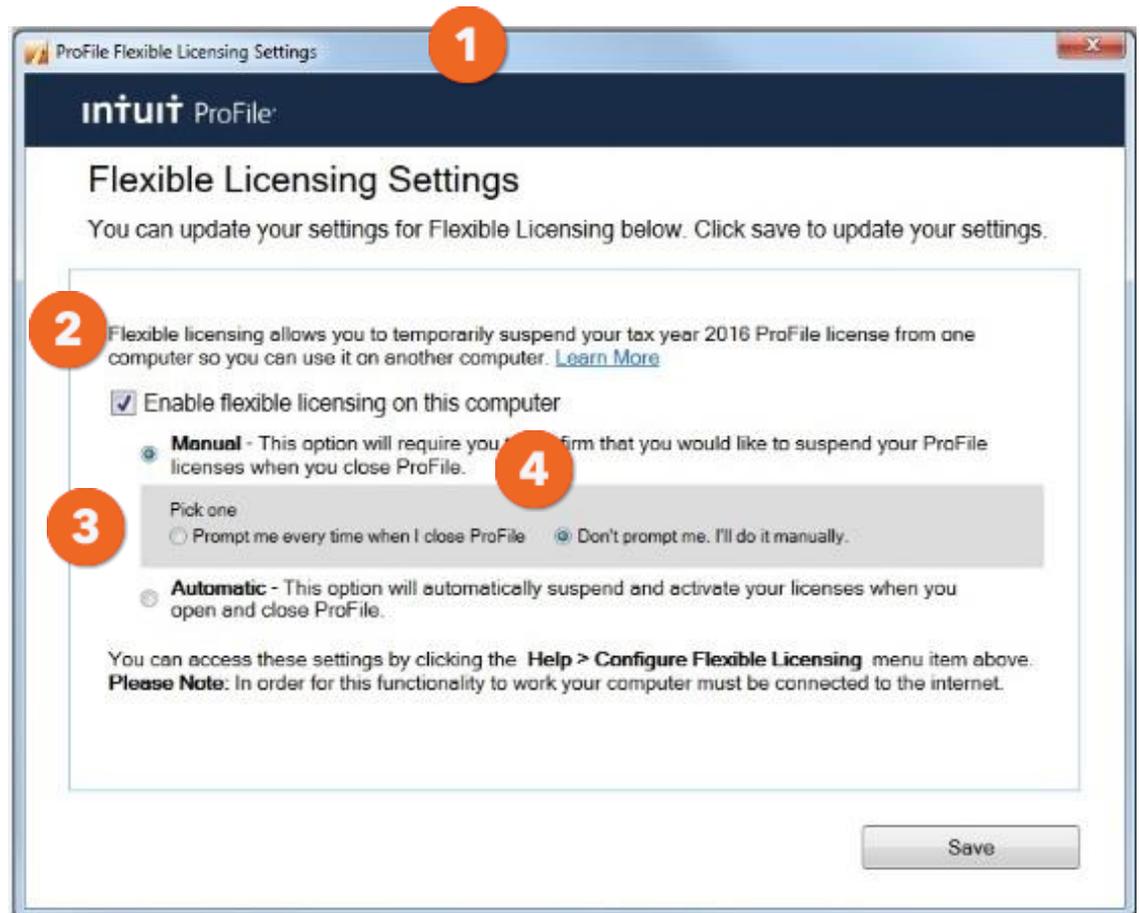
Click the “**Enable flexible licensing on this computer**” check box.

Select either the “**Manual**” or the “**Automatic**” mode button to activate your choice.

The “Manual” mode displays the choice of two additional options:

- “Prompt me every time when I close ProFile” – selecting this option results in ProFile prompting the user to suspend your license when closing the application
- “Don’t prompt me. I’ll do it manually” – selecting this option requires the user to suspend their license manually themselves when closing the application

Click the “Save” button to save your preferences.



## Flexible Licensing: Suspending the License Automatically

The “Automatic” mode automatically suspends or activates your licenses when you close and open ProFile, respectively.

**Note:** a working Internet connection is required to suspend a license.

### Suspending the License Automatically:

Select the “Configure Flexible Licensing” option from the “Help” drop-down menu in the top toolbar.

The “Flexible Licensing Settings” window displays.

Click the “Enable flexible licensing on this computer” box.

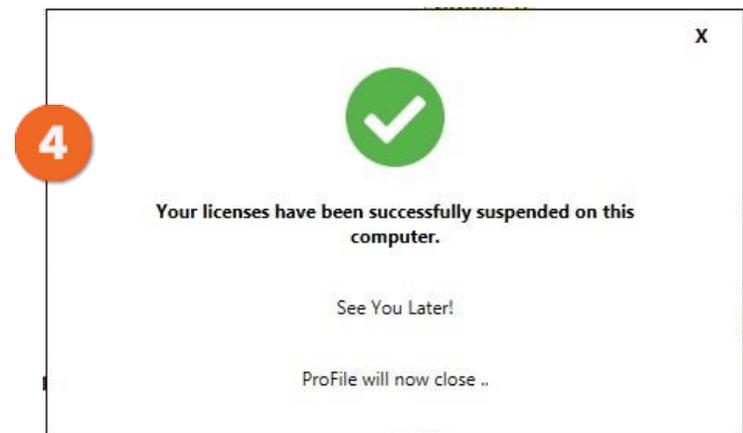
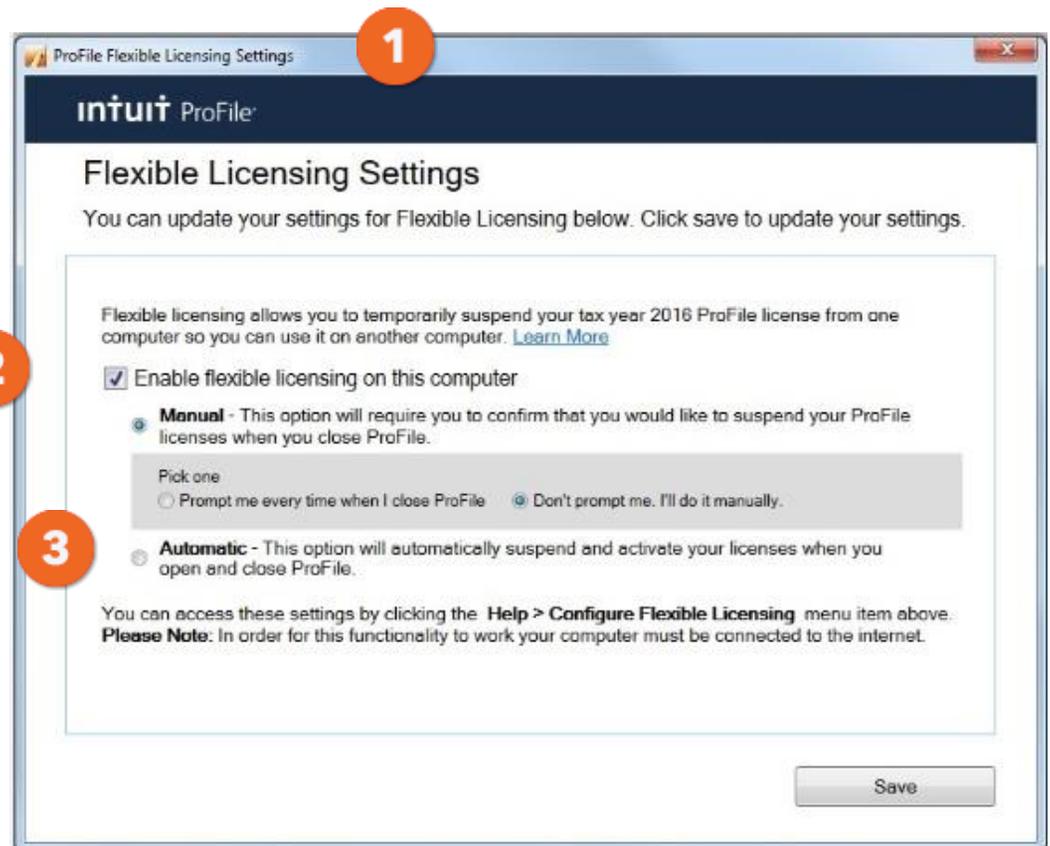
Select the “Automatic” mode button.

Click the “Save” button to save your preferences.

Close the ProFile application, either by clicking the “X” icon on the application or by selecting the “Exit” option under the “File” menu.

The ProFile application closes.

A message displays indicating that your license is suspended on the computer.



## Flexible Licensing: Suspending the License Manually

Manual suspension occurs when the user suspends the licensing themselves in ProFile.

**Note:** this process needs to be undertaken each time ProFile is closed to ensure the Flexible Licensing is properly suspended. Proper suspension ensures the license can be activated on another computer.

### Suspending the License Manually:

Save any files being used in ProFile.

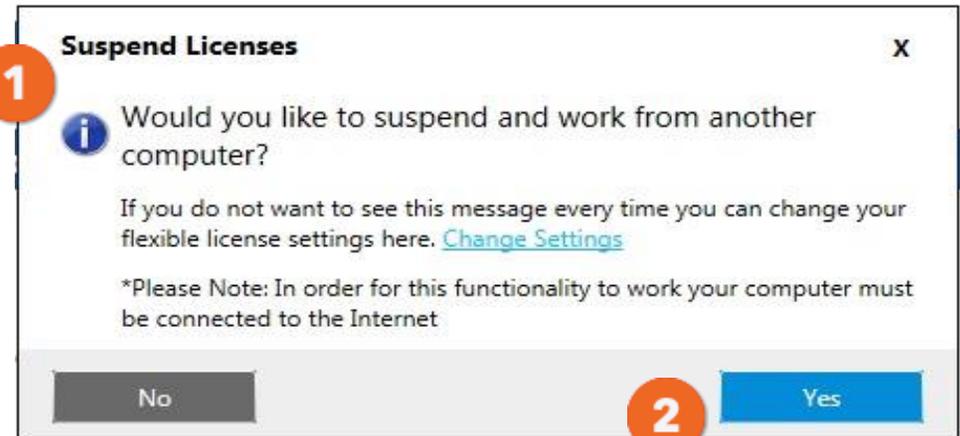
Click the “X” icon on top-right corner of ProFile or select the “Exit” option under the “File” drop-down menu.

A **prompt displays asking** if you would like to suspend your license and work on another computer.

Select the **“Yes” option**.

A message displays, confirming the license suspension can proceed.

A **confirmation message displays** when the license is suspended.



# Using the Client Explorer database in ProFile

## Setting Client Explorer as the ProFile Database

ProFile users can set and use Client Explorer as the database when preparing client returns.

### Setting Client Explorer as database

Open ProFile.

Select the “Database” option from the “Options” drop-down menu in the top toolbar.

The “Database/Client Explorer Options” window displays.

Select the “Use Client Explorer” option; the Client Explorer menu displays.

Select the “Personal Server” or “Shared Server” option.

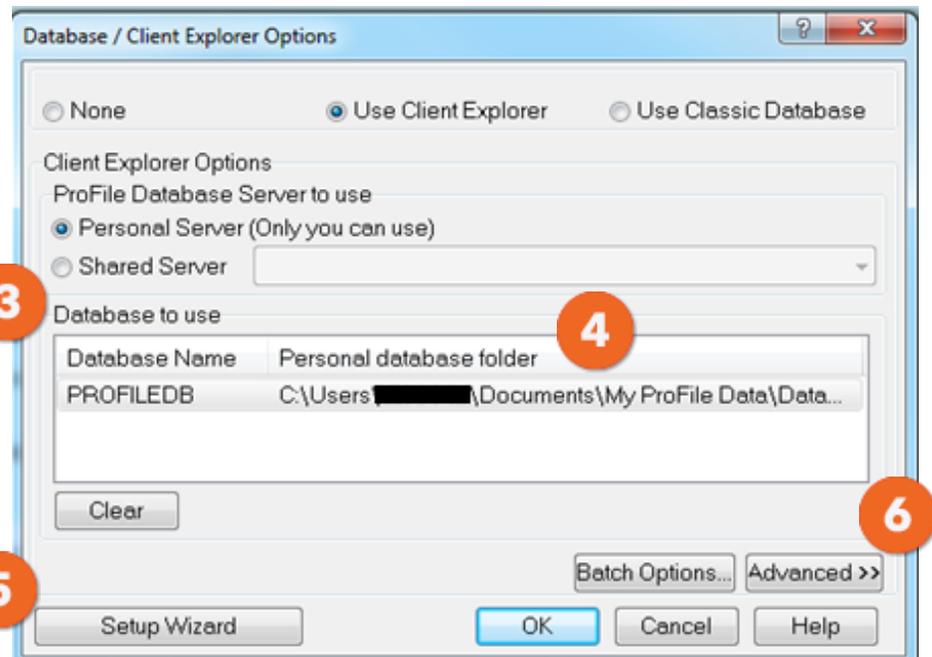
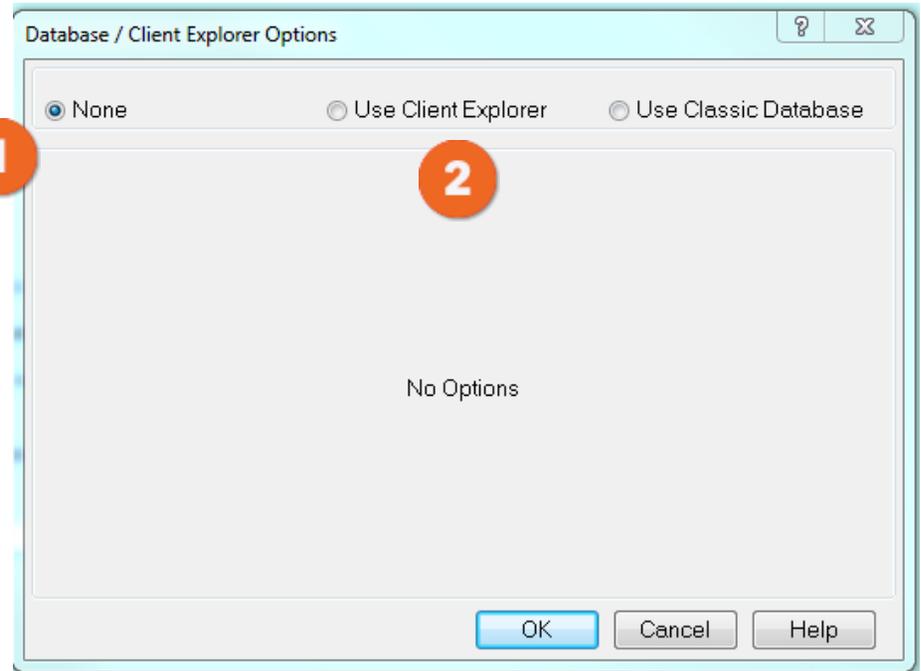
Select the folder path if a shared server is being used.

To create a shared server, click the “Setup Wizard” button.

Click the “Advanced” button to explore additional options, including the handling of clients with no SIN.

Click the “OK” button when completed.

The Client Explorer is set as the database option.



## Using Filters in Client Explorer

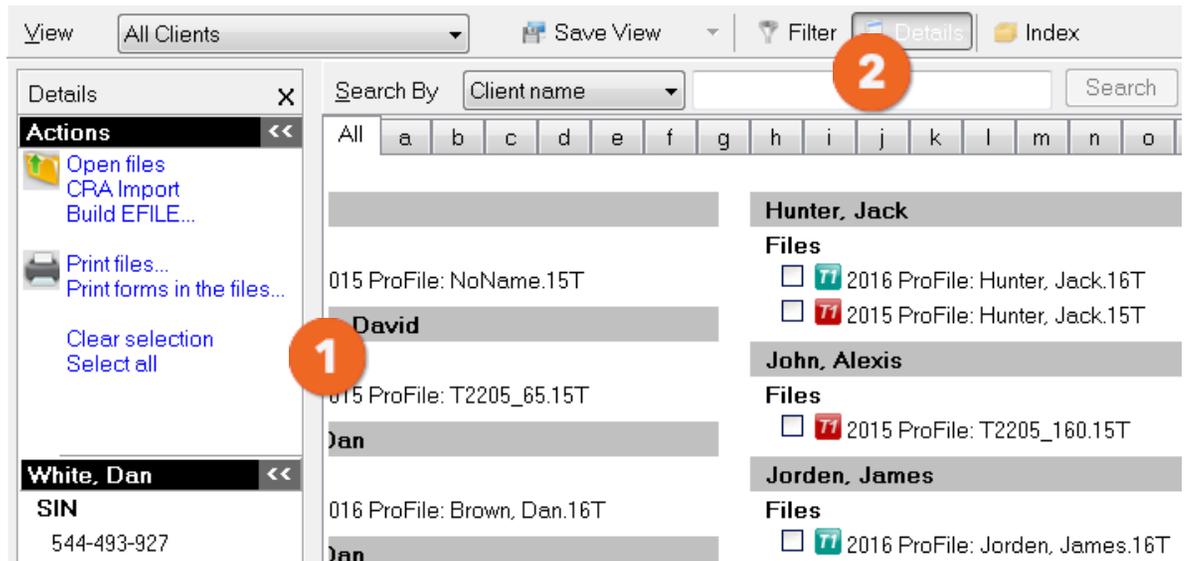
By default, the Client Explorer displays all files regardless of the type of return, taxation year, or status. Filters allow the display of only those files that meet the criteria preparers set, such as those which have been filed or those which are still outstanding.

### Viewing Filter options

Select the “Client Explorer” option from the “Goto” drop-down menu in the top toolbar.

A list of all available returns for clients displays.

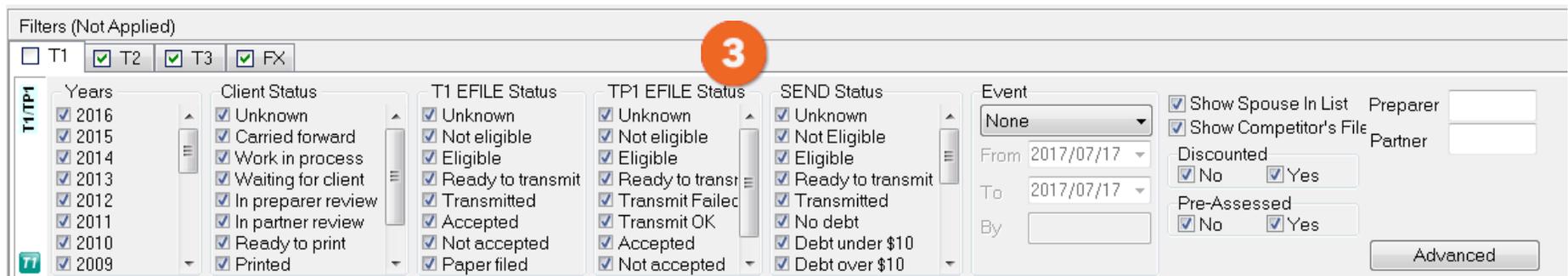
Click the “Filter” button.



The **filter window displays** at the bottom of the ProFile program. The filter pane contains all filter options for clients and their returns. (3)

Options for filtering display in individual tabs and include:

- available tax years
- modules (e.g., T1, T2, etc.)
- Client Status
- EFILE status
- SEND status
- EVENT



## Using Filters in Client Explorer: T1 EFILE Filtering Example

Example: filter for only T1 returns that are completed and ready to EFILE.

Select the “Client Explorer” option from the “Goto” drop-down menu in the top toolbar.

Click the “Filter” button; the filter window displays at the bottom of the window.

### Selecting forms

Select the checkbox on the “T1” tab and clear the other module tabs by unchecking them. This displays only T1 forms.

Select the checkbox for the current year (e.g., “2016”) on the “T1” tab and clear the checkboxes for all other years by unchecking them. This displays only 2016 tax year.

Select the checkbox for “Carry Forward” in the “Client Status” column and clear the other statuses by unchecking them. This displays only those returns in the “carry forward” state.

Select the checkbox for “Eligible” in the “T1 EFILE Status” column and clear the other statuses by unchecking them. This displays only those returns in the “eligible” state.

### Applying filters

Click the “Apply Filters” button.

Click the “All” tab in the Client view.

The current year T1 files that are eligible for EFILE display.

## Printing Reports in Client Explorer

The Client Explorer's report function allows preparers to print data from ProFile returns.

**Note:** a query applies only to returns of a single type (e.g., 2016 T1 returns).

### Setting Client Explorer Report Parameters and Data:

Open Client Explorer in ProFile.

Filter returns by the necessary parameters (e.g., tax year, module, status, etc.).

Select the "Select All" option under the "Database" drop-down menu in the top toolbar.

Select the "Print Report" option under the "Database" drop-down menu; the **"Create Report" window displays**.

Click the **"Options" button**; the **"Report Options" window displays**.

Select the **"Fields" tab**.

The options display for creating a report, including column, rows, titles, and organization of report content.

Select the data to be listed under each report heading.

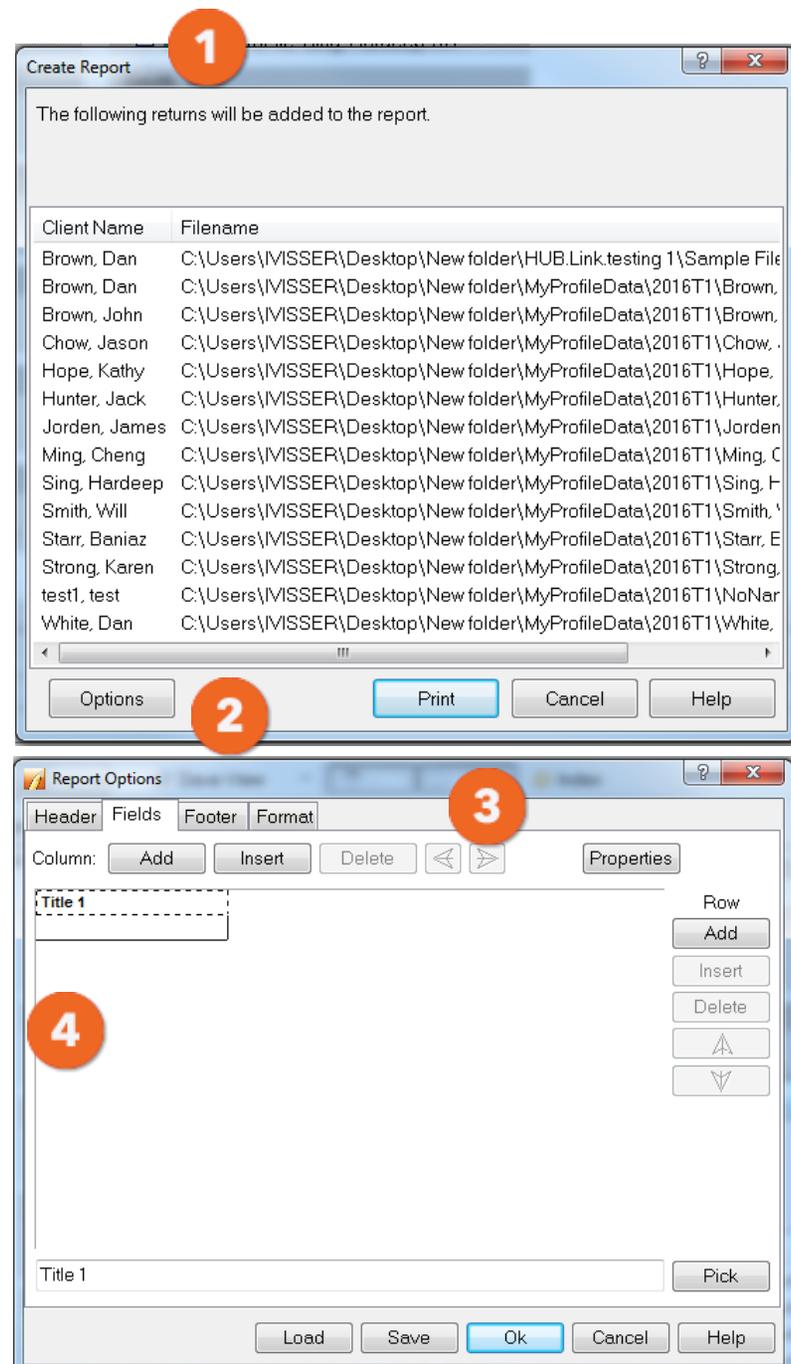
### Running a Client Explorer report

Click the "Save" button in the "Report Options" window; the report parameters save.

Click the "OK" button; the "Report Options" window closes.

Click the "Print" option from the "Create Report" window.

The report compiles and is sent to the designated printer.



## Using Mailing Labels in Client Explorer

ProFile's Client Explorer provides preparers with a simple and convenient method for printing mailing labels.

### Choosing a mailing label

Select the "Setup Mailing Labels..." option from the "File" drop-down menu in the top toolbar.

The "Label Selection" window displays.

Select the return type (e.g., T1) and tax year (e.g., 2016) from the tab menu.

Select the "Label Type" from the drop-down menu.

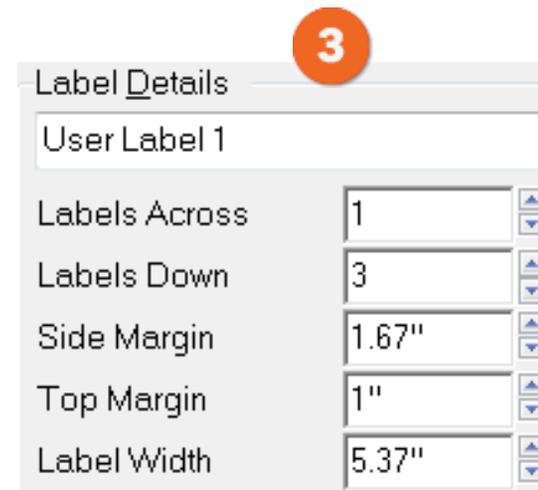
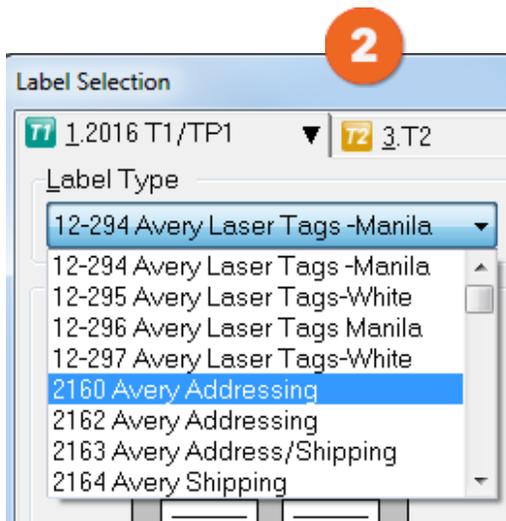
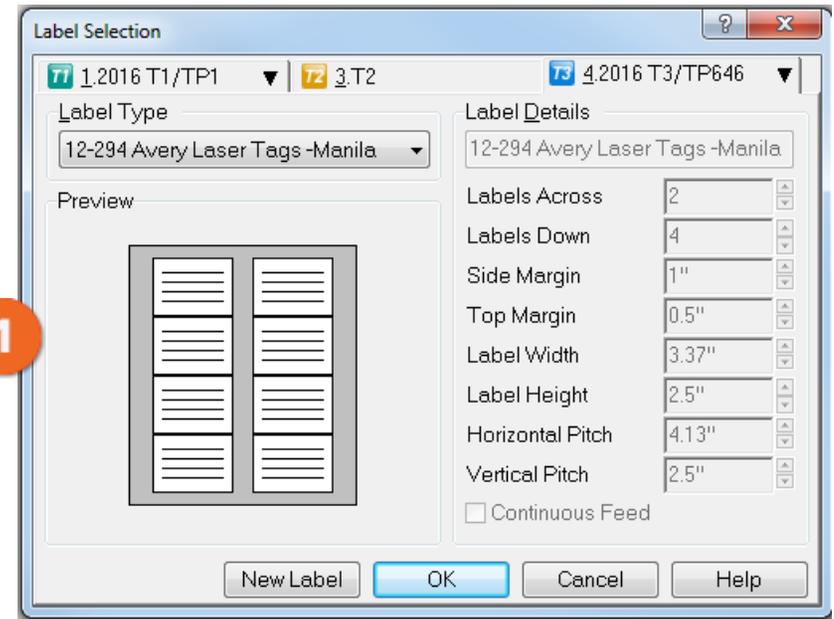
### Creating a new mailing label

Click the "New Label" button; the "Label Details" fields activate and populate.

Enter the specific measurements for the label in the "Label Details" fields.

Save the name of the new label in the "Label Details" field (e.g., "T1 2016 Label").

Click the "OK" button; the label saves and the window closes.



## Using Mailing Labels in Client Explorer (continued...)

### Printing mailing labels

Open the Client Explorer database in ProFile.

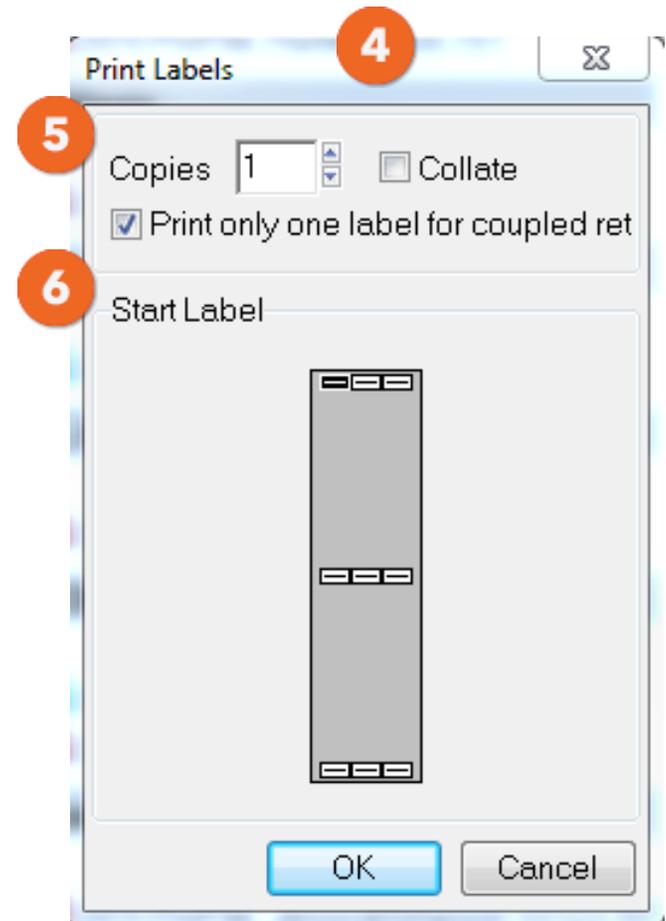
Select the client for which the label will apply.

Select the “Print Mailing Labels” option under the “Database” drop-down menu in the top toolbar; **the “Print Labels” window displays.**

Select **the number of labels to print** under the “Copies” field.

**Select the checkbox for “Print only one label for coupled return?”**, if required.

Click the “OK” button; the label(s) print.



## Batch EFILE in Client Explorer

ProFile users can build and EFILE files to CRA for multiple clients and returns at once. Doing so creates a “batch”, a set of individual and client files ready for EFILE, which ProFile sends to CRA or RQ all at once.

### Batch and transmit files

Open Client Explorer in ProFile.

Select **the type of EFILE operation to perform from the drop-down menu**; ProFile filters the list of files to reflect only those with the selected status (e.g., “T1 - EFILE Eligible”).

The list of eligible files displays.

Select the files to include in the batch transition.

Right-click on the selected files and **select the “Build EFILE File...” option** from the menu.

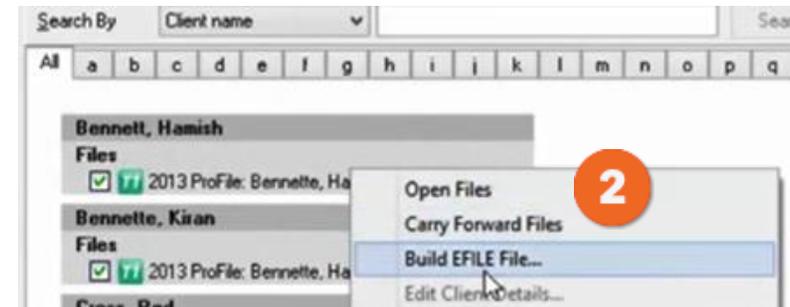
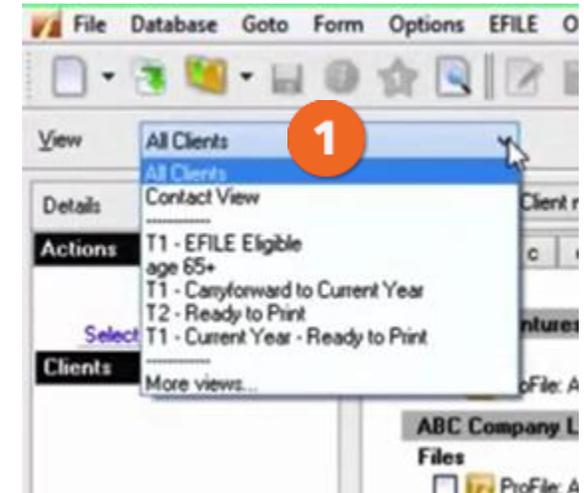
The build window displays.

If necessary, specify the type of EFILE file to create, or the agency, data type, or slip type.

Click the “OK” button.

The EFILE files build; the build status of each return **displays as “Successful” or “Failed”**.

Click the red “X” to display the issue with the “Failed” return. Click **the “Transmit now” button**; the files transmit to CRA; you can also select the “Transmit later” option.



## Batch EFILE in Client Explorer (continued...)

### Transmit batch files at a later time

Select the “Transmit later” button when prompted during the batch process.

When ready to EFILE, select the “EFILE Online Batch” option from the “EFILE” drop-down menu in the top toolbar.

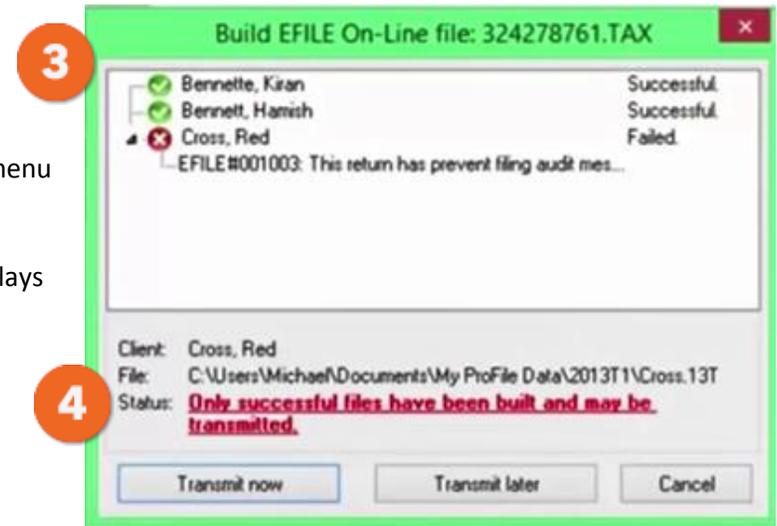
ProFile searches the EFILE folder and sub-folders for any unsent transmission files and displays those meeting the criteria.

Select the files to EFILE and click the “OK” button.

The EFILE files build; the build status of each return displays as “Successful” or “Failed”.

Click the red “X” to display the issue with the “Failed” return.

**Note:** CRA stipulates a two-second pause between the EFILE of each file; this may result in a slower-than-expected process to EFILE for customers with a large number of files in a batch.



## Batch Carry Forward Files

Carry forward of batch files is an option available in ProFile that easily brings previous year's returns forward into the current module.

Open Client Explorer in ProFile.

Client Explorer displays a list of tax return files.

Click on the **"Filter"** button; the filter menu displays at the bottom of the Client Explorer window.

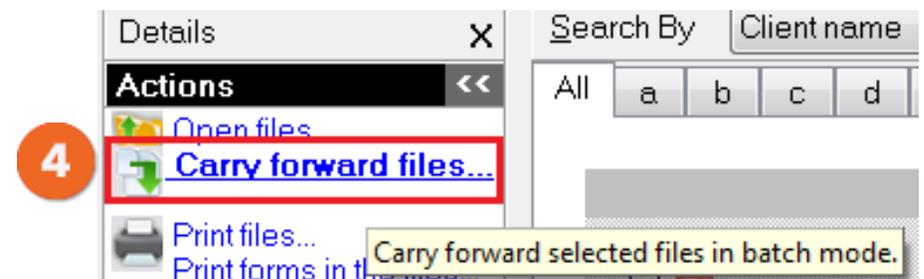
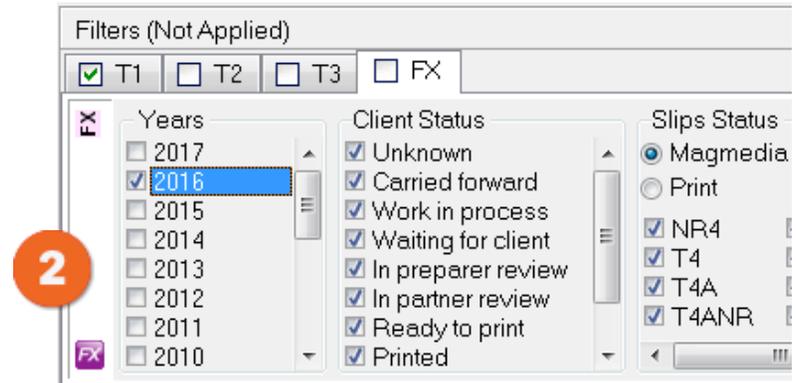
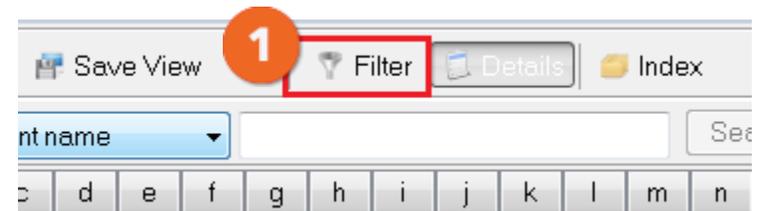
Select files to carry forward (e.g. all T1 files) and the previous year (e.g. 2016) from the **checkbox menu**.

