INTUIT PROFILE – 2017/18 TRAINING GUIDE

Learning about Taxes with Intuit ProFile

Chapter 6: An Online World

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About the Author

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Michael is a CPA, CMA with a strong background in training and technology. Over the years Michael has written dozens of training materials and has taught QuickBooks, ProFile, Microsoft Office and other software applications to thousands of individuals. When not teaching or training you'll often find Michael in various coffee shops, throughout Ottawa and Montreal, discussing business and technology with friends, clients and, even, perfect strangers.

ADDITIONAL RESOURCES

In addition to this document, Intuit provides numerous resources to accounting professionals. Refer to these sites to explore additional tutorials and training opportunities:

- http://accountant.intuit.ca/professional-accounting/index.jsp
- http://profile.intuit.ca/professional-tax-software/index.jsp
- http://profile.intuit.ca/professional-tax-software/training.jsp

Introduction

Intuit ProFile Tax software is reliable and easy-to-use, and it offers sophisticated features that help tax preparers experience a more productive tax season. The following paragraphs summarize the key components of Intuit ProFile Professional Tax software

ProFile T1 imports and converts data created by competing software products. Whether you carry files forward individually or in batches, you will find the process quick and convenient. Using ProFile`s WYSIWYG (what you see is what you get) forms, you can view and edit federal T1 and Québec TP1 forms in either French or English. You can also print all tax forms in either language at the click of a button.

ProFile T2 is designed for professional preparation of corporate tax returns in all provinces and territories. ProFile T2 includes:

- Federal T2 returns, including T2 RSI (for 2006-2009 and earlier) and Corporation Internet Filing
- Provincial corporate tax returns for Alberta (including AT1 RSI), for Ontario returns with taxation years ending prior to January 1, 2009 (including CT23 disk filing) and for Quebec (CO-17).
- Provincial capital tax returns for Manitoba, Saskatchewan and British Columbia

ProFile T3 prepares Trust income tax returns and supporting schedules, including T3 and T5 slips that the trust receives. Simply enter slip information on intuitive income-reporting screens and ProFile T3 automatically transfers the amounts to the appropriate forms. ProFile T3 also integrates business and rental income statements. In addition to T3 slips, the software allows you to prepare NR4 slips for non-resident taxpayers (including the NR4 summary).

ProFile FX (Forms Expert) gives you more than 80 of the most commonly-used CRA forms which supplement the form-sets in Intuit`s other tax applications. Here are a few highlights of ProFile FX:

- Customizable options help you complete and file the forms you need.
- Automatic form selection facilitates form printing.
- Audit and review features help pinpoint potential errors
- Forms flexibility lets you print facsimile forms on plain paper or directly onto pre-printed CRA forms. ProFile FX also prepares magnetic media files for T4, T4A, T5, T5018 and NR4 slips, as well as for the RL1, RL2, RL3 and RL4.
- Import identification from an existing ProFile T1 or T2 data file minimizes potential data entry errors.

Benefits of Using ProFile

ProFile is powerful, efficient and secure tax software that helps you get your work done fast and efficiently. Here’s how you benefit by using Profile:

- With phone, email or in-product live chat support, you have year-round access to knowledgeable Canadian technical experts
- With its comprehensive set of forms and schedules, ProFile lets you handle just about every tax scenario in any jurisdiction, including Québec
- With a built-in auditor that runs up to 2,800 diagnostic checks of your tax returns, ProFile has your back
- Flexible Licensing means you can install ProFile on more than one personal computer without having to pay additional licensing fees
- Work with QuickBooks? So does ProFile! There’s no need for manual data entry because you can now export data from QuickBooks directly into ProFile

Plus, with ProFile you enjoy a consistent level of advanced features that include:

- Customizable client correspondence
- Database queries and reporting
- Online tools to quickly and easily stay in touch with your clients

Chapter 6: An Online World

Chapter 6 Learning Objectives

At this chapter's conclusion, students will understand:

- How to use CRA's AutoFill My Return
- How to ReFile a T1
- How to communicate with clients with ProFile's Hub and Link

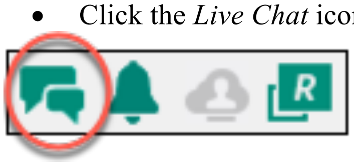
Every day, more and more businesses are taking things online. Online stores; online information; online payments; online communication—all are part of our everyday lives. It should come as no surprise, then, that tax preparers too are increasingly using cloud tools. Canada Revenue Agency, for example, demands that tax preparers EFILE tax returns and, at the same time, with a dedicated *Represent a Client* account, CRA gives tax preparers online access to an array of client information that was unthinkable just a few short years ago. ProFile is accentuating this cloud trend as well. As a ProFile user, you have access to an increasing number of cloud tools. Let's take a closer look:

Getting Online

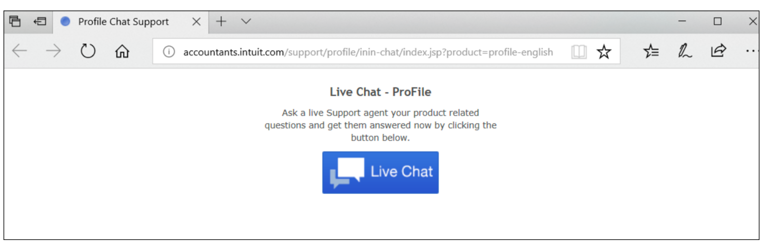
The online toolbar

The *Online* toolbar sits permanently under ProFile's Menu bar. Here's what the four icons in that toolbar do:

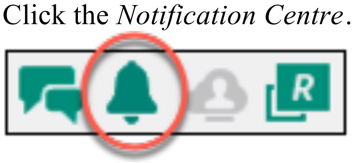
- Click the *Live Chat* icon…



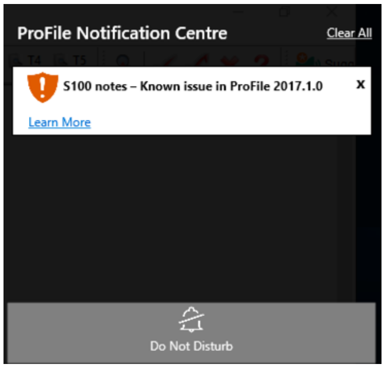
… To engage a ProFile support agent and chat online



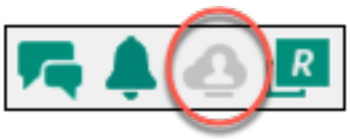
Click the *Notification Centre*…



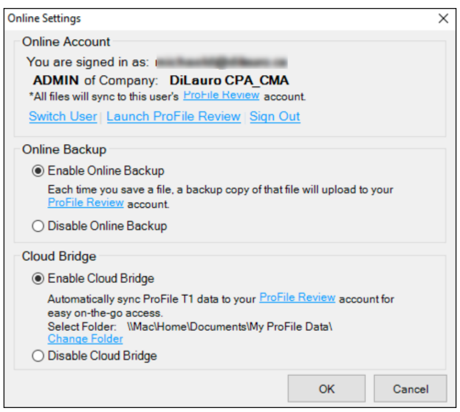
…To view alerts, reminders and other ProFile messages



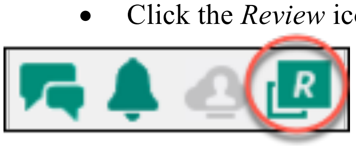
- Click the *Online Settings* to access ProFile's online tools…



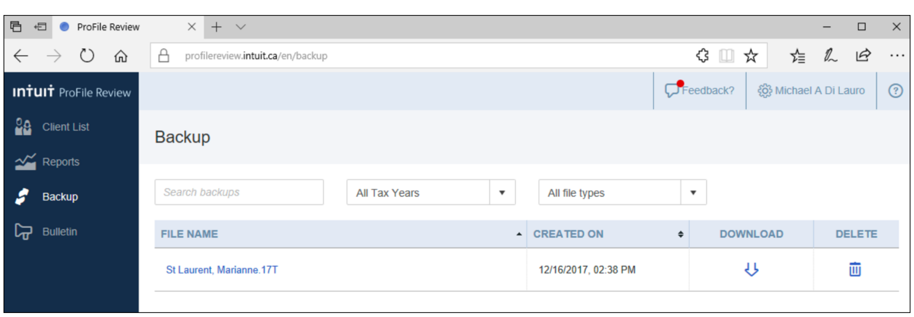
- …Including features for online access and backup of your tax files



