



INTUIT PROFILE – 2017/18 TRAINING GUIDE

Learning about Taxes with Intuit ProFile

Chapter 6: An Online World

Copyright

Copyright 2018 Intuit, Inc.
All rights reserved.

Intuit, Inc.
5100 Spectrum Way,
Mississauga, ON L4W 5S2

Trademarks

©2018 Intuit Inc. All rights reserved. Intuit, the Intuit logo, Intuit ProFile, ProAdvisor, and QuickBooks, among others, are trademarks or registered trademarks of Intuit, Inc. in Canada and other countries. Other parties' marks are the property of their respective owners.

Notice to Readers

The publications distributed by Intuit Inc. are intended to assist educators by providing current and accurate information. However, no assurance is given that the information is comprehensive in its coverage or that it is suitable in dealing with a particular situation. Accordingly, the information provided should not be relied upon as a substitute for independent research. Intuit Inc. does not render any accounting, legal, or other professional advice nor does it have any responsibility for updating or revising any information presented herein. Intuit Inc. cannot warrant that the material contained herein will continue to be accurate or that it is completely free of errors when published. Readers should verify information before relying on them.

The material in this publication is provided for informational purposes only. Laws, regulations, policy and procedures regarding this subject are continuously changing and the information and examples are intended as general guidelines only. This publication is sold with the understanding that neither the publisher nor the author are engaged in rendering professional advice and it is recommended that such advice be obtained before acting on any information herein.

Users of this publication are responsible for *their own actions and outcomes*. *The publishers and author therefore expressly disclaim all and any liability to any person* in respect of anything and any consequence. Any examples in this book are factitious and any resemblances to actual people or circumstances are purely coincidental.

Table of Contents

About the Author	2
Additional Resources	3
Introduction.....	4
Benefits of Using ProFile.....	5
Chapter 6: An Online World	6
Chapter 6 Learning Objectives	6
Getting Online.....	6
Auto-Fill My Return	10
All About ReFILE.....	14
Client Communication	18
Chapter 6 Quiz	28

About the Author

Michael Di Lauro, CPA CMA, *Hein & Associates CPAs*



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

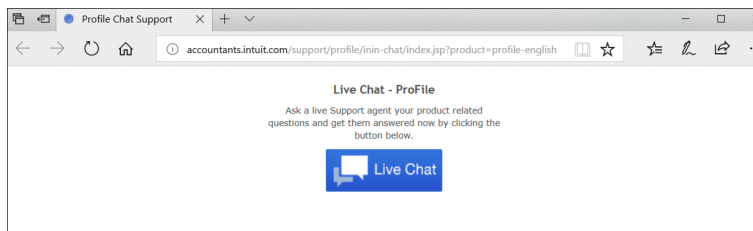
The online toolbar

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

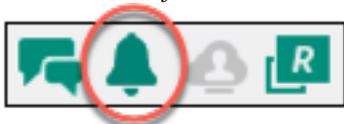
- Click the *Live Chat* icon...



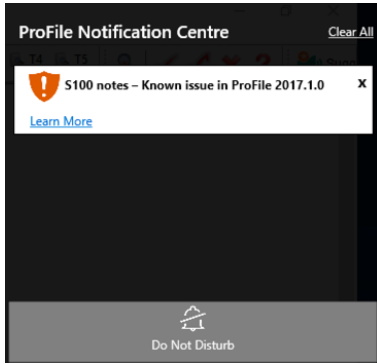
... To engage a ProFile support agent and chat online



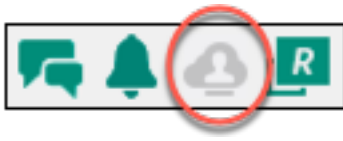
Click the *Notification Centre*...