Click the **"Apply Filters"** button; the filter displays all files meeting the selected criteria.

Click the **"Select All"** link on the left-side menu; all files select.

Click the **"Carry Forward Files"** option on the left-side menu.

The files carry forward.



## Batch Printing Forms in Client Explorer

It is easy to print pre-configured print sets for multiple clients at the same time.

### Printing forms for a group of clients

Open Client Explorer.

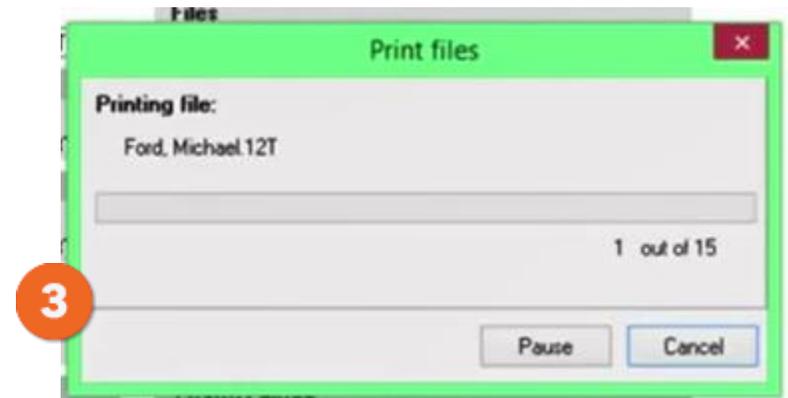
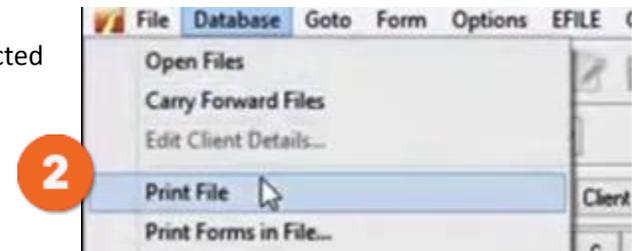
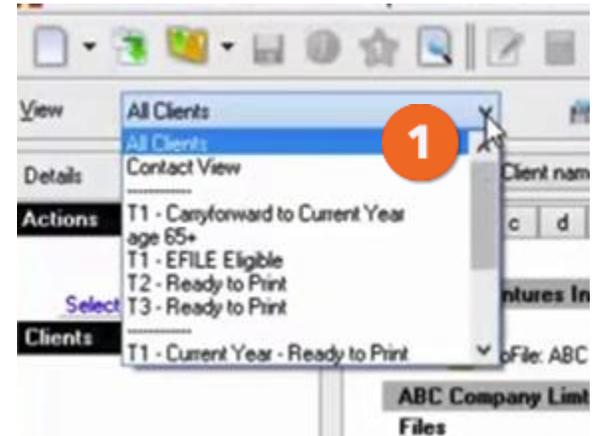
Select the designation for **clients in the drop-down list** (e.g. “T1 - EFILE Eligible”); the clients matching the designation displays.

Select the clients to batch print.

Select the **“Print file” option** from the “Database” drop-down menu.

Profile automatically selects the forms to print for each file based on the print job and print setting options configured in the “form selection” window. For example, ProFile detects that each client selected will receive an “overdue invoice” letter.

The **files print**.



## Batch Printing Forms in Client Explorer (continued...)

### Printing the same forms from each file

It is simple to print the same form for multiple clients at once in a batch. For example, a ProFile user may want to print a form for each client so that it can be mailed for the client's signature.

**Note:** when printing forms from multiple clients at the same time, you can print only forms from files of the same module and year.

### Printing forms

Select the designation for **clients in the drop-down list** (e.g. "T1 - EFILE Eligible"); the clients matching the designation displays.

Right-click in the client list and choose the "Select All" option from the menu.

All forms are selected.

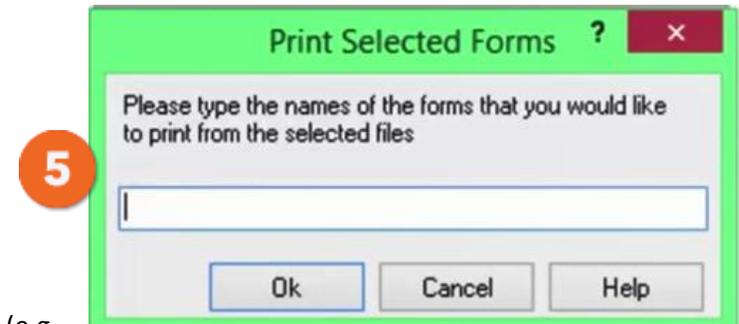
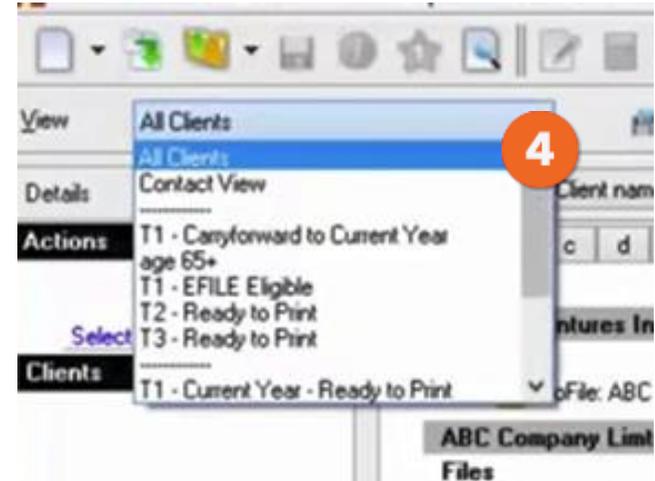
Select the "Print Forms in File..." option from the "Database" drop-down menu.

The **"Print Selected Forms" window** displays.

Enter the name of the form to print (e.g. "t2038").

**Note:** to print several forms, enter them all with a semi-colon as a divider between each form (e.g. "t2038; t2036").

Click the "OK" button; the forms print.



## Using Queries in Client Explorer

**Note:** a query applies only to returns of a single type (e.g., 2015 T1 returns).

The Client Explorer's query function allows preparers to produce a list of files with specific values for batch printing or to include on a report. Queries can also select data to export or to select files that require mailing labels.

The query function filters the client list to compare fields and display the matching client files. A query can be applied for any field in the client file, including client city, debt level, return status, or age.

### Query example

- a preparer wishes to select all clients who have birthdates prior to January 1, 1934, but later than December 31, 1932: these are the clients who turned age 69 during 2002

### Running a query

Set Client Explorer as the database option in ProFile.

Open Client Explorer in ProFile; a list of clients displays.

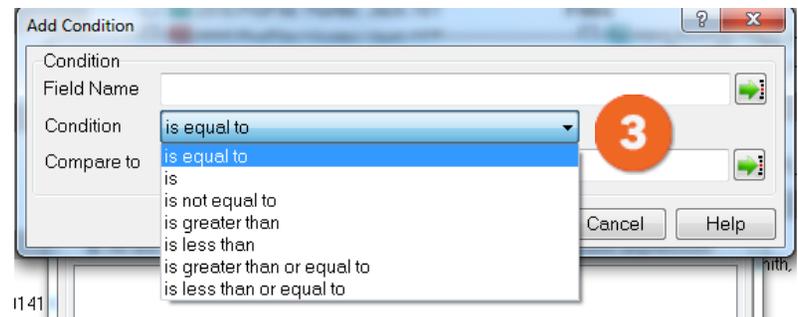
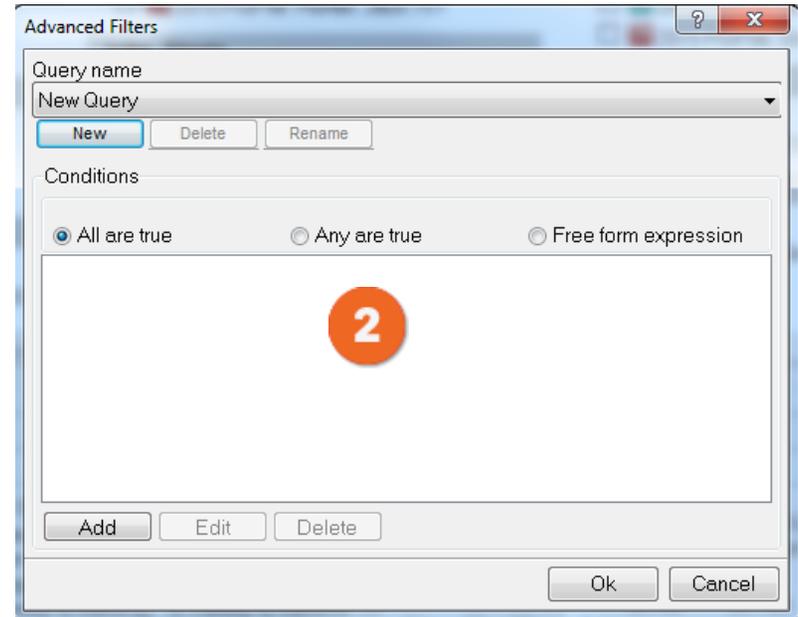
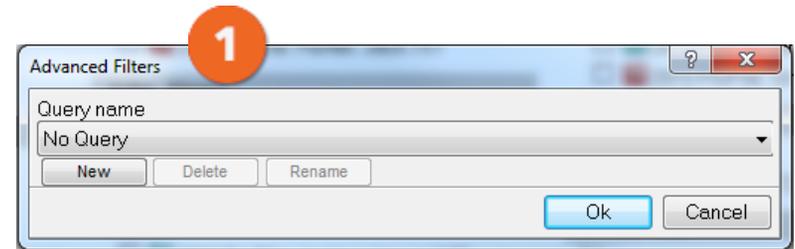
Click the "Filter" button; a list of options displays.

Select the module to be queried (e.g., T1) and tax year to be queried (e.g., 2016).

Click the "Advanced" button; the **"Advance Filters" window displays**.

Click the "New" button; **the "Advanced Filter" window expands** to display the "Add" button and three "Conditions" for queries.

Click the "Add" button; **the "Add Condition" window displays**.



## Using Queries in Client Explorer (continued...)

### Setting conditions for queries

In this instance, we will be querying client invoices for amounts no greater than than \$10,000.

Click the drop-down menu in the “Condition” field of the “Add Condition” window; a list of conditions displays.

Select the condition necessary for the query. For example, you may be seeking value “not greater than” the amount of \$10,000. If this condition is selected, no amount greater than \$10,000 displays in the query results.

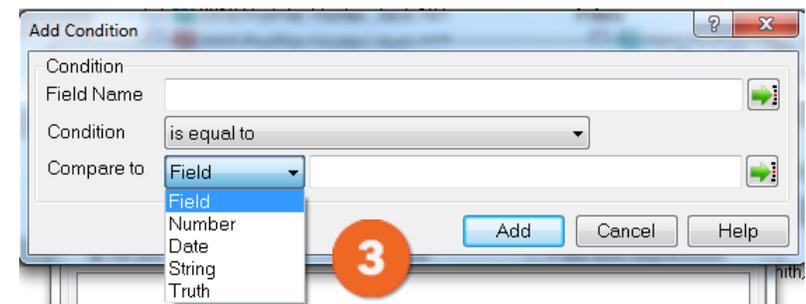
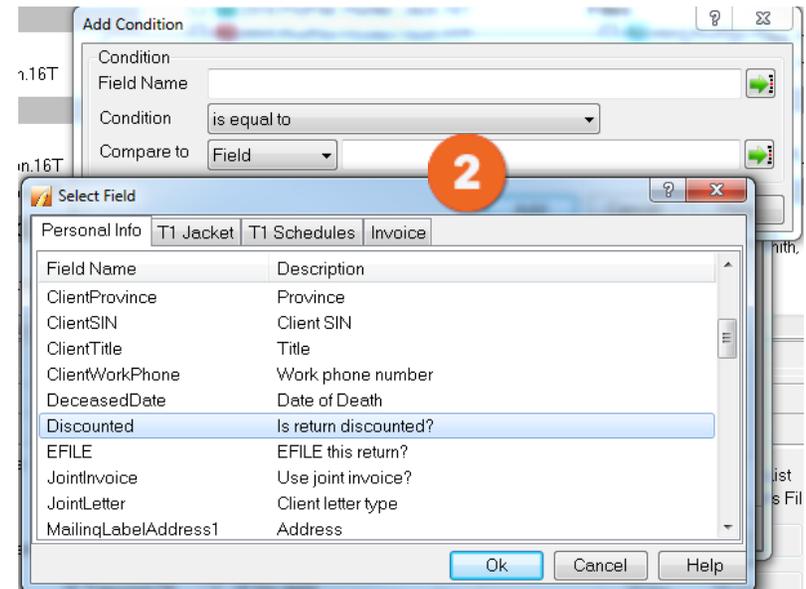
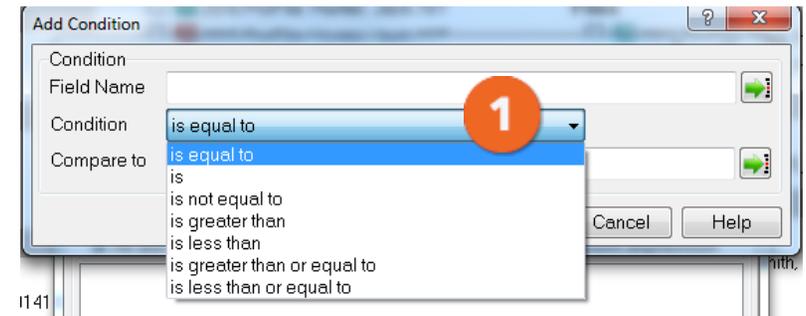
Click the drop-down menu in the “Compare to” field of the “Add Condition” window; a list of conditions displays.

Set the condition necessary for the query. For example, if you are querying invoices for billings of less than \$10,000, select the appropriate invoice field to query.

If this query will be used again at a later time, enter the query name in the “Field Name” field (e.g. “Invoices less than 10K”).

Click the “Add” button; the newly created query saves in the query list.

In the Client Explorer, click the “Apply Filters” button. The query runs and displays results.



# Using Intuit's Hub and Link

## Overview of ProFile Hub

Hub is a document management dashboard that helps you access customer information quickly and seamlessly so you may process returns more efficiently.

Within Hub, you can access client contact information, check the status of a return and review any notes that may have been added.

Within Hub, you have access to document management sources, such as Link, to help you gather information from your clients in one secure place. Hub will be your one-stop shop for all of your data sources and much more.

### **What modules does Hub support?**

Hub supports T1 and T2 modules.

### **Does Hub support Auto-fill my Return (AFR)?**

Yes.

### **How does Hub work with Inuit Link?**

Hub works effortlessly with Link, a user-friendly online portal that helps you collaborate more effectively with your clients to gather their information for tax season.

Through Link, you can seamlessly create and send personalized requests to clients to request documents and information. You can also leverage templates already created within Link or create specific requests based on previous year's returns.

You are also able to send reminders within Link if you would like to follow-up on outstanding items.

Together, Intuit Hub and Link streamline document management in ProFile.

### **How much do Hub and Link cost?**

Hub and Link are complimentary with 2016 ProFile. Customers need to have purchased a ProFile T1 module.

## Initial Setup of Hub

**Note:** preparers should download the latest version of ProFile before undergoing the Hub setup process.

### Setting up Hub

Open the ProFile application.

Select the “Hub” option from the “Goto” drop-down menu in the top toolbar.

The “ProFile Hub Set Up” window displays.

Select the “Enable ProFile Hub” check box.

The options menu for Hub set up becomes active.

Select an option from the “How are your ProFile client files stored?” section; preparers select “Local Server” or Network Server” for file storage.

Click the “Browse” button in the “Where are your client files stored?” section.

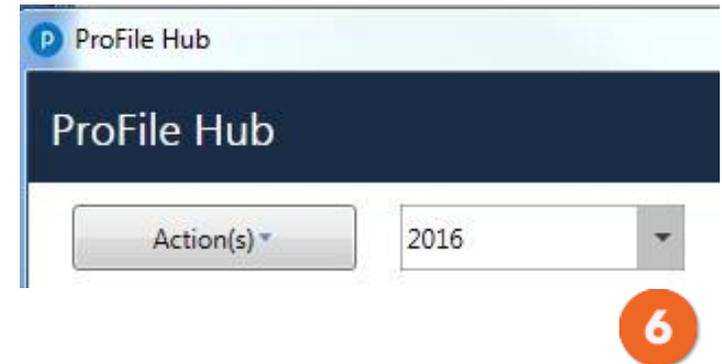
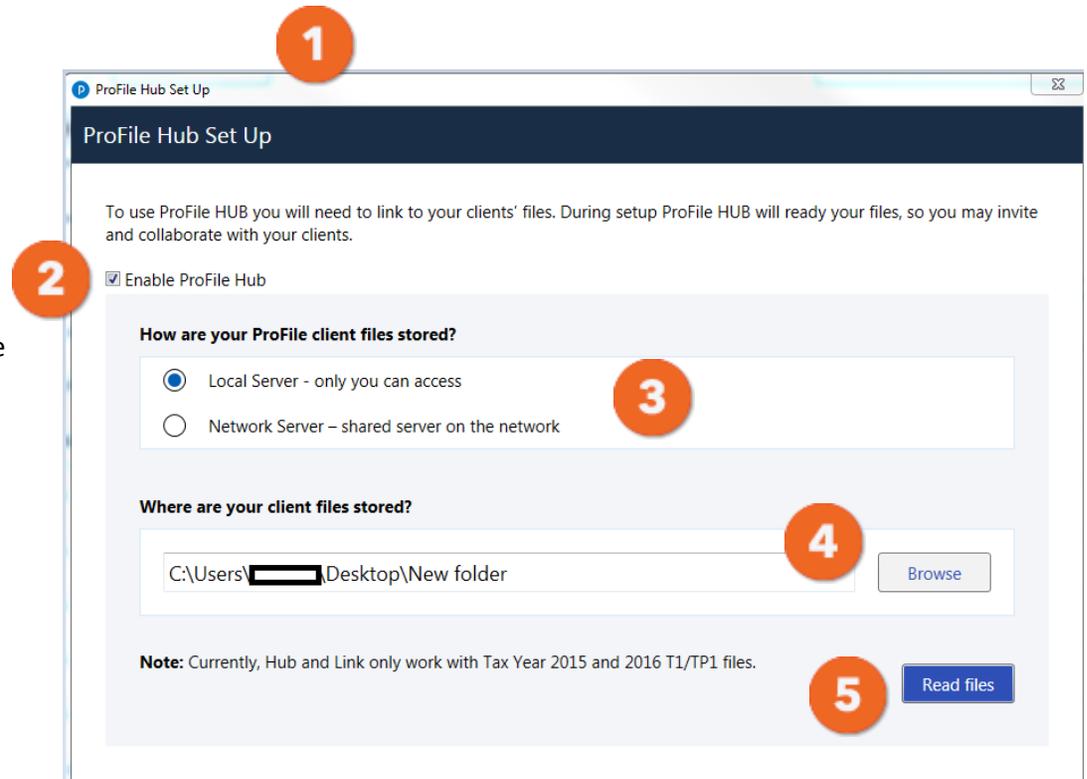
Select the location where client files are stored; this allows Hub to access client information.

Click the “Read files” button.

The Hub interface populates with returns; these files originate from the location selected in the “Where are your client files stored?” section.

Select the applicable tax year from the drop-down menu to filter imported returns.

The list of client returns displays.



# Import Data via Auto-Fill my Return (AFR) in Hub

**Note:** a completed T1013 form is required before a preparer can import data to Hub via AFR.

## Importing Data in Hub

Open ProFile.

Select the “Hub” option from the “Goto” drop-down menu in the top toolbar.

Hub opens, **displaying the list of clients.** Add a new client if required.

Identify the client to undergo data import.

Click the “Run CRA Import” link in the “CRA IMPORT” column.

A **prompt displays** inquiring to the completion of a T1013 for.

Click the “OK” button to proceed.

The ProFile “CRA Data Import” window displays.

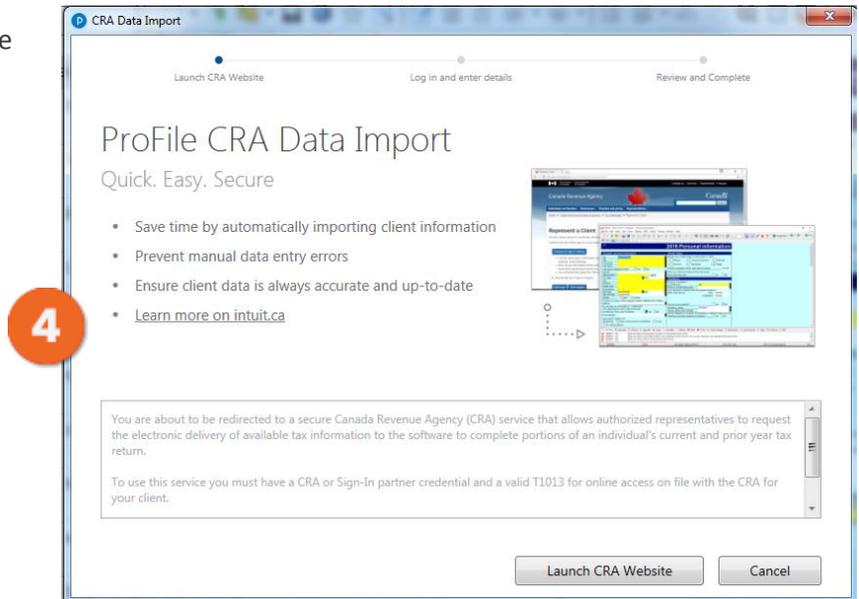
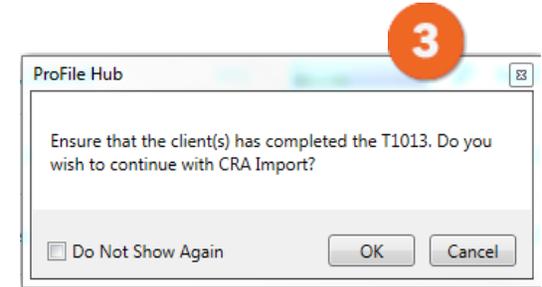
Complete the prompts; the data import process in Hub is identical to that in ProFile from this point onwards.

Workflow

Action  Search a client or a file

<input type="checkbox"/>	CLIENT NAME	FILE NAME	INTUIT LINK	CRA IMPORT
<input type="checkbox"/>	Brown, Dan ✉	T1 Brown, Dan.16T	Invite client	<a href="#">Run CRA Import</a>
<input type="checkbox"/>	Brown, Dan ✉	T1 Brown, Dan.16T	Invite Pending	<a href="#">Run CRA Import</a>
<input type="checkbox"/>	Brown, John ✉	T1 Brown, John.16T	Invite client	<a href="#">Run CRA Import</a>

1



## Using Filters in Hub

Hub allows preparers to filter the tax year of returns in the client list. Preparers can view returns from specific years or from all years.

### Setting filters in Hub

Open ProFile.

Select the “Hub” option from the “Goto” drop-down menu in the top toolbar.

Hub opens, **displaying a list of clients.**

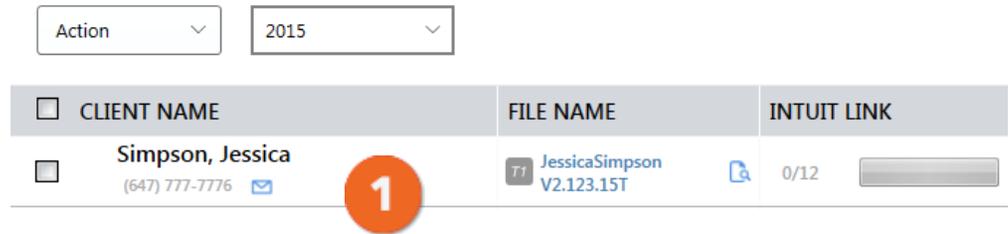
The filter drop-down menu displays at the top of the client list.

**Select the drop-down menu;** a list of available tax years displays.

The “All years” designation also displays.

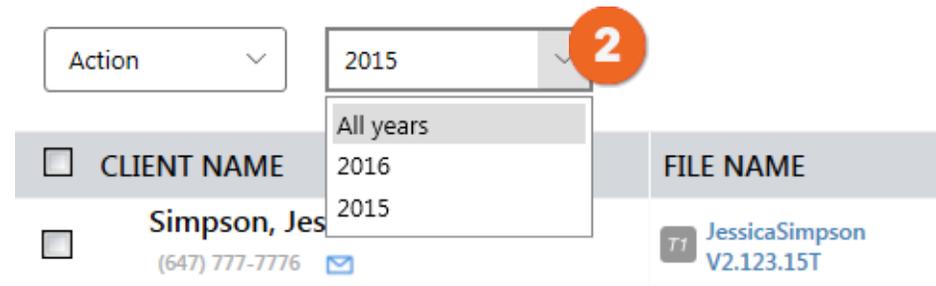
Select the applicable option to filter.

The filtered results display in the client list.



The screenshot shows the top toolbar with an 'Action' dropdown and a '2015' filter dropdown. Below is a table with columns: CLIENT NAME, FILE NAME, and INTUIT LINK. A red circle with the number '1' is positioned over the filter dropdown menu.

<input type="checkbox"/>	CLIENT NAME	FILE NAME	INTUIT LINK
<input type="checkbox"/>	Simpson, Jessica (647) 777-7776	JessicaSimpson V2.123.15T	0/12



The screenshot shows the filter dropdown menu open, displaying options: All years, 2016, and 2015. A red circle with the number '2' is positioned over the dropdown menu.

<input type="checkbox"/>	CLIENT NAME	FILE NAME
<input type="checkbox"/>	Simpson, Jessica (647) 777-7776	JessicaSimpson V2.123.15T

## Using Checklists in Hub

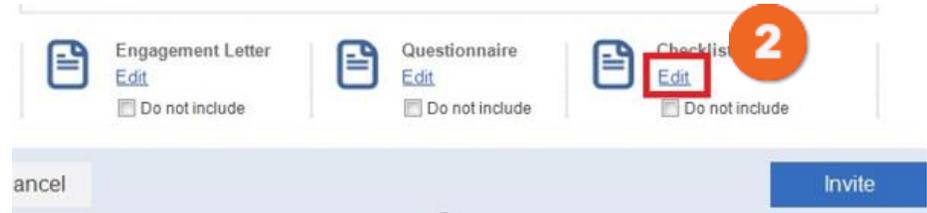
Hub allows users to maintain a checklist of tasks and/or requests assigned to a client. This list generates automatically based on the client's prior-year return that can be added to or changed as needed.

### Reviewing a checklist

Open ProFile.

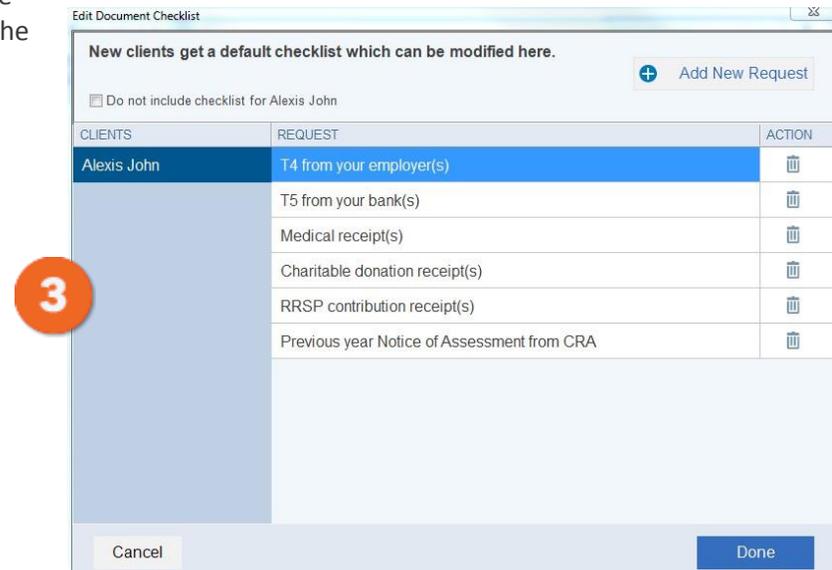
Select the "Hub" option from the "Goto" drop-down menu in the top toolbar.

Hub opens, displaying a list of clients. Identify the client that requires a checklist for (e.g., "Brown, Dan"). **Click the "Invite" button** associated with the client.



The "Invite Clients to Use Link" window opens. **Select the "Edit" link** from the "Checklist" option.

The **"Edit Document Checklist" window displays**. The checklist details the client, the individual requests made to the client (based on the previous-year's requests) and the action that can be undertaken.



## Using Checklists in Hub (continued...)

### Deleting an existing checklist entry

Identify the checklist entry to be deleted.

Click on the **"trash can" icon next to the checklist entry** under the "ACTION" menu; the entry deletes.

**Note:** Hub users will not see a confirmation window; the checklist entry deletes immediately.

Click the "Done" button. The checklist updates and the "Edit Document Checklist" window closes.

Click the "Invite" button in the "Invite Clients to Use Link" window.

The invitation with the checklist is sent to the client.

### Adding a new checklist entry

Click the "Add New Request" button in the "Edit Document Checklist" window.

A **new blank checklist entry field** is created.

Enter the new checklist entry (e.g., "Travel receipts").

Click the "Done" button. The checklist updates and the "Edit Document Checklist" window closes.

Click the **"Invite" button** in the "Invite Clients to Use Link" window.

The invitation with the checklist is sent to the client.

T5 from your bank(s)	
Medical receipt(s)	
Charitable donation receipt(s)	

4

REQUEST	ACTION
T5 from your bank(s)	
Medical receipt(s)	
Charitable donation receipt(s)	
RRSP contribution receipt(s)	
Previous year Notice of Assessment from CRA	
<input type="text"/>	

5

 Engagement Letter <a href="#">Edit</a> <input type="checkbox"/> Do not include	 Questionnaire <a href="#">Edit</a> <input type="checkbox"/> Do not include	 Checklist (6) <a href="#">Edit</a> <input type="checkbox"/> Do not include
Cancel		Invite

6

## Using Questionnaires in Hub

The questionnaire template in Hub allows users to compile and send questions via email for clients to answer.

Questionnaire templates are customizable to the type of clients, their location, or any other need. Response types can include either “Yes/No” or “Open-ended” responses.

### Opening a questionnaire template

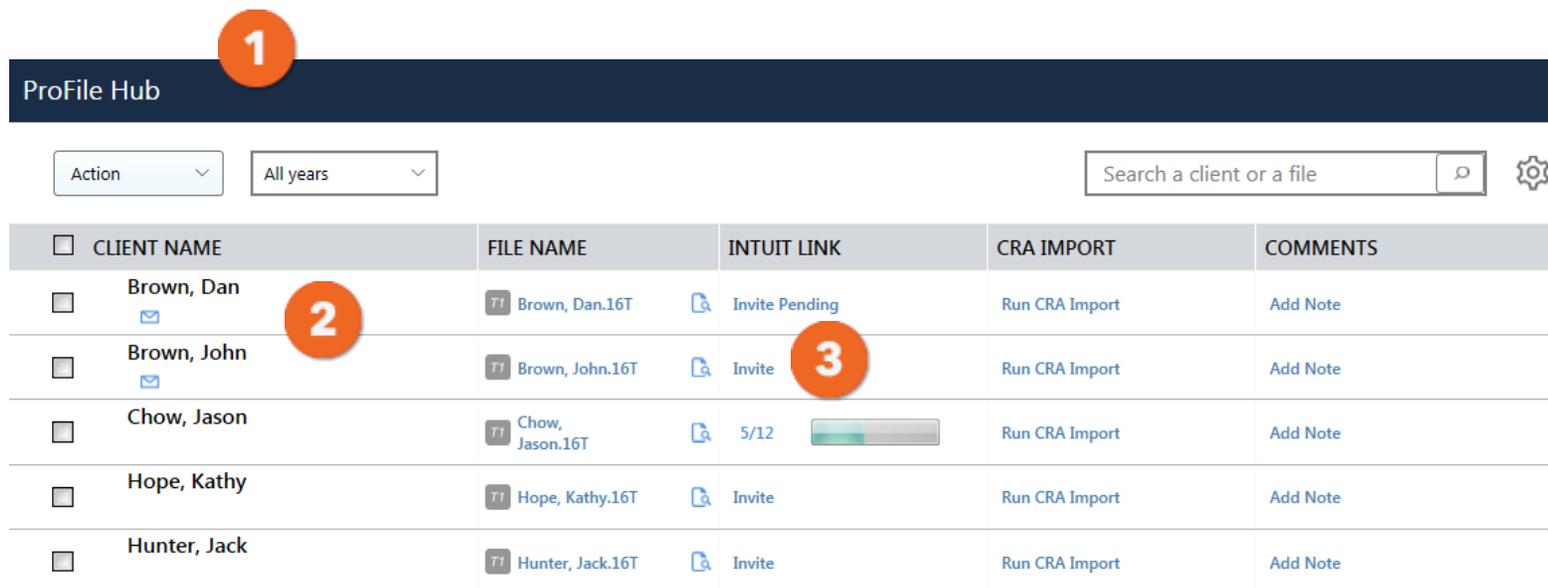
Open ProFile.

Select the “Hub” option from the “Goto” drop-down menu in the top toolbar.

Hub opens, **displaying a list of clients.**

**Identify the client** to whom you want to send an engagement letter (e.g., “Brown, John”).

Click the **“Invite” button** associated with the client.



<input type="checkbox"/>	CLIENT NAME	FILE NAME	INTUIT LINK	CRA IMPORT	COMMENTS
<input type="checkbox"/>	Brown, Dan ✉	Brown, Dan.16T	Invite Pending	Run CRA Import	Add Note
<input type="checkbox"/>	Brown, John ✉	Brown, John.16T	Invite	Run CRA Import	Add Note
<input type="checkbox"/>	Chow, Jason	Chow, Jason.16T	5/12	Run CRA Import	Add Note
<input type="checkbox"/>	Hope, Kathy	Hope, Kathy.16T	Invite	Run CRA Import	Add Note
<input type="checkbox"/>	Hunter, Jack	Hunter, Jack.16T	Invite	Run CRA Import	Add Note

## Using Questionnaires in Hub (continued...)

The “**Invite Clients to Use Link**” window opens.

Select the “**Edit**” link from the “**Engagement Letter**” option.

The “**Edit Questionnaire**” window displays.

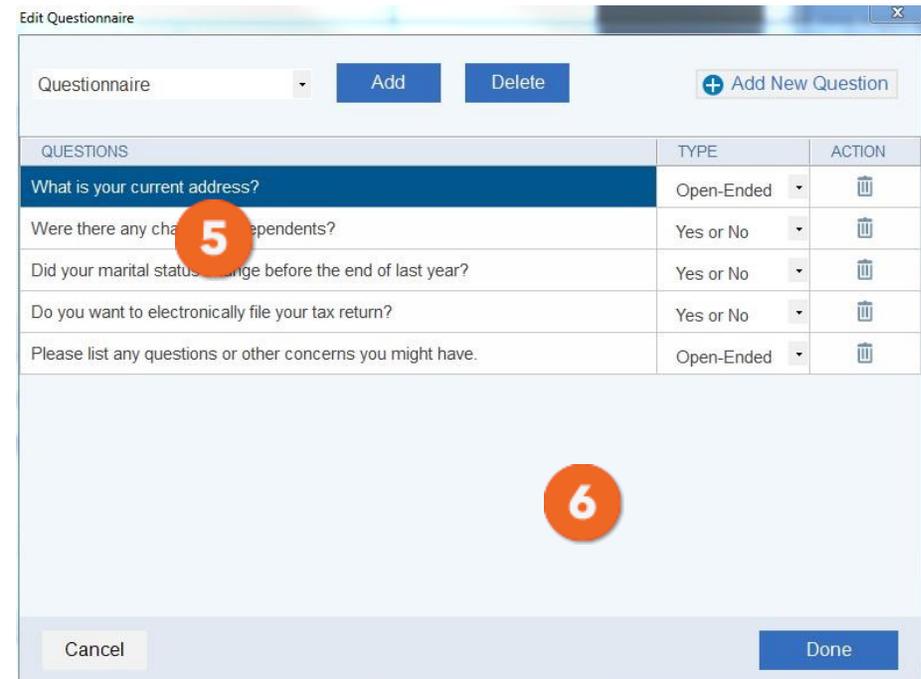
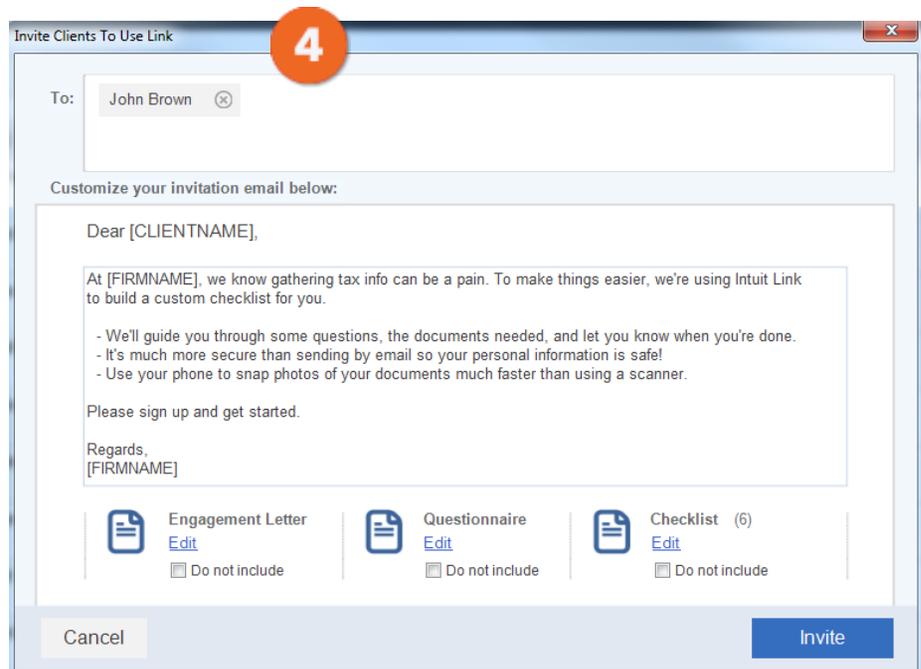
Users can undertake **the following actions**:

- edit the existing questions
- remove an existing question
- create new questions
- assign an answer type
- delete a question
- create a new questionnaire template

The questionnaire is sent to the selected client and responses are tracked under their entry in Hub.