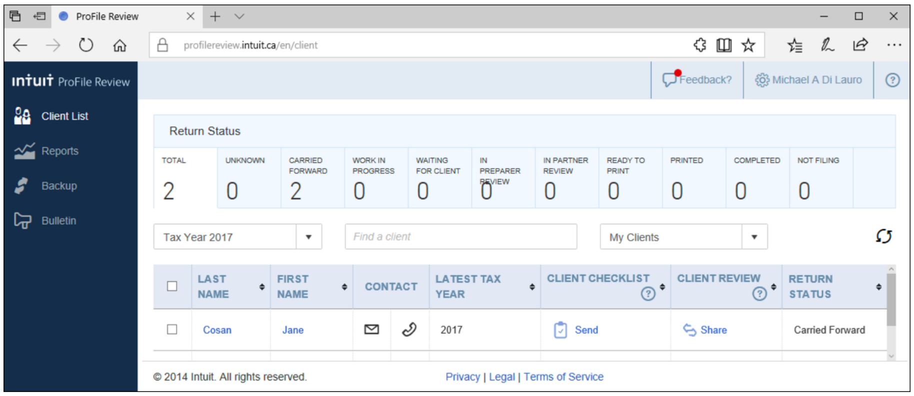
- Click the *Review* icon…



- … To access and download your backups…



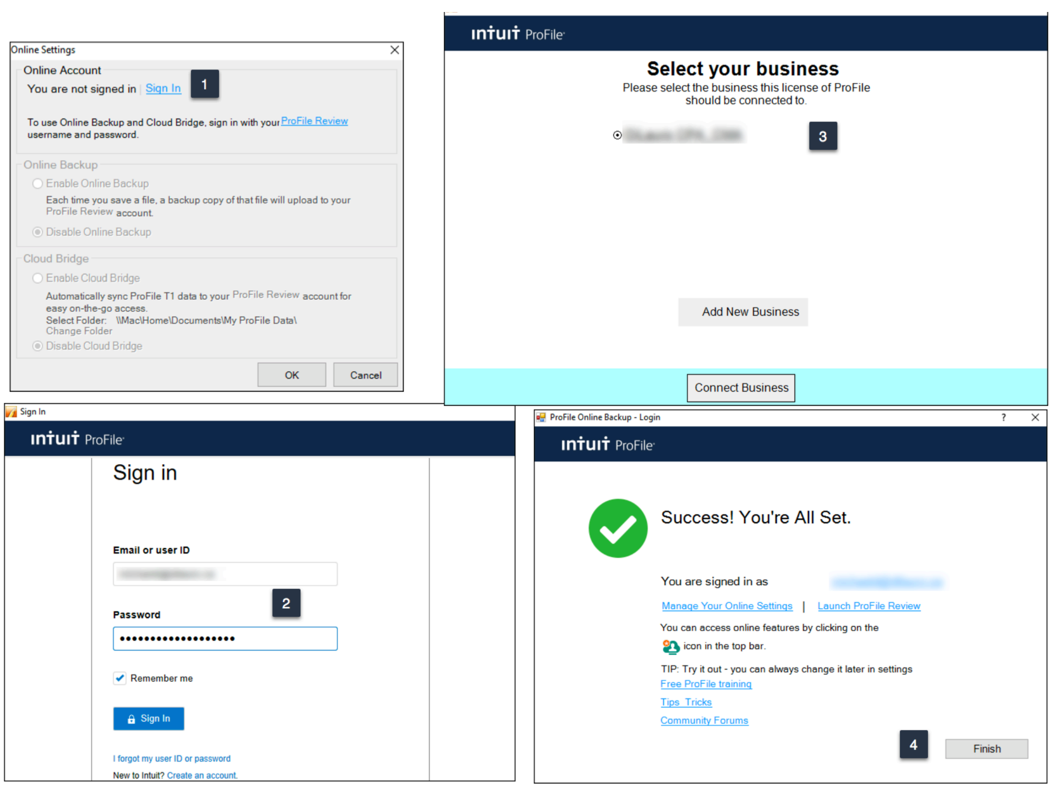
- …And also to view your tax files online



Accessing your online account

If you have a ProFile account, getting online is quick and easy:

- From the toolbar, click the *Online Settings* icon and ProFile launches the sign-in window
- Click Sign In 1
- Enter your user ID and password 2
- Select your firm (or add a new one) 3
- Click *Finish* and you're done 4

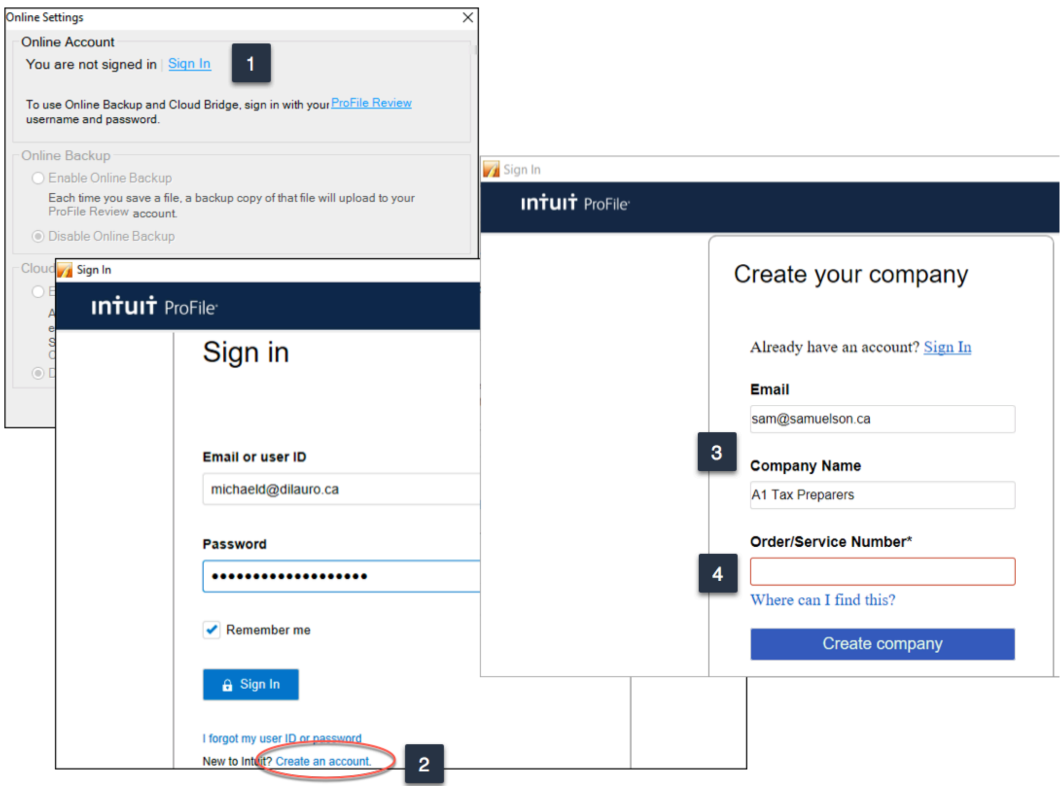


But I don’t have an online account

If you don’t have an online account, creating one is a snap:

- From the toolbar, click the *Online Settings* icon to launch the sign-in window
- Click Sign In 1
- Click Create an account 2
- Enter your email and company name. 3
- You will also need your order or service number from when you bought ProFile 4
- Follow the prompts, per steps 2 through 4 in the previous example, to complete the process

See the images further below for details on order or services numbers

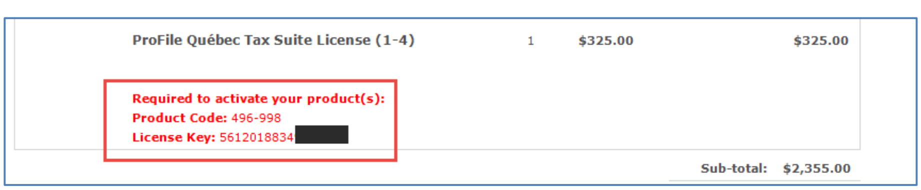


Order/Service Number

Read on if you’re not sure where to find the Order/Service Number required for the window above.

- After purchasing ProFile, you will receive an emailed receipt containing the product information to be entered in this window

If you purchased ProFile through Intuit’s Web Store, you will find the codes at the very bottom of the receipt.