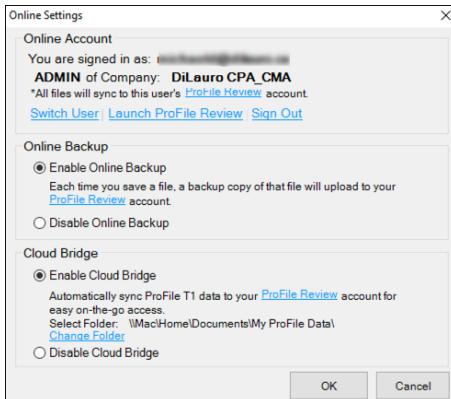
...To view alerts, reminders and other ProFile messages



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



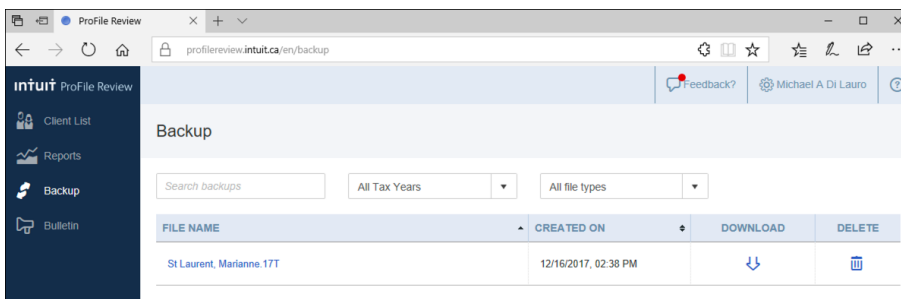
- ...Including features for online access and backup of your tax files



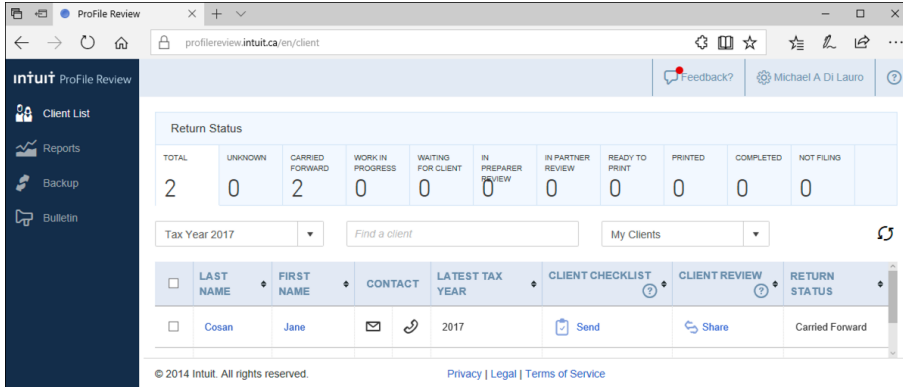
- Click the *Review* icon...



- ... To access and download your backups...



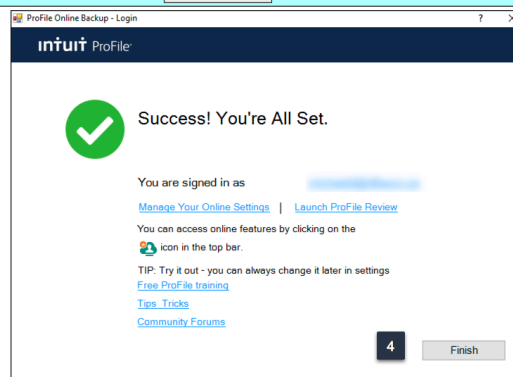
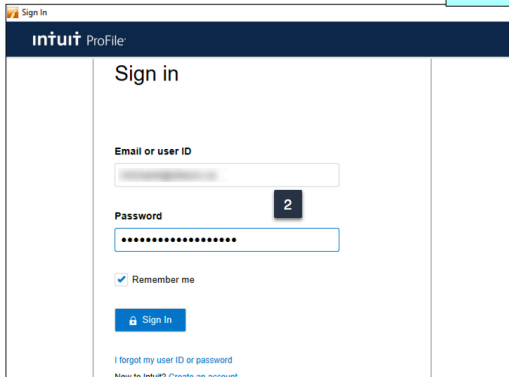
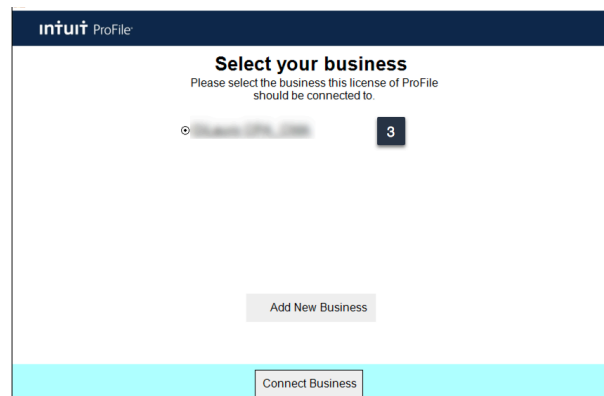
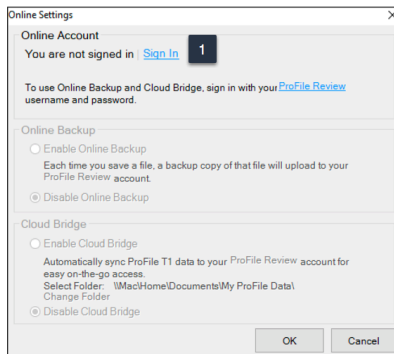
- ...And also to view your tax files online