### Related Articles

[Click here](#) to review our full suite of Hub articles.



## Using Engagement Letters in Hub

Engagement letters allow a preparer to communicate with clients via letters that are personalized and reusable to reduce time and effort.

There are two options for personalizing an engagement letter in Hub:

- use an existing engagement letter from a template
- create a new engagement letter

### Using an existing engagement Letter

Open ProFile.

Select the “Hub” option from the “Goto” drop-down menu in the top toolbar.

Hub opens, **displaying a list of clients.**

Identify the client to whom you want to send an engagement letter (e.g., “Brown, John”).

Click the “Invite” button associated with the client.

The “**Invite Clients to Use Link**” window opens.

Select the “Edit” link from the “Engagement Letter” option.

1

CLIENT NAME	FILE NAME	INTUIT LINK	CRA IMPORT	COMMENTS
<input type="checkbox"/> Brown, Dan	Brown, Dan.16T	Invite Pending	Run CRA Import	<a href="#">Add Note</a>
<input type="checkbox"/> Brown, John	Brown, John.16T	Invite	Run CRA Import	<a href="#">Add Note</a>
<input type="checkbox"/> Chow, Jason	Chow, Jason.16T	5/12	Run CRA Import	<a href="#">Add Note</a>

2

To: John Brown

Customize your invitation email below:

Dear [CLIENTNAME],

At [FIRMNAME], we know gathering tax info can be a pain. To make things easier, we're using Intuit Link to build a custom checklist for you.

- We'll guide you through some questions, the documents needed, and let you know when you're done.
- It's much more secure than sending by email so your personal information is safe!
- Use your phone to snap photos of your documents much faster than using a scanner.

Please sign up and get started.

Regards,  
[FIRMNAME]

Engagement Letter [Edit](#)  Do not include

Questionnaire [Edit](#)  Do not include

Checklist (6) [Edit](#)  Do not include

Cancel Invite

## Using Engagement Letters in Hub (continued...)

The "Edit Engagement Letter" window opens.

Click the drop-down menu at the top of the window; a list of existing letter templates displays.

Select the template to be edited and sent to the client (e.g., "Letter of Engagement").

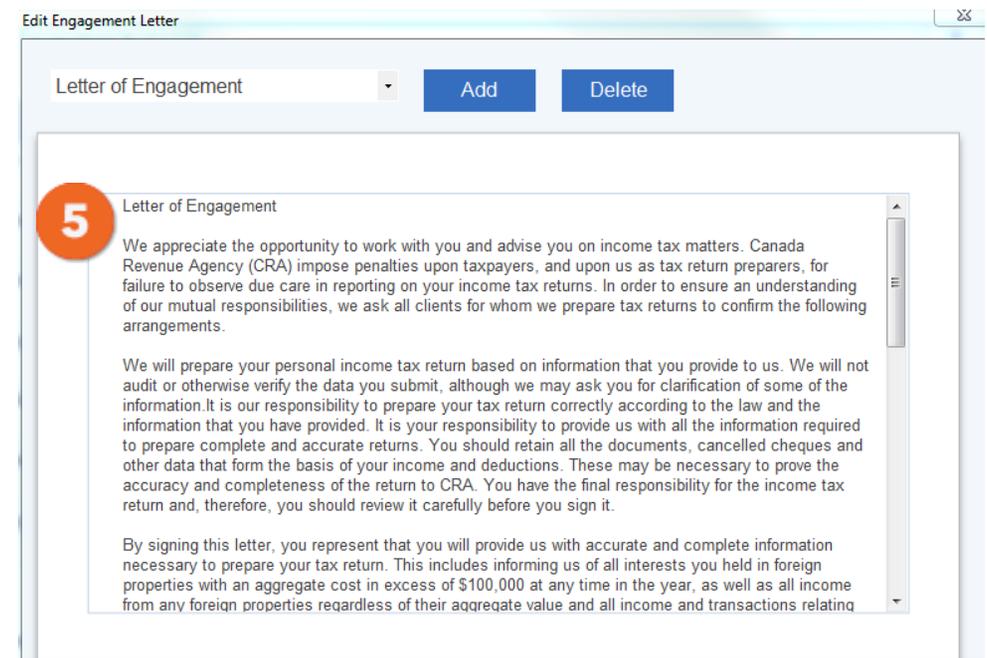
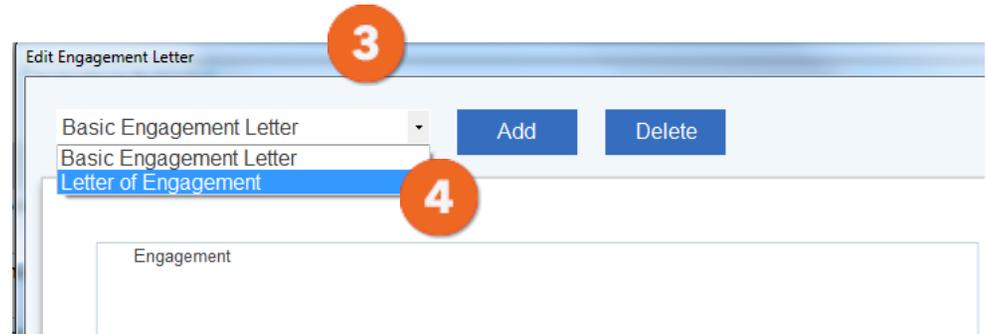
The template-editing window displays.

Make any edits in the template-editing window.

Click the "Add" button above the editing window to save any changes.

Click the "Done" button; the engagement letter saves.

Click the "Invite" button in the "Invite Clients to Use Link"; the engagement letter is sent to the client.



## Using Engagement Letters in Hub (continued...)

### Adding a new engagement letter

Open ProFile.

Select the “Hub” option from the “Goto” drop-down menu in the top toolbar.

Hub opens, **displaying a list of clients.**

Identify the client to whom you want to send an engagement letter (e.g., “Brown, John”).

Click the “Invite” button associated with the client.

The “Invite Clients to Use Link” window opens.

Select the “Edit” link from the “Engagement Letter” option.

6

ProFile Hub

Action All years Search a client or a file

<input type="checkbox"/>	CLIENT NAME	FILE NAME	INTUIT LINK	CRA IMPORT	COMMENTS
<input type="checkbox"/>	Brown, Dan	Brown, Dan.16T	Invite Pending	Run CRA Import	Add Note
<input type="checkbox"/>	Brown, John	Brown, John.16T	Invite	Run CRA Import	Add Note
<input type="checkbox"/>	Chow, Jason	Chow, Jason.16T	5/12	Run CRA Import	Add Note

7

Invite Clients To Use Link

To: John Brown

Customize your invitation email below:

Dear [CLIENTNAME],

At [FIRMNAME], we know gathering tax info can be a pain. To make things easier, we're using Intuit Link to build a custom checklist for you.

- We'll guide you through some questions, the documents needed, and let you know when you're done.
- It's much more secure than sending by email so your personal information is safe!
- Use your phone to snap photos of your documents much faster than using a scanner.

Please sign up and get started.

Regards,  
[FIRMNAME]

Engagement Letter [Edit](#)  Do not include

Questionnaire [Edit](#)  Do not include

Checklist (6) [Edit](#)  Do not include

Cancel Invite

## Using Engagement Letters in Hub (continued...)

The “Edit Engagement Letter” editing window displays.

Click the “ADD” button above the letter content.

The “New Engagement Letter” window displays.

Enter the name of the new template in the field (e.g. “Receipt Request Letter”).

Click the “OK” button.

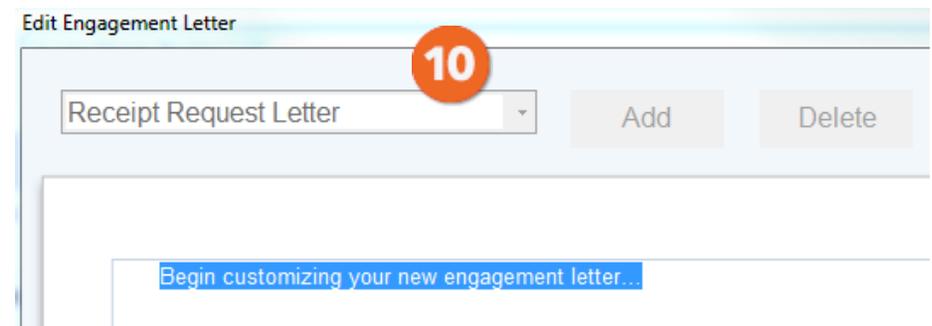
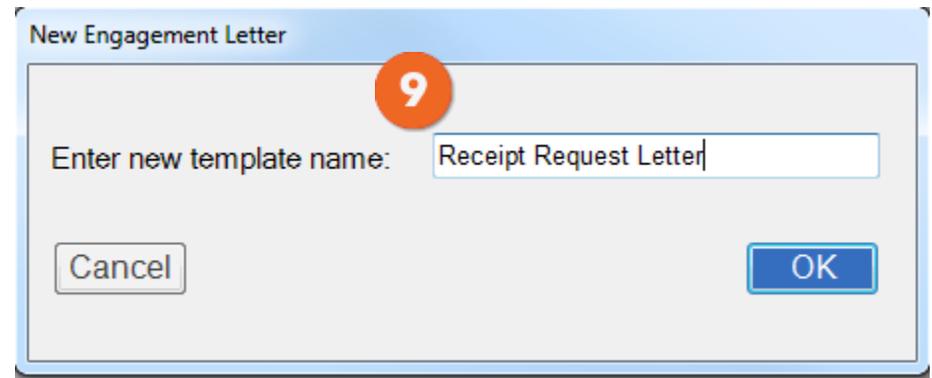
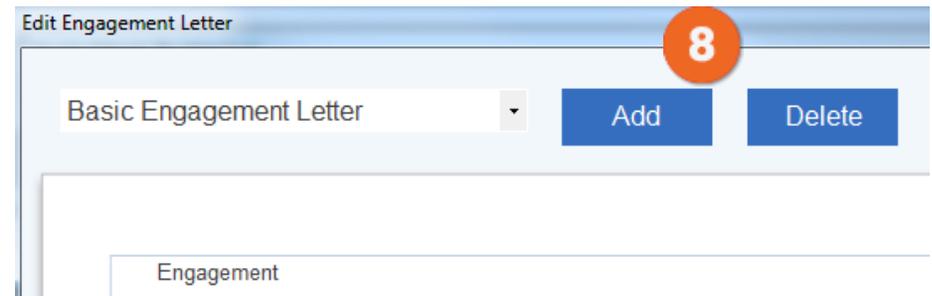
The new letter is added to the drop-down list of available engagement letter templates.

Add the necessary content and information to the new engagement letter.

Click the “Done” button; the template saves.

The new letter is available under the drop-down menu when creating future engagement letters.

Click the “Invite” button in the “Invite Clients to Use Link”; the new engagement letter is sent to the client.



## Overview of ProFile Link

**Intuit Link** is a secure, web-based portal that accountants use to gather tax data and responses from their clients.

### **What are the benefits of Link?**

Link provides several benefits to a preparer's clients, including but not limited to:

- clarity on what a preparer needs to prepare a client's tax return(s)
- flexibility to collect and share tax data year-round from any device
- convenience of providing preparers with materials via pictures taken with a mobile device or from a financial institution
- ability to keep track of what material has been submitted or is still outstanding
- bank-level encryption to protect client data

### **How much does Link Cost?**

Link is complimentary with 2016 ProFile and later years. Customers need to have purchased a ProFile T1 module or current year Service Pack.

### **How do I review documents my client has provided?**

You can check the responses from clients in **Hub**; the details of their responses display in Link.

## Accountant View in Link

The “accountant” view in Link displays the majority of information that a preparer needs to manage client invitations and acceptances.

**Tax year selection:** filter the client list by the appropriate tax year

**Clients:** displays clients that have been added to Link

**Firm Settings:** details the firm information, notification settings, and template options

**New Features:** details new Link features as they become available

**Learning Library:** opens an external link to the “Link Learning Library”

**Invitation status:** details status of invitations, including those accepted, pending, declined, and done.

**Client details:** lists the name, progress, activity, and actions for each client in Link

**Client activity:** details recent client activity, such as acceptance of invitations or completed tasks

**Invitation Reminder:** sends clients a reminder that a previous invitation is still pending

**Add New Client:** adds a new client to the client list

The screenshot shows the 'Clients' page in Intuit Proconnect Link. The page is divided into several sections:

- 1:** Tax Year selection dropdown (set to 2017).
- 2:** Clients link in the left sidebar.
- 3:** Firm Settings link in the left sidebar.
- 4:** New Features link in the left sidebar.
- 5:** Learning Library link in the left sidebar.
- 6:** Summary cards showing: 7 All clients, 3 Invites accepted, 0 Invites pending, 0 Invites declined, and 0 TY17 done.
- 7:** Client table with columns: NAME, TY17 PROGRESS, LAST ACTIVITY, and ACTIONS.
- 8:** Client activity feed showing 'Starr, Baniaz has accepted your invite (10/23/17)'. The client name 'Starr, Baniaz' is highlighted in blue.
- 9:** Invitation Reminder button.
- 10:** Add New Client button.

NAME	TY17 PROGRESS	LAST ACTIVITY ^	ACTIONS
Smith, Ted ted_smith@smithcorp.com	Invite accepted		Review ▾
Mitchell, Robert rmitchell@mitchell.ca	Not invited		Invite ▾
Hadler, Luna lhbusiness@lhbusiness.com	Not invited		Invite ▾

## Adding a Client to Link's Accountant View

Preparers can add clients into the "Accountant" view in Link to help track communications and progress in delivering materials (receipts, forms, etc.)

### **Navigating to Hub**

Open ProFile.

Select the "Hub" option from the "Goto" drop-down menu in the top toolbar.

Sign in to Hub using your "One Intuit" username and password.

A list of clients in Hub displays.

Select the appropriate module (e.g. "T1 Module") from the drop-down menu in the top left corner of Hub.

The list of Hub clients filters.

### **For T1 clients**

Create a new "T1 Individual" client return in ProFile.

Navigate to the Hub application; the client named in the newly created T1 displays.

Click the "Invite" link under the "Intuit Link" column for the new client.

The new client information exports from ProFile and displays in Link.

## Adding a Client to Link's Accountant's View (continued...)

### For non-T1 clients

**Note:** ProFile displays the Link status of clients that have been invited from ProFile. Those created within Link as described below will NOT be connected to the desktop program in any way.

You can create the new client (Individual) in Link and the new client will flow back to your ProFile Online client list.

Navigate to the Link website:

<https://link.intuit.com/accountant/login/#/signin>

Sign in using your "One Intuit" username and password.

Link opens; a list of clients who have accepted the invitation displays.

Click the "Add New Client" button from the right-side menu.

The "Add Client" window displays.

Indicate if the client is an "Individual" or "Organization".

For an "Individual", populate the "First Name", "Last Name", and "Email" fields. "Mobile Phone" is an optional field.

For an "Organization", populate the "Organization Name" and "Email" fields. "Work Phone" is an optional field.

Click the "OK" button; the client is added to the client list.

**1**

### Add Client

Link is connected to Lacerte, ProSeries, and ProConnect Tax Online. For the BEST experience, add or edit your clients from your tax software.

Individual  
 Organization

**First Name**  
First Name

**Last Name**  
Last Name

**Email**  
Email

**Mobile Phone**  
Phone

Cancel OK

## Sorting Client List in Link

Preparers can sort the client list in Intuit Link to display and identify clients of a particular status.

Categories for sorting include:

- “NAME”
- “TYYY PROGRESS” (e.g., “TY16 PROGRESS”)
- “LAST ACTIVITY”

### Example: Sorting alphabetically by “NAME”

Log in to the Intuit Link site.

Select the “Clients” link on the left-side menu.

The list of clients displays.

Click **the text within the column header** (e.g. “NAME”).

The sort order displays, listed alphabetically by the client’s last name.

**Note:** users must click on the text itself, not the space surrounding the text to sort the order list.

The screenshot displays the Intuit Link interface. On the left, a dark sidebar contains navigation links: 'Tax Year 2016', 'Clients' (with a red circle '1' next to it), 'Firm Settings', 'New Features', 'Learning Library', and 'Link Sweepstakes'. The main content area features a summary of client counts: 'All clients' (6), 'Invites accepted' (1), 'Invites pending' (1), 'Invites declined' (0), and 'TY16 done' (0). Below this is a search bar labeled 'Filter clients by name or email' and buttons for 'Invitation Reminder' and 'Add New Client'. A table lists clients with columns for 'NAME', 'TY16 PROGRESS', 'LAST ACTIVITY', and 'ACTIONS'. The 'NAME' column header is highlighted with a red circle '2'. The table contains two rows: 'Smith, Ted' and 'Hadler, Luna', both with 'Not invited' under 'TY16 PROGRESS' and 'Invite' under 'ACTIONS'.

NAME	TY16 PROGRESS	LAST ACTIVITY	ACTIONS
Smith, Ted	Not invited		Invite
Hadler, Luna	Not invited		Invite

## Using Email Templates in Link

Intuit Link's custom email templates allow preparers to streamline communications with clients by creating unique email content that can be easily re-utilized, rather than having to copy-and-paste or rewrite emails from previous examples.

Email templates can include invite emails, reminder emails, and request emails.

### Creating custom Email templates

Login to the Intuit Link site.

Select the **"Clients"** link on the left-side menu; the client list displays.

Select the client.

Click the **"Firm Settings"** option from the left-side menu.

The **"Firm Settings"** display.

NAME	TY16 PROGRESS	LAST ACTIVITY	ACTIONS
Merdelbaum, Sarah thesbaum@hotmail.com	Not invited		Invite ▾
James, Jenkins ian_visser@intuit.com	Invite accepted		Review ▾

**Account** | Email Templates | Request Templates

**Firm Information:**

**Company Name**  
Visser Corp. Save

**Firm Name Shown to Client**  
Visser Corp. Save

**Firm Logo**

**Your Firm Logo**  
Add a photo or logo  
Select PNG, JPEG, or GIF image files.  
The image will be resized to 150x150 pixels.

**Client Activity Emails**

**Sign up for Notifications** Opt In:  NO  
Receive daily notifications from Link to inform you that your clients have been active.  
ian\_visser@intuit.com Save

**Intuit Account**

## Using Email Templates in Link (continued...)

Click the **“Email Templates”** link in the menu bar.

Click the **“New Template”** button.

Complete the **“New Template”** fields:

- “Template Name” gives the new template a name (e.g., “Due Date Email”)
- “Email Subject” gives the email a title that a client will see in their inbox (e.g., “A due date is approaching for return forms”)
- “Email Body” is the text that a client will see in their inbox (e.g., “This is a reminder that March 15th is the due date for all return forms to be provided”)

Click the **“Save”** button.

The new email template displays under the **“Email Templates”** menu.

The screenshot shows the 'Email Templates' interface in Intuit Profile. At the top, a navigation bar contains 'Account', 'Email Templates' (highlighted with a blue bar and a red circle with the number 4), and 'Request Templates'. Below this, the 'Email Templates' section has a blue button with a plus icon and the text 'New Template' (highlighted with a red circle with the number 5). The main form area is titled 'Template Name' (with a red circle with the number 6) and contains three sections: 'Template Name' with a text input field containing 'Due Date Email'; 'Email Subject' with a text input field containing 'A due date is approaching for return forms'; and 'Email Body' with a larger text area containing 'This is a reminder that March 15th is the due date for all return forms to be provided'. Below these is a 'Keywords' section with a dropdown menu showing 'Client Nam' and an 'Add Keyword' button. At the bottom right, there are 'Cancel' and 'Save' buttons.

# Using the Active Auditor in ProFile

## Using the Active Auditor in ProFile

Profile's Active Auditor displays messages that relate to the data file. These include passive audit messages, notices, processing errors, overridden fields, fields that have memos attached, fields with review marks, and EFILE-related messages.

Error messages or errors that may restrict processing the return display in red text.

### Accessing the Active Auditor

The Active Auditor is accessed two ways:

- select the "Active Auditor"  icon in the top toolbar menu
- right-click on any form and select the option "Show Auditor" from the menu

### Selecting Active Auditor options

**Note:** setting the Active Auditor options in one location applies the settings for all modules Open ProFile.

Select "Environment..." from the "Options" drop-down menu in the top toolbar.

Select the "Audit" tab; the **audit options window displays**.

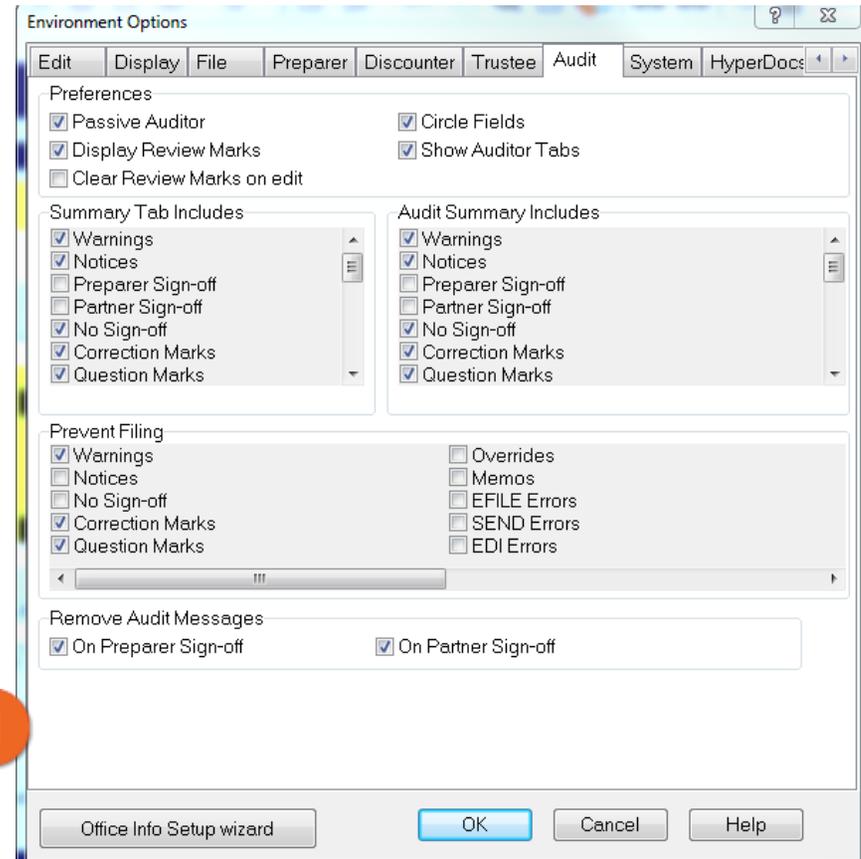
Each section of the audit options window has pre-set default selections.

**Note:** modules may display different tabs in the Active Auditor based on the nature of the module itself, rather than settings.

### "Preferences" settings

The "Preferences" section of the "Audit" tab includes settings that affect the display of warnings.

**Note:** ProFile recommends the "Show Auditor Tabs" option be selected to provide the clearest feedback and indication of errors on forms.



## Using the Active Auditor in ProFile (continued...)

### “Summary Tab Includes” settings

The “Summary Tab Includes” section of the “Audit” tab includes options that display in the auditor toolbar. Each of the selected options displays related errors in the corresponding Active Auditor tab.

### “Prevent Filing” settings

The “Prevent Filing” section of the “Audit” tab includes options that halt the filing of the form. Errors created by the violation of these options must be cleared before filing can take place.

### “Remove Audit Messages” settings

The “Remove Audit Messages” section of the “Audit” tab includes options as to who can remove errors in the Active Auditor for a form.

**Note:** Profile recommends one or both options be selected; otherwise error messages in the Active Auditor cannot be cleared to allow filing.-

### Clearing Active Auditor messages

Error messages **display as red text** in the Active Auditor tabs.

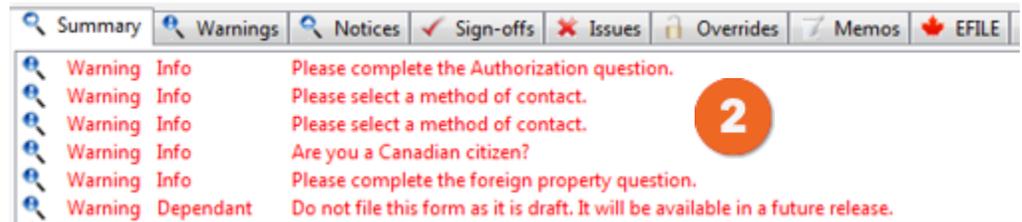
Double-click on an error warning in the tab.

The **error circles in red on the form.**

Resolve the error; the specific error in the tab details the issue.

In some cases, the error – as identified by ProFile – may actually be acceptable to the preparer and/or the client. For example, an RRSP amount may be acceptable but ProFile suggests the amount is outside the range expected by CRA and determines it to be an “error”.

In such cases the individual selected in the “Remove Audit Messages” section of the “Audit” tab can “sign-off”, or approve, the “error”.



The screenshot shows a form field for "Birth date" with a red circle around the input area. The input area contains the text "yyyy/mm/dd". A red circle with the number 3 is positioned over the input area. The form also includes fields for "Province", "Postal code", "Home phone", "Date of Death", "Gender" (Male/Female), and "Province or territory where taxpayer resides if different from mailing".

## Using Review Marks in ProFile

Preparers assign review marks while undertaking returns in ProFile. Preparers use review marks to indicate if field contents are correct and verified or if the field requires further review or data from a client.

Review marks appear on the ProFile top toolbar menu as red icons: check marks, an "X", and a question mark.



### Types of review marks

There are **four types of review marks** available in ProFile:

- Preparer sign-off: the preparer of the return must provide sign-off
- Partner sign-off: the partner of the return must provide sign-off
- Correction required: the field requires a correction (amount, etc.)
- Question: the data provided in the field prompts a question or clarification

### Using review marks

Open the return that requires review marks.

Select the appropriate review mark from the top toolbar menu; the mouse pointer changes to an arrow with the corresponding mark attached.

Click on the appropriate field in the return to apply the review mark; **the review mark appears** over the black status box to the right of the field.

Save the return. The added review marks are retained in the return until addressed/removed by the preparer.

1

50.00	✓
No transfer	✓↑
200.00	✓↑
300.00	✓↑
455.00	✗
500.00	✗

# Using additional ProFile features

## Using Intuitive Copy in ProFile

The “copy and paste” function allows preparers to save time when it is necessary to create a copy of a business statement already in use.

For example, a preparer may be completing business statement for non-spousal partners in a T1 return. Using “copy and paste”, it is not necessary to re-enter the same business data in both files.

### **Using Form copy and paste**

Open ProFile.

Complete the necessary statement in the client file.

Select the “Copy Form” option from the “Edit” drop-down menu in the top toolbar.

Open the data file for the partner.

Open a blank copy of the same statement in the partner’s file.

Select the “Paste Form” option from the “Edit” drop-down menu in the top toolbar; the blank form populates.

Edit/complete the populated form for this client.

### **Intuitive Copy and Paste**

ProFile business statements include a section for partner details, including the name, social insurance number, and percentage of share in the partnership. “Intuitive copy and paste” allows this information to be copied quickly into each partner form.

Finalize all business statement data.

Select the “Intuitive copy” option from the “Edit” drop-down menu in the top toolbar; the statement’s data copies.

Open the business statement in the partner’s file.

Select the “Intuitive paste” option from the “Edit” drop-down menu in the top toolbar; the copied data pastes into the partner’s statement.

ProFile automatically adjusts all amounts and partner details. Attached memos and tapes also copy to the partner’s business statement.

## Attaching Tapes in ProFile

Using ProFile, preparers can attach tapes to fields. The “Attach Tape” feature functions much like an adding machine that performs and records calculations.

Tape options are managed in the “Options” -> “Environment...” -> “Edit” tab in ProFile.

### Attaching a tape

Open a file in ProFile.

Select a field to attach a tape.

Right-click and select the “Attach Tape” option from the menu.

The “Tape” window displays.

Enter a **description** (e.g. “Shirts”) into the left-side field of the table.

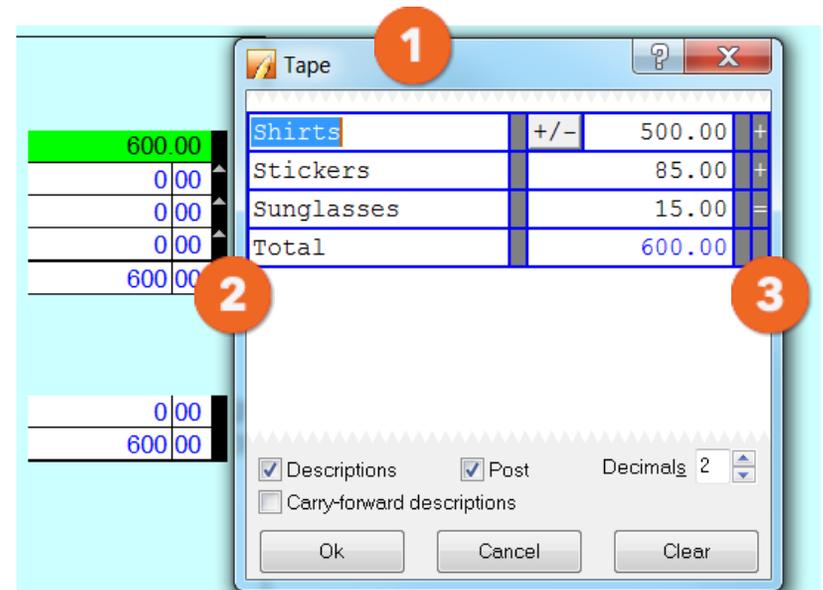
Enter a **value** (e.g., “\$500.00”) into the right-side field of the table.

Press the <Tab> key to cycle through the fields and start a new row.

Press the <Enter> key; the total is calculated and inserted into the selected field on the form.

The **background color of the field changes to green** when a field has a tape attached.

**Note:** Only the sum of a tape - not individual entry details - are printed or transmitted with the tax return data. The details and descriptions are for preparer reference only.



## Attaching Tapes (continued...)

### Clearing an Attached Tape

Open the file with the attached tape in ProFile.

Select the field from which an attached tape is to be cleared.

Right-click and select the “Attach Tape” option from the menu.

The “Tape” window displays.

Click the “Clear” button; the tape clears.

Click the “OK” button; the window closes and **the tape clears from the field.**

### Copying a Tape from One Field to Another

Open the file with the attached tape in ProFile.

Select the field with a tape attached.

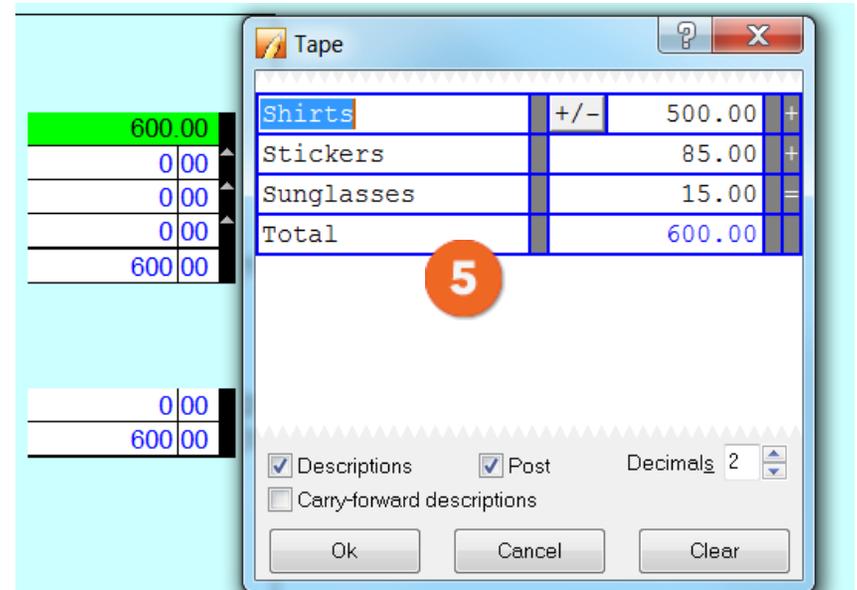
Right-click and select the “Copy Memo/Tape” option from the menu.

Select the destination field for the copied tape.

Right-click the destination field and select the “Paste Memo/Tape” option from the menu.

The tape attaches to the destination field.

**Note:** when pasting a tape to a destination field, the value of the destination field will be set to the total in the tape. If that destination field is also a calculated field, ProFile sets the override flag on that field.





## Attaching HyperDocs in ProFile

ProFile's "HyperDocs" feature allows multiple documents in any format to attach to a form or field in a return.

**Note:** HyperDocs are stored with the preparer files but are not included with T1 EFILE or TP1 NETFILE transmissions.

### Attaching HyperDocs

Open a form in ProFile.

Select the field to attach a HyperDoc.

Select the "HyperDocs..." option from the "File" drop-down menu in the top toolbar.

The "HyperDocs" window displays.

Click the "add" button  in the top-right corner of the window.

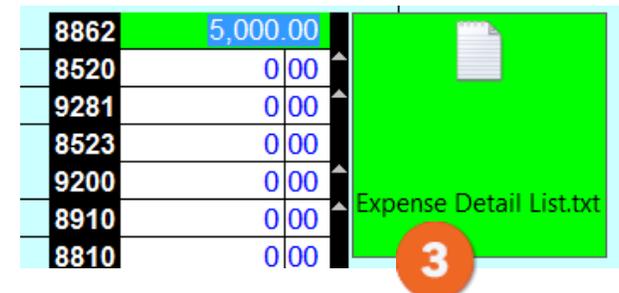
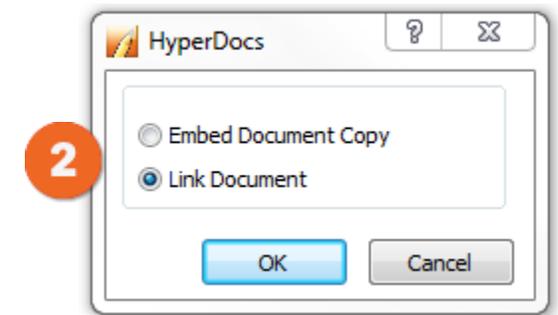
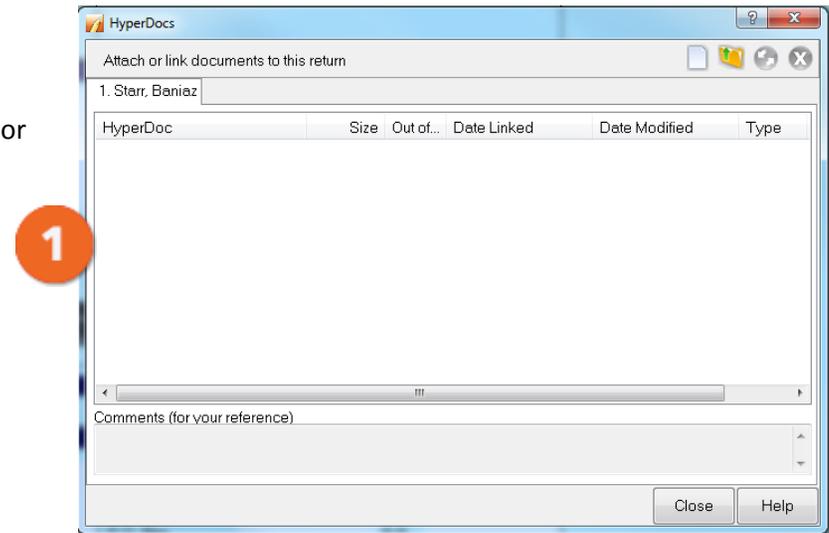
Navigate to the location of the document to attach. Select the document and click the "OK" button.

The options window displays.

Select one of the options presented:

- "Embedded" documents open in "read-only" state and cannot be edited in ProFile
- "Linked" documents open from the source and can be edited in ProFile; any changes are saved in the source document in the file location

Click the "OK" button; the document attaches to the field as a HyperDoc. The field displays in green color, indicating the HyperDoc attachment.



## Attaching Hyperdocs in ProFile (continued...)

### Detaching HyperDocs from a field

Right-click on the field with the attached HyperDoc.

Select the “Detach HyperDoc” option from the menu.

The document detaches and the field restores to its default color.

**Note:** the document remains attached to the form but is not linked to a specific field.

### Removing HyperDocs from a form

Select the “Hyperdocs...” option from the “File” drop-down menu in the top toolbar.

The “HyperDocs” window displays.

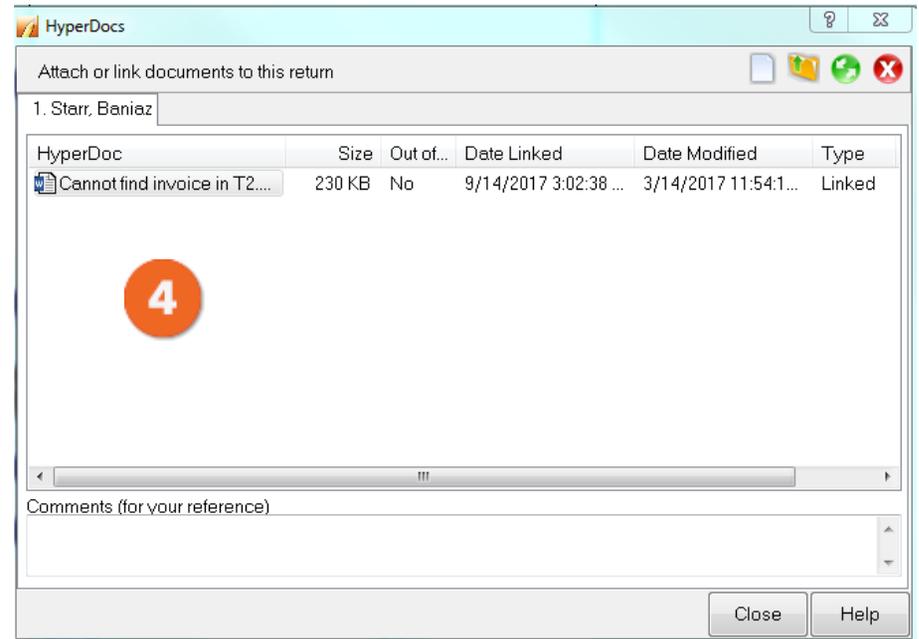
Select the document from the HyperDoc list of attached documents.