If you placed your order by telephone, the codes will appear in the Order Details section

ORDER DETAILS

Quantity	Item Id	Unit Price	Ext Price
1	423452 FR PROFILE TY14 QUEBEC SUITE	$1,680.00	$1,680.00
1	423522 FR ProFile TY14 Quebec Suite License (1-4)	$325.00	$325.00

Required to activate your product:
Product Code:496-998 License Key:9059-8678-952[redacted]

AUTO-FILL MY RETURN

AutoFill My Return (AFR) is a secure Canada Revenue Agency (CRA) service that allows individuals and authorized representatives to automatically fill-in parts of a T1 return with information that the CRA has available at the time of filing the return. Many authorized representatives are already accessing CRA's online services to gather client information. AFR is the logical next step. By filling in key tax data, CRA's AFR simplifies the tax preparation process.

To use the AFR service, a tax preparer must:

- Register and be an approved electronic filer
- Register in CRA's *Represent a Client* and have a RepID, GroupID or business number (BN)
- Have a valid Form T1013 Authorization Form (described in Chapter 3) for each client

It is important to note that AFR service is not mandatory for EFILE certified software products. Some products include the service in their product, but others may not. ProFile falls in the former category and has full AFR functionality.

Summary of Tax Information that CRA delivers with AFMR

Information Slips

- T3, Statement of Trust Income Allocations and Designations
- T4, Statement of Remuneration Paid
- T4A, Statement of Pension, Retirement, Annuity, and Other Income
- T4A(OAS), Statement of Old Age Security
- T4A(P), Statement of Canada Pension Plan Benefits
- T4E, Statement of Employment Insurance and Other Benefits
- T4RIF, Statement of Income from a Registered Retirement Income Fund
- T5, Statement of Investment Income
- T5007, Statement of Benefits
- T5008, Statement of Securities Transactions
- RC62, Universal Child Care Benefit Statement
- RC210, Working Income Tax Benefit Advance Payments Statement
- Registered Retirement Savings Plan contribution receipt
- T1204, Government Service Contract Payments
- RENT ASSIST

- T4RSP, Statement of Registered Retirement Savings Plan Income

Other Tax-Related Information

- RRSP contribution limit
- Lifelong Learning Plan repayment amount
- Capital gains and losses
- Federal tuition, education, and textbook carryover amounts
- Home Buyers' Plan repayment amount
- Non-capital losses
- Capital gains deductions
- Provincial tuition, education, and textbook carryover amounts

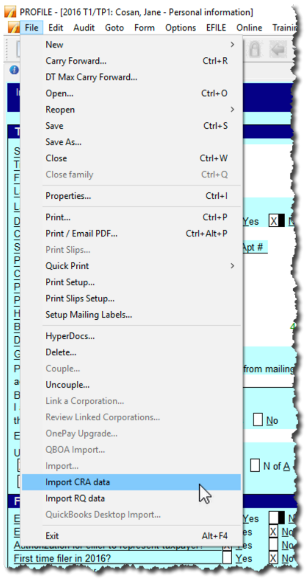
Client Data Enquiry (CDE)

- Home Buyers' Plan
- Social assistance or workers' compensation benefits
- Working income tax benefit advance payments (RC210)
- Reassessment information
- New balance owing message for prior claim(s) on a refund
- Current tax year return
- Insolvency, consumer proposal indicator
- Recent page access
- Lifelong Learning Plan
- Employment insurance and other benefits (T4E)
- Universal child care benefit (RC62)
- Balance owing
- No debt owing indicators
- Bankruptcy
- Other existing outstanding balances
- Federal tuition, education, and textbook carryforward
- Provincial tuition, education, and textbook carryforward
- Unfiled returns
- External refund set-off amounts
- Reassessment in progress
- CPP payments (T4A(P))
- Working income tax benefit
- Emigration Date
- Direct deposit indicators
- Disability tax credit eligibility
- Review
- Internal refund set-off notification
- T4A income
- Outstanding GST/HST returns
- Immigration Date
- EFILE ineligibility indicators
-

AFR Download

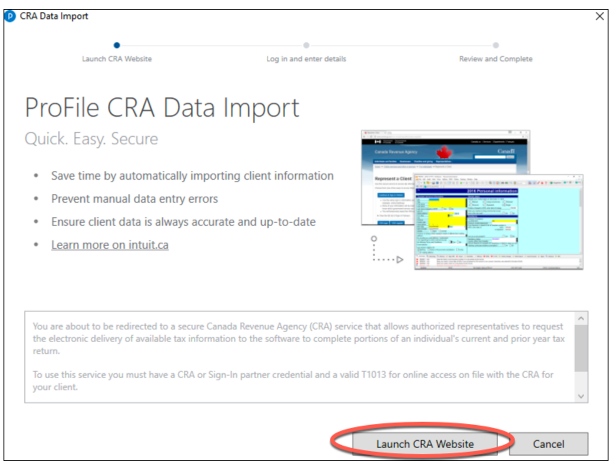
Before you file a tax return with the CRA using the information delivered by Auto-fill My Return, you must make sure that all the proper fields on the return are filled in and that the information provided is true and accurate.
If you notice a mistake on an information slip, contact the employer, payer, or administrator responsible for preparing that slip.
If you notice a mistake in the tax-related information, have an account-specific question about other tax-related information, or need additional information, call the individual income tax and trust enquiries line at 1-800-959-8281.

Using AutoFill My Return

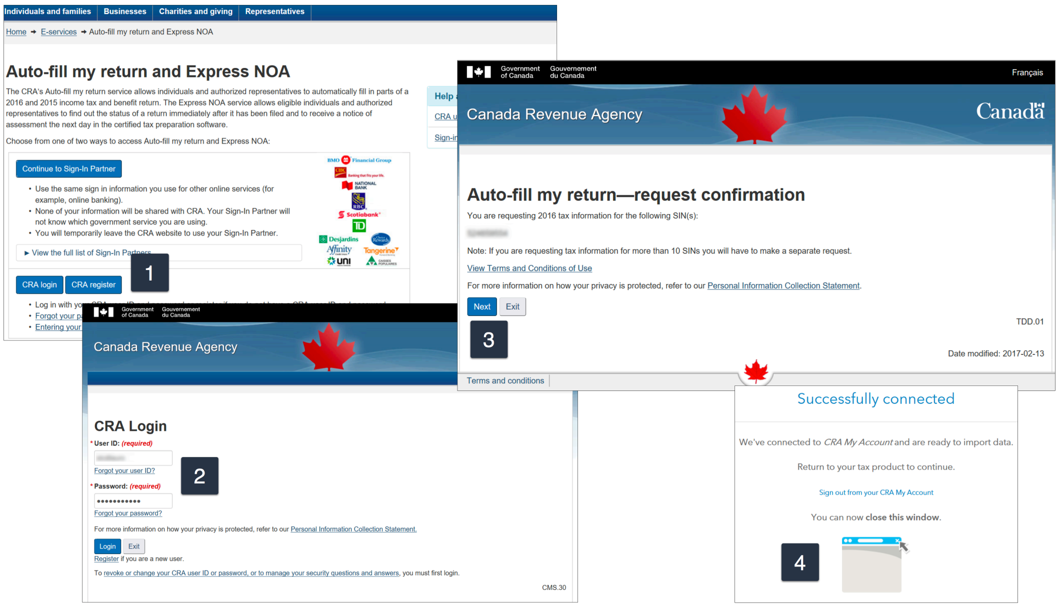


- With a client file open in ProFile, click *File>Import CRA Data*

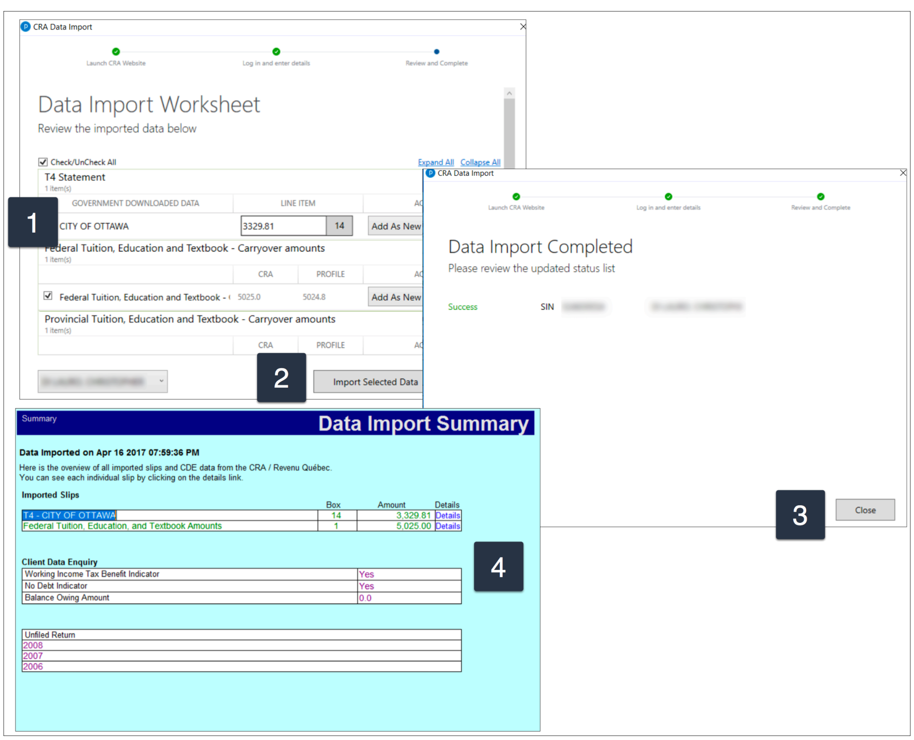
- Click *Launch CRA Website*



- ProFile will open a browser and take you to CRA's website
- Click CRA Login 1
- Enter your credentials 2
- Confirm CRA's request then click *Next* 3
- Close the window to return to ProFile 4