The red “X” logo in the top-right corner activates.

Click the red “X” logo.

Click the “Yes” button to confirm the removal of the document.

The document detaches from the form.



## Setting up Data Monitors in ProFile

ProFile's "Data Monitor" feature displays any number of fields at the bottom of the "Edit" window. By default, the software monitors several key fields in the client file. Preparers can observe the totals for these fields change while working on different forms in ProFile.

### Selecting fields for data monitoring

You may decide to monitor different fields. Then, as you make changes in other areas of the file, look at the bottom of the screen to see the effect those changes have on the fields you are monitoring.

A **monitor amount that appears bold** means that the field was affected by the last recalculation. A monitor amount that appears in red is a negative number.

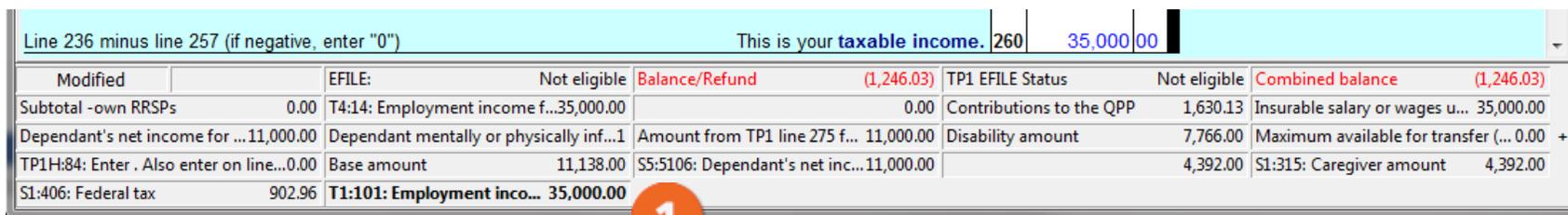
**Hint:** Right-click on the Data Monitor and select "Monitor" from the menu to access several options, including the option to rename the monitor field description. This makes it easy to remember what is being monitoring.

### To monitor a data field to the Data Monitor

Click and hold on the field. After a brief pause, the cursor will change to an arrow carrying a white square.

To replace another field already on the Data Monitor, drag the cursor to that cell and release the mouse button. The field code (or name, if there is one), along with the current value of the field, will appear in the monitor cell.

To add a new cell to the Data Monitor (on a new row, if necessary) drag the white square and release your mouse button when the cursor is over top of the + symbol in the bottom right corner of the ProFile window.



Line 236 minus line 257 (if negative, enter "0")		This is your <b>taxable income.</b>		260	35,000.00				
Modified		EFILE:	Not eligible	Balance/Refund	(1,246.03)	TP1 EFILE Status	Not eligible	Combined balance	(1,246.03)
Subtotal -own RRSPs	0.00	T4:14: Employment income f...	35,000.00		0.00	Contributions to the QPP	1,630.13	Insurable salary or wages u...	35,000.00
Dependant's net income for ...	11,000.00	Dependant mentally or physically inf...	1	Amount from TP1 line 275 f...	11,000.00	Disability amount	7,766.00	Maximum available for transfer (...	0.00 +
TP1H:84: Enter . Also enter on line...	0.00	Base amount	11,138.00	S5:5106: Dependant's net inc...	11,000.00		4,392.00	S1:315: Caregiver amount	4,392.00
S1:406: Federal tax	902.96	<b>T1:101: Employment inco...</b>	<b>35,000.00</b>						

### Related Articles:

To add more than four (4) data monitors, review [the support article](#).

To transfer data monitors to a new computer, review [the support article](#).

## Using Multiple Windows in ProFile

The “multiple windows” features allows the preparer to view two ProFile returns, each in its own window. This is a useful feature when the preparer needs to see two returns side-by-side for clarity or comparison. For example, a preparer can open two T1 returns and view them at the same time, rather than having to toggle back-and-forth between them.



### Opening multiple windows outside ProFile

Open two or more returns in ProFile.

Click the “tile window” icon in the ProFile top toolbar.

The returns open in individual windows on the desktop.

Click the “tile window” icon in each individual window to collapse the return back into ProFile.



### Opening multiple windows inside ProFile

Open two or more returns in ProFile.

Select the appropriate option from the “Window” drop-down menu in the top toolbar. These include:

- Tile Horizontally: the returns are “stacked” on top of each other
- Cascade: the returns each open in a smaller window that can be manipulated
- Launch Current Window: the current return opens in a new window outside ProFile

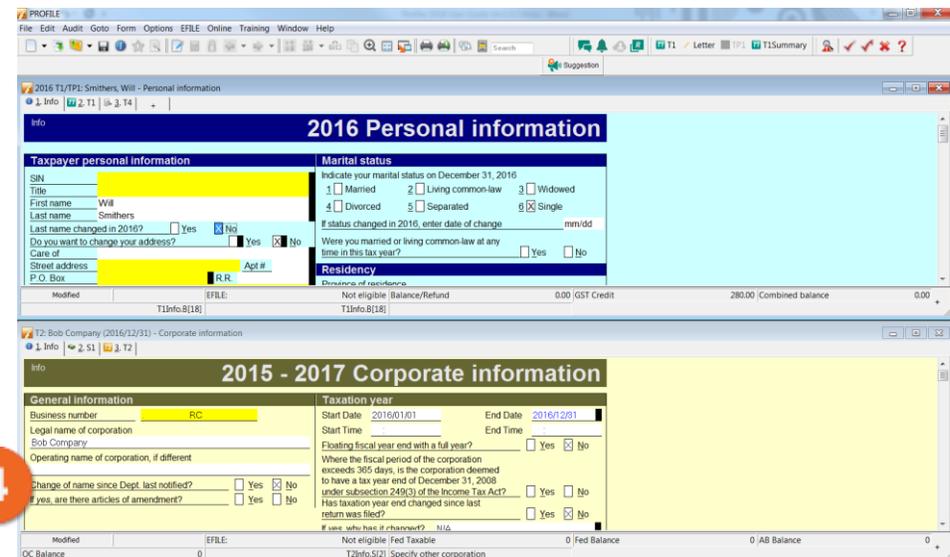


### Toggling between multiple open returns

Select the “Window” drop-down menu in the top toolbar.

Any open returns displays at the bottom of the menu; **the active window is marked with a checkmark.**

Select any return listed in the menu to display it.



## Viewing EFILE Reports in ProFile

EFILE reports provide preparers with the date, time, and the confirmation number of the EFILE from CRA.

### To view reports from files used during current EFILE and NetFile services

Select the “Reports” option from the “EFILE” drop-down menu in the top toolbar, and **then select the “Current” option.**

The “Open EFILE Report” window displays.

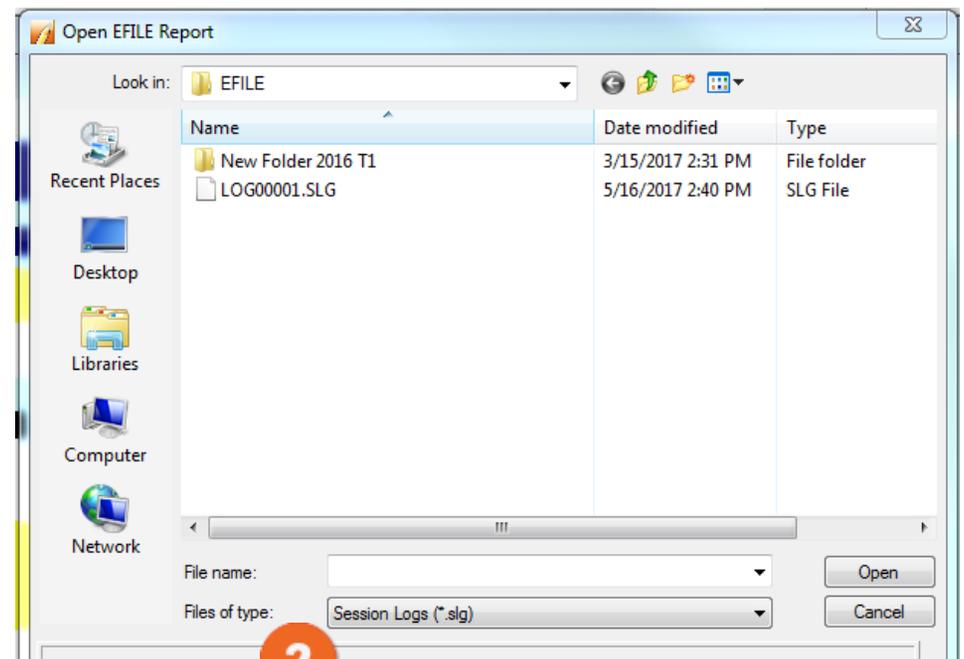
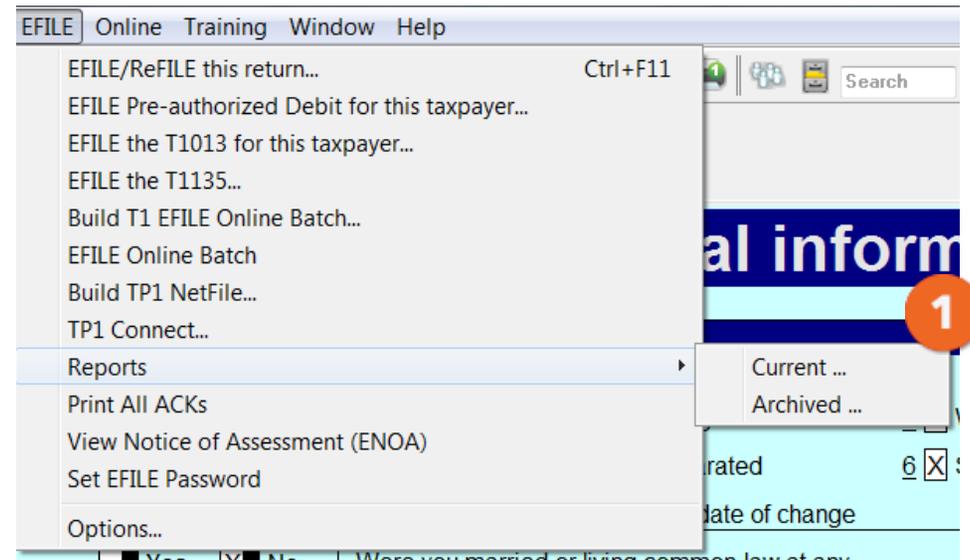
Select **the type of file in the “Files of type” field** from which you want to generate a report:

- EFILE Submission files (\*.TAX)
- TP1 NetFile Submission files (\*.EAX)
- Session logs (\*.SLG)

Session logs are descriptions of events that occurred while you were connected to the NetFile Québec website. If you choose "Session logs", select a session log and click the “Open” button to view the full report.

For other file types, select the option and click the “Open” button; ProFile displays the report information.

Click the “Print” button from the report to print a copy for your records.



## Viewing EFILE Reports in ProFile (continued...)

### Setting up a shared EFILE folder

If you installed ProFile onto a shared network folder, you can use the default folders created during installation. For each module that uses EFILE, you will find appropriate EFILE folders within each module's files folder.

Alternatively, you can use any shared folder on your network as a shared EFILE folder. To do so, you must specify that folder on each workstation.

#### For T1/TP1 returns

Select the "Options..." entry from the "EFILE" drop-down menu in the top toolbar.

Select the option for the EFILE service that you want to configure from the left-side menu.

Select the **"Common"** option under the **"T1"** section of the **"General"** menu.

Click the "Browse" button; the "EFILE Directory" window displays.

**Navigate to the folder used as a shared EFILE folder.**

Click the "OK" button.

Click the "OK" button in the EFILE options window; the folder is assigned.

#### For T2 returns

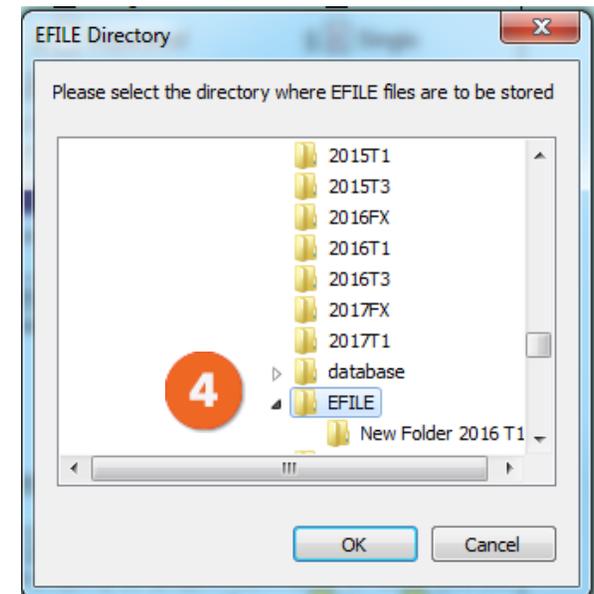
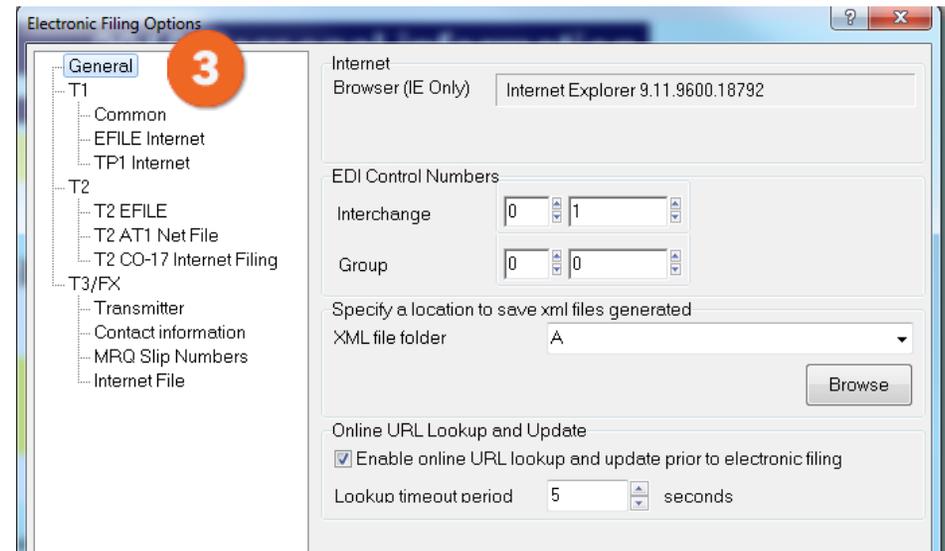
Select the "T2 EFILE" option under the "T2" section of the "General" menu.

Click the "Browse" button; the "EFILE Directory" window displays.

Navigate to the folder use as a shared EFILE folder.

Click the "OK" button.

Click the "OK" button in the EFILE options window; the folder is assigned.



## What Can Undergo EFILE in ProFile

The CRA makes changes each tax year as to what can (and cannot) undergo the EFILE process.

ProFile maintains a support article that addresses the EFILE status of all modules, as well as independent forms that undergo EFILE separately from the return (e.g., T1013, T1135, etc.).

Review the list of what can [undergo EFILE from ProFile](#).

# Managing T1 returns in ProFile

## Overview of T1 Module in ProFile

### What is a T1?

The T1 General Tax Form (usually referred to casually as a “T1”) is used by individual Canadians to complete their personal income tax return.

It has five sections for personal and income information:

- **Identification**, for details including name, address, SIN and marital status.
- **Total income**, for declaration of income, including employment, self-employment, disability, foreign income, and any others.
- **Net income**, where childcare expenses, union dues, and more are subtracted from total income.
- **Taxable income**, where allowable deductions like capital gains are subtracted from net income.
- **Refund or balance owing**, where it is determined if any money must be paid or any money is paid back.

### Submission Dates for T1

April 30 of the following year is the deadline for most individuals to file a T1 return, or June 15 of the following year for self-employed individuals and their spouses or common-law partners.

In the event that April 30 falls on a weekend, the following Monday becomes the deadline.

If the individual owes money to the CRA, the due date of April 30 is the hard due date for filing.

Late payment results in penalties being applied by the CRA.

## Using T1013 Authorizations for T1 in ProFile

The T1013 form “*Authorizing or Cancelling a Representative*” authorizes a representative to access a taxpayer’s tax information via the CRA.

### Thing to know about T1013 authorizations

- the taxpayer can grant access to a person, a group, or a business. To grant a group online access, the GroupID number must appear correctly in Part 2 of T1013.
- the T1013 is submitted to the Government of Canada separately from the T1 return
- the T1013 can be completed either manually or automatically by ProFile
- the T1013 has two levels of authorization: Level 1 allows CRA to disclose information to the representative, and Level 2 allows CRA to disclose information to the representative and the representative to request change.
- parts 3, 4, and 5 of the T1013 must be completed manually

### Entering preparer credentials

ProFile lets you enter preparer credentials; select the “Environment...” option under the “Options” drop-down menu in the top toolbar. Select the “Preparer” tab and complete the credentials. The information populates Part 2 (both sections A and B) of the T1013.

### Setting default options via the software options

Most of the T1013 content is automatically populated; select the “Module...” option from the “Options” drop-down menu in the top toolbar. Options are presented under the “Carry Forward” and “New Files” section of the “Module Options” window. Select the required options; the T1013 populates based on the selections, which should also include the purpose of the form, representative information and authorization, and the level of authorization.

### EFILE the T1013

Select the “EFILE the T1013 for this taxpayer” option from the “EFILE” drop-down menu in the top toolbar. The T1013 only transmits if Part 2 A is selected.

### Related Articles

For detailed steps on completing the T1013, visit the [support article](#). For detailed steps on EFILE of the T1013 from T1, visit the [support article](#).

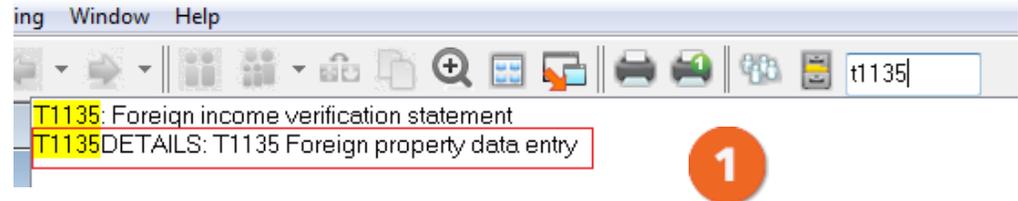
The screenshot shows the 'Part 2 - Representative information and authorization' section of the T1013 form. It includes fields for the representative's name (William Stonehenge), mailing address (123 Electric Ave., PO242, Toronto, Ontario, M1L3R1), and authorization options. Section A is for online access, and Section B is for access by telephone, in person, and in writing. The form also includes fields for RepID (1234567), GroupID, Business Number (BN), and the level of authorization (set to 2).

This close-up shows the authorization options in the T1013 form. It includes three radio buttons: 'To grant an individual online access, enter his or her RepID.' (checked), 'To grant a group online access, enter its GroupID.', and 'To grant a business online access, enter its Business Number (BN).'

## Using T1135 EFILE for T1 in ProFile

All Canadian resident taxpayers (including non-resident trusts deemed resident in Canada by section 94 of the Act) are required to file Form T1135, *Foreign Income Verification Statement*, if at any time in the year the total cost amount of all specified foreign property to the taxpayer was more than \$100,000 (CAD).

**Note:** The T1135 does not EFILE with a T1 or T2; it must undergo EFILE independently.

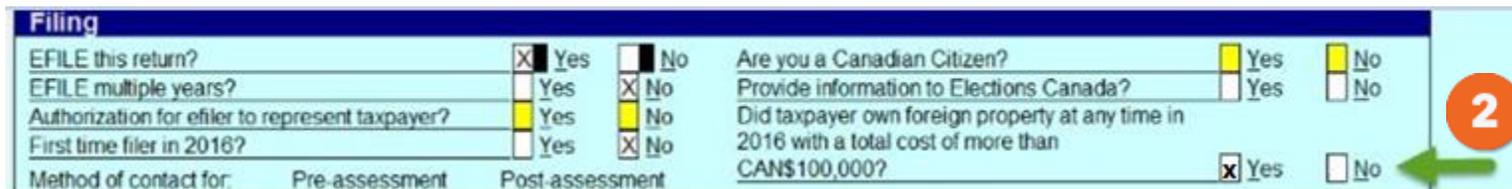


### Finding the T1135

Enter “t1135” into the forms search bar in the top toolbar menu. Select the “T1135” Foreign income verification statement” **from the search results.**

The initial question is located in the “Filing” section of the T1 “Info” tab:

### EFILE the T1135

A screenshot of the 'Filing' section of the T1 'Info' tab. The section contains several questions with radio button options for 'Yes' and 'No'. The 'EFILE this return?' question has 'Yes' selected. The 'Did taxpayer own foreign property at any time in 2016 with a total cost of more than CAN\$100,000?' question has 'Yes' selected. A red circle with the number '2' and a green arrow points to the 'Yes' button for the second question.

Ensure **the related “Yes/No” question** is answered affirmatively on the T1 “Info” tab.

Select the “EFILE the T1135...” option from the “EFILE” drop-down menu in the top toolbar; a transmission window displays indicating that the T1135 is ready to transmit.

Click the “OK” button; the T1135 transmits to CRA and a confirmation number is provided.

**Note:** the confirmation number can also be viewed on the information tab of a T1 or T2 return, post-transmission.

### Related Articles

Common questions regarding T1135 are found on the [CRA website](#).

Review the [support article](#) regarding the T1135.

## Using CRA Data Import with AFR for T1 in ProFile

Auto-Fill My Return (AFR) is a secure CRA service. It allows authorized representatives to electronically request and receive certain tax information to fill in parts of their client's income tax and benefit return. ProFile offers the service for both single and multiple individual T1 returns.

### Acquiring AFR permissions

The tax preparer must have a valid authorization from the taxpayer to access the "Represent a Client" website. There are two ways to acquire this authorization:

- the taxpayer can access CRA's *My Account* service. Preparer's request that the taxpayer enter the Rep ID to authorize the preparer as an individual, a Group ID to authorize a group of representatives, or a business's Business Number (BN) to authorize all employees of a business
- request the permission of the taxpayer to file a "T1013 - *Authorizing or Cancelling a Representative*" form

### Importing data with AFR

Open or create a T1 return.

Select the "Import CRA data" option from the "File" drop-down menu in the top toolbar; the "**CRA Data Import Tool**" window displays.

Click the "Launch CRA Website" button; the CRA's "Represent a Client" window launches in a separate browser window.

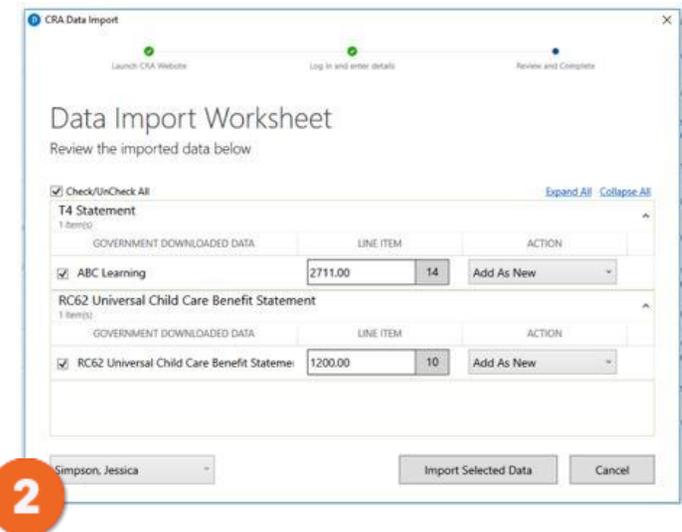
Sign in to the CRA site. The "CRA Data Import" window lists the clients whose SINs can be entered into the CRA website.

Select the client and click the "Next" button to provide confirmation; the CRA system processes the request. The "Successfully Connected" message displays when the connection has been made between the ProFile and CRA systems.

ProFile's "**Data Import Worksheet**" window displays; the default display setting is the "basic" view. Click the "+" icon next to each statement to reveal the "expanded" view of the information which displays more details.

Review the data and forms to be imported; if correct, click the "Import Selected Data" button. Click the "Close" button.

To review the data imported, click on the Data Import tab in ProFile's Auditor.



## Using ReFILE for T1 in ProFile

If you are an EFILE service provider, you can use ReFILE to send T1 adjustments online for tax years 2015 and 2016 on behalf of your clients. The ReFILE service allows you to change the same lines that individual taxpayers can with the “Change my Return” service in “My Account”.

### Who can use ReFILE?

Preparers can use the ReFILE service under the following conditions:

- you have ProFile version 2016.4.3 or later (for tax year 2015 and 2016 ReFILE)
- you have level 2 authorization from your client
- the initial return was filed online via EFILE
- the initial return was assessed
- you have acquired a new sign-off of a revised T183 from client

### What tax years does ReFILE support?

ReFILE is supported for 2015 and 2016 tax years with the latest ProFile version (2016.4.3 or later).

### Undertaking the ReFILE process

Open a T1 return that has already undergone EFILE and for which a CRA assessment has been received.

Save the return as a new file, using the “Save As...” option from the “File” drop-down menu in the top toolbar.

Enter the new information that mandates a ReFILE into the return. For example, a client has received an unexpected T4 indicating additional income.

Open a **“T1ReFILE” form**.

Ensure the client information (SIN, Name) is correct and enter the current date in the “Date of ReFILE” field.

Select the “Yes” option in the “Is this an amended tax return?” field.

Reprint and get the client to sign off on a new T183.

Select the “EFILE/ReFILE this return” option from the “EFILE” drop-down menu in the top toolbar.

You will get a new confirmation number on the return’s “Info” page.

### Related Articles

Review the [support article](#) for a list of detailed steps, additional resources and a FAQ about ReFILE.



## Using a Direct Deposit Request in ProFile

The **Direct Deposit Request form** allows a refund, tax credit, or payment to be directly deposited into a taxpayer's account.

If you used EFILE to file a return, complete the Direct Deposit Request form to change the direct deposit information already provided to the CRA.

### Regarding Direct Deposit service

Do not complete this form if you already use the direct deposit service and your banking information has not changed.

Your direct deposit request will stay in effect until you change the information or cancel the service.

### Eligible deposit types

The form is for the following types of deposits:

- income tax return refund
- Goods and Services Tax / Harmonized sales tax credit (GST/HST), including certain related provincial payments
- Working Income Tax Benefit (WITB) advance payment
- Canada Child Tax Benefit payment
- Universal Child Care Benefit payment
- Canada Pension Plan payment
- Old Age Security payment
- Veterans Affairs payment

You can also use the online Direct Deposit form if you do not use EFILE and you need to update your banking information with the CRA.

**Direct Deposit Request**

Do you wish to start or change direct deposit information?

**Complete the banking information area below**

Branch number (5 digits)	Institution (3 digits)	Account number (maximum 12 digits)
460 <input type="text"/>	461 <input type="text"/>	462 <input type="text"/>

**Direct deposit information previously provided to CRA**

Branch number (5 digits)	Institution (3 digits)	Account number (maximum 12 digits)
<input type="text"/>	<input type="text"/>	<input type="text"/>

## Using Preauthorized Debit (PAD) for T1 in ProFile

Pre-Authorized Debit (PAD) is a CRA feature that allows tax professionals to submit a payment to CRA on behalf of taxpayer clients who have an amount due on their current-year T1 Personal returns. This feature saves the taxpayer time over printing a T7DR(A) form and making the payment in-person at their Bank.

**Note:** complete a PAD and EFILE it for each taxpayer. If there is a spouse with balance owing, the spouse requires his or her own PAD form to be completed and undergo EFILE.

### Completing the PAD Form

Complete the taxpayer's T1 Personal return in ProFile and EFILE.

Select the "Form Explorer" option from the ProFile "GoTo" menu.

Search for "T1PAD" and **open the PAD form.**

**Note:** if the taxpayer has completed the T1DD form, you can retrieve their banking information from the T1DD to automatically populate the PAD form.

Change the "Do you wish to set up Pre-Authorized Debits (PAD) for current year tax owing" value **from "no" to "yes"**:

**Pre-Authorized Debits (PAD)**

Do you wish to set up Pre-Authorized Debits (PAD) for current year tax owing?  Yes

**Instructions**

- Pre-authorized debit (PAD) is a secure, online, self-service payment option for individuals and businesses. This option lets you set the payment amount you authorize the Canada Revenue Agency (CRA) to withdraw from your Canadian chequing account to pay your taxes on a date you choose.
- Only Payment on Filing (POF) for the current tax year will be allowed to create PAD agreement through T1 Filers.
- **To Efile PAD-Agreement: Go to the Efile Menu and select "Efile Pre-Authorized Debit for this TaxPayer"**

First name	Last name	Social insurance number
John	Doe	123 123 123

Total amount owing

Total amount you would like to pay through PAD (single one time payment)  Pay in full

**Complete the banking information area below**

Do you want to use the same banking information entered in T1DD (Direct deposit) form?  No

Branch number (5 digits)	Institution (3 digits)	Account number (maximum 12 digits)	Payment date (YYYY/MM/DD)
12345	002	123121231231	2017/02/25

T1PAD confirmation number:

1

Do you wish to set up Pre-Authorized Debits (PAD) for current year tax owing?

2

Yes

Enter the amount to be paid into the "Total amount you would like to pay through PAD (single one-time payment) field.

For payment in full, **check the "Pay in full" checkbox.** For partial payment, enter the amount in the value field.

Total amount owing

Total amount you would like to pay through PAD (single one time payment)  Pay in full

Enter a payment date; the date must be between five days and one year in advance of the current date.

Enter details of the bank and account the payment is being made from.

The PAD form is completed.

# T1: Preauthorized Debit (PAD) (con't...)

## Completing the T183 Form

Select the “Form Explorer” option from the GoTo” drop-down menu in the top toolbar.

Search for “T183” and **open the T183 form** from the results.

Complete “**Part C**” of the **T183 form**, including the current date, date of payment, amount, and branch information.

Print the T183 form and acquire a physical signature from the taxpayer.

Print and save the T183 form and retain a copy for the preparer’s records. Provide the taxpayer with a copy of the physical, signed form.

## EFILE the PAD Form from the T1

Return to the taxpayer’s T1 form that underwent EFILE.

Select the “EFILE Pre-authorized Debit for this taxpayer...” option from the “EFILE” drop-down menu in the top toolbar.

The PAD form undergoes EFILE; the preparer receives a confirmation number that populates the PAD form (field “T1PAD confirmation number”) and on the information page following the EFILE.

## Additional information

Read the [CRA guide on PAD](#) for more information.

Review a [detailed support article](#) on PAD for ProFile customers.

The screenshot shows the 'Part C - Optional sign up for new Canada Revenue Agency (CRA) services' section of the T183 form. It includes several checkboxes and input fields for the taxpayer to authorize electronic services. A red circle with the number '4' is overlaid on the form. The 'Tax Year' is set to 2017. The form is titled 'Information Return for Electronic Filing of an Individual's Income Tax and Benefit Return' and is marked as 'Protected B when completed'.

This is another screenshot of the 'Part C - Optional sign up for new Canada Revenue Agency (CRA) services' section of the T183 form. It shows the same fields and checkboxes as the previous screenshot, but with a red circle containing the number '5' overlaid. The 'Tax Year' is 2017, and the 'E-file number' is D3333.

## Using Express Notice of Assessment (ENOA) for T1 in ProFile

ENOA is a CRA service that allows individuals and authorized representatives to view the basic result of an assessment immediately after filing a return and to receive the full notice of assessment the next day.

The instant assessment results provide the status of the return with a summary of the refund, amount owing, or a zero balance and deposit information, if applicable.

The full notice of assessment provides an account summary with the result of the assessed return showing a refund, a zero balance, or a balance owing, tax assessment summary, explanation of changes and other information, and RRSP/PRPP deduction limit statement.

**Note:** While the CRA processes most ENOA requests within 24 hours, some cases may require up to five days for processing.

### Making the initial ENOA request

Open the return that ENOA is being sought for.

Select the “View Notice of Assessment (ENOA)” option from the “EFILE” drop-down menu in the top toolbar. The ENOA wizard displays in ProFile. Review the wizard content and click the “Next” button.

If this is a spousal return, select a specific spouse from the drop-down menu, then click the “Launch CRA Website” button

The ENOA wizard indicates that the CRA website is launched in a separate browser window. Navigate to the “CRA Login” browser window and enter the user ID and password information. Click the “Login” button.

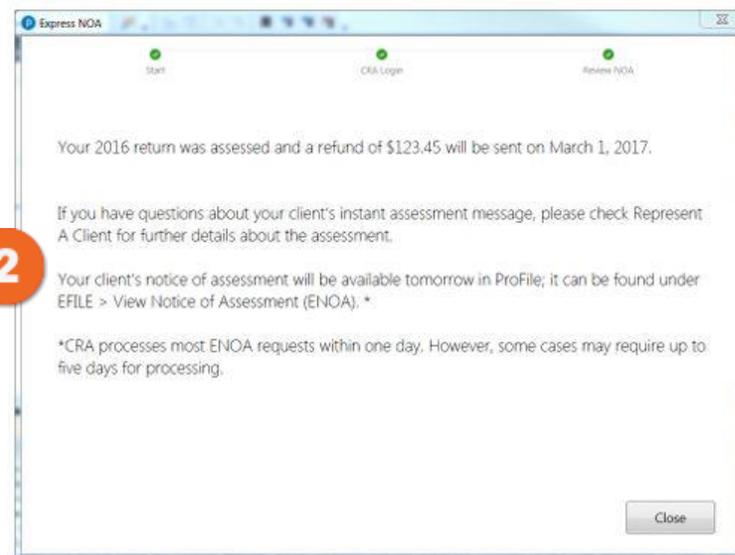
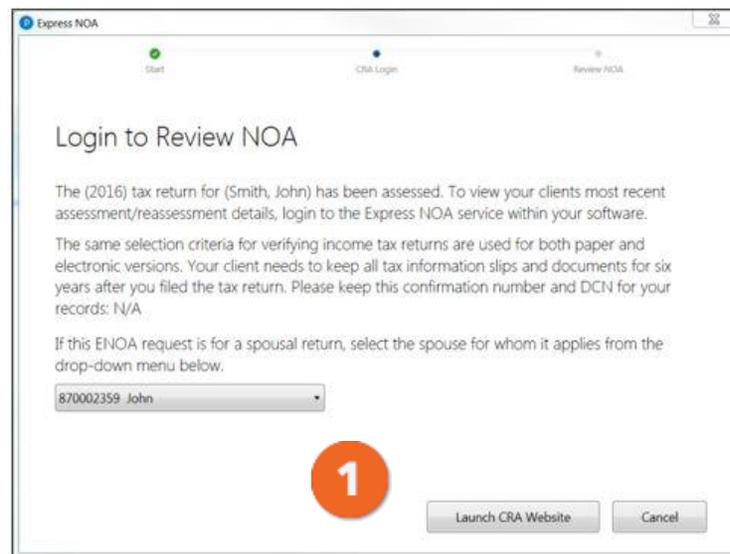
In the CRA web browser, the ENOA “request processing” status displays.

The CRA web browser displays the SIN of the client for whom the ENOA request is being made; if the number correctly corresponds to the client, click the “Next” button.

A new browser displays the **details of the successful ENOA request**; this page can be saved or printed.

Click the “Close” button; it is now necessary to wait a minimum of 24 hours to repeat the request and acquire the full ENOA summary.

**More information:** review [our full support article](#) for more information on ENOA and FAQ.



## Using Couple's Returns for T1 in ProFile

### Creating a couple's return

Open or create the T1 return for the client.

On the "Info" form, select either "Married" or "Living common-law" for the marital status.

Click the "switch to spouse"  button on the top toolbar menu; the "Couple Returns" window displays.

Choose **whether to create a new return for the spouse, or couple the file** to an existing return.

- select **"Create a new return for spouse"** to open a new return for the spouse, or
- select **"Open an existing return"** to browse to a file on your hard drive and select it

**Note:** after combining the data, ProFile will ask if you want to delete the original file for the spouse. Delete the file to avoid duplication or possible confusion of the original spouse's file and the same return in the new coupled file.

Select the "Save" option from the "File" drop-down menu in the top toolbar.

ProFile **saves both spouses' tax returns in the same data file**. This keeps the tax returns together as file operations are performed on the tax return file (e.g., backing up to a disk).

Once returns are coupled, select <F5> on the keyboard to toggle between the returns.

### Uncoupling a couple's return

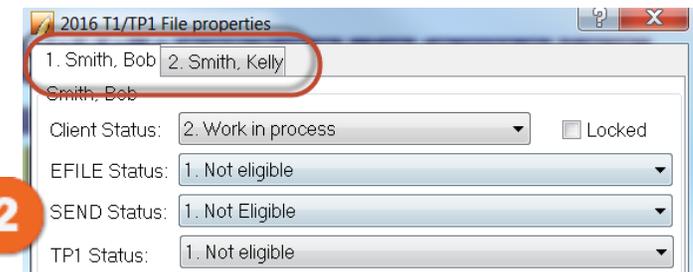
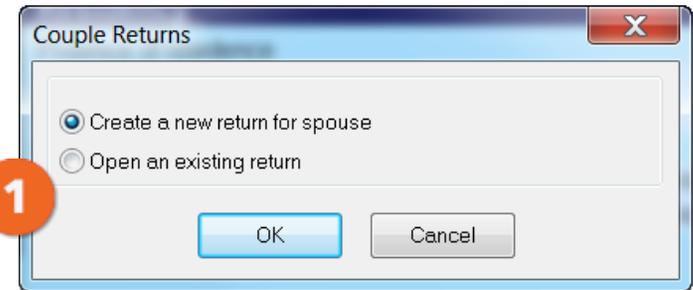
Open the coupled return.

Select the "Uncouple" option from the "File" drop-down menu in the top toolbar menu.

Confirm the desire to uncouple the returns. ProFile automatically prompts the option save the spouse's return in a separate file.

Click the "Save" button. The client's file keeps the coupled file name (e.g., "Couple, Joe and Thelma.T08"). It may be renamed by selecting the "Save As" option from the "File" drop-down menu in the top toolbar.

On the Info form in each file, select "Widowed", "Divorced", "Separated" or "Single" for the marital status.



## Using a Medical Expense form for T1 in ProFile

Taxpayers may claim medical expenses for any 12-month period that ends in the current tax year. Expenses already claimed on last year's tax return cannot be claimed again. Generally, all amounts paid can be claimed even if they were not paid in Canada.

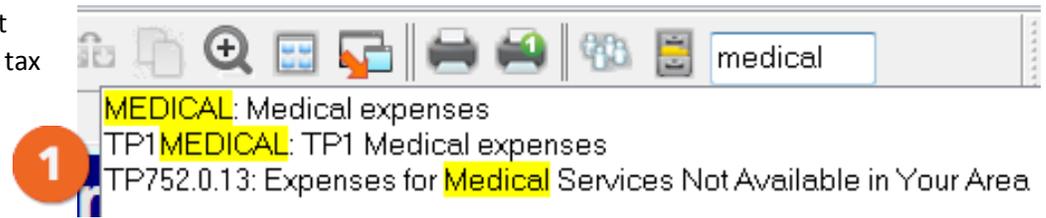
### Opening the Medical Expense form

Search using the term "medical" in the ProFile search bar, located in the top toolbar menu.

Select the "Medical expenses" form displayed in the search results.

### If a coupled return...

The "Medical Expense" form in ProFile automatically shares information between coupled returns



A screenshot of the "Medical expenses - line 330" form in ProFile. At the top, there is a question "Optimize medical expenses?" with "Yes" and "No" radio buttons. The "No" button is selected, and a red circle with the number "2" is positioned over it. Below this, the form title "Medical expenses - line 330" is displayed. Underneath, there is a section for "Period covered by claim:" with "from 2016/01/01" and "to 2016/12/31". A table follows with columns: "Payment date", "Name of patient", "Payment made to", "Description of expense", "\* Subject to limitation?", and "Amc". The table has three rows: the first row has "2016/05/01", "Bob Smith", "Drug Co", and "No"; the second row has "yyyy/mm/dd", "Kelly Smith", "Druv Co", and "No"; the third row has "yyyy/mm/dd" and is empty. Below the table, there is a question "Are you claiming medical expenses?" with "Yes" and "No" radio buttons. A context menu is open over the "Druv Co" cell in the table, showing options: "Help", "Optimize and sort expenses", and "Optimize expenses without sorting".

Payment date	Name of patient	Payment made to	Description of expense	* Subject to limitation?	Amc
2016/05/01	Bob Smith	Drug Co		No	
yyyy/mm/dd	Kelly Smith	Druv Co		No	
yyyy/mm/dd					

To optimize medical expenses, select the "Yes" option to the "Optimize medical expenses?" question at the top of the form.

ProFile determines which taxpayer should claim the deduction at lines 330, according to the lowest net income (as long as the taxpayer can claim all expenses).

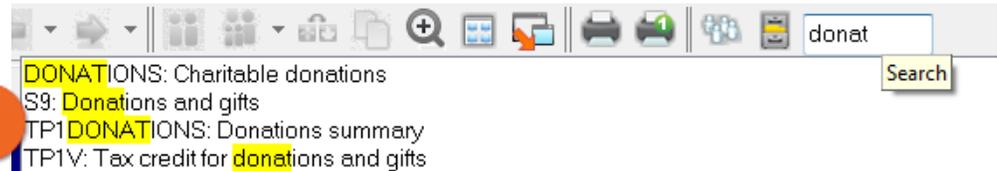
To decide independently which spouse should claim the deduction, **select the "No" option to the "Optimize medical expenses?" question at the top of the form and select the "Yes" option to the "Are you claiming medical expenses?" question.**

Select "Percentage" and enter it in the corresponding field for the current return to allocate a percentage to each spouse. The spouse's return will automatically reflect the remaining percentage.

## Using a Charitable Donations Form for T1 in ProFile

The ProFile “Donations” form is used to enter charitable donations for the taxpayer. Donations can be entered for both Canadian and U.S. organizations.

Search for the term “donations” in the ProFile search bar in the top toolbar menu; **select the appropriate form** (e.g., “Charitable donations”).



### Carrying forward donations

If a return carried forward from a previous taxation year, ProFile copies the list of organizations into the “Charitable donations details” and “Donations to U.S. organizations” tables, but leaves amounts as “0”.

A screenshot of the 'Charitable donations' form in ProFile. The form has a dark blue header with the title 'Charitable donations'. Below the header, there are two main sections: 'Charitable donations details' and 'Donations to U.S. organizations'. The 'Charitable donations details' section contains a table with columns 'Name of organization' and 'Amount paid'. Two rows are visible: 'Animal Shelter' with an amount of '500|00' and 'Red Cross' with an amount of '0|00'. Below this table, there are fields for 'Reported on slips' and 'Claim: Own slips'. The 'Donations to U.S. organizations' section contains a table with columns 'Name of organization' and 'Amount'. A red circle with the number '2' is overlaid on the right side of the form, near a context menu that is open, showing options like 'Sort donations', 'Remove 'zero' lines', 'Transfer all donations', and 'Transfer current donation'.

Any donation amounts can be entered to the same organizations for the current year in the appropriate rows.

When completed delete the remaining organizations, right-click in each table and select the “Remove 'zero' lines” option.

If the taxpayer has donation amounts from slips (e.g., T4 slips), enter those amounts on the related slip or slips (e.g. T4, T3, T2202A, T4A, and T5013). ProFile automatically carries donation amounts from slips to the “Reported on slips” line in the “Donations” worksheet.

The donation carry forwards display at the bottom of the “Charitable donations” form. ProFile automatically claims older donations first to ensure that the taxpayer uses them before they expire; charitable donations for up to 5 years are eligible for carry forward.

### Transferring donations to spouse

Open the donations form.

Right-click on the form and select the option “Transfer all donations” or “Transfer current donation”.

The donations transfers to the spouse.

## Adding Dependants for T1 in ProFile

There is no limit to the number of dependants that can be added to the form; a new blank column displays when the last column provided is populated.

### Completing the “Dependant information” form

Enter the term “dependant” into the ProFile search field in the top toolbar menu; **select the form from the search results** (e.g. “Dependant information”).

**Enter the dependent information** in full.

Personal information entered on the Dependent form automatically populates for both spouses, regardless of which is chosen.

### Selecting family linking

Select the “Module...” option from the “Options” drop-down menu in the top toolbar.

Ensure **the “Allow family linking” option is checked** in the “Allow family linking” section of the “General” tab.

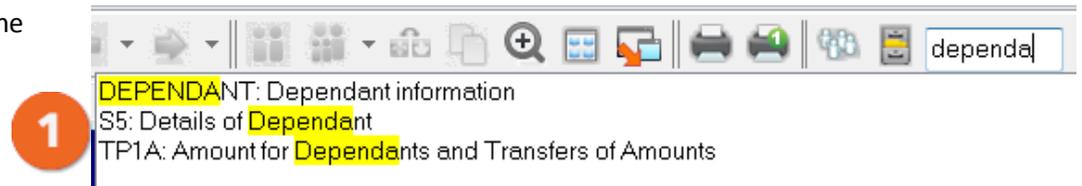
Click the “OK” button.

Identify the dependant in the “Dependant information” form that to link.

Right-click in one of the dependant’s form fields; select the “Return for” option from the menu.

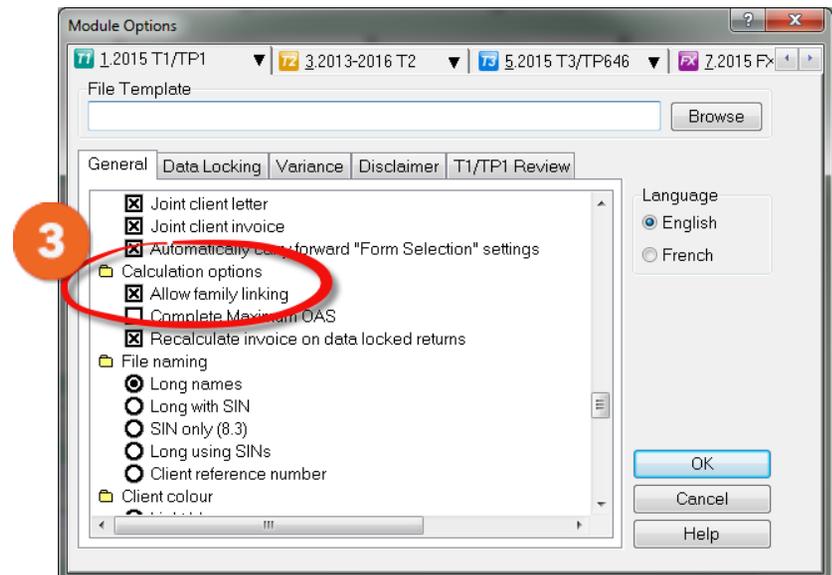
Click the “Yes” button when asked “Create a new return for?”

The new return is created for the dependant.



2

	Dependant #1	Dependant #2	Dependant #3
Social Insurance Number			
First name			
Last name			
Relationship	N/A	N/A	N/A
Birth date	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
Net income	0.00	0.00	0.00
Claim as eligible dependant?	No	No	No
Dependant claiming GST credit?	No	No	No
Dependant claiming PST credit (MB)?	No	No	No
Did you or your spouse or common-law partner received in December 2016, child assistance payments from Retraite Québec? (QC)	No	No	No
Did dependant live with you in 2016?	Yes	No	No
Street address			



## Family Linking for T1 Returns

A number of file management features make it easy to work with linked T1 or T1/TP1 files for members of the same family:

- linking family returns
- working with linked files
- printing linked files
- saving linked files
- sharing income between spouses
- sharing data between family members
- estimating Child Tax Benefits
- open and close family files

### **Working with linked family files**

Once linked, family files can be opened and closed together.

If you prefer working with family files open together, open them all together when beginning to work on a set of family files.

If files were closed together, (e.g. “File” -> “Close family”) ProFile will open the returns together.

If closing the file for one family member separately, automatic opening of all family files together will not occur until after the next time you open all the files at once.

### **Optimize Transfer Credits**

When opening all family files together, ProFile optimizes transfer credits among the different returns.

### **Switch between Family Members**

Use the toolbar icon, the “Form” menu or the “Window” menu to switch between open files for members of a family.

### **Print Family Files**

When selecting “File” -> “Print” option for a linked file, the “Print Selection” dialog box displays a tab for each family member whose file is currently open to permit printing returns for the whole family at once.

## T1 Family Linking (continued...)

### **File Properties**

View the “File Properties” details for all family files open together and listed in the “Window” menu.

### **Deactivate Family Files**

To deactivate the family file-handling features, clear the checkbox “Allow family linking” under “Options” -> “Module” > “T1/TP1” -> “General” -> “Calculation” options.

## Using Pension Split Optimization for T1 in ProFile

Canadian residents who received eligible pension income during the taxation year may be able to allocate up to half of their eligible income to their spouse (or common-law partner) for income tax purposes.

### Completing T1032 form

Open form T032, *“Joint Election to Split Pension Income”*.

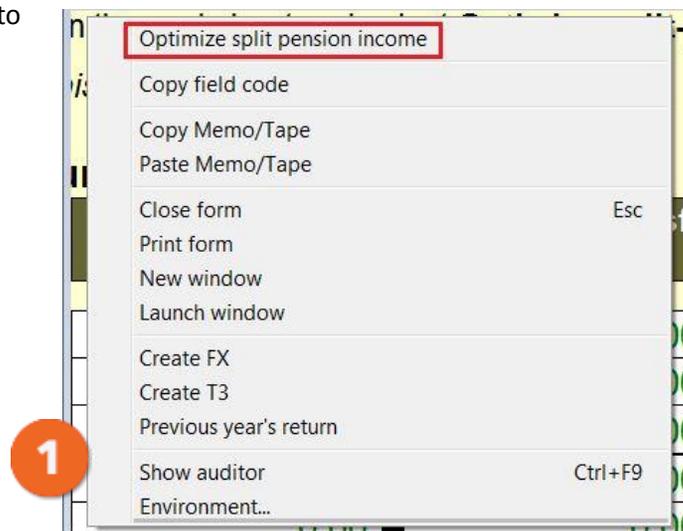
Indicate at the top of form T1032 whether you are the **“Pensioner”** (transferring pension income to his/her spouse) or the **“Pension Transferee”** (receiving pension income from his/her spouse).

Enter the amount of the elected split pension on **“Line E”** of the form. Based on your Pensioner/Pension Transferee selection, the amounts will automatically flow to lines 210/116 of each of the spouse's returns.

### Utilizing the pension optimizer worksheet

Open the form T1032OPT, *“Optimize – Split-pension income”*.

To view the amount that ProFile recommends that the taxpayer transfer to his/her spouse or common law partner, right-click on the worksheet and select the **“Optimize split-pension income”** option.



### Utilizing scenarios in the "Calculator" section

Open the form T1032OPT, *“Optimize – Split-pension income”*.

Enter the amount of pension income to be split in the "Elected split-pension amount box" under Scenario # 1.

Press "Enter".

The calculator displays the "Total Payable and Balance Owing" for each individual, as well as combined totals for the couple.

### Related Articles

Review the [pension-splitting support article](#) to learn more about pension splitting.

# Using Business Statements for T1 in ProFile

There are multiple business statements in ProFile, including:

- **T2125 - Statement of Business or Professional Activities**
- T776 - Statement of Real Estate Rentals
- T2042 - Statement of Farming Activities
- T2121 - Statement of Fishing Activities
- T1163 & T1273 - AgriStability

Each statement has their own set of forms such as the asset, CCA, and summary forms.

Amounts from certain slips are transferable to a business statement. It gives the option to transfer on the slip.

These statements are multi-copy forms; in order to create a secondary statement, **select the “New Form” option** from the “Form” drop-down menu in the top toolbar menu.

## Deleting business statement sets (T4slip)

If you delete any form in a business statement set, ProFile deletes all the related forms in the same set. ProFile automatically selects for printing any of the business statement forms that are used. Unused forms in a set have no impact on a tax return filing.

To clear a particular form in the set, open the form in the “Edit” window and select the “Clear Form” option from the “Form” drop-down menu in the top toolbar menu.

This option does not impact other forms in the same set.

## Related Articles

Review the “business statement” and “Asset details” entries in ProFile’s “Help” feature for additional information.

1

2

## Adding Motor Vehicles for T1 in ProFile

The “**Motor vehicle expenses (Business)**” worksheet lists motor vehicle expenses used for business purposes, related to the T2125, T2121, T2042 and Quebec business statements.

From the “Allocation of expenses” drop-down menu, select your business statement (if you have not yet opened a business statement, the drop down list will be empty).

Data entered on the “Business Auto” form flows to the selected business statement(s).

In the case of the T2125, T2121 and T2042 business statements, ProFile transfers automobile expenses to different areas on the statements depending on the taxpayer's percentage of ownership of the business:

- if the business is a sole proprietorship (% ownership = 100%), then the automobile expenses are transferred to the expense section of the business statement (line 9281 or 9819, depending on the business statement).
- if the business is a partnership, the expenses are transferred to line 9943, "Other amounts deductible from your share of net partnership income (loss)".

As you complete the Business Auto worksheet, ProFile automatically transfers the required information to the related Quebec business auto form (for example, TP80Auto, TP1FishingAuto).

### Capital Cost Allowance (CCA)

Chart C of the “Business Auto” worksheet lets you calculate the [Capital Cost Allowance](#) (CCA). CCA amounts are transferred to the business statement's “CCASummary” or the CCA (assets owned by partner) table of the relevant business statement, depending on whether or not the vehicle is owned by the business. This is specified in the “Owned by business?” column of the “**Allocation of expenses**” table. For vehicles owned by a partner in a business, ensure that the “Owned by business?” column is set to “**No**” for the related business statement.

### Sharing automobile expenses between spouses

ProFile does not automatically share the details of motor vehicle expenses with the spouse's return. If both spouses have expenses related to the business use of an automobile, they will each have to create their own “Business Auto” form.

### Related Articles

To learn more about CCA for motor vehicles, click [here](#).

1

Business Auto <span style="float: right; font-weight: normal; font-size: 1.2em;">Motor vehicle expenses (Business)</span>									
Allocation of expenses	Fiscal period		%	Amount	CCA	Terminal Loss	Recapture	Owned by business?	
	Start	End						Yes	No
T2125#1	2016/01/01	2016/12/31	100	250.00	4,500.00	0.00	0.00	0.00	Yes
	yyyy/mm/dd	yyyy/mm/dd	0	0.00	0.00	0.00	0.00	0.00	No

**Chart A - Motor vehicle expenses**

Description of automobile							
Enter the kilometers you drove in the tax year to earn business income				500		1	
Enter the total kilometers you drove in the tax year				1,000		2	
				Taxable	Non Eligible		Total
				GST	HST		
Fuel and oil				0 00	500 00	0.00	500 00 3

## Adding Assets and CCA for T1 in ProFile

Asset details forms are part of the business-statement set. For each business statement, ProFile creates a corresponding “asset details” and “asset list” form. For example, when creating a T2125#1 form, ProFile creates the corresponding T2125Asset#1 and T2125AssetList#1 forms.

Use “asset details” and “asset list” list forms to track business and rental assets. Enter asset information on the “asset details” form. ProFile automatically transfers this information to the corresponding “asset list” form. The “asset list” form displays all assets in a single table that you can print.

**Note:** it is not possible to print the “asset list” form.

### Entering asset information

Complete a separate entry for each asset.

A list of assets appears in the panel on the left of the “asset details” form. Click on one of these items to display the asset details for a particular asset.

Click “New” to enter information in a blank column. ProFile automatically numbers each asset as entered on the information and creates a blank entry for the next asset. Complete a separate entry for each asset.

Enter details for each asset under the Federal/Quebec headings. ProFile automatically calculates the net cost or proceeds and transfers the amount to the “CCA” form to calculate the capital cost allowance (CCA), recapture, or terminal loss.

### Capital Cost Allowance (CCA) form

Capital Cost Allowance (CCA) forms and summaries are part of the business statement set. For each business statement, ProFile creates a corresponding “CCA” and “CCASummary” form. For example, when creating a T2125#1, ProFile creates the corresponding T2125CCA#1 and T2125CCASummary#1 forms.

T2125CCA		T2125 CCA	
Please enter addition and disposition details on T2125Asset.			
		CCA Item #1	
Class			
Terminal loss?	No		
Description			
Class 10 or 10.1 limited by the number Km?	No		
Kilometres travelled in carrying on your activity		0	
Total kilometres		0	
Acquisition date / Start of lease	yyyy/mm/dd		
Expiry date	yyyy/mm/dd		
Capital cost		0.00	
Number of 12 month periods		0	
Annual CCA		0.00	
CCA claim in prior years		0.00	
Undepreciated capital cost (UCC) - start of year		0.00	
Cost of additions	Normal additions	0.00	
	Additions exempt from 50% rule	0.00	
	Total additions	0.00	
Proceeds of dispositions		0.00	
Adjustments	Prior year ITC	0.00	
	Other	0.00	
	Total	0.00	
Subtotal		0.00	
Adjustment for additions (50% rule)		0.00	
Base amount for CCA		0.00	
CCA Rate		0.00	
CCA for the year, personal use portion		0.00	
CCA for the year		0.00	
Recapture of CCA		0.00	
Terminal loss		0.00	
UCC Reduction		0.00	
UCC - end of year		0.00	

# Using the Employment Expenses form for T1 in ProFile

Use form T777 to calculate allowable employment expenses.

There are four forms related to employment expenses:

- T777
- T777Details
- T777Other
- **T777Auto**

Enter employment expenses for commission and non-commission employees on T777Details.

Enter expenses for musicians, forestry workers and apprentice mechanics on T777Other.

Use form T777Auto to calculate **automobile expenses related to earning employment income**

## T777Auto#: Motor vehicle expenses

Use this form to calculate automobile expenses related to earning employment income.

Create a new T777Auto worksheet for each automobile.

Complete the expense details for the automobile.

Right-click on the form and select “New form” from the context-sensitive menu.

1

Motor vehicle expenses summary					
	# 1	# 2	# 3	# 4	Total
Allowable expenses	0.00	0.00	0.00	0.00	0.00
Interest	0.00	0.00	0.00	0.00	0.00
Capital cost allowance	0.00	0.00	0.00	0.00	0.00
Allowable motor vehicle expenses	0.00	0.00	0.00	0.00	0.00

Calculation of allowable motor vehicle expenses				
Description of automobile				
Enter the kilometres driven in the tax year to earn employment income	0	1		
Enter the total kilometres you drove in the tax year	0	2	0.00 %	
	Taxable		Non Eligible	Total
	GST	HST		
Fuel (gasoline, propane, oil)	0.00	0.00	0.00	0.00
Maintenance and repairs	0.00	0.00	0.00	0.00
Insurance			0.00	0.00
License and registration			0.00	0.00
Leasing	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
Subtotal	0.00	0.00	0.00	0.00
Multiply line 9 by 0.00 %	0.00	0.00	0.00	0.00
Reimbursements (Note)	0.00	0.00	0.00	0.00
Allowable expenses (Line 10 minus line 11)	0.00	0.00	0.00	0.00
Interest			0.00	0.00
Capital cost allowance	0.00	0.00	0.00	0.00
<b>Allowable motor vehicle expenses</b>				
Add lines 12, 13, and 14	0.00	0.00	0.00	0.00

Note: Where an employee receives a reasonable allowance to cover particular motor vehicle expenses, this allowance does not represent a reimbursement. Please also note that a reasonable allowance is excluded from income under subparagraph 6(1)(b)(vii.1) of the Income

2

Do you qualify for the GST/HST rebate?  Yes  No Jump to: T777

Limit expenses to commission income?  Yes  No

Employees earning a salary				
	Taxable		Non Eligible	Total
	GST	HST		
Allowable motor vehicle expenses	0.00	0.00	0.00	0.00
Accounting and legal fees	0.00	0.00	0.00	0.00
Food and beverages	0.00	0.00	0.00	0.00
Less non-deductible (50%)	0.00	0.00	0.00	0.00
Lodging	0.00	0.00	0.00	0.00
Parking	0.00	0.00	0.00	0.00
Supplies (postage, stationery, other office supplies)	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
Subtotal	0.00	0.00	0.00	0.00
CCA and interest on a motor vehicle	0.00	0.00	0.00	0.00
Subtotal	0.00	0.00	0.00	0.00

Employees earning commission income			
	Taxable	Non Eligible	Total

# Using Comparative Summary for T1 in ProFile

ProFile provides summary forms that present the tax return data in different ways. These include:

- **Summary - 2016 Tax Summary (Federal):** this form displays all the non-zero line items of a single taxpayer's T1 return (each field that contains data in the return)
- **T1Summary - 2016 Tax Return Summary, TP1Summary - Tax Summary (Québec):** this form displays major items from the taxpayer's return
- **5Year - 5 Year Tax Summary (Federal), TP15Year - TP1 5 Year Tax summary (Québec):** this form displays the major items for a single taxpayer's last five years of tax returns
- **Comparative - Comparative Tax Summary (Federal), TP1Comparative - TP1 Comparative tax summary:** this form compares the major items from this year's tax return to last year's tax return for a single taxpayer. If the return carried forward using Profile, last year's amounts appear automatically on the comparative summary
- **NRTC - Comparative NRTC Summary:** this form compares the non-refundable tax credits on the federal and provincial tax returns
- **T1Review - T1 Review, TP1Review - TP1 Review:** similar to the Comparative Tax Summary, this form compares the major items from this year's tax return to last year's tax return for a single taxpayer, with a special focus on review. The form uses the variance thresholds specified under "Options" -> "Module..." -> "T1/TP1 Review" to highlight significant changes between current and prior year returns. It is also possible to adjust the variance threshold in the "Review" preferences section of the form. ProFile calculates the differences and displays them on the "T1/TP1 Review" tab in dollar and/or percentage amounts.

1

Summary		2016 Tax Summary (Federal)	
<b>Total income</b>			
Employment *	101	0	0
Old Age Security	113	0	0
CPP/QPP benefits	114	0	0
Other pensions	115	0	0
Split-pension amount	116	0	0
Universal Child Care Benefit	117	0	0
Employment Insurance	119	0	0
Taxable dividends	126	0	0
Interest	121	0	0
Limited partnership	122	0	0
RRSP	125	0	0
Rental	126	0	0
Taxable capital gains	127	0	0
Support payments	128	0	0
RRSP	129	0	0
Other	130	0	0
Self-employment *	135	0	0
Workers' compensation and social assistance	147	0	0
<b>Total income</b>	<b>150</b>	<b>0</b>	<b>0</b>
<b>Net income</b>			
RPP	207	0	0
RRSP *	208	0	0
Split-Pension Deduction	210	0	0
Union and professional dues	212	0	0
UCCB repayment	213	0	0
Child care expenses	214	0	0
Disability supports deduction	215	0	0
Business investment loss	217	0	0
Moving expenses	219	0	0
Support payments	220	0	0
Carrying charges and interest	221	0	0
CPP/QPP/RRSP *	222	0	0
Exploration and development	224	0	0
Employment expenses	228	0	0
Social benefits repayment	235	0	0
Other deductions *	231	0	0
<b>Net income</b>	<b>236</b>	<b>0</b>	<b>0</b>
<b>Taxable income</b>			
Canadian Forces personnel	244	0	0
Home relocation loan	248	0	0
Security options deductions	249	0	0
Other payments deduction	250	0	0
Losses of other years *	251	0	0
Capital gains deduction	254	0	0
Northern residents	255	0	0
Additional deductions	256	0	0
<b>Taxable income</b>	<b>260</b>	<b>0</b>	<b>0</b>
<b>2017 Estimated</b>			
GST/HST credit	280	00	0
Child Tax Benefit	0	00	0
RRSP contribution limit	0	00	0
* More than one line is considered			
<b>Non-refundable tax credits</b>			
Basic personal amount	300	11,471	0
Age amount	301	0	0
Spouse / eligible dependent *	303	0	0
Family caregiver amount	307	0	0
Infirmary caregiver *	306	0	0
CPP/QPP/RRSP/IE *	308	0	0
Volunteer firefighters' amount*	362	0	0
Canada employment amount	363	0	0
Public transit passes amount	364	0	0
Children's arts amount	370	0	0
Home accessibility expenses	398	0	0
Home buyers' amount *	399	0	0
Adoption expenses *	313	0	0
Pension income amount	314	0	0
Disability amount	316	0	0
Transfers *	318	0	0
Interest on student loans	319	0	0
Tuition / education	323	0	0
Medical expenses	332	0	0
<b>Subtotal</b>	<b>335</b>	<b>11,471</b>	<b>0</b>
Credit at 15%	338	1,721	0
Donations and gifts	349	0	0
<b>Non-refundable tax credits</b>	<b>350</b>	<b>1,721</b>	<b>0</b>
<b>Total payable</b>			
Federal tax	404	0	0
Non-refundable tax credits	350	1,721	0
Dividend tax credit	429	0	0
Min. tax carry-over/other *	426	0	0
<b>Basic federal tax</b>	<b>429</b>	<b>0</b>	<b>0</b>
Non resident surtax	0	0	0
Foreign tax credits / other	405	0	0
<b>Federal tax</b>	<b>406</b>	<b>0</b>	<b>0</b>
Provincial/territorial tax credit/other *	410	0	0
Labour-sponsored tax credit	414	0	0
Alternative minimum tax	417	0	0
WTB Payment (RC210)	415	0	0
Special Taxes	418	0	0
<b>Net federal tax</b>	<b>421</b>	<b>0</b>	<b>0</b>
CPP contributions payable	420	0	0
El self-employment	430	0	0
Social benefits repayment	422	0	0
Provincial/territorial tax	428	0	0
<b>Total payable</b>	<b>435</b>	<b>0</b>	<b>0</b>
<b>Total credits</b>			
Income tax deducted *	437	0	0
QC or YT abatement *	440	0	0
CPP/EEI overpayment *	448	0	0
Medical expense supplement	452	0	0
WTB (Schedule G)	453	0	0
Other credits *	454	0	0
GST/HST rebate	457	0	0
Children's fitness amount	459	0	0
School supply credit	469	0	0
Installments	476	0	0
Provincial tax credits	479	0	0
<b>Total credits</b>	<b>482</b>	<b>0</b>	<b>0</b>
<b>Balance owing (refund)</b>			
<b>Combined balance (refund)</b>			<b>0</b>

**Five-year comparative summaries** are part of the business-statement set. For each business statement, ProFile creates a corresponding five-year comparative summary form. For example, if creating a T2125#1 form, ProFile creates the T2125Comparative#1 form. This form is used to compare up to five years of business statement information.

ProFile automatically carries forward previous-year business statement information from the previous year to this form. Enter any additional information directly in the summary.

If creating a new return, rather than undertaking the carry forward of an existing return, enter the prior year information directly on the comparative summary. ProFile carry forwards this information in the following year.

2

T777Comparative		T777 5 Year Comparative				
	2016	2015	2014	2013	2012	
Accounting and legal fees	8862	0	0	0	0	
Advertising and promotion	8520	0	0	0	0	
Motor vehicle expenses	9281	0	0	0	0	
Entertainment expenses	8523	0	0	0	0	
Lodging	9200	0	0	0	0	
Parking	8910	0	0	0	0	
Supplies	8810	0	0	0	0	
Other expenses	9270	0	0	0	0	
Tradesperson's tools expenses	1770	0	0	0	0	
Apprentice tools expenses	9131	0	0	0	0	
Musical instrument costs	1776	0	0	0	0	
CCA for musical instruments	1777	0	0	0	0	
Artists' employment expenses	9973	0	0	0	0	
<b>Subtotal</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	
Works-space-in-the-home	9945	0	0	0	0	
<b>Total expenses</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	

## Using Tax Planner for T1 in ProFile

The tax planner in ProFile prepares a projection of the taxpayer's position for the next taxation year.

“Tax Planner” is an unlimited form, so as many different scenarios as required can be created for a single T1 file.

### Creating a T1 tax plan

Enter the term “tax plan” in the ProFile search bar in the top toolbar.

Select the “PLAN: Tax planner” option from the search results; the tax planner displays.

Right-click on a form field and select the “New form” option from the menu.

Enter a description for the scenario in the “Description” field at the top of the form. This description displays in the “Form Explorer” to distinguish between the different scenarios created.

**Note:** when creating a new plan, ProFile creates new T1 plans for the client and spouse, all in the same numbered set.

### Transferring data from the current year's tax return

To save time entering data on a new plan, you can transfer amounts from the current year's tax return to get you started.

Open a completed T1 client file.

Open the tax planner from the “Client” category of the Form Explorer.

Right-click on a form field and select the “Copy T1 return” option from the menu; the return's data imports into the tax planner.

Change any amounts to reflect the client's new projections for the year.

**1**

Plan

Description: \_\_\_\_\_

### Tax plan summary

Taxpayer name	Baniaz Starr
Birthdate	yyyy/mm/dd
Province of residence	NA
Spouse name	
Birthdate	yyyy/mm/dd
Spouse's net income	0.00

Gross income	49,800.00
Total income for tax	49,800.00
Net income	49,800.00
Taxable income	49,800.00
Non-refundable credits	2,044.20
Federal Tax	5,639.42
Other payable	+ 0.00
Provincial Tax	+ 0.00
Total payable	= 0.00
Other credits	- 5,822.94
Balance owing (refund)	= (5,822.94) = (5,822.94)

Instalments: Calculate?  Yes  No

March 15	0.00
June 15	0.00

**Marginal tax rate summary**

%	_____
100	_____
80	_____
60	_____

## Using a Motor Vehicle Expenses form for T1 in ProFile

Form T777 calculates allowable employment expenses.

Enter the term “T777” into the ProFile search bar in the top toolbar menu and select the appropriate result.

There are four forms related to employment expenses:

- T777: enter employment expenses
- **T777Details**: enter employment expenses for commission and non-commission employees
- T777Other: enter expenses for musicians, forestry workers and apprentice mechanics
- T777Auto: calculate automobile expenses related to earning employment income

1

T777Details **Employment expenses**

Do you qualify for the GST/HST rebate?  Yes  No Jump to: T777

Limit expenses to commission income?  Yes  No

**Employees earning a salary**

	Taxable		Non Eligible	Total
	GST	HST		
Allowable motor vehicle expenses	0.00	0.00	0.00	0.00
Accounting and legal fees	0.00	0.00	0.00	0.00
Food and beverages	0.00	0.00	0.00	0.00
Less non-deductible (50%)	0.00	0.00	0.00	0.00
Lodging	0.00	0.00	0.00	0.00
Parking	0.00	0.00	0.00	0.00
Supplies (postage, stationery, other office supplies)	0.00	0.00	0.00	0.00
Subtotal	0.00	0.00	0.00	0.00
CCA and interest on a motor vehicle	0.00	0.00	0.00	0.00
Subtotal	0.00	0.00	0.00	0.00

**Employees earning commission income**

	Taxable	Non Eligible	Total

### T777Auto#: Motor vehicle expenses

This form calculates automobile expenses related to earning employment income.

Create a new “T777Auto” worksheet for each automobile.

Complete the expense details for the automobile. Any number of copies of the form may be created. Right-click on the form and select the “New Form” option from the menu.

2

T777Auto **Motor vehicle expenses (Employment)**

**Motor vehicle expenses summary**

	# 1	# 2	# 3	# 4	Total
Allowable expenses	0.00	0.00	0.00	0.00	0.00
Interest	0.00	0.00	0.00	0.00	0.00
Capital cost allowance	0.00	0.00	0.00	0.00	0.00
Allowable motor vehicle expenses	0.00	0.00	0.00	0.00	0.00

**Calculation of allowable motor vehicle expenses**

Description of automobile \_\_\_\_\_

Enter the kilometres driven in the tax year to earn employment income: 0 | 1

Enter the total kilometres you drove in the tax year: 0 | 2 | 0.00 %

	Taxable		Non Eligible	Total
	GST	HST		
Fuel (gasoline, propane, oil)	0.00	0.00	0.00	0.00
Maintenance and repairs	0.00	0.00	0.00	0.00
Insurance			0.00	0.00
License and registration			0.00	0.00
Leasing	0.00	0.00	0.00	0.00
Subtotal	0.00	0.00	0.00	0.00
Multiply line 9 by 0.00 %	0.00	0.00	0.00	0.00
Reimbursements (Note)	0.00	0.00	0.00	0.00
Allowable expenses (Line 10 minus line 11)	0.00	0.00	0.00	0.00
Interest			0.00	0.00
Capital cost allowance	0.00	0.00	0.00	0.00
<b>Allowable motor vehicle expenses</b> Add lines 12, 13, and 14	0.00	0.00	0.00	0.00

**Note:** Where an employee receives a reasonable allowance to cover particular motor vehicle expenses, this allowance does not represent a reimbursement. Please also note that a reasonable allowance is excluded from income under subparagraph 6(1)(b)(vii.1) of the Income

# Filing a T1 for a Deceased Taxpayer in ProFile

## Complete a return for a deceased taxpayer who is single

Create a new T1 return in ProFile.

Navigate to the “Info” sheet.

Enter the date of the client’s death in the “**Date of Death**” field under the “Taxpayer personal information” section.

The date of the client’s death in the “**Is this return for a deceased person?**” section of the “T1” sheet updates automatically.

If the deceased taxpayer is married, the status of the individual’s spouse changes automatically to “**Widowed**” on the spouse’s form.

## Completing “Special return” for deceased taxpayer

Enter the date of the client’s death in the “Date of Death” field under the “Taxpayer personal information” section.

Scroll down the “Info” sheet to the “**Special return for the deceased taxpayer (Other than “final return”)**” section.

Review the options in the section and select one if applicable.

## Carrying forward a coupled deceased return

When carrying forward a coupled file in which a spouse files a deceased return for the previous taxation year, ProFile automatically carries forward only the return for the surviving taxpayer.

Birth date	yyyy/mm/dd	Age
Date of Death	yyyy/mm/dd	
Gender	<input type="checkbox"/> Male	<input type="checkbox"/> Female

Is this return for a deceased person?	
If this return is for a deceased person, enter the date of death:	Year/Month/Day yyyy/mm/dd

Marital status		
Tick the box that applies to your marital status on December 31, 2016:		
1 <input type="checkbox"/> Married	2 <input type="checkbox"/> Living common-law	3 <input checked="" type="checkbox"/> Widowed
4 <input type="checkbox"/> Divorced	5 <input type="checkbox"/> Separated	6 <input type="checkbox"/> Single

Special return for the deceased taxpayer (Other than “final return”)	
• Separate return for the value of the rights or thing - S70(2)	<input type="checkbox"/>
• Separate return for the business income of the stub period - S150(4)	<input type="checkbox"/>
• Separate return for the income received from a testamentary trust – S104(23)(d)	<input type="checkbox"/>

# Managing T2 returns in ProFile

## Overview of T2 Module in ProFile

A T2 is the federal tax return for incorporated businesses (also called corporations). An incorporated business must complete a T2 return each year, even if there is no tax payable.

The form must be filed within six months of the end of each corporation's fiscal year.

As of 2009, the CRA requires all T2 returns be filed electronically via their “EFILE” service.