- Profile displays the Data Import Worksheet where you can accept or deselect the information to import into the tax file 1
- Click Import Selected Data 2
- Close the window that confirms the import is complete 3
- ProFile will list the imported information on the *Data Import Summary* form 4
- You have successfully used CRA's Autofill My Return



ALL ABOUT REFILE

If you are an EFILE service provider, you can use ReFILE to make changes to T1 that was previously filed with CRA. These online adjustments only apply for the 2015 and 2016 tax years.

Who can use ReFILE?

Preparers can use the ReFILE service if the following conditions apply:

- You have ProFile version 2016.4.3 or later (for tax year 2015 and 2016 ReFILE)
- You have T1013 level 2 authorization from your client
- The initial return was filed online (EFILE)
- The initial return was assessed
- You have acquired a new sign-off on a revised T183 from client

What does the ReFILE service exclude?

In addition to CRA's standard EFILE and Change My Return exclusions, you **cannot** use the ReFILE service if the taxpayer is:

- Subject to provincial or territorial income tax in more than one jurisdiction
- Waiting for either an initial Notice of Assessment or a Reassessment
- Amending an election or wants to make an election (for example, Form T2057, Election on disposition of property by a taxpayer to a taxable Canadian corporation)
- Applying for child and family benefits
- Allocating the refund, if applicable, to other CRA accounts
- Applying for the disability tax credit
- In the position of having been arbitrarily filed by CRA

In addition, you **cannot** use ReFILE to change page 1 of the taxpayer's T1 Income Tax and Benefit Return. Instead, individual taxpayers should use My Account to make changes to the following information:

- marital status
- address
- direct deposit
- email address

Service limitations

- The online system accepts only **nine** adjustments per tax year for each taxpayer, whether the taxpayer or you or CRA initiates the adjustments
- If you go over the limit, you will get an automated response saying the limit has been reached and explaining how to send a paper request
- Make additional requests on paper, preferably using Form T1-ADJ, T1 Adjustment Request, and mail them to the CRA

If you have any questions or concerns about the ReFILE service, contact CRA's EFILE Helpdesk at

Winnipeg Tax Centre
66 Stapon Road
Winnipeg MB R3C 3M2

Local and long distance calls:
1-800-461-1806
Fax: 204-984-5302

Sudbury Tax Centre
1050 Notre-Dame Avenue
Sudbury ON P3A 5C1
Local calls: 705-670-6499
Long distance calls: 1-800-361-6283
Fax: 705-670-6500 or 1-855-338-5495

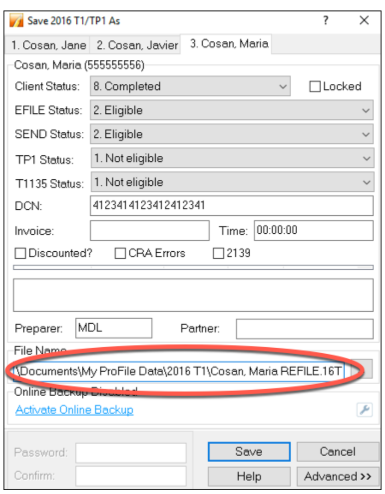
Jonquière Tax Centre
2251 René-Lévesque Blvd
Jonquière QC G7S 5J2
Local and long distance calls:
1-855-699-4640
Fax: 418-699-0203 or 1-800-497-5806

Using ReFILE

Before attempting to ReFILE a return, verify that you have a valid T1013 form—with level 2 authorization—on file with CRA. If CRA already has the authorization information on file another filing of the T1013 is not required.

To ReFILE a return

- Open a T1 return that has already been EFILED and for which a CRA Notice of 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



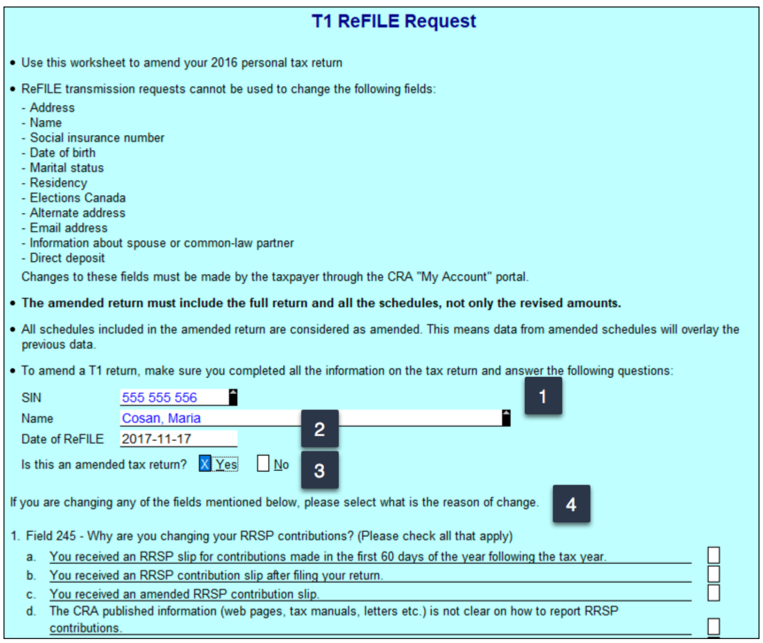
- In the tax file, enter the new information that mandates a ReFILE. If, for example, a client has received an unexpected T4, then enter that new information on ProFile's *T4 Slip*

- After making the necessary changes to the tax file, press *F4* to open *Form Explorer* and, in the Search field, enter *T1ReFILE*
- Ensure the client information (SIN and Name) is correct in their respective fields 1
- Enter the current date in the Date of ReFILE field 2
- Select the *Yes* option in the "Is this an amended tax return?" field: 3

Note: failing to select the "yes" option will produce an error when attempting to ReFILE.

- Answer the subsequent questions in the form 4

Note: these questions are not mandatory and preparers are not required to provide answers. Any notices related to these questions may be ignored.



T1 ReFILE Request

- Use this worksheet to amend your 2016 personal tax return
- ReFILE transmission requests cannot be used to change the following fields:
  - Address
  - Name
  - Social insurance number
  - Date of birth
  - Marital status
  - Residency
  - Elections Canada
  - Alternate address
  - Email address
  - Information about spouse or common-law partner
  - Direct deposit

  Changes to these fields must be made by the taxpayer through the CRA "My Account" portal.
- **The amended return must include the full return and all the schedules, not only the revised amounts.**
- All schedules included in the amended return are considered as amended. This means data from amended schedules will overlay the previous data.
- To amend a T1 return, make sure you completed all the information on the tax return and answer the following questions:

SIN 555 555 556 1

Name Cosan, Maria 2

Date of ReFILE 2017-11-17

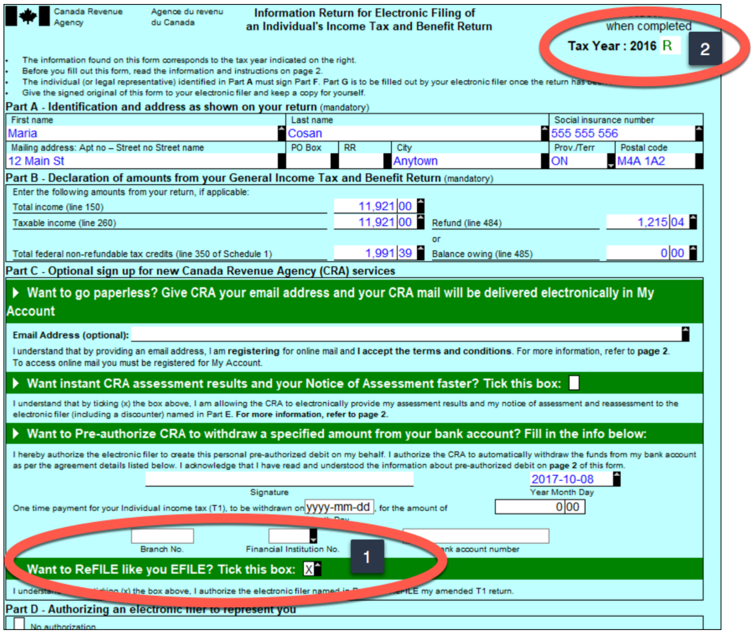
Is this an amended tax return? X Yes No 3

If you are changing any of the fields mentioned below, please select what is the reason of change. 4

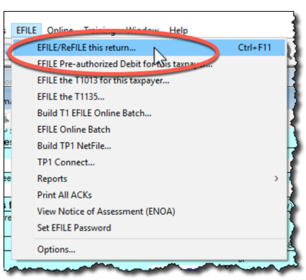
1. Field 245 - Why are you changing your RRSP contributions? (Please check all that apply)
   a. You received an RRSP slip for contributions made in the first 60 days of the year following the tax year.
   b. You received an RRSP contribution slip after filing your return.
   c. You received an amended RRSP contribution slip.
   d. The CRA published information (web pages, tax manuals, letters etc.) is not clear on how to report RRSP contributions.

Before completing the submission, you must update the T183 Form (as described in Chapter 4).

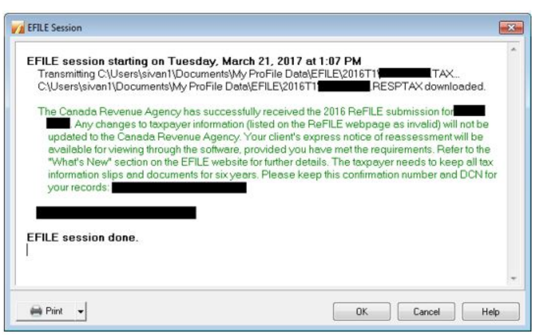
- Open the T183 used for the initial EFILE of the return:



- Tick the checkbox that asks *Want to ReFILE like you EFILE?* Note that this checkbox displays only for tax year 2016 and later 1
- A letter "R" now displays in the Tax Year field indicating the form was referenced for the ReFILE 2 This new designation is permanent and cannot be rescinded from the form
- Acquire a new sign-off from the client on the updated T183 form prior to your ReFILE attempt
- After the client signs the updated T183, click *EFILE/ReFILE this return…*

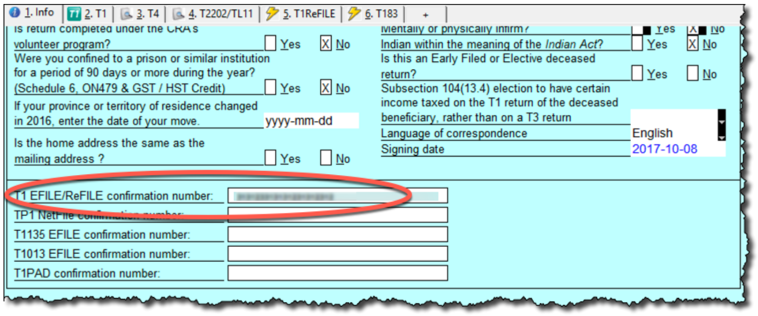


- After the ReFILE process is successfully completed, ProFile will display a confirmation window

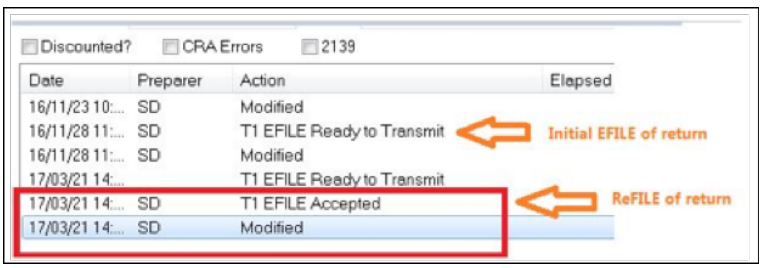


Confirming the ReFILE submission

ProFile enters the ReFILE confirmation number on the *Info* form to the return. It matches the number displayed in the ReFILE confirmation message.



- You can also confirm the history of the submission by selecting *Properties* option under the *File* menu
- Review the history of the return; the ReFILE displays as an "EFILE" with the date of the ReFILE displayed in the "Date" field



Client Communication

Gathering and disseminating client information used to be straightforward. When paper was the only option, clients would stop by the tax preparer's office to drop off their documents, and come back later to pick up their completed tax returns.

Now, thanks to online tools, clients rarely visit their tax preparer's office, oftentimes preferring to email their documents. Email, though, comes with two inherent risks—privacy and efficiency. The fact is that regular email is a bad idea for sending private and sensitive data. In addition, controlling the influx of emailed attachments, especially during a very busy tax season, can lead to lost or misplaced documents, and erroneous or incomplete tax returns.

What tax preparers need, then, is a safe and efficient method for sending information to and requesting documents from their clients. And now, with Hub and Link, ProFile has that very thing built in.

Introducing Hub & Link

Hub is a document-management dashboard that helps you access customer information quickly and seamlessly. Hub works effortlessly with Link, a user-friendly online portal that lets you collaborate more effectively with your clients to gather their information. Together, Intuit Hub & Link will streamline document management in ProFile.

Link makes data collection a breeze. As described in the paragraphs below, Link lets you simplify client data collection, invite clients to collaborate, create customized client requests and track the status of all your requests.

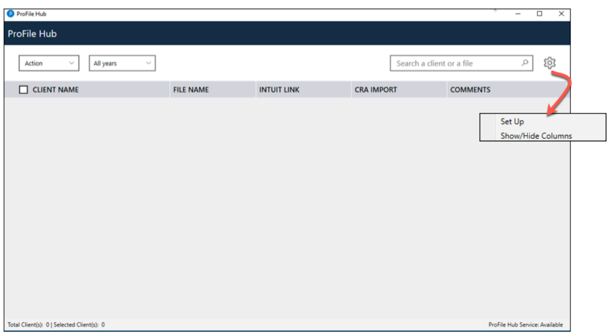
Once logged-in, you are ready to use Hub and Link, ProFile's latest online tools that make client communication a breeze.

Using Hub

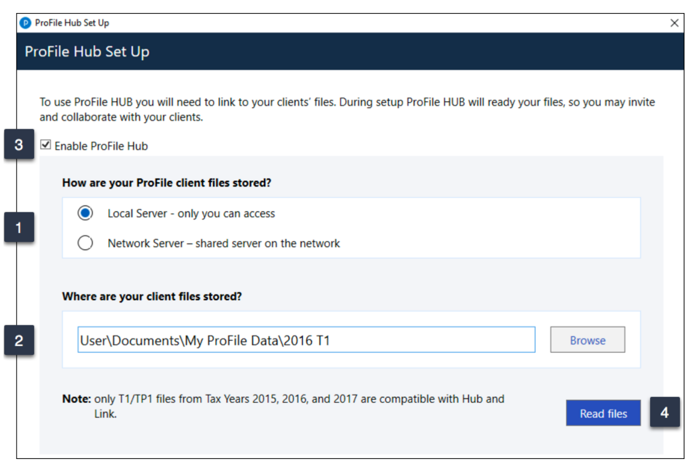
Hub is a dashboard within ProFile that gives you a bird's eye view of your client documents and information. You can access client contact information, check the status of a return and review any notes that may have been added.
Within Hub you have access to document management sources, such as Link, to help you gather information from your clients in one secure place.
And now, CRA's Auto-fill my return is available through Hub.