### Required information and material for T2 returns

For the best-possible experience, assemble the following information and materials prior to undertaking the T2 return:

- prior-year financial statements and T2 return, if applicable
- articles of incorporation
- list of product and services provided in percentages
- obtain backup electronic copies of applicable bookkeeping (e.g., QuickBooks, Simply accounting, MS Excel, etc.), trial balance sheet, income statement, general ledger, credit card and bank statements of the last month of the corporation year
- corporate installment payments made during the year
- copy of prior years' Notice of Assessment (NOA)
- correspondence with any government relating to the corporation
- list of changes to the corporation from last year (e.g., new director, shareholders, new assets, etc.)
- business number of the corporation (review the incorporation documents or prior-year return)
- address of corporation, including head office, mailing and location of books, if applicable (you can review the CRA “My Account” feature for this information)
- fiscal year-end date of company
- enter information and carry-forward the return in ProFile of the prior-year corporation return, if available
- provide a signed RC59 form to acquire access to the client’s business information through the CRA. **Note:** a RC59 form is now only to request mail or phone authorization. ProFile recommends that preparers follow the instructions [here](#) to acquire full online authorization using the CRA's “Represent a Client” function.

## Using GIFI Import from Caseware for T2 in ProFile

The General Index of Financial Information (GIFI) is a comprehensive list of financial statement items where each item has a unique code. It allows a corporation to report its unique combination of accounts to the CRA.

### Importing GIFI from CaseWare to ProFile

#### In Caseware:

Open Caseware.

Open the “Working Papers” client file from which to export.

Select the “GIFI” option from the “Export” menu; the “Export of Data to GIFI” dialog box displays.

Complete the fields of the dialog box.

Click the “OK” button; the export processes and creates the GIFI file.

#### In ProFile:

Open a T2 return.

Select the “Import...” option from the “File” drop-down menu in the top toolbar.

Select the location where the Caseware-created GIFI file is stored.

Select the GIFI file; click the “Open” button.

**Note:** the “Import Successful” dialogue box displays an incorrect “X” icon. Click the “OK” button.

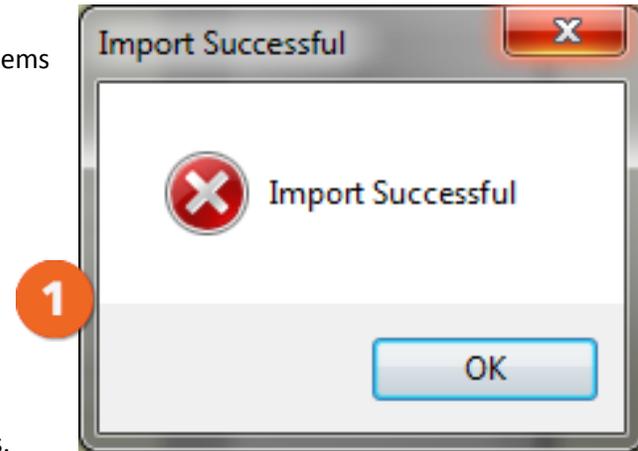
The GIFI information imports to the T2 return.

#### More information:

[Review the Profile article](#) on GIFI import from QuickBooks Online (QBOA).

[Review the ProFile article](#) on GIFI import from QuickBooks desktop to ProFile.

[Review the Caseware article](#) on exporting GIFI data for imports.



# Using GIFI Import from QuickBooks Desktop for T2 in ProFile

**Note:** it is necessary to undertake QuickBooks integration prior to importing GIFI from QuickBooks Desktop. This guide includes a “QuickBooks Integration” section.

## About GIFI Import

The General Index of Financial Information (GIFI) is a comprehensive list of financial statement items where each item has a unique code. It allows a corporation to report its unique combination of accounts to the CRA.

## Importing GIFI from QuickBooks desktop

Open a T2 return in ProFile.

Ensure that the **ProFile T2 taxation year** matches the corresponding year entered in **QuickBooks**.

Select the “Yes” option for the question “Complete return from GIFI?” in the “Filing” section of the ProFile T2 return.

Select the “QuickBooks Desktop Import...” option from the “File” drop-down menu in the top toolbar.

Set the “Year start” and “Year end” values in the “GIFI Data Import” window.

Click the “Continue” button.

Review the amounts being imported from QuickBooks to ProFile.

If correct, click the “Import” button.

PROFILE - [T2: <NewCorp> (2016-05-04) - Corporate information

2014 - 2016 Corporate information

**General information**

Business number: RC

Legal name of corporation: [Redacted]

Operating name of corporation, if different: [Redacted]

Change of name since Dept. last notified?  Yes  No

If yes, are there articles of amendment?  Yes  No

**Taxation year**

Start: 2015-05-05 End: 2016-05-04

Planning fiscal year end with a full year?  Yes  No

Prior year-end date: yyyy-mm-dd

Where the fiscal period of the corporation exceeds 365 days, is the corporation deemed to have a tax year end of December 31, 2008 under subsection 249(3) of the Income Tax Act?  Yes  No

Has taxation year end changed since last return was filed?  Yes  No

If yes, why has it changed? N/A

If change in control, provide date: yyyy-mm-dd

Deemed tax year-end under 249(3.1)?  Yes  No

Previous tax year end deemed to be December 31, 2008 under 249(3)?  Yes  No

**Filing**

Internet file this return?  Yes  No

T2 Confirmation number: [Redacted]

T1135 Confirmation number: [Redacted]

Complete return from GIFI?  Yes  No

Gross Revenue: 0

Total assets: 0

Was the corporation an associated CCPC in the previous year?  Yes  No

Date of incorporation: yyyy-mm-dd

Date of amalgamation: yyyy-mm-dd

Date of dissolution: yyyy-mm-dd

Date of bankruptcy: yyyy-mm-dd

Is corporation a professional corporation that is a member of a partnership?  Yes  No

First year of filing after incorporation?  Yes  No

First year of filing after amalgamation?  Yes  No

GIFI Data Import

Enter fiscal year start and end

Year start: 2013/10/31

Year end: 2014/10/30

Use fiscal year dates from T2 Info form

Continue Cancel

Trial Balance Import Preview: Akhron Enterprise

Akhron Enterprise

Company file: C:\Users\Public\Documents\Intuit\QuickBooks\Company Files\Akhron Enterprise.qbw

Thu Jun 4 14:46:12 EDT 2015

Trial Balance

As of 2015-06-03

Account Number/Name	GIFI Code*	Debit	Credit
Accounts Receivable		911300.00	
Driver Advances	1071	25000.00	
Accounts Payable			100938.14
GST/HST Payable		11112.35	
PST Payable (ON)			800.00
Fuel Surcharge	8000	10000.00	
Uncategorized Income			900000.00
Professional Fees	8860	45078.00	
Reconciliation Discrepancies			25000.00
Utilities	9220	44247.79	
Total		1036738.14	1036738.14

Done

Cancel Import

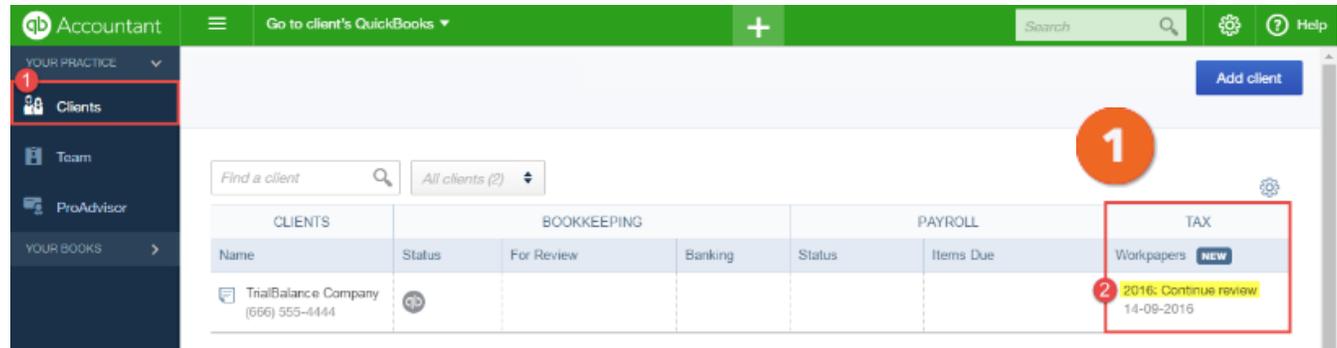
## Using GIFI Import from QBOA for T2 in ProFile

The General Index of Financial Information (GIFI) is a comprehensive list of financial statement items where each item has a unique code. It allows a corporation to report its unique combination of accounts to the CRA.

### GIFI Import from QBOA

Login to the QBOA Firm containing the data to export.

Click the hyperlink text under the **“Workpapers”** column, or if logged into the client file [click here](#).



In QuickBooks navigate to the “Workpapers” section for the client’s books.

Review the “Working Trial Balance” and the **“GIFI Mapping”** to ensure that all the work is completed. If there are any unassigned codes, these can be mapped under the GIFI mapping section. To assign GIFI Codes review the list and click **“Assign GIFI Codes”**.

Click “Save GIFI codes” at the top-right corner.

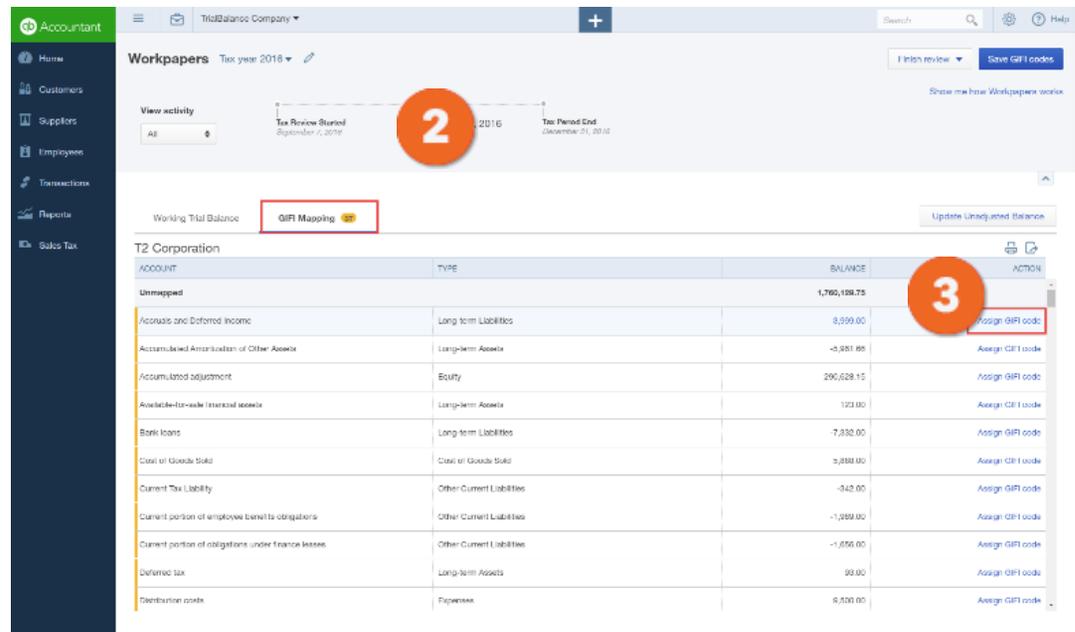
### In Profile

Select the “QBOA Import...” option from the “File” drop-down menu in the top toolbar.

Navigate to the GIFI file to import.

Select the GIFI file and click the “OK” button.

The GIFI information imports.



## Using Amendments for T2 in ProFile

T2 amendments are carried out when a new piece of information demands that the original T2 be amended to reflect the new data.

### Saving the original T2 return

ProFile strongly recommends that the file be renamed before amending the return. This ensures the original T2 is not lost in the process of being amended.

Open the T2 return that requires amendment.

Select the “Save As...” option from the “File” drop-down menu in the top toolbar.

Save the T2 return as “[Your Corp Name]\_amended”.

### Amending the corporate information page

Select the “Info” tab in the T2 return.

Set the following values in the “Filing” section:

- “Is this an amended return?” is set to “Yes”
- “Internet file this return?” is set to “Yes”

Select the “Yes” value on line 997 of the “T2 Adjustment worksheet”

Enter a description of the amendment in the field of line 996.

### Restrictions

The following fields cannot be amended under this process; ProFile displays a warning message if an amendment is submitted regarding one of these fields. These fields must be amended via the CRA’s website:

- Head office address change
- Mailing address change
- Location of books and records change
- Direct deposit information
- Language of correspondence

2013 - 2015 Corporate information

**General Information**

Business number: RC

Legal name of corporation: [Redacted]

Operating name of corporation, if different: [Redacted]

Change of name since Dept. last notified?  Yes  No

If yes, are there articles of amendment?  Yes  No

**Taxation year**

Start: 2014/02/02 End: 2015/02/01

Floating fiscal year end with a full year?  Yes  No

Prior year-end date: yyyy/mm/dd

Where the fiscal period of the corporation exceeds 365 days, is the corporation deemed to have a tax year end of December 31, 2008 under subsection 249(3) of the Income Tax Act?  Yes  No

Has taxation year end changed since last return was filed?  Yes  No

If yes, why has it changed? N/A

If change in control, provide date: yyyy/mm/dd

Deemed tax year-end under 249(3.1)?  Yes  No

Previous tax year end deemed to be December 31, 2008 under 249(3)?  Yes  No

**Filing**

Internet file this return?  Yes  No

Confirmation number: [Redacted]

Delete return from GIF?  Yes  No

Revenue: 0

Assets: 0

Is the corporation an associated CCPC in the previous year?  Yes  No

Taxable capital employed in Canada for the previous taxation year: 1,000

Taxable capital of the associated group for the previous taxation year: 1,000

Total taxable capital employed in Canada of the corporation and its related corporations: 0

Total taxable capital employed in Canada of the corporations and its associated corporations (Applicable to taxation years starting in 2008 and later): 0

Date of incorporation: yyyy/mm/dd

Date of amalgamation: yyyy/mm/dd

Date of dissolution: yyyy/mm/dd

Date of bankruptcy: yyyy/mm/dd

Is corporation a professional corporation that is a member of a partnership?  Yes  No

First year of filing after incorporation?  Yes  No

First year of filing after amalgamation?  Yes  No

Section 88 wind-up of sub. during the year?  Yes  No

Final year before amalgamation?  Yes  No

Final return up to dissolution?  Yes  No

Is the corporation bankrupt?  Yes  No

Elected not to be a CCPC under 89(11)?  Yes  No

If an election was made under section 261, state the functional currency used: [Redacted]

Corporation exempt from tax? N/A

Language of correspondence changed since Dept. last notified?  Yes  No

Language of correspondence: English

Is this an amended tax return?  Yes  No

Is this return being prepared by a tax preparer for a fee?  Yes  No

Business number (BN): [Redacted]

Corporation's name: [Redacted]

Tax year end: 2015/02/01

997 Is this an amended tax return?  Yes  No

996 Description of changes  
(Press the Shift + Enter keys to advance to the next line.)  
Enter info here

## Using EFILE with Web Access Code (WAC) for T2 in ProFile

Corporate returns can undergo EFILE using a Web Access Code (WAC). In some cases, a preparer may not have a need to undertake a request for an EFILE number and the WAC provides a quick, convenient alternative.

ProFile allows users to apply for and receive a WAC online through a ProFile web service, without having to call the CRA Corporation Internet Filing Helpdesk.

Alternatively, users can enter a WAC if already acquired from an earlier EFILE effort/request.

### Applying for a WAC

Select the “Transmit this return...” option from the “EFILE” drop-down menu in the top toolbar.

ProFile reviews the T2 return for any outstanding warning. If there are no auditor warnings, ProFile displays a green checkmark.

Click the “OK” button.

The “Corporation Internet Filing” window displays.

### Select the method of filing the return:

- “I want to request a Web Access Code and file this tax return”. This automatically makes a request to CRA for the specific return to undergo EFILE, based on the return’s information.
- “I already have a Web Access code for this tax return”. The user enters their existing WAC from a previous EFILE effort/request.

Click the “Accept” button; the return transmits using the WAC.

The screenshot shows the "Corporation Internet Filing" window. At the top, it says "Please select your Authorization method:". There are three radio button options: 1. "I want to use my EFILE Number and Password to file this tax return. The EFILE Number and password used appears in the EFILE Options window." (This option is selected and has a red circle with the number 1 next to it). 2. "I want to request a Web Access Code and file this tax return". 3. "I already have a Web Access Code for this tax return" followed by a text input field. Below the options is a section titled "To proceed with Corporation Internet Filing online transmission, you must agree to the following terms and conditions:". It contains a list of seven terms and conditions. At the bottom right, there is a warning: "Clicking the Accept button will transmit this return to CRA" and two buttons: "Accept" and "Decline".

## T2 Guide and in-product tutorial in ProFile

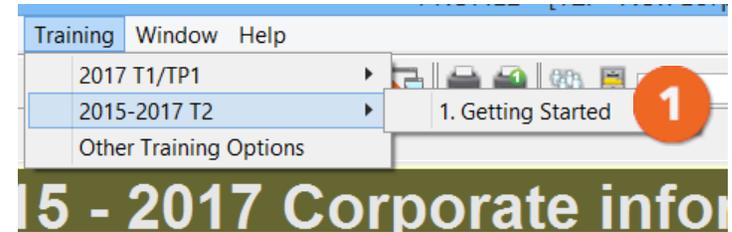
ProFile provides customers a T2 guide that includes list of steps a user should understand in order to file a corporate return.

**Note:** the T2 guide covers basic steps for filing a T2 return, but does not provide any tax-related advice or opinion. ProFile recommends reviewing the CRA website, contacting the CRA tax inquiry line, or consulting an accredited CPA firm for information regarding current tax laws. ProFile also recommends having any return prepared or reviewed by a professional accountant before filing.

Click here to [view the T2 Guide](#).

### In-product T2 tutorial

ProFile provides an in-product T2 tutorial that walks a user through the basic functions of completing and filing a corporate return.



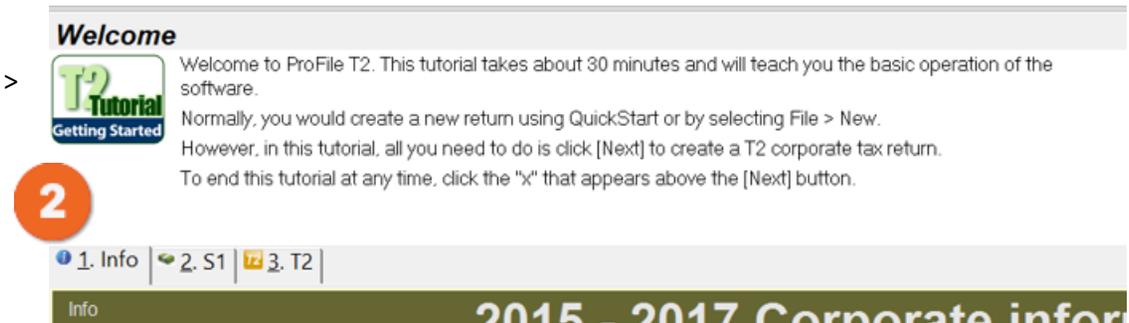
### To access the tutorial

Open a T2 return.

Select the **“1. Getting Started”** option under the “Training” -> “T2” drop-down menu in the top toolbar.

The **T2 tutorial opens below the top toolbar**.

Click the “Next” button to proceed through the tutorial.



# Managing T3 returns in ProFile

## Overview of T3 Module in ProFile

### **About T3 tax forms**

A T3 Statement of Trust Income Allocations and Designations indicates investment income from mutual funds in non-registered accounts and from certain trusts. In Québec, the form is a relevé 16. The income may come from individual investments or from an estate trust as inheritance tax.

Amounts present in box 51 and/or 39 indicates a dividend tax credit is available.

T3 slips show income from interest, dividend, and capital gains. All these types of income are taxed at different rates.

### **Receiving the T3 tax slip**

In most cases, T3 tax slips are received around March 31.

## Key Forms for T3 in ProFile

There are some key T3 forms to be mindful of when completing a trust return:

### **Beneficiary form**

Use the “Beneficiary details” form to enter information for trust beneficiaries. Amounts flow from the “Beneficiary details” form to the corresponding T3, NR4 and RL16 slips. ProFile also uses the “Beneficiary details” form to complete Schedule 9 in the trust return.

### **Allocation worksheet**

Use the “Allocation” worksheet to indicate how the trust allocates income to beneficiaries. If the trust is claiming expenses at line 41 of the return, apply the expenses to specific types of income before allocating income to the beneficiaries. The trust gets a deduction on the T3 jacket for income that is allocated to the beneficiaries.

Some of the trust income may be taxed in the trust. Specify for each type of income the amount that the trust will retain. ProFile displays the remaining income as the amount to be allocated to the beneficiaries.

On the Allocation form, preparers may also need to enter certain T3 slip amounts, such as a retiring allowance, death benefit, or foreign business income.

## Data Entry and Flow for T3 in ProFile

The T3 “Info” form contains sections for general information, trust type, and other basic details of the trust.

Prepares will report the income and deductions of the trust. Enter these details on the various income and deductions forms, schedules and on the T3 Jacket (which has some edit fields with no supporting schedules).

There are numerous data entry forms, including business and rental statements, dispositions on Schedule 1, and T3, T5 income received by the trust.

If the trust is allocating income to its beneficiaries, the forms in the Beneficiaries tab of the Form Explorer become important.

Any income not allocated to beneficiaries is taxed on Schedule 11, which transfer to page 4 of the T3 jacket.

### About the Allocation worksheet

The “Allocation” worksheet is used to complete the slip amounts for beneficiaries.

Use this worksheet:

- to indicate how you wish income to be allocated to the beneficiaries: the default is each one gets an equal share of the income. If not the case, choose “Other” and enter the percentage applicable to each beneficiary on the “Beneficiary details” worksheet. If “Other” is selected, the percentage field on each slip of the “Beneficiary worksheet” becomes an input field; otherwise, it is calculated based on the equal allocation to all beneficiaries.
- if the trust has claimed expenses at line 41 of the return, the expenses have to be applied to specific types of income before the income can be allocated to a beneficiary. These expenses must be applied manually: an audit message will appear if these expenses have not been entered.
- to retain some of the income to be taxed in the trust. You can specify which type of income and how much is to be retained by the trust.
- to specify amounts for certain boxes of the T3 slips that is not automatically completed by ProFile T3. For example, details related to foreign income and tax paid. Also, if the trust is allocating a retiring allowance or death benefits, those amounts have to be specified here.

**2016 Trust information**

**Name and address**

Trust account number T - -

Québec enterprise number (NEQ)

MRQ Identification number

Québec Trust account number

Name of trust

Title of trustee, liquidator, executor or administrator (Mr, Ms, etc)

Name of trustee, liquidator, executor or administrator

Mailing address

Apartment #

Street number

Street name or PO Box

City Province Country

Postal Code Telephone number Ext Home telephone

Address on last return, if different

Email address

**Residency**

Province of residence at end of year NA

Was the trust resident in Canada throughout the year? Yes

Did the trust leave Canada during the year? No

If yes, give the date of departure yyyy/mm/dd

Date of entry yyyy/mm/dd

Is this an offshore trust? No

Country of offshore trust CAN

Provinces where business income was earned

Is this a Yukon First Nation (FN) trust? No

FN name

**Type of trust**

Testamentary trust  Inter vivos trust

Type of testamentary trust N/A

If “Other”, please specify

Date of death yyyy/mm/dd

SIN of deceased

Type of inter vivos trust N/A

If “Non-profit organization”, provide BN RC

If “Other”, please specify

**Filing**

Taxation year Start yyyy/mm/dd End yyyy/mm/dd

Is this the first year of filing a T3? No

If no, for what year was the last return filed

If yes, copy of trust document/will and list of assets at death is

Is this an amended return? No

Is this the final return of the trust? No

If yes, give the date the trust was/will be wound up yyyy/mm/dd

Language of correspondence English

Signing officer - position or title

Signing date 2017/08/25

Filing due date yyyy/mm/dd

Did the 21-year deemed realization rule apply to the trust in the year? No

If the trust is a pre-1972 spousal trust, did it, in any previous taxation year, use Form T1015 to elect to defer the deemed realization day? Yes No

**Beneficiary details**

Name

<Unknown>

<New>

**Beneficiary #1**

**Individual beneficiary**

Last name

First name Initial

SIN

**Beneficiary address**

Address

City

Province Country CAN Postal code

**Corporation, organization, association, or institution beneficiary**

Name

BN RC

Residency status 0

Type of slip 0 Re-Amended?

Type of beneficiary Preferred beneficiary No

Print blank slip?

NR4 Payer #

NR4 Residency for tax

NR4 % rate of tax 0.00

**Second beneficiary (if joint account)**

Last name

First name Initial

SIN

**Second Corporation, organization, association, or institution beneficiary (if joint account)**

Name

Identification Number

% of income allocated to this beneficiary 0

	Box	T3 slip	NR4 slip
Capital gains	21	0.00	0.00
Non-business income for foreign tax credit		0.00	0.00
Lump-sum pension benefits	22	0.00	0.00
Actual amount of dividends (other than eligible) 2016	23	0.00	0.00
Foreign business income	24	0.00	0.00
Foreign non-business income	25	0.00	0.00
Other income			
Eligible death benefits		0.00	0.00
Pension - annuity for minor		0.00	0.00
Retiring allowance		0.00	0.00
Self-employment (communal)		0.00	0.00
Other		0.00	0.00

## Data Entry and Flow for T3 in ProFile (continued...)

### About the Beneficiary worksheet

On the Beneficiary worksheet, enter details such as name, address and residency of the beneficiary. The slip amounts at the bottom of this form are calculated using amounts from the “Allocation” worksheet multiplied by the percentage applicable to the particular beneficiary (percentage is on the “Beneficiary” worksheet).

### Navigating on the Beneficiary worksheet

On forms like “Beneficiary”, where there are an unlimited number of slips, navigation is simplified with the following shortcuts:

- use the horizontal scroll bar at the top of the slip table to navigate.
- <Ctrl+Enter> takes you to the top of the next slip
- <Shift+Ctrl+Enter> takes to the previous slip
- <Ctrl+RightArrow> and <Ctrl+LeftArrow> take you to the next or previous column (and scroll to the next or previous slip accordingly)

### Using the Beneficiary worksheet

The information on the “Beneficiary” worksheet transfers to the T3 and NR4 slips. These slips are for reporting and preview purposes only: data cannot be edited on these forms.

The data from the T3 and NR4 slips is posted to the **T3 Summary** and NR4 Summary.

Schedule 9 is a summary of the amounts allocated/designated to the beneficiaries. ProFile completes this form using the amounts from the “Beneficiary” worksheet. The trust gets a deduction for the total income allocated to beneficiaries at line 928 of this schedule.

Review the T3 jacket and manually enter data into any fields not automatically calculated by ProFile T3 (especially the questions on the first two pages).

1. Info | 3. Beneficiary | 4. Allocation | 2. T3

### Allocation

## Allocation of income and expenses

Options for allocating income to beneficiaries

Share revenue equally among beneficiaries

Automatically allocate expenses?

Income to be allocated to beneficiaries

Type of income	Income reported on T3	Allocation of expenses	Amounts not paid or payable to beneficiaries	Amounts claimed under s.104(13.1)/(13.2)	Amounts to be allocated
1 Taxable capital gains	0.00	0.00	0.00	0.00	0.00
2 Redeemed realizations (capital gains)	0.00	0.00	0.00	0.00	0.00
3 Lump-sum pension income	0.00		0.00	0.00	0.00
Other pension income	0.00	0.00	0.00	0.00	0.00
ACTUAL amount of eligible dividends	0.00	0.00	0.00	0.00	0.00
ACTUAL amount of dividends other than eligible dividends	0.00	0.00	0.00	0.00	0.00
Foreign investment income	0.00	0.00	0.00	0.00	0.00
Other investment income	0.00	0.00	0.00	0.00	0.00
Business, farming, fishing, rental	0.00	0.00	0.00	0.00	0.00
Canadian	0.00	0.00	0.00	0.00	0.00
Foreign	0.00	0.00	0.00	0.00	0.00
NISA Fund 2	0.00	0.00	0.00	0.00	0.00
Eligible death benefits	0.00		0.00	0.00	0.00
Pension - annuity for minor	0.00		0.00	0.00	0.00
Other Income	0.00		0.00	0.00	0.00
Retiring allowance	0.00		0.00	0.00	0.00
Recapture (T1055)	0.00		0.00	0.00	0.00

1. Info | 3. Beneficiary | 4. Allocation | 5. S9 | 2. T3

### T3 - 2016

## Income Allocations and Designations to Beneficiaries

Protected B - when completed

### Schedule 9

- Do not complete this schedule if line 46 of the return is zero or negative, unless the trust is an insurance segregated fund that is allocating capital losses.
- Include a completed copy of this schedule with the trust's return.

Part A - Total income allocations and designations to beneficiaries

1. Number of beneficiaries to whom income on line 928 is being allocated (including beneficiaries being allocated less than \$100 for whom no T3 slip is being prepared) **9001** 0

2. Total resident income allocated under \$100 per beneficiary for which no T3 slips were prepared **9002** 0.00

3. Total resident income allocated to non-taxable entities **9003** 0.00

4. Total taxable capital gains, excluding return of capital, allocated to redeeming unit holders using form T5008. **9004** 0.00

5. Do the T3 slips include amounts attributed to a person? **9005** Yes  No

If yes, attach a statement showing the amount and the name of the person(s) and any transferrors.

6. Was each beneficiary allocated an equal share of the income? If no, attach a statement showing the breakdown. Yes  No

Box no.	Type of income	Column 1 Resident	Column 2 Non-resident	Column 3 By preferred beneficiary election	Column 4 Total	
21	Taxable capital gains <sup>1, 2</sup>	0.00	0.00	0.00	0.00	921
22	Lump sum pension income	0.00	0.00		0.00	922
23	Actual amount of dividends other than eligible dividends	0.00	0.00	0.00	0.00	923
24	Foreign business income	0.00	0.00	0.00	0.00	924
25	Foreign non-business income	0.00	0.00	0.00	0.00	925
26	Other income	0.00	0.00	0.00	0.00	926
49	Actual amount of eligible dividends	0.00	0.00	0.00	0.00	949
	<b>Totals<sup>3, 4</sup></b>	0.00	0.00	0.00	0.00	928

## Using EFILE Slips for T3 in ProFile

### About T3 slip EFILE

A T3 Trust return must still undergo paper filing. However, the “Slips Summary” can undergo EFILE with the related slips.

**Note:** always print or retain a PDF copy of the CRA confirmation of an EFILE when completed. ProFile does not retain a report or record of which slips are transmitted.

### Transmitting slips

Prepare the T3 slip in ProFile.

Open the **“Beneficiary details” form** and select the “Type of slip” being transmitted.

Select the “Transmit” option under the “EFILE” drop-down menu in the top toolbar.

Select the appropriate option under the **“Data type” drop-down menu** and click the “OK” button.

ProFile builds the XML file and automatically launches the CRA transmission window.

Review the CRA disclaimer, login, and submit the .xml file.

The file submits; click on the “print” icon on the browser window to print the confirmation number.

Click the “Close” button.

**Beneficiary details**

Beneficiary #1

**Beneficiary address**

Address

City

Province Country CAN Postal code

Residency status 0

Type of slip **Original** Re-Amended?

Type of beneficiary **Original** Preferred beneficiary No

Print blank slip? A. Amended C. Cancelled

NR4 Payer #

NR4 Residency for tax

NR4 % rate of tax 0.00

**Transmit slips**

Select ONE slip type

T3

NR4

RL16

Data Type Original

OK Cancel

## Early Filing Next Year for T3 in ProFile

The next year's T3 module in ProFile is not available until the year after: for example, when the 2017 T3 module is the last one released and you need to prepare a T3 return with 2018 year-end, the 2018 T3 module is not available until January of 2018. In this situation, the previous year's T3 module is used for preparing next year's T3 return.

### **New tax rate implementation**

New tax rates are implemented in the previous year's T3 module to handle preparation of next year's T3 returns. Entering the appropriate year-end on the "Info" page initiates the applicable tax rates for that year. T3 returns filed using the previous year's tax forms are acceptable to CRA, and they will reassess the return if required.

### **Preparing next year's T3 return using the previous year's T3 module**

Save a duplicate copy of the previous year's T3 return to be used as the next year's T3 return.

Open the previous year-end T3 return in ProFile.

Enter the appropriate year-end for the trust return T3 to be prepared; this initiates the applicable tax rates for next year.

Delete the information pertaining to the previous year-end, keeping what is required for the next year-end.

Enter the T3 data required for filing the next year's trust return, allocate income to beneficiaries, and create the T3 slips.

Print the T3 trust return using "File" -> "Print" and print T3 slips using "File" -> "Print Slips".

Save the T3 trust return with a different file name to identify the tax rates for that year.

# Managing FX module in Profile

## Overview of Form Expert (FX)

FX & FX/Q includes a comprehensive set of tax forms that are fully interactive, automatically performing all calculations.

The forms include:

- T4, T5, T5018, T5008, T5013, RL1, RL3, RL15, and more.
- Partnership Information Return and Schedules (T5013 Schedules and TP600 for Québec)
- Charity & Non-Profit Organization forms (T3010 and TP-985.22 for Québec)
- Additional GST/HST/QST, TD1, RCA, Non-resident and Recourse forms
- Federal, Québec and provincial rollover forms (T2057, T2058, T2059, TP529, TP614, AT107, AT108 and AT109)
- BC Logging Tax Return of Income (FIN542 and FIN571)
- Other forms (e.g RC199, CPT30, T3D, T3RI, etc.)

### Related Articles

[Review the list](#) of ProFile forms and tax slips

## EFILE Slips for Form Expert (FX)

**Note:** ProFile does not retain a report or record of which slips are transmitted. Always print or retain a PDF copy of the CRA confirmation of an EFILE when completed.

### EFILE original and amended slips

Navigate to the “Info” tab of the return.

Ensure the “Yes” option is selected for the question “Are you magnetic media or internet filing slips?”. The option to EFILE slips will not appear unless this option is selected.

Select the “Properties...” option from the “File” drop-down menu in the top toolbar; the “FX/Q File properties” window displays.

Set the “E filing” status in the “Slips Status:” section to "Ready to file".

Select the “Transmit slips or a T5013 return” option from the “EFILE” drop-down menu in the top toolbar; the “Internet File Slips” window displays.

Select the slip to undergo EFILE.

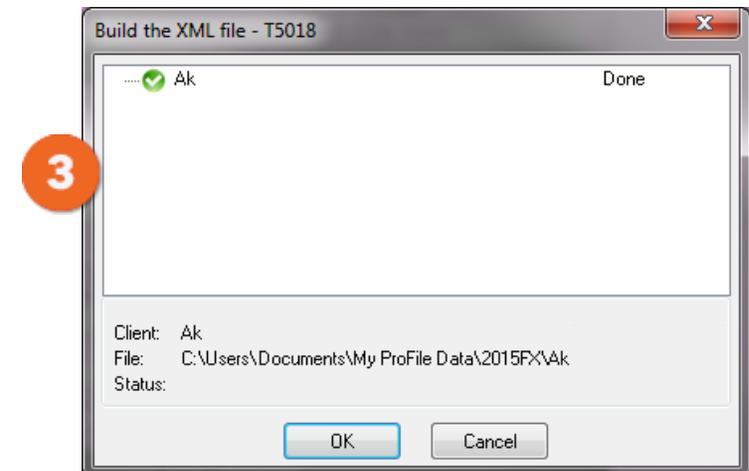
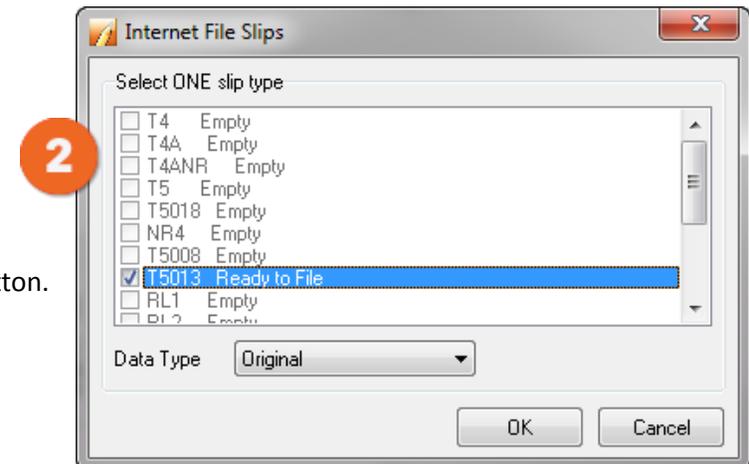
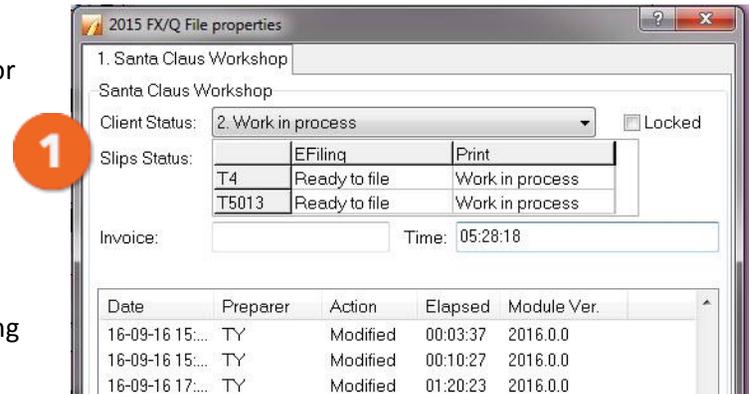
Select the appropriate option under the “Data type” drop-down menu and click the “OK” button.

**ProFile builds the XML file** and automatically launches the CRA transmission window.

Review the CRA disclaimer, login, and submit the .xml file.

The file submits; click on the “print” icon on the browser window to print the confirmation number.

Click the “Close” button.



## Batch EFILE Slips for FX

Multiple FX slips can undergo a “batch” transmit slips at one time using the Client Explorer database.

### Starting the Client Explorer database

Select “Database...” from the “Options” drop-down menu in the top toolbar; the “Database/Client Explorer Options” window displays.

Select the “Use Client Explorer” option.

Click the “OK” button.

Select the “Client Explorer” option under the “GoTo” drop-down menu in the top toolbar.

The Client Explorer displays.

### Filtering and selecting returns

Click the “Filter” button; the filter window displays at the bottom of the window.

Select the checkbox on the “FX” tab and clear the other module tabs by unchecking them.

Select the checkbox for the desired tax year (e.g., “2016”) on the “FX” tab and clear the checkboxes for all other years by unchecking them.

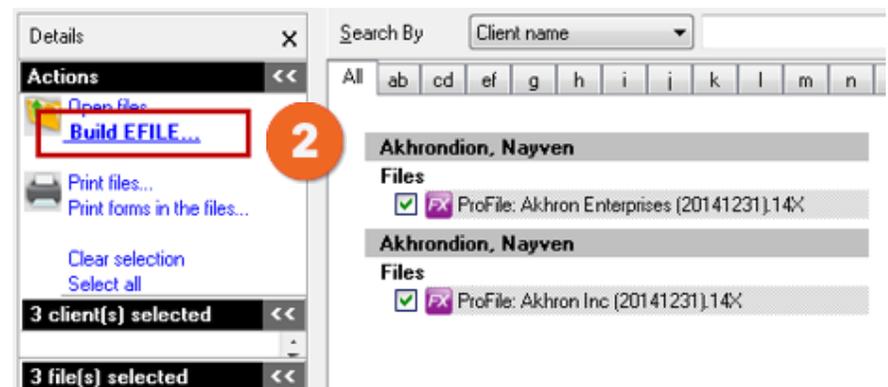
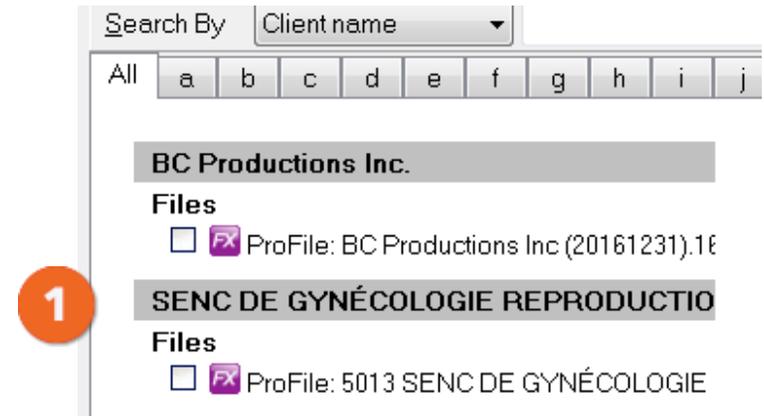
Select the appropriate checkboxes in the remaining sections of the “FX” tab to filter for slip details; clear the other options by unchecking them.

Click the “Apply Filters” button; a list of slips that meet the set slip criteria displays.

Select the slips to EFILE.

### Building the EFILE Link

Click the “Build EFILE...” link in the top-left “Actions” menu.



## Batch File for FX (continued...)

The **“Build the XML file”** window displays.

Select the **slips to undergo EFILE** (e.g. “T4”).

Click the **“OK”** button.

The XML file builds and **the CRA “Internet File Transfer”** window opens.

**4**

Client Name	Fil...	T4	T4A	T4...	T5	T50...	T50...	NR4
SENC DE GYNÉCOLO...	C...	<input type="checkbox"/>						
BC Productions Inc.	C...	<input type="checkbox"/>						

### Transmitting the XML file to CRA

Log onto the CRA slip transmission [website](#).

**Note:** transmission of the XML file requires an FX “Web Access Code” (WAC). If this is the first time internet filing slips, a WAC request must be made to the CRA. Ensure that you print a confirmation copy provided by the CRA for your submission records.

Complete the XML transmission process.

**5**

Canada Revenue Agency  
www.cra.gc.ca

Internet File Transfer (XML)

To file your electronic information return you must provide the following information:

**Step 1: Identification area**

Your account number: (required)

Note: Do not enter dashes or spaces in the account number.

and

Your Web access code: (required)

letters which must be entered in the same upper or lower case as when it was provided to you.

Date Modified: 2015-01-05 [Top of Page](#) [Important notices](#)

## Transmitting Amended Slips for Form Expert (FX)

Preparers can electronically file an amended slip through the FX module.

**Note:** ProFile does not retain a report or record of which slips are transmitted. Always print or retain a PDF copy of the CRA confirmation of an EFILE when completed.

### Transmitting an amended slip

Open the **applicable return in ProFile** (e.g., a T4).

Under the "Slip type?" section, **set the type to "AMENDED"**.

Make all the necessary changes to the slip.

Select the "Properties..." option under the ProFile "File" drop-down menu in the top toolbar.

Set the **"Slip Status"** for **"Magmedia"** to **"Ready to File"**.

Select the "Internet File Slips" option under the ProFile "EFILE" drop-down menu.

Check **the box of the slip to be transmitted** (e.g., "T4").

Change the data type to "Amended" in the "Data Type" drop-down menu.

Click the "OK" button; the amended slip transmits.

ProFile builds the XML file and automatically launches the CRA transmission window.

Review the CRA disclaimer, login, and submit the .xml file.

The file submits; click on the "print" icon on the browser window to print the confirmation number.

Click the "Close" button.

T4Details **T4 Details**

T4 #1

1

Surname \_\_\_\_\_  
First name \_\_\_\_\_ Initial \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ Province \_\_\_\_\_  
Postal code \_\_\_\_\_ Country \_\_\_\_\_ CAN  
SIN \_\_\_\_\_ Employee no. \_\_\_\_\_  
Province of employment \_\_\_\_\_ Employment code \_\_\_\_\_  
Pay period type N/A # of pensionable pay periods N/A  
Slip type? ORIGINAL  Re-Amended?  
Carry forward this slip?  Yes  No Print blank slip?

2

Slip type? AMENDED

3

NoName

Client Status: 2. Work in process  Locked

Slips Status: Magmedia Print  
T4 Ready to file Work in process

4

Internet File Slips

Select ONE slip type

T4 Ready to File  
 T4A Empty  
 T4ANR Empty  
 T5 Empty  
 T5018 Empty  
 NR4 Empty  
 T5008 Empty  
 T5013 Empty  
 RL1 Empty  
 RL2 Empty

Data Type Amended

OK Cancel

## Transmitting a Cancelled Slip for Form Expert (FX)

Preparers can electronically file a cancelled slip through the FX module.

**Note:** ProFile does not retain a report or record of which slips are transmitted. Always print or retain a PDF copy of the CRA confirmation of an EFILE when completed.

### Transmitting a cancelled slip

Open the applicable return in ProFile (e.g., a T4).

Under the "Slip type?" section, set the type to "CANCELLED". When transmitting, the slips automatically revert to a value of "0".

Select the "Properties..." option under the ProFile "File" drop-down menu in the top toolbar.

Set the "Slip Status" for "Magmedia" to "Ready to File".

Select the "Internet File Slips" option under the ProFile "EFILE" drop-down menu.

Check the box of the slip to transmit (e.g., "T4").

Change the data type to "Cancelled" in the "Data Type" drop-down menu.

Click the "OK" button; the amended slip transmits.

ProFile builds the XML file and automatically launches the CRA transmission window.

Review the CRA disclaimer, login, and submit the .xml file.

The file submits; click on the "print" icon on the browser window to print the confirmation number.

Click the "Close" button.

T4Details  
T4 Details

T4 #1

Surname \_\_\_\_\_  
First name \_\_\_\_\_ Initial \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ Province \_\_\_\_\_  
Postal code \_\_\_\_\_ Country CAN  
SIN \_\_\_\_\_ Employee no. \_\_\_\_\_  
Province of employment \_\_\_\_\_ Employment code \_\_\_\_\_  
Pay period type N/A # of pensionable pay periods N/A  
Slip type? ORIGINAL  Re-Amended?  
Carry forward this slip?  Yes  No Print blank slip?

2 Slip type? CANCELLED

NoName

Client Status: 2. Work in process  Locked

Slips Status:	Magmedia	Print
	T4	Ready to file
		Work in process

Internet File Slips

Select ONE slip type

- T4 Ready to File
- T4A Empty
- T4ANR Empty
- T5 Empty
- T5018 Empty
- NR4 Empty
- T5008 Empty
- T5013 Empty
- RL1 Empty
- RL2 Empty

Data Type Cancelled

OK Cancel

# Verifying Client Data for Form Expert (FX)

## Verifying Client Data before filing slips in FX module

Before transmitting a slip or return information with EFILE, ensure that the file is complete and accurate. ProFile includes audit and review tools that can help.

### FX Module

Ensure the question **“Are you magnetic media or internet filing slips?”** question on the **“Info”** form is set to **“Yes”**.

Ensure any messages in the Active Auditor, especially those in the **“Mag Media”** tab, are resolved. Double-click the message in the Auditor to identify the area that needs reviewing.

When undertaking the initial EFILE of a slip, preparers enter the transmitter number in the EFILE wizard. If a transmitter number has not been provided, use the default **“MM000000”**.

If transmitter information must be changed in the future, select **“EFILE”** -> **“Options”** -> **“Transmitter”** under the **“T3/FX”** section. Information can be updated as required.

1. Info

Info

**Taxation Year**

Tax Year

Fiscal Period Start  yyyy/mm/dd End  yyyy/mm/dd

Are you magnetic media or internet filing slips?

Yes  No  File ID

Transfer data to applicable forms?  Yes  No

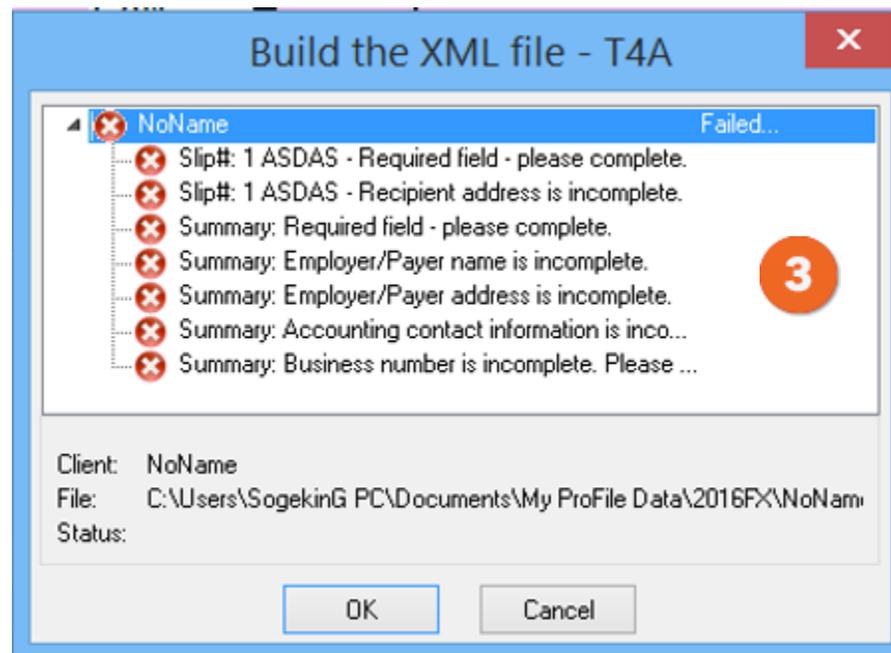
Electronic Filing Options

- General
- T1
  - Common
  - EFILE Internet
  - TP1 Internet
- T2
  - T2 EFILE
  - T2 AT1 Net File
  - T2 CO-17 Internet Filing
- T3/FX
  - Transmitter
  - Contact information
  - MRQ Slip Numbers
  - Internet File

## Verifying Client Data for Form Expert (FX) (continued...)

When ProFile builds an XML file suitable for transmission, it **flags slips and information in which there are issues that prevent the XML file from being built**. View a brief summary of the problems affecting a file by clicking the “plus” (+) symbol adjacent to a failed file. Hover the mouse over the message to read the full text.

A common cause of invalid XML files is the use of overrides on fields that are included in the information that is to be sent (e.g. when overriding a field instead of using amounts that ProFile calculates or carries from another form.) Avoid using the override feature whenever possible.



## Print Setup for Form Expert (FX)

Select the “Print Setup...” option from the “File” drop-down menu in the top toolbar.

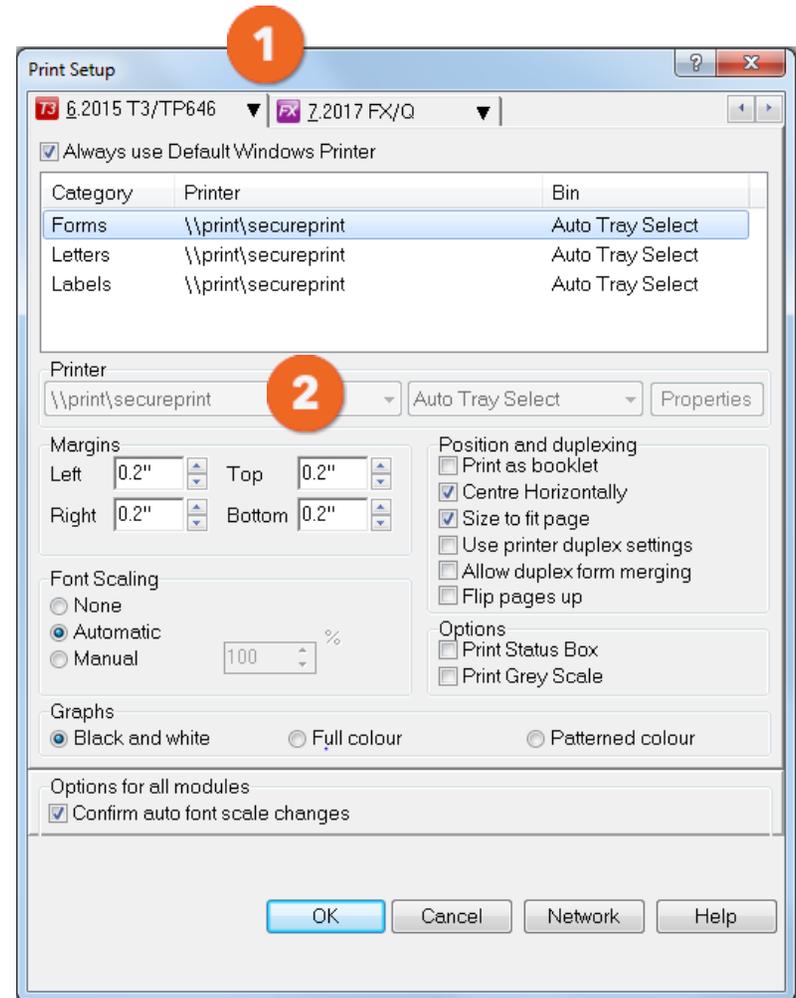
The “Print Setup” window displays.

Select **the correct year for the module**; the available print settings display.

Applicable forms, jackets, letters, and more that are applicable to the module are listed under the “Category” column.

Select **each available category and set/approve the margin settings, font scaling, position, duplexing, and other printing values.**

Click the “OK” button to save the print setup settings.



# Managing printing in ProFile

## Print Setup in ProFile

Select the “Print Setup...” option from the “File” drop-down menu in the top toolbar.

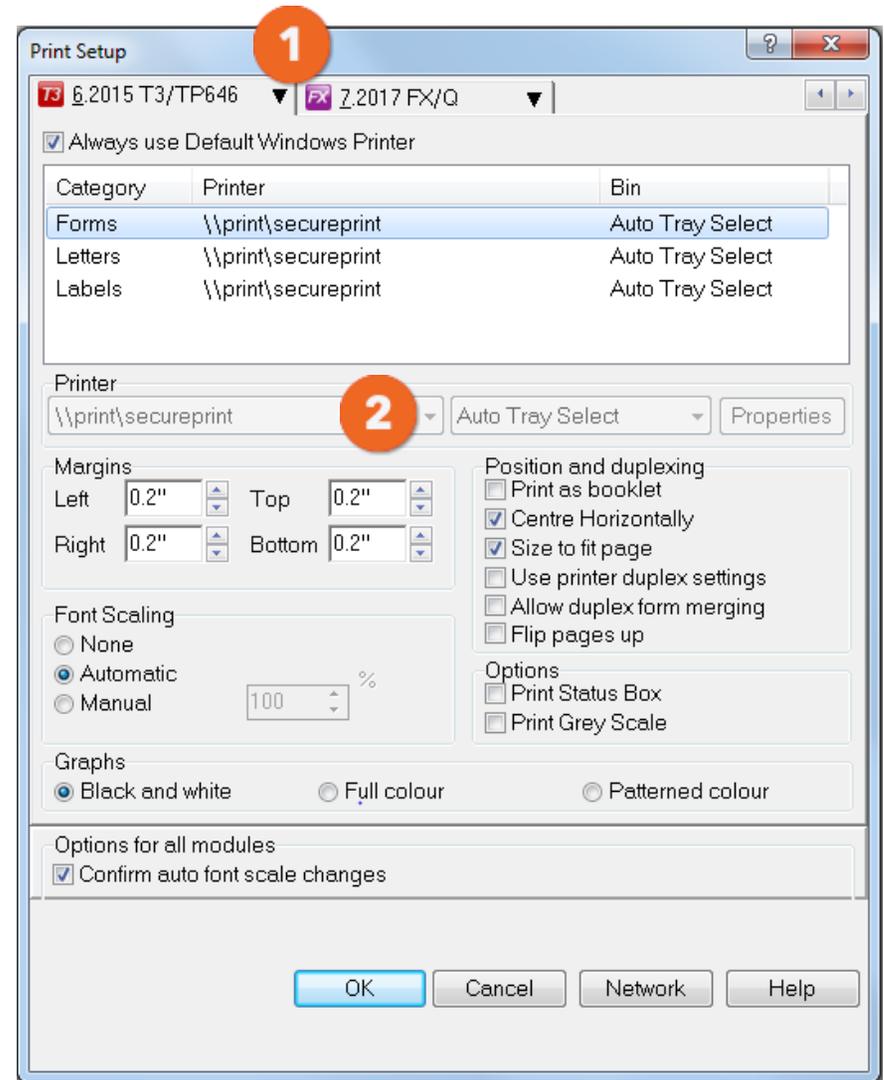
The “Print Setup” window displays.

Select the correct year for the module; the available print settings display.

Applicable forms, jackets, letters, and more that are applicable to the module are listed under the “Category” column.

Select **each available category and set/approve the margin settings, font scaling, position, duplexing**, and other printing values.

Click the “OK” button to save the print setup settings.



## Printing: Printing Different Copies

ProFile users can set the print job options for returns and forms.

### Setting print job options

Open the return in ProFile.

Select the “Print...” option from the “File” drop-down menu in the top toolbar.

The “Print Selection” window displays.

The “Print Job” section in the top-left corner of the window displays the print job types (e.g. “T1 Paper”).

**Note:** the province of residency selected on the return determines the available print jobs. For example, setting “Quebec” as the province of residency displays TP1 print jobs.

Set the print job settings along the section on the left side of the window.

### Advanced and simplified settings

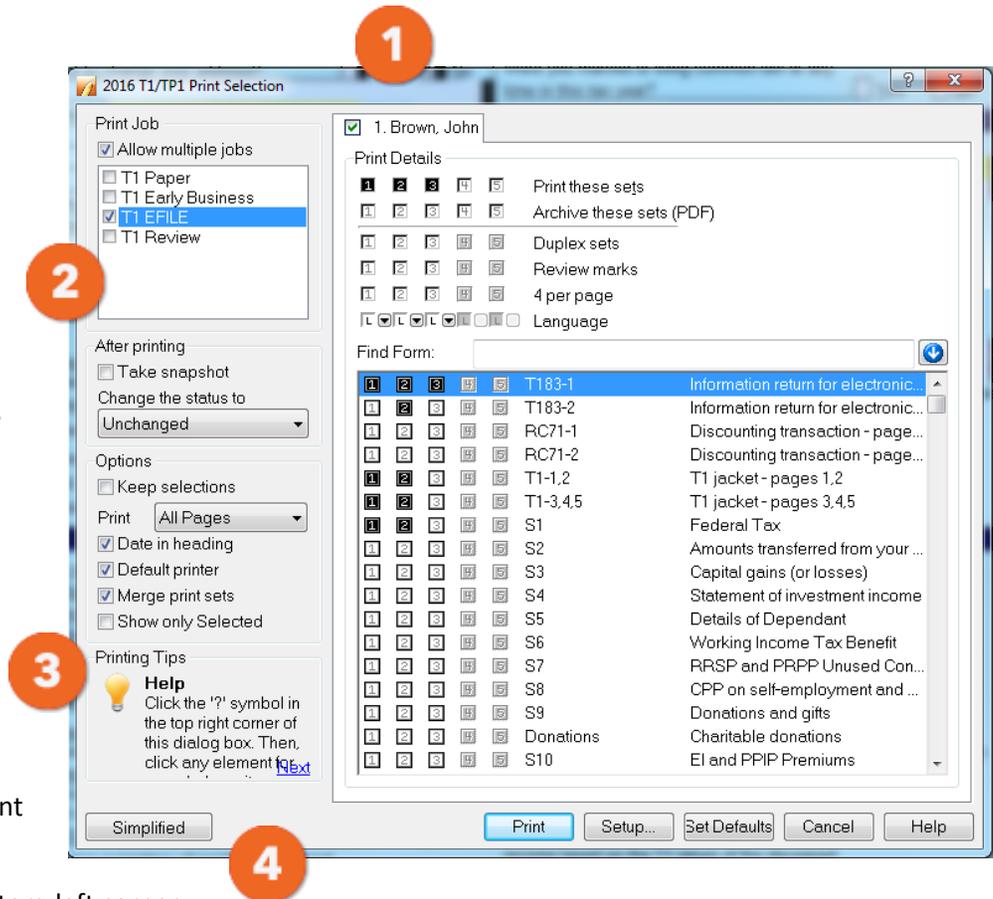
Click the “Advanced” button in the bottom-left corner; the advanced print job options display.

To return to the simplified view, click the “Simplified” button in the bottom-left corner.

### Printing jobs

Click the “Set Defaults” button to set the selected print job options as the default.

Click the “Print” button to print the print job.



## Printing to PDF in ProFile

### Setting print to PDF options

Open the return.

Select the “Print/Email PDF...” option from the “File” drop-down menu in the top toolbar.

The “Print Selection” window displays.

Several **options for PDF printing are available**, including:

- setting the print job type in the top-left menu (“Print Job”)
- setting print job options under the “Options” section
- setting the print job resolution under the “Resolution” drop-down menu
- emailing the print job to an email address entered in the email field

Set the necessary options for PDF printing.

### Previewing the PDF

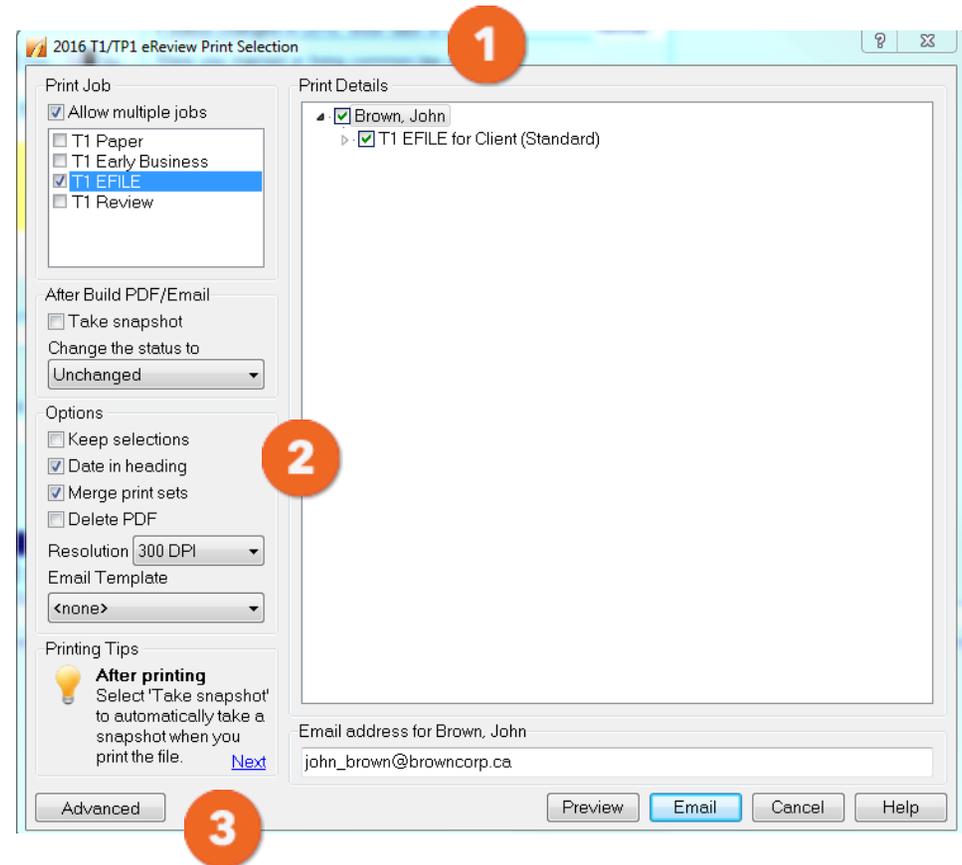
Click the “Preview” button; a preview copy of the PDF displays.

Review the form for any issues or needed corrections.

### Advanced menu option

Click the “Advanced” button.

The window expands to display the advanced print to PDF options.



## Printing to PDF in ProFile (continued...)

### Building the PDF

If there is an email listed in the “Email Address” field, delete the address.

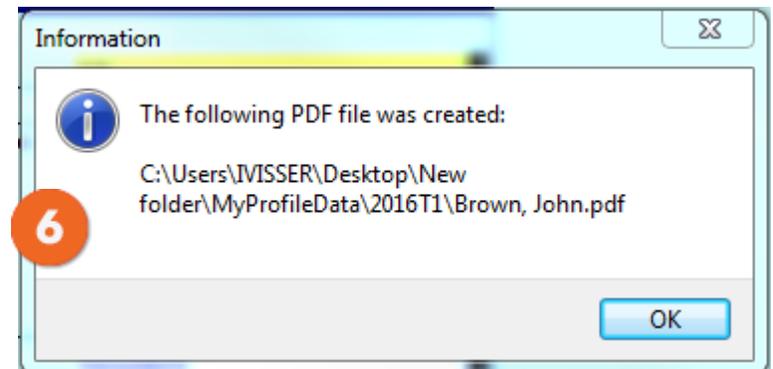
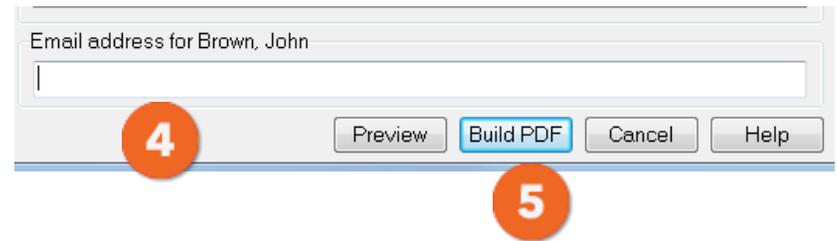
The “Build PDF” button activates.

Click the “Build the PDF” button; the PDF creates and the path/file name displays.

Click the “OK” button; the build of the PDF completes.

### Related Articles:

[Review the support article](#) to learn more about the “Archive PDF” functionality.



# Setting up Duplex Printing in ProFile

Duplex printing allows preparers to print returns on both sides of a single sheet of paper.

## Setting Duplex Printing Options

Open ProFile.

Select the “Print Setup” option from the “File” drop-down menu on the top toolbar; **the “Print Setup” window displays.**

Select the desired tax year and module from the tab menu at the top of the window (e.g., “1. 2016 T1/TP1”).

A list displays below the tabs, detailing available forms, letters, and more.

Uncheck the **“Always use Default Windows Printer”** above the “Category” heading.

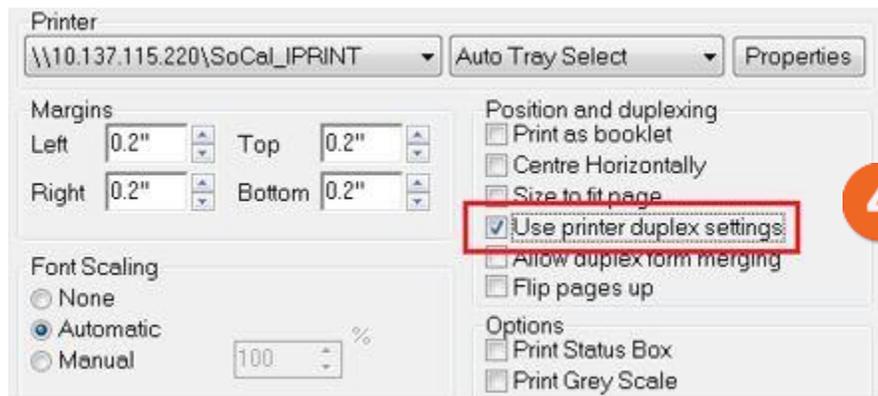
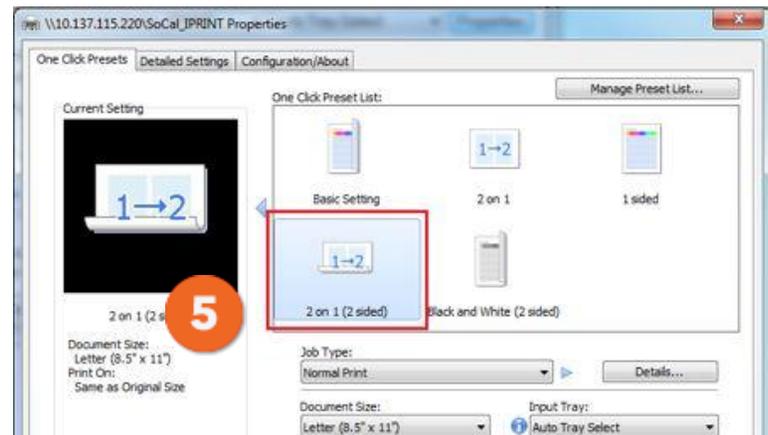
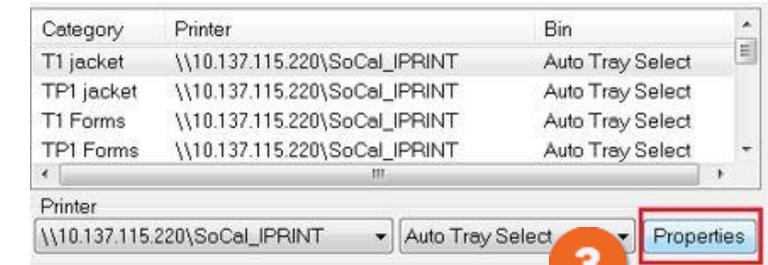
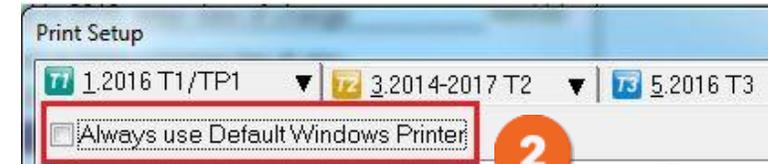
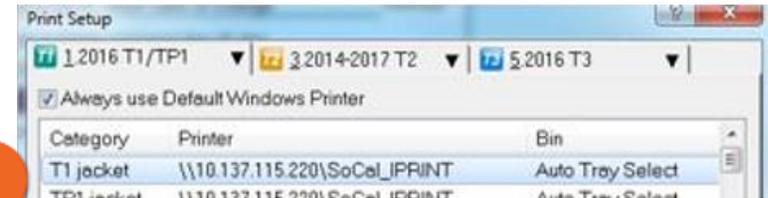
Click on the first item under listed under the “Category” heading (e.g., “T1 jacket”).

Click the **“Properties”** button under the “Printer” heading.

The print properties window displays.

Select the duplex printing option from the options presented; note that this option may vary in name based on the individual printer manufacturer. In the example below, the duplex printing option is titled as **“2 on 1 (2 sided)”**.

Click the “OK” button. On the “Print Setup” window, check the **“Use printer duplex settings”** box; this activates the duplex settings. Repeat the duplex printing configuration for each applicable option under the “Category” list (e.g., “T1 forms”, “Letters”, etc.)



## Printing Slips in ProFile

When sending a slip to print from ProFile, the printout may be cut off, print a blank page, or not print at all. This is due to the slips official size conflicting with the printer settings.

### Changing default slip print settings

Select the “Print Slips Setup...” option from the “File” drop-down menu in the top toolbar.

The “Slips Print Setup” window displays.

Select the tax year from the **module drop-down menu** in the top bar.

Select the slip type **from the tab menu** (e.g. “T4PS”). Update and apply the necessary print slip settings.

Click the “Test” button to test print the settings.

Click the “OK” button; the settings save.

### Printing the slip

There are four printing options available under the “File” drop-down menu in the top toolbar:

- Print...
- Print / Email PDF...
- Print Slips...
- Print Slips / PDF

Each option opens a print settings window. Update and apply the necessary print slip settings.

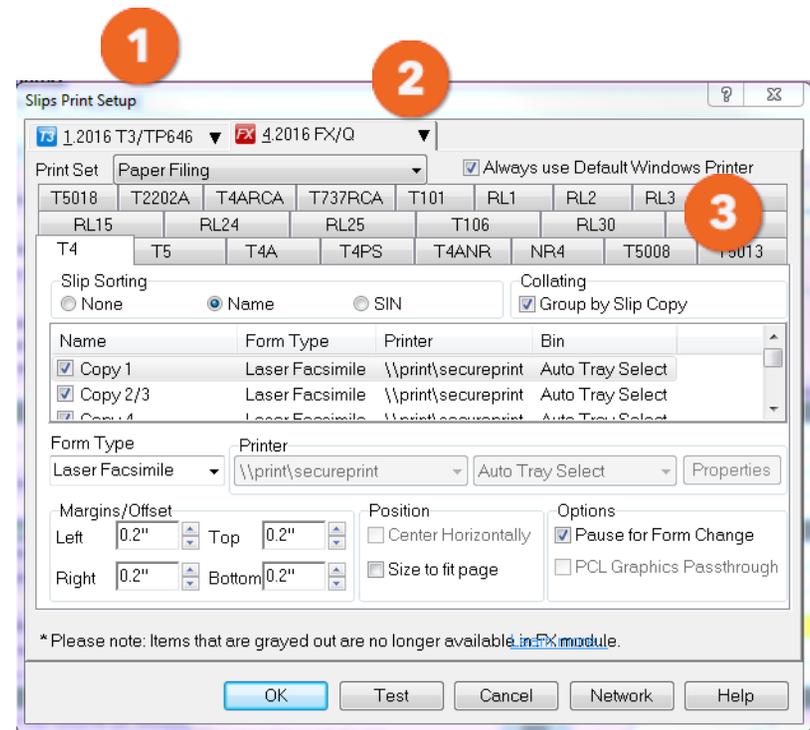
Click the “Print” or “Build PDF” button; the slip prints or builds a PDF file.

### Reviewing the printed slip (if PDF printed)

Open the generated PDF in the PDF-viewing software (e.g. Adobe Acrobat); ensure that the PDF is set to fit on the page.

Select the desired paper size under the “Page Setup” option.

Match the desired paper size under the “Printer Properties” option.



# Managing software integration in ProFile

## QuickBooks Integration

It is easy and convenient to integrate QuickBooks with ProFile.

The following support articles detail the process.

### **Integrate ProFile and QuickBooks**

The integration process allows ProFile to display as an integrated application in QuickBooks.

<https://profile-en.community.intuit.ca/articles/1625439-how-to-integrate-profile-and-quickbooks>

### **Importing data from QuickBooks to ProFile (T2)**

The import data process imports amounts from QuickBooks into ProFile.

<https://profile-en.community.intuit.ca/articles/1625388-importing-data-from-quickbooks-to-profile-t2>

# QBOA Software Integration in ProFile

QBOA integration is undertaken via the Workpapers.

Workpapers is a collection of tools in QBOA that allows accountants/bookkeepers to quickly and efficiently complete year-end work for their client.

## Accessing Workpapers

Log in to the QBOA Firm containing the data to be exported:

<https://ca.qbo.intuit.com/app/trialbalance>

Click the hyperlink text under the Workpapers column.

## Preparing data to be exported in QBOA

Open QuickBooks.

Navigate to the Workpapers section for the client's books.

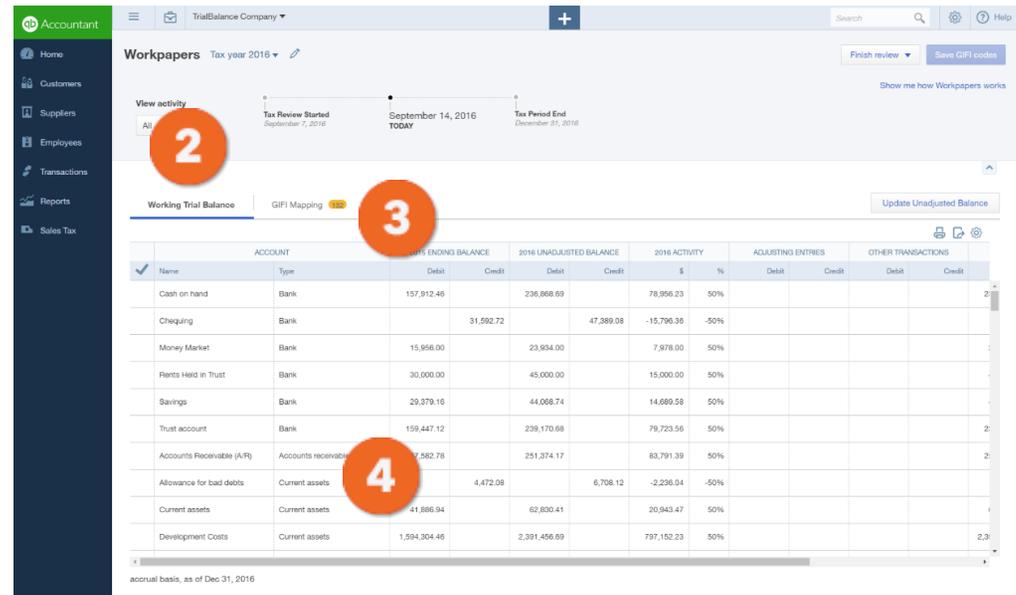
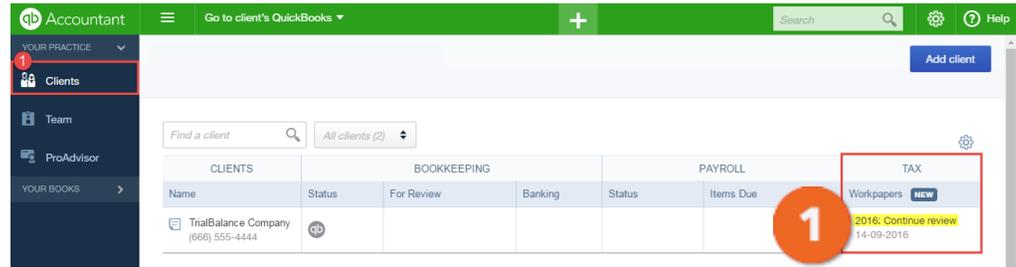
**Note:** only tax year 2015 and forward are supported.