To launch Hub:

- Click *Go to* and select *Hub*
- Click the *Gear* icon and choose *Set Up*

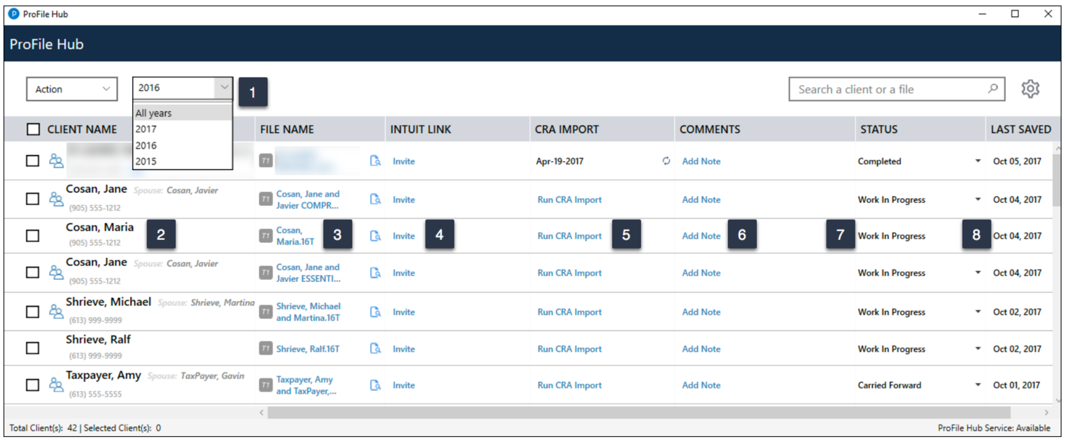


- Confirm whether your files are on a local drive or network server 1
- Indicate the file location 2
- Click the *Enable ProFile Hub* checkbox 3
- Click *Read Files* and ProFile will then index your tax files 4



The Hub window, below, provides at-a-glance information for all your client tax files, including:

- A dropdown window to filter tax years 1
- Client name column with phone numbers readily displayed 2
- Clickable file-name column for opening tax files 3
- Intuit Link column (discussed later) 4
- CRA Import column that displays the date of the import or the ability to import from CRA 5
- A comments column for recording notes 6
- Status column 7
- Date the tax file was last saved 8

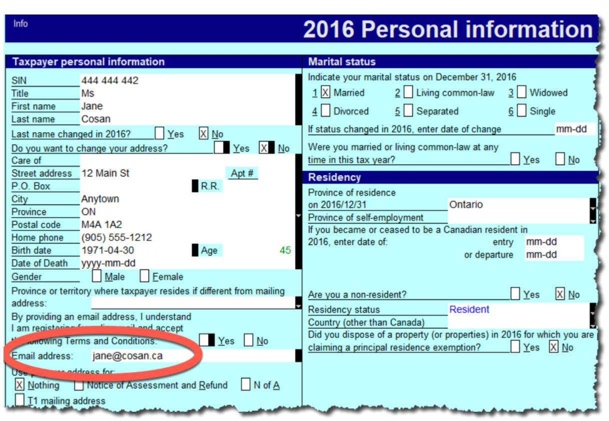


Using Link

Link is ProFile's online portal that opens a communication channel to your clients. With Link, you can personalize and electronically send client documentation such as questionnaires and checklists. With Link, your clients can also send you their tax data in a timely and organized way. And with Link, you can personalize—with your own logos—the documents you send to your clients.

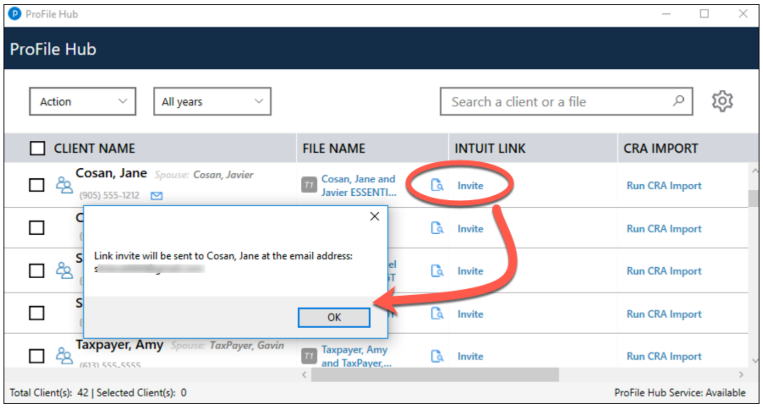
Inviting your clients

For all this to work, it's important to enter, on the Personal Information page, a valid email addresses for your clients.

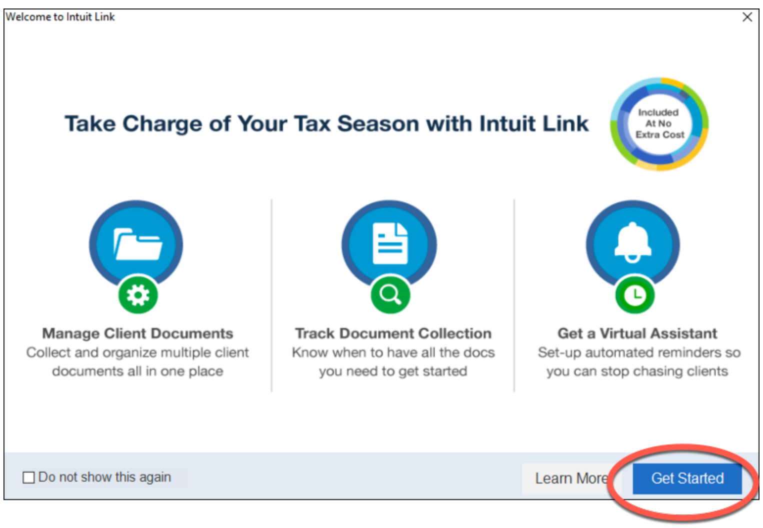


To launch Link:

- From Hub, click *Invite,* next to the desired client
- Confirm the email address, and click *OK*

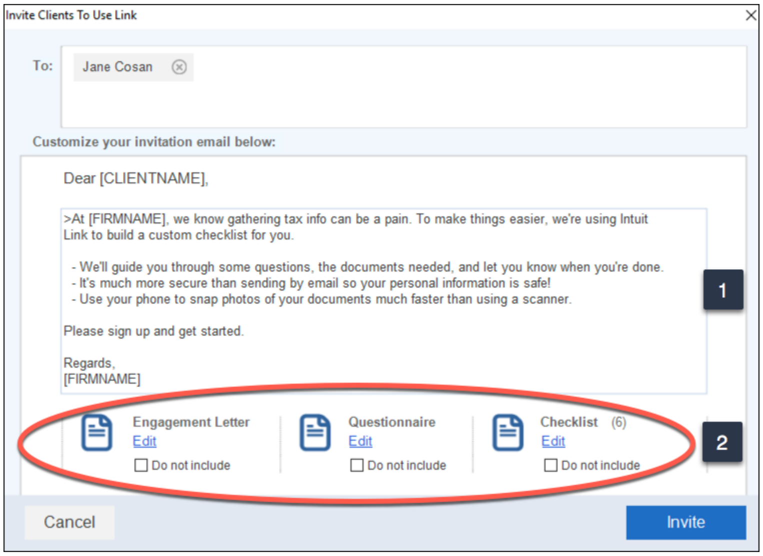


Click *Get Started* in the splash screen that opens



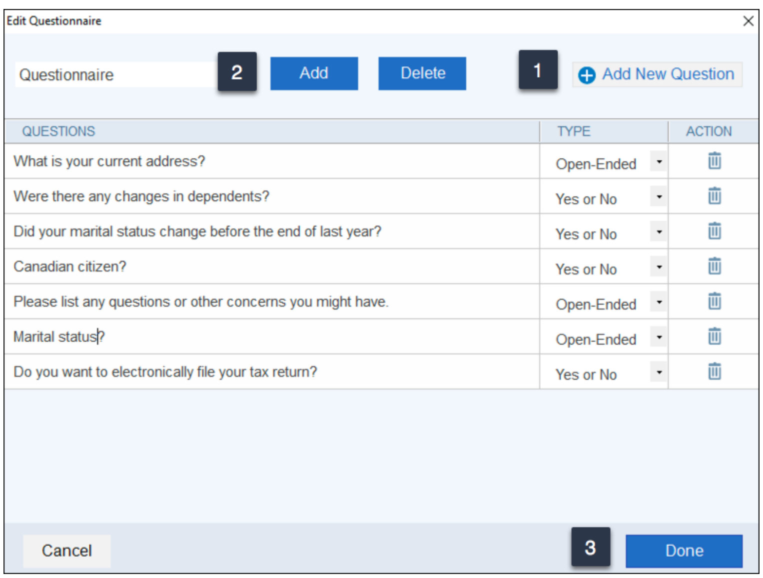
From the window below, you can choose to:

- Edit the invitation email that your client will see [1]
- View, edit or select to send ProFile's default Engagement Letter, Questionnaire and Checklist [2]