Review the “**Working Trial Balance**” and the “**GIFI Mapping**” to ensure all necessary work is complete.

Map any unassigned codes under the GIFI mapping section.

Navigate through the GIFI codes list and click on “Assign GIFI Codes” to assign; a row displays under the line to be mapped.

Select the **GIFI code** from the list.



## QBOA Software Integration in ProFile (continued...)

Once complete, click on **“Save GIFI codes”** in the top right corner; the information saves in the GIFI File format.

Open ProFile.

Create a T2 return, or open the existing T2 return associated with the QBOA firm.

### Importing the GIFI from ProFile

Select the **“QBOA Import”** option under the **“File”** drop-down menu in the top toolbar.

Click **“OK”**; the process completes.

The screenshot shows the 'GIFI Mapping' interface for 'T2 Corporation' for the tax year 2016. The 'Unmapped' row has a balance of 1,760,129.75. The 'Assign GIFI code' button is highlighted with a red box. A large orange circle with the number '5' is in the top right corner.

ACCOUNT	TYPE	BALANCE	ACTION
Unmapped		1,760,129.75	
Accruals and Deferred Income	Long-term Liabilities	-3,999.00	Assign GIFI code
Accumulated Amortization of Other Assets	Long-term Assets	-5,961.66	Assign GIFI code
Accumulated adjustment	Equity	290,828.15	Assign GIFI code
Available-for-sale financial assets	Long-term Assets	123.00	Assign GIFI code
Bank loans	Long-term Liabilities	-7,332.00	Assign GIFI code
Cost of Goods Sold	Cost of Goods Sold	5,888.00	Assign GIFI code
Current Tax Liability	Other Current Liabilities	-342.00	Assign GIFI code
Current portion of employee benefits obligations	Other Current Liabilities	-1,989.00	Assign GIFI code
Current portion of obligations under finance leases	Other Current Liabilities	-1,656.00	Assign GIFI code
Deferred tax	Long-term Assets	93.00	Assign GIFI code
Distribution costs	Expenses	9,500.00	Assign GIFI code

The screenshot shows the 'GIFI Mapping' interface for 'T2 Corporation' for the tax year 2016. The 'Unmapped' row has a balance of 1,770,000.41. The 'Save GIFI codes' button is highlighted with a red box. A large orange circle with the number '6' is in the top right corner.

ACCOUNT	TYPE	BALANCE	ACTION
Unmapped		1,770,000.41	
Accumulated adjustment	Equity	290,828.15	Assign GIFI code
Available-for-sale financial assets	Long-term Assets	123.00	Assign GIFI code
Bank loans	Long-term Liabilities	-7,332.00	Assign GIFI code
Cost of Goods Sold	Cost of Goods Sold	5,888.00	Assign GIFI code
Current Tax Liability	Other Current Liabilities	-342.00	Assign GIFI code
Current portion of employee benefits obligations	Other Current Liabilities	-1,989.00	Assign GIFI code
Current portion of obligations under finance leases	Other Current Liabilities	-1,656.00	Assign GIFI code
Deferred tax	Long-term Assets	93.00	Assign GIFI code
Distribution costs	Expenses	9,500.00	Assign GIFI code
GST/HST Payable	Other Current Liabilities	205,453.05	Assign GIFI code
GST/HST Suspense	Other Current Liabilities	76,017.00	Assign GIFI code

# Managing One Intuit accounts in ProFile

## Inuit “One Account” log in

The Intuit “One Account” tool allows access to several Intuit products and services with a single log in and password.

### One Intuit products and services

The “One Account” tool provides access to the following:

- ProFile Review
- ProFile Link
- ProFile support community
- QBOA
- QBO
- TurboTax online

### One Account access

Customers can create a “One Account” when accessing a supported service for the first time.

The **“One Account” log in window displays** when accessing a supported service.

Select the “New to Intuit? Create an account” link at the bottom of the log in window to create a new account.

intuit

turbotax quickbooks mint

One Account.  
Everything Intuit.

Sign in to your Intuit account to access all our products. [Learn more](#)

Email or user ID

Password

Remember me

[Sign In](#)

By clicking Sign In, you agree to our [License Agreement and Privacy Statement](#)

[I forgot my user ID or password](#)

[New to Intuit? Create an account.](#)

## Backing up to Cloud for ProFile Review

### How do I first synchronize my returns with ProFile Review?

There are a few steps you must follow to synchronize your data with ProFile Review. These steps are:

1. Enable synchronization on ProFile Desktop.
2. Create or register an account with ProFile Review and associate it with a License Key and Order Number.
3. In ProFile Desktop, sign in to your online account by clicking the **Online** menu and choosing **Manage Online Account**. (Enter the account credentials and password that you used to register your account with ProFile Review.)
4. Select the folder that contains the returns you wish to synchronize with ProFile Review.

### Do I have to sign in to my Online Account in ProFile to synchronize with ProFile Review?

No. Once you complete the initial synchronization with ProFile Review, every time you save a file it automatically synchronizes with ProFile Review.

### How do I synchronize my data while within ProFile Review?

As with ProFile Desktop, synchronizing occurs automatically. Every time you save changes made to the return that you are reviewing, you are synchronizing your data with ProFile Desktop.

### How do I know that the returns I reviewed in ProFile Review have synchronized with ProFile Desktop?

When you open ProFile, a pop-up window will appear telling you that changes were made to the return using ProFile Review. You can review these changes in ProFile's Auditor Tool using a new tab called "Online Change". Every review mark and memo change that was made in ProFile Review will appear in the "Online Change?" tab in the Auditor Tool.

**Note:** you cannot save a return that has been reviewed using ProFile Review until all of the online changes noted in the Auditor Tool are accepted or declined.

### Can I edit a client's tax information from online with ProFile Review?

You cannot edit a client's tax information. You may add or edit review marks and memos, and create PDFs of returns.

### Why don't returns that I have uploaded show up in ProFile Review immediately?

The Client List is cached (temporarily stored on your computer) to make navigation faster. It should refresh within about 10 minutes. Alternatively, you can sign out and back in again, or refresh your browser.

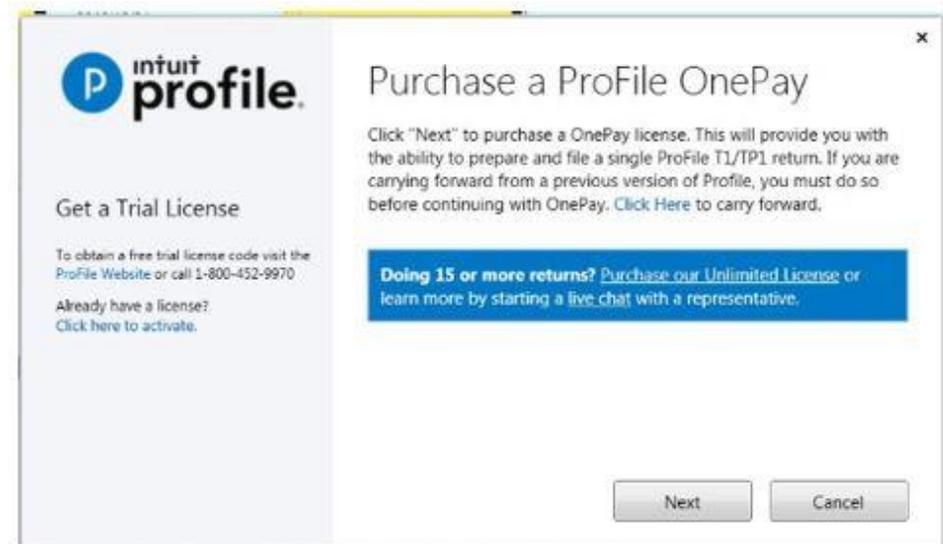
# Managing OnePay in Profile

## Overview of ProFile OnePay

OnePay is a one-time license that allows a ProFile customer to file a single T1, T2, or T3 return. It is an alternative to purchasing a full ProFile license, which allows for unlimited returns.

OnePay is best suited for:

- an existing ProFile customer whose license has expired, but still needs to file a return or returns
- a new ProFile customer with a limited number of returns to be filed
- a resident of Quebec at the end of the fiscal year, and only the Federal module has been purchased and not the Quebec TP1 or the Quebec T646 \*
- a ProFile customer with a business registered in Quebec\*



\*In the event of the OnePay purchase for Quebec, the preparer is required to NetFile the TP1 separately from the Federal. They also require a NetFile QC Number and Access Code. For more information, visit Revenu Québec.

**Note:** if the taxpayer resides in any other Province and has an RL-1, the TP1 return is not necessary. The RL-1 information may be entered in the T4 form.

## Purchasing ProFile OnePay

**Please be aware:** an Internet connection is required to complete the purchase via our secure web page. OnePay can only be purchased from within ProFile.

### Purchasing OnePay

Open ProFile.

Open a new return ("File" -> "New" from the top toolbar) or carry forward an existing return ("File -> "Carry Forward...").

The **OnePay payment wizard displays**, requesting the following information:

- the social insurance number (SIN)
- the first/last name of the taxpayer whose return is to be filed

Click the "Next" button.

Complete the "**Customer Info**" information:

- the necessary company and billing information
- the necessary payment information
- a confirmation of the payment and purchase information

Click the "**Place Order**" button when all necessary information has been provided.

The confirmation window displays confirming the OnePay has been successfully purchased.

Close the confirmation window.

The preparer is returned to ProFile and to the return to be filed.

**1** Get a Trial License

To obtain a free trial license code visit the [Profile Website](#) or call 1-800-452-9970

Already have a license? [Click here to activate.](#)

SIN  
144935913

First Name  
Will

Last Name  
Smith

**Important!** Before clicking Next, make sure the above information is correct. You will not be able to change this information later.

Next Back

**2** Customer Information

\* Required

\* E-mail

Company/Billing Information:

\* Company/Business Name

\* Address Line 1

Address Line 2

\* City

\* Province Alberta

Shop with Confidence

Privacy Policy

In short, nothing's more important than your privacy. We're not going to share your info with anyone. [View our Privacy Policy](#) for more details.

You'll Love Your Product. We Guarantee It!

Once your product gets to you, you know you'll love it. If you don't, you can get a full refund within 30 days of purchase, with the exception of ProFile which is 24 days.

Safe Shopping

As always, your order is safe as

**3** Review Your Order

Review your order and click the Place Order button.

Place Order

Item	Qty	Item Price	Item Total
Profile T1/TP1 - OnePay (2016)	1	\$27.00	\$27.00

Sub-total: \$27.00

GST: \$1.35

PST: \$0.00

HST: \$0.00

Total (CAD): \$28.35

Billing Address

Payment Method

Teal Smith  
122 Maple Street  
Westville, AB  
CA, A5F 4R5  
(955) 999-9995

Credit Card: VISA  
Card Number: XXXXXXXXXXXXXXX1328  
Expiration Date: 07/2019

[Edit](#)

### **I am being prompted to purchase OnePay...**

If a ProFile customer attempts to populate a form for any module (e.g., T1, T2, or T3) without an existing valid ProFile license, the OnePay purchase wizard displays.

### **Can I use Auto-fill my Return (AFR) with OnePay?**

Yes. Prior to using AFR with OnePay the preparer requires:

- an EFILE account
- a representative ID
- EFILE a T1013 form

To learn more about authorizing or cancelling a representative, please [review the CRA article](#).

### **I downloaded a trial version of ProFile, but when I try to evaluate the software, the OnePay Wizard appears, asking me to purchase a return...**

When installing a ProFile Trial version, make sure you insert the new Product Code and License Key in the License window.

### **I am seeing a "TRIAL" watermark written through all of the forms when I print the return using a OnePay license. ..**

This happens because the Trial license and the OnePay are both activated in ProFile at the same time and the Trial license is overriding the OnePay.

In ProFile:

1. Navigate to the "Help" -> "License" -> "Details" option.
2. Click on the "Trial License" option
3. Click on the "Delete Selected License" option.
4. Close the "Licensing" windows
5. Open the file to print by navigating to the "File" -> "Open" option.
6. Print normally.

## Troubleshooting ProFile OnePay (continued...)

### **I received an error message at the end of a OnePay purchase transaction...**

When purchasing OnePay through ProFile's OnePay Purchase wizard, the following error may appear:

"Your online purchase transaction was not completed. Please go back and review your selections".

This is not a ProFile error, but could be resulting from one of the following situations:

- high security settings on the computer (see solutions below)
- a network disruption (check your network is functioning)
- the transaction timed-out (retry the transaction to completion)

The following are solutions that may resolve the high security setting issue:

- check ProFile version is the latest
- check Windows Update for any recent OS updates
- set firewall/antivirus exception for ProFile
- set SSL/TSL security
- allow pop-ups
- clear your cache and browsing history
- check for Proxy settings
- check .NET version is the latest

### **Can I purchase more than a single OnePay?**

When purchasing One-Pay, only one unit can be purchased at a time. If a quantity greater than one is entered in the "Quantity" field, you will be charged for that quantity but will only receive one license.

# Managing ProFile security settings

## Using Options Packages in ProFile

An options package is a file that preserves customized ProFile settings. These can include office details, printing options, database settings, and template and module settings.

Creating an options package means that your ProFile settings can be used by you or by others without having to recreate any preferences.

### How do I use the option package?

An options package can be used two different ways:

- saved on a shared network/server where everyone has access to it
- saved on a terminal server where everyone has access to it
- saved locally to a single computer that is not on a shared network/server

Depending on which use is selected multiple users can work with ProFile in the same consistent manner, or an individual user can work with ProFile in a manner specific to themselves.

### Types of options packages

There are three types of options packages in Profile, **individual**, **shared**, or **custom**.

**Individual** options packages save on an individual computer and are loaded when ProFile launches.

**Shared** options packages save to a network/shared server where one or more individual computers have access to the package. This is the ideal option if you are using a network environment, Client Server, or Terminal Server environment.

**Custom** option packages allow the same ProFile options to be utilized even if an individual computer is disconnected from a network/server/terminal server. A Profile user creates custom options packages in different locations and instructs ProFile which to use.

## Creating an Options Package in ProFile

Start ProFile.

Select “Options Administration...” from the “Options” menu; the **“Options Administration” window displays**.

Set the necessary options for the package (e.g., template use, pricing, database, etc.); these selections will become the settings in the new options package.

Select the **options package type (1, 2, or 3)**.

Check the **option “Include preparer and discounter name with Option packages”**, if applicable.

Check the **option “Prompt to save changes”**, if applicable. This feature applies only to package types 2, 3, and 4 and selecting the option prompts the user to save any changes made to an options package when closing ProFile.

**Note:** any changes made to an options package prior to ProFile being closed are **NOT** saved if the “Prompt to save changes” feature is not activated. Users must explicitly use the “Save” function to save any changes or they will be lost when closing Profile.

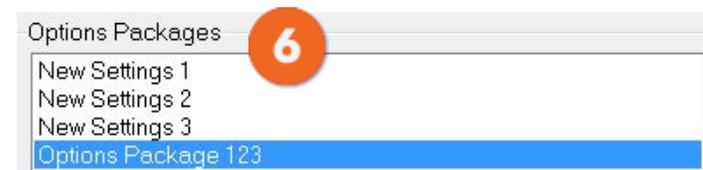
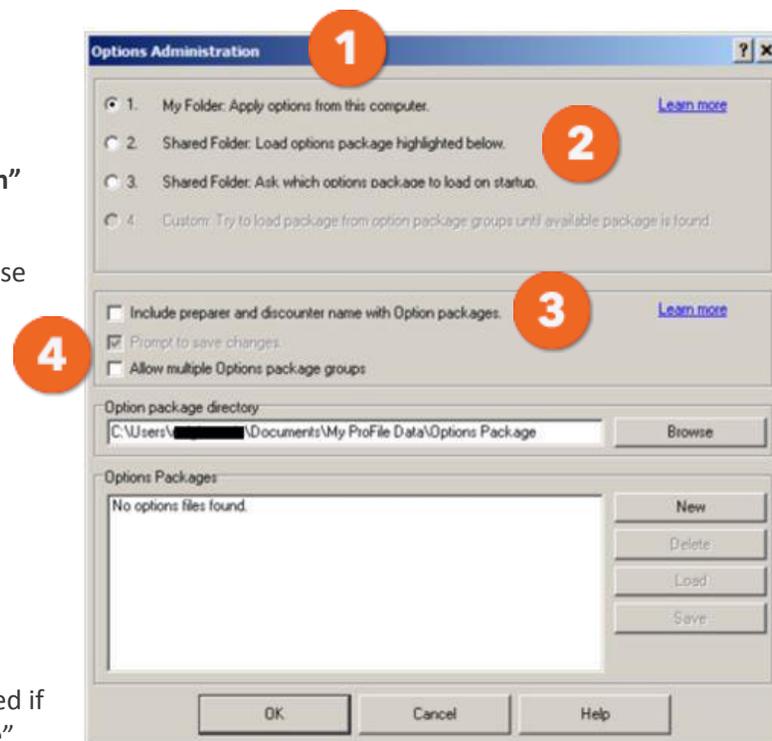
Click the **“New” button**.

The **“New Settings” window displays**.

Enter **the name of the new options package**.

Click the **“OK” button**.

The new options package file saves to the designated location and **displays in the “Options Packages” list**.



## Managing Options Packages in ProFile

Options package management includes several tasks that can be undertaken, including:

- creating a new options package
- loading an options packages
- updating an existing options package
- deleting an options package
- transferring an existing options package

Review [our full support article](#) to learn more about how option packages are managed.

## Using Multiple, or “Custom”, Options Packages in ProFile

A computer that is utilizing an options package on a network/server/terminal server will lose access to it if the computer disconnects from the network/server/terminal server.

However, ProFile can be set to access an alternate local options package (or packages) on the individual computer’s hard drive as a substitute to the network/server/terminal server options package. ProFile will first search for the designated options package on the network/server/terminal server; if that options package is not available ProFile will search for the next options package on the list.

**Note:** ProFile does not synchronize changes between options packages. Any changes to a local options package while disconnected from the network/server/terminal server are not saved in the network/server/terminal server options package.

### **Managing files in multiple options packages**

When the laptop is connected to a network/server/terminal server, users should use the options package stored on the network/server/terminal server.

When the laptop is disconnected from the network/server/terminal server users can specify an options package stored locally on the laptop itself.

However, be aware that by having two different sets of options you are using two different databases. Files created or changed when you are disconnected from the network/server/terminal server will not be listed in the database stored on the network/server/terminal server.

### **Creating and assigning multiple options packages**

ProFile users who will disconnect at some future time from a network/server/terminal server and continue working will need to create at least two options packages: one for connected network/server/terminal server use and one for when disconnected from the network/server/terminal server. This allows the disconnected work to use the same options package settings as that on the network/server/terminal server.

### **Related articles**

Review [our full support article](#) to understand more about using multiple options packages.

## Password Protecting Options Packages in ProFile

Any options package can be password-protected. This prevents unauthorized users or other preparers from altering the options package.

### Password protecting options packages

Select the “Options password...” item from the “Options” drop-down menu in the top toolbar.

The **“Set Options/Delete Password” window displays.**

Enter a password in the “Password:” field of the “New password” section.

Enter the same password again in the “Confirm:” field.

Click the “OK” button.

The password saves and the options package file is protected from alterations and deletion.

A prompt requesting the password displays any time changes are made to the settings.



## Data/File Locking in ProFile

Data locking automatically locks a return to prevent any changes from occurring after the return's status is set.

### Setting the data locking options

Open ProFile.

Select the "Module..." option from the "Options" drop-down menu in the top toolbar menu.

The "**Module Options**" window displays.

Select the **appropriate module and year** from the **tab menu** in the top of the window (e.g. "2014 T1/TP1").

Select the "**Data Locking**" tab.

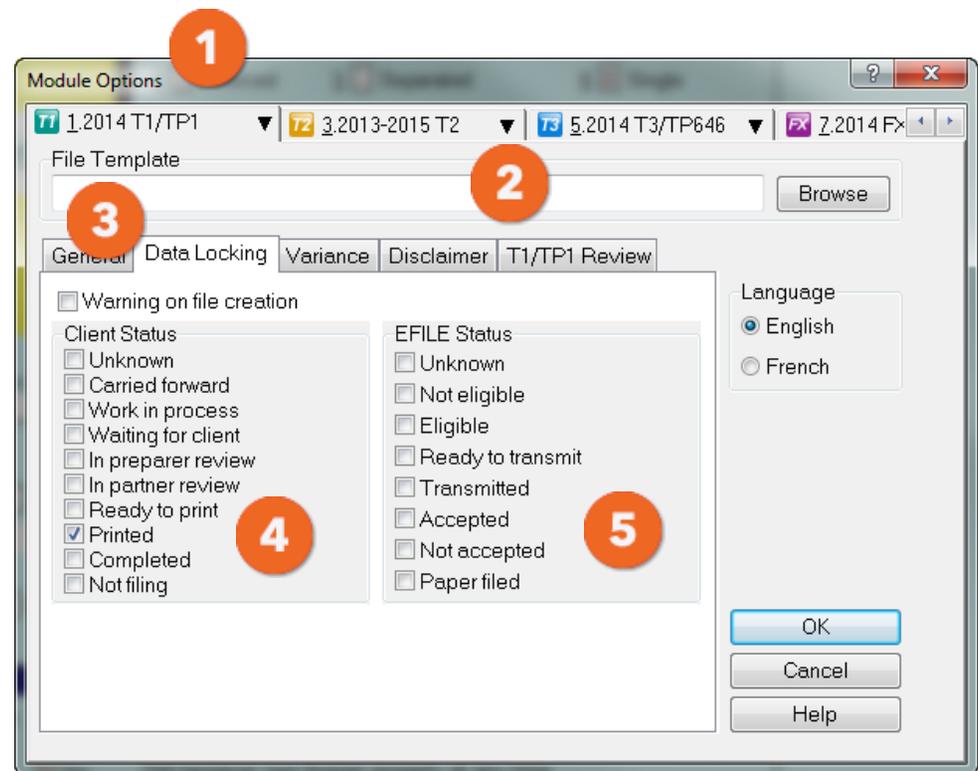
Select the appropriate option under the "**Client Status**" list.

Select the appropriate option under the "**EFILE Status**" list.

**Note:** one or more option may be selected from the lists.

Click the "OK" button.

The file locks when the selected criteria occur.



## Security: Data/File Locking (continued...)

### Setting the print locking options

Select the “Form Selection...” option from the “Options” drop-down menu in the top toolbar menu.

The “Form Selection” window displays.

Select the **appropriate module and year from the tab menu** in the top of the window (e.g. “2014 T1/TP1”).

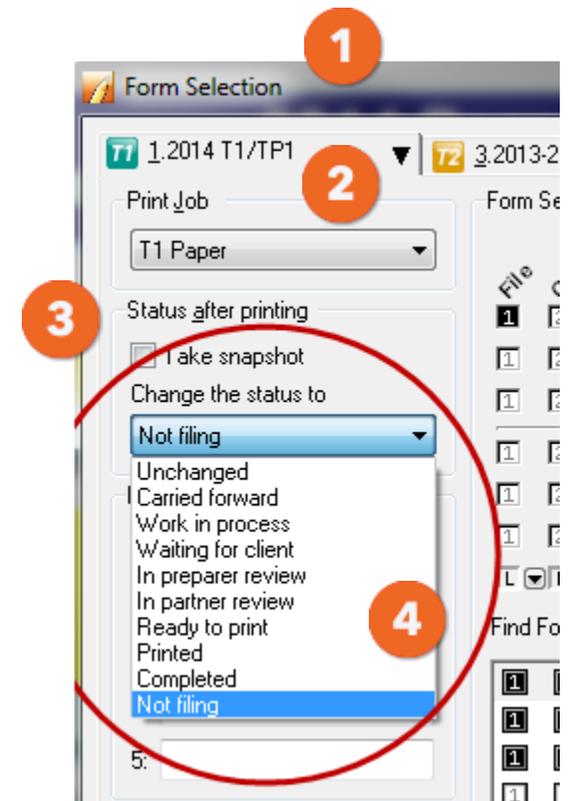
Click the **drop-down menu arrow** in the “Status after printing” section; the menu expands.

Select the **appropriate option from the menu**.

Set the appropriate options for each module.

Click the “OK” button.

After the return is printed, the return locks to the selected status.



## Locking a PDF in ProFile

Data locking automatically locks a return to prevent any changes from occurring after the return's status is set.

### Setting the PDF locking options

Open ProFile.

Select the "Environment..." option from the "Options" drop-down menu in the top toolbar menu.

The "Environment Options" window displays.

Select the "PDF" tab.

Select the appropriate option under the "PDF Security" option list:

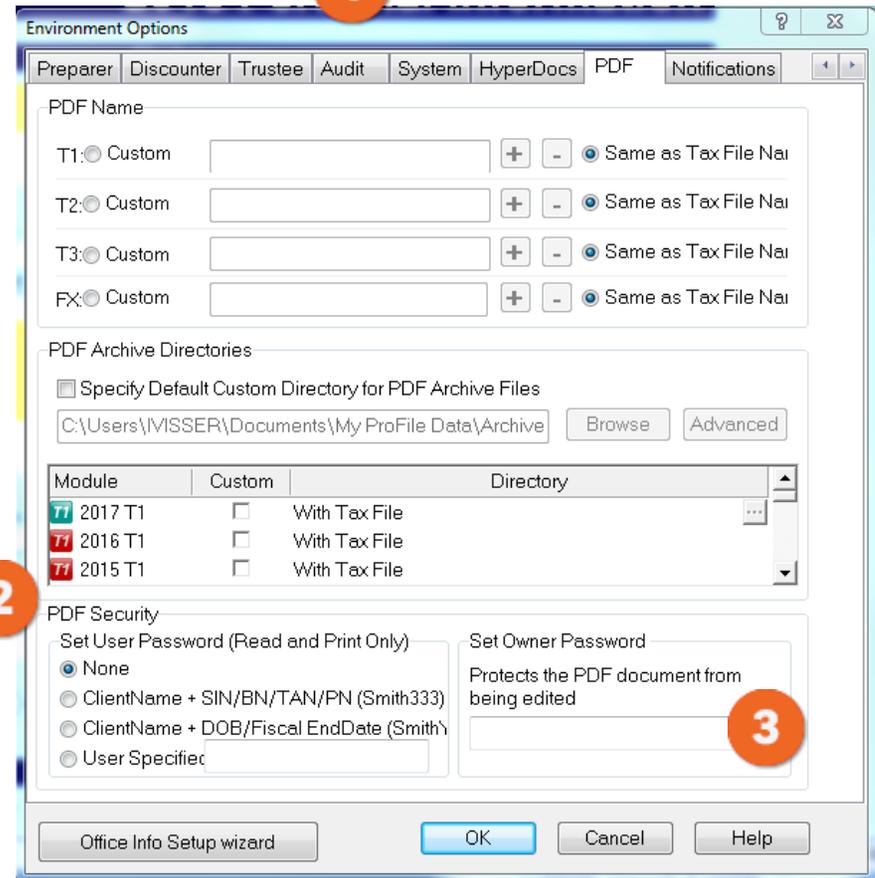
- None
- Client Name + SIN/BIN/TAN/PN
- Client Name + DOB/Fiscal EndDate
- User Specified

### Setting Owner Password

The "Set Owner Password" option provides an additional level of security to prevent a "locked" PDF from being edited.

Enter a **password in the "Set Owner Password" field**; users will require this password to open a file, in addition to any password set in the "PDF Security" option list.

Click the "OK" button; the PDF locking selection applies.



## Using Keyboard Shortcuts in ProFile

If a preparer processes a large volume of client files, there is an advantage to learn the keyboard shortcuts for common functions in ProFile.

Action	Shortcut Command
Attach tape	<Ctrl+F8>
Back to previous form	<Alt+F7>
Carry forward a file	<Ctrl+R>
Clear highlighter	<Ctrl+H>
Clear review mark on field	<Ctrl+Alt+0>
Close current window	<Ctrl+F4>
Copy field	<Ctrl+C>
Correction required mark	<Ctrl+Alt+3>
Create a new file	<Ctrl+N>
Cut field	<Ctrl+x>
Display jump list	<Shift+F6>
Display previous audit message	<Shift+F9>
Ditto key	(back apostrophe)
EFILE this return	<Ctrl+F11>
Instant SEND	<Shift+F11>
End review	<Ctrl+E>
Exit ProFile	<Alt+F4>
Explorer Keyword view	<Shift+F7>
Explorer Line view	<Shift+F4>
Federal/Quebec toggle	<Shift+F5>
File properties	<Ctrl+l>
Form help	<Shift+F1>
Next checklist form	<Ctrl+Alt+PgDn>
Next Edit window form	<Ctrl+Tab>
Next file	<Ctrl+F6>
Next page on form	<Ctrl+PgDn>
Next section on form	<Alt+PgDn>
Non-zero T1 summary	<Ctrl+F10>
Open an existing file	<Ctrl+O>

## ProFile Keyboard Shortcuts (continued...)

Action	Shortcut Command
Open form in new window	<Ctrl+Alt+F6>
Open the Tape dialog box.	<=>
Override format	<Ctrl+F2>
Partner sign-off	<Ctrl+Alt+2>
Paste field	<Ctrl+V>
Pause / start timer	<Ctrl+T>
Preparer sign-off	<Ctrl+Alt+1>
Previous checklist form	<Ctrl+Alt+PgUp>
Previous Edit window form	<Ctrl+Shift+Tab>*
Previous page on form	<Ctrl+PgUp>
Previous section on form	<Alt+PgUp>
Print file(s)	<Ctrl+P>
Question review mark	<Ctrl+Alt+4>
Quick-print audit messages	<Alt+F9>
Quick-print T1 summary	<Ctrl+Alt+F10>
Quick-print T183 form	<Alt+F11>
Quick-print tax summary	<Alt+F10>
Save the file	<Ctrl+S>
Show/hide auditor	<Ctrl+F9>
Snapshot/Variance	<Alt+F8>
Switch to family member	<Alt+F5>
T1, T2, T3 jacket	<Ctrl+J>
Toggle T1/TP1	<Shift+F5>
Toggle T2/AT1 RSI	<Ctrl+F5>
Top of next slip	<Ctrl+Enter>
Top of previous slip	<Ctrl+Shift+Enter>
ProFile Help	F1
Override	F2
Client Explorer	F3

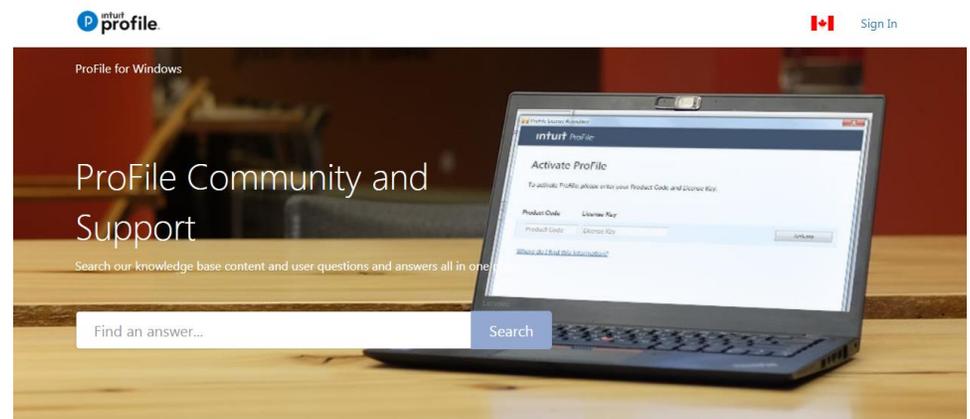
# Learning more about ProFile

## ProFile Community and Support Site

The ProFile Community and Support Site has recently undergone a redesign in order to serve our customers more effectively. You can now search both our support articles and forum questions at the same time, in order to return the best possible answer to your product question.

Available 24-hours a day, our Community and Support Site has more than 800 articles designed to improve your ProFile experience.

<https://profile-en.community.intuit.ca/profile-ca-en>



### Browse Topics

 <b>Announcements and Trending Topics</b>	 <b>Products and Services</b>	 <b>Install &amp; Configure</b>
 <b>Prepare &amp; Review</b>	 <b>Network &amp; Database</b>	

#### Additional resources

- [Browse Community Posts](#)
- [Contact Support](#)
- [Remote Desktop Session](#)
- [Webinar and How to Videos](#)
- [Browse the Document Library](#)
- [Know Your ProFile Terms](#)

## Sending Feedback about ProFile

ProFile users can conveniently provide feedback on ProFile’s functionality or suggest an enhancement to the product.

All feedback is reviewed by the product owner, developer, or analyst.

### Opening the feedback window in ProFile

Select the “Send Feedback” option under the “Help” drop-down menu in the top toolbar.

The **“Post an idea” window displays.**

Describe your idea in **the feedback field**; you can be as specific as you like.

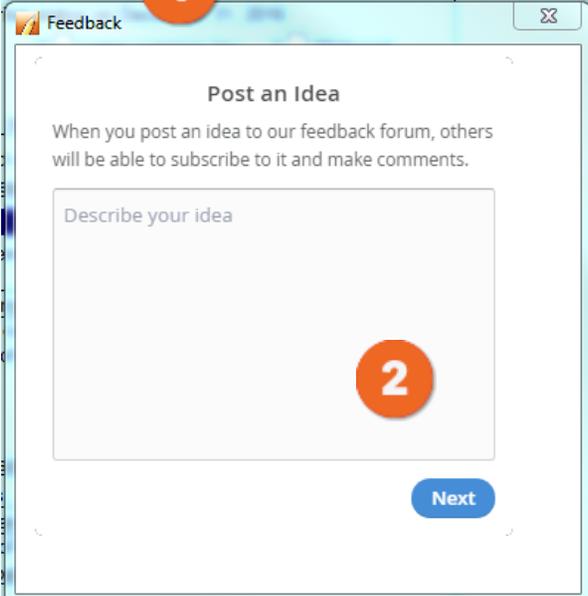
Click the “Next” button when finished.

The **“Additional details” window displays.**

Enter the idea title (e.g. “New function idea”) and select the related category. If you are unsure which category to select, just choose the one closest to matching with your idea/feedback.

Enter your email address; this allows ProFile to follow up with you in the future about your idea/feedback.

Click the “Post idea” button.



1

Feedback

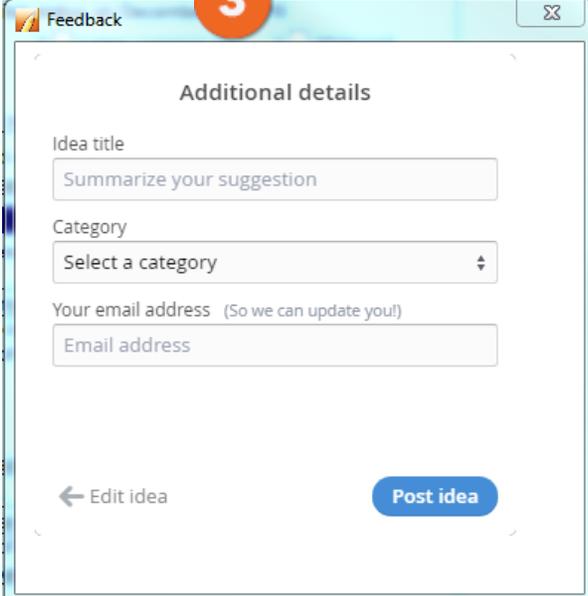
### Post an Idea

When you post an idea to our feedback forum, others will be able to subscribe to it and make comments.

Describe your idea

2

Next



3

Feedback

### Additional details

Idea title

Summarize your suggestion

Category

Select a category

Your email address (So we can update you!)

Email address

← Edit idea

Post idea

## Additional ProFile Resources

### Training and Tutorials Site

Whether you are a new ProFile user or an experienced professional, you can enhance your skills with our training resources, video tutorials, and “Tips & Tricks” site. Updated regularly, this site includes both core and advanced information to help throughout the return preparation process.

<http://profile.intuit.ca/professional-tax-software/training.jsp>

### Webinars Calendar

Keep learning with our informative webinars, held every Tuesday and Thursday throughout the year. Live webinars take you through the finer points of ProFile, and if you have any questions, our experts are there online with you, ready to answer.

You can join an upcoming webinar through the calendar:

<http://profile.intuit.ca/professional-tax-software/webinars-events.jsp>

### In-product Help

The in-product “Help” utility provides an easy way to learn about forms, slips, schedules, ProFile’s functions, and many other topics. Simply press the <F1> key from anywhere in ProFile to launch the Help utility.

### Live Chat

Inside the ProFile software (and on many of our support pages) you will find the “Live Chat” option. This quick and convenient tool lets you immediately begin speaking to one of our support representatives online, without having to wait on the phone or interrupt your work. Available during our regular support hours.