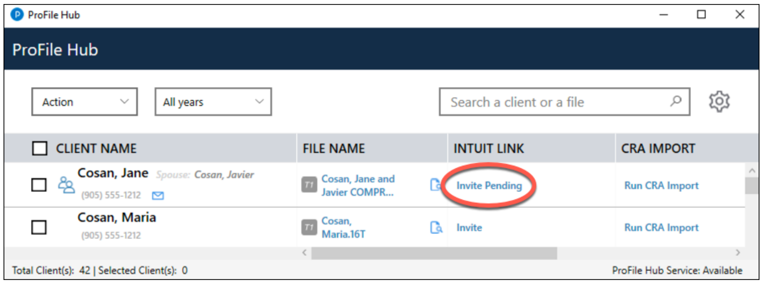
To modify the default questionnaire template, in the window above, click *Edit:*

- Click *Add New Question* to insert a question in a new row [1]
- Click *Add* to create your own document [2]
- Click *Done* to return to the invitation window [3]
- Then, from the invitation window (above), click *Invite* to send the selected documents to your client



Meanwhile back at Hub

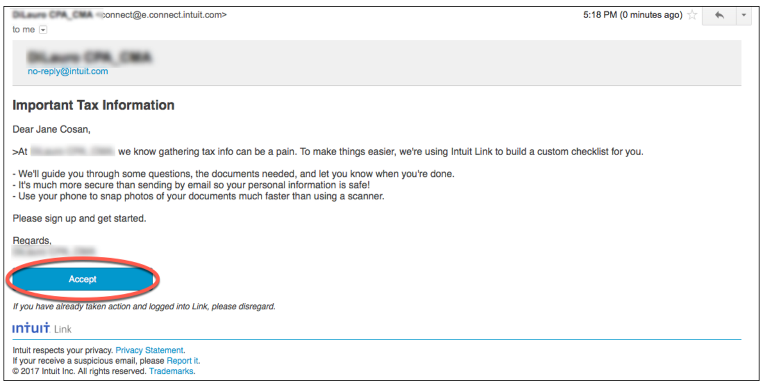
A return visit to Hub reveals an *Invite Pending* status for that client, thereby keeping you up to date with all your client requests.



What your client sees

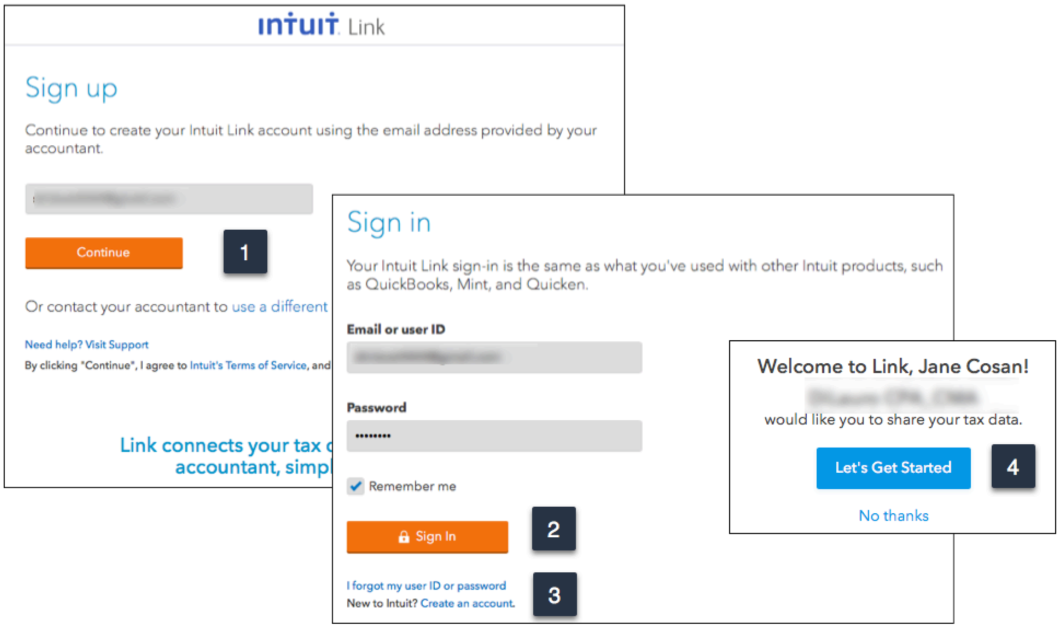
Here is the email your client receives.

- Your client launches Link by clicking on *Accept.*



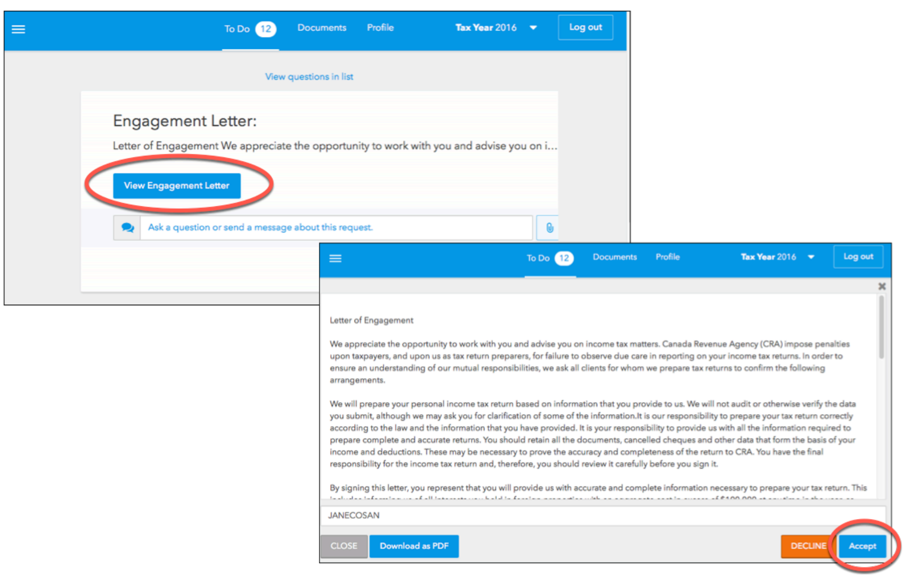
After your client clicks *Accept* in the window above:

- Link opens a *Sign up* page where your client clicks on *Continue* 1
- If your client has an Intuit account (QuickBooks or Mint, for example), she can use that account's ID and password 2
- If your client has no Intuit account, she can set one up by clicking Create Account 3
- You client then clicks *Get Started* 4

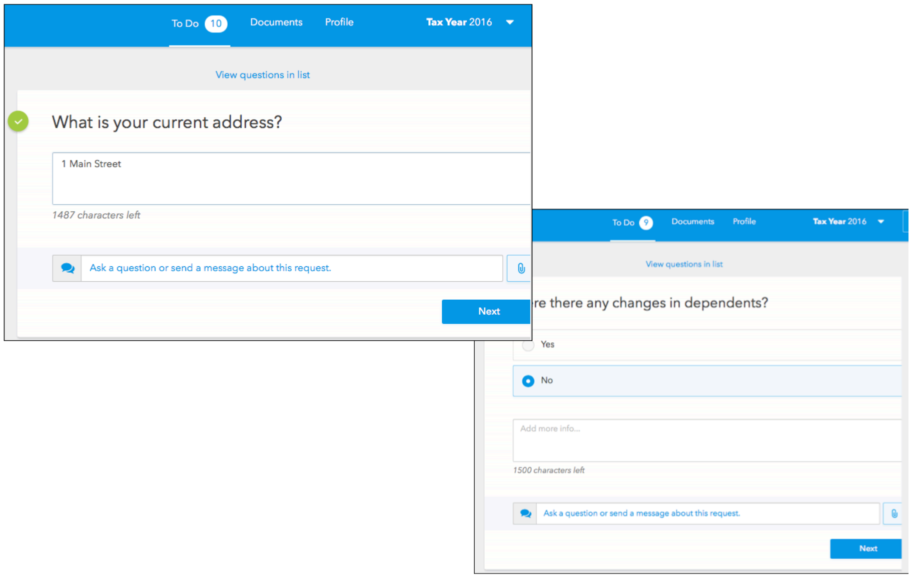


You client now only needs to scroll through the documents and answer the questions that you sent.

- For example, your client can view your Engagement Letter
- And then accept it with just a click

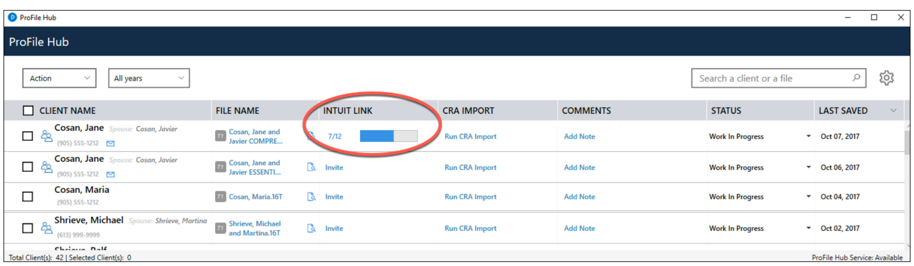


- Your client then cycles through and responds to your questionnaire

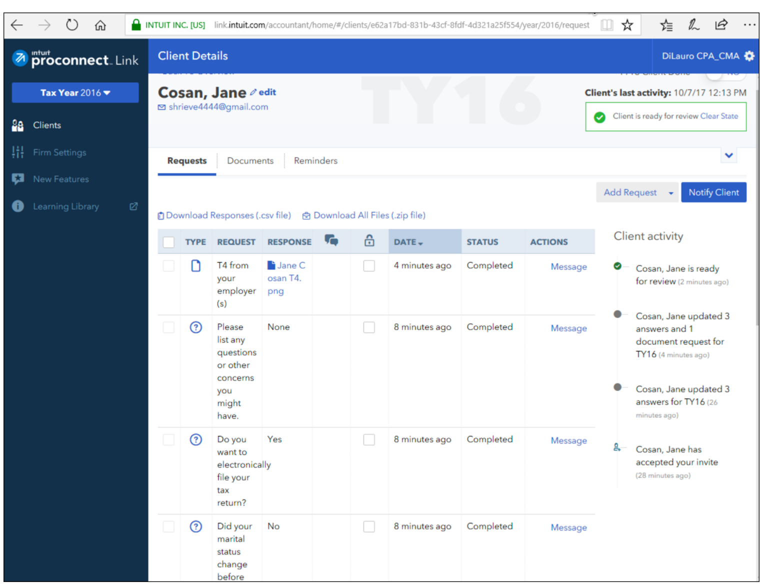


And all the while…

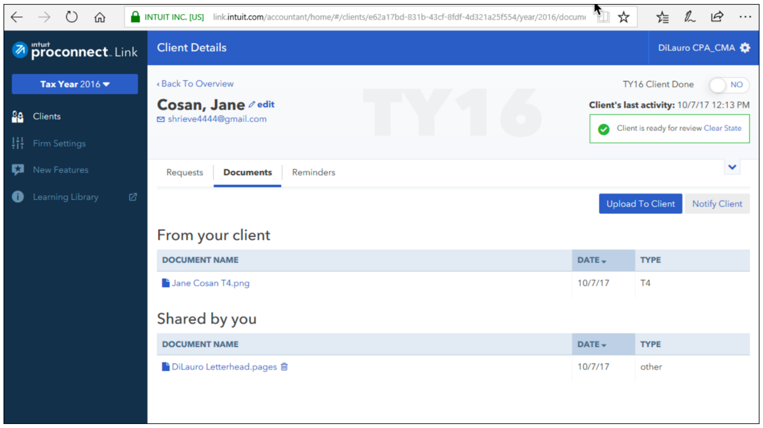
- Hub keeps track of your client's Link status and updates you with the number of addressed questions and accepted documents



- Plus, when you click on the progress number in the Intuit Link column, Link takes you to its online portal where you can view responses and access your client's submitted documents

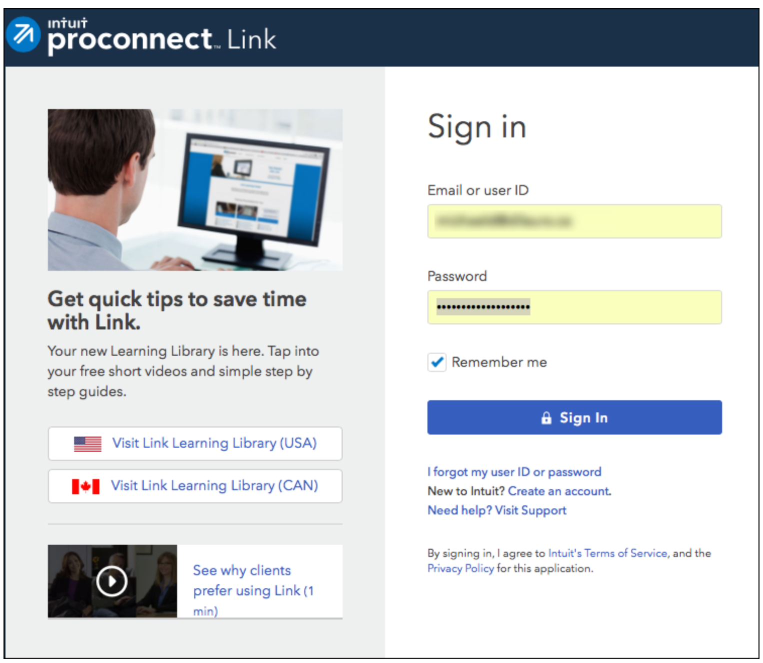


- Click the *Documents* tab (window below) to view both sent and received documents
- Send your client additional documents by clicking on *Upload to Client*
- And click *Notify Client* to let them know that your submitted documents are waiting for them in Link

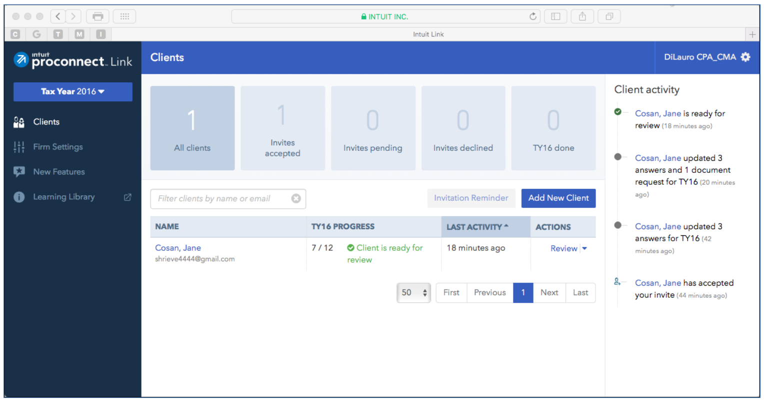


One more thing

You can log into Link from any browser by visiting http://link.intuit.com/accountant



- Once logged in you can view and deal with all your client correspondence


INTUIT INC.
Intuit Link
intuit proconnect. Link
Tax Year 2016
Clients
Firm Settings
New Features
Learning Library
Clients
DiLauro CPA_CMA
1
All clients
1
Invites accepted
0
Invites pending
0
Invites declined
0
TY16 done
Filter clients by name or email
Invitation Reminder
Add New Client
NAME
TY16 PROGRESS
LAST ACTIVITY
ACTIONS
Cosan, Jane
shrieve4444@gmail.com
7 / 12
Client is ready for review
18 minutes ago
Review
50
First
Previous
1
Next
Last
Client activity
Cosan, Jane is ready for review (18 minutes ago)
Cosan, Jane updated 3 answers and 1 document request for TY16 (20 minutes ago)
Cosan, Jane updated 3 answers for TY16 (42 minutes ago)
Cosan, Jane has accepted your invite (44 minutes ago)

Chapter 6 Quiz

Question 1: ProFile features a number of Online tools. These tools include:

A. Hub and Link
B. ProFile Review
C. Online backup
D. All the above

Question 2: ProFile's toolbars include a dedicated set of icons for accessing online features

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Question 3: The four online icons are:

E. Chat, Notifications, Online Settings, and Review
F. Chat, Explorer, Review and Bridge
G. Run, Synchronize, Archive and Bridge
H. None of the above

Question 4: True or False: You can use ProFile Review to view T1 returns online

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Question 5: True or False: With ProFile you can use CRA's AutoFill My Return to download tax amounts to a T1 file

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Question 6: To use CRA's AutoFill My Return, you must:

I. Register to become an approved electronic filer
J. Register in CRA's *Represent a Client* program and have current and valid credentials
K. Have a signed T1013 Authorization form for each client
L. All the above

Question 7: True or False: With AutoFill My Return, ProFile will be able to autofill all tax data including RRSP contributions, medical expenses and charitable donations

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Question 8: True or False: ReFile is a CRA service that lets you make adjustments to the same T1 return an unlimited number of times

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Question 9: What are the ReFile service limits:

M. You cannot change information such as marital status, address or direct deposit information
N. T1 ReFile lets adjust the same tax return up to nine times
O. You must make additional adjustments by paper-filing a T1-ADJ
P. All the above

Question 10: True or False: Before ReFiling a T1 on behalf of a client, you must first obtain an updated and signed T183