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

The screenshot shows two overlapping windows. The top window, titled 'Online Settings', has a 'Sign In' button (1) and a 'Create an account' link (2). The bottom window, titled 'intuit ProFile', has a 'Sign in' section with 'Email or user ID' (3) and 'Password' (4) fields, and a 'Create your company' section with 'Email', 'Company Name', and 'Order/Service Number*' fields. A 'Create company' button is at the bottom of the 'Create your company' section. A red circle highlights the 'Create an account' link in the bottom window.

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.

Item	Quantity	Unit Price	Total Price
ProFile Québec Tax Suite License (1-4)	1	\$325.00	\$325.00

Required to activate your product(s):
Product Code: 496-998
License Key: 5612018834 [REDACTED]

Sub-total: \$2,355.00

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	\$1,680.00	\$1,680.00
FR PROFILE TY14 QUEBEC SUITE			
1	423522	\$325.00	\$325.00
FR ProFile TY14 Quebec Suite License (1-4)			
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
-

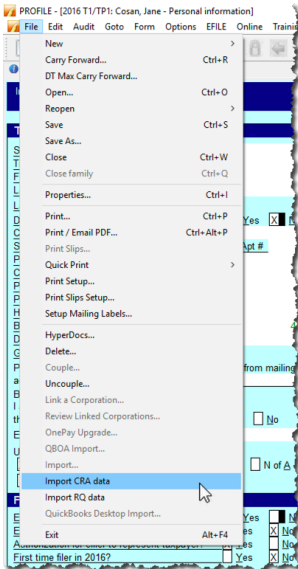
AFR Download

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.

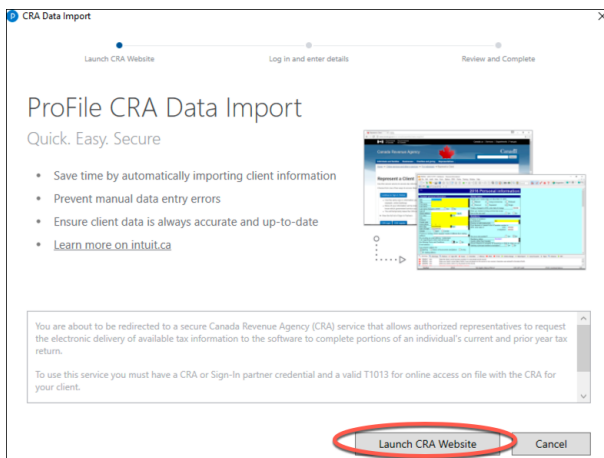
If you notice a mistake in the tax-related information, have an account-specific question about other tax-related information, or need additional information, call the individual income tax and trust enquiries line at 1-800-959-8281.

Using AutoFill My Return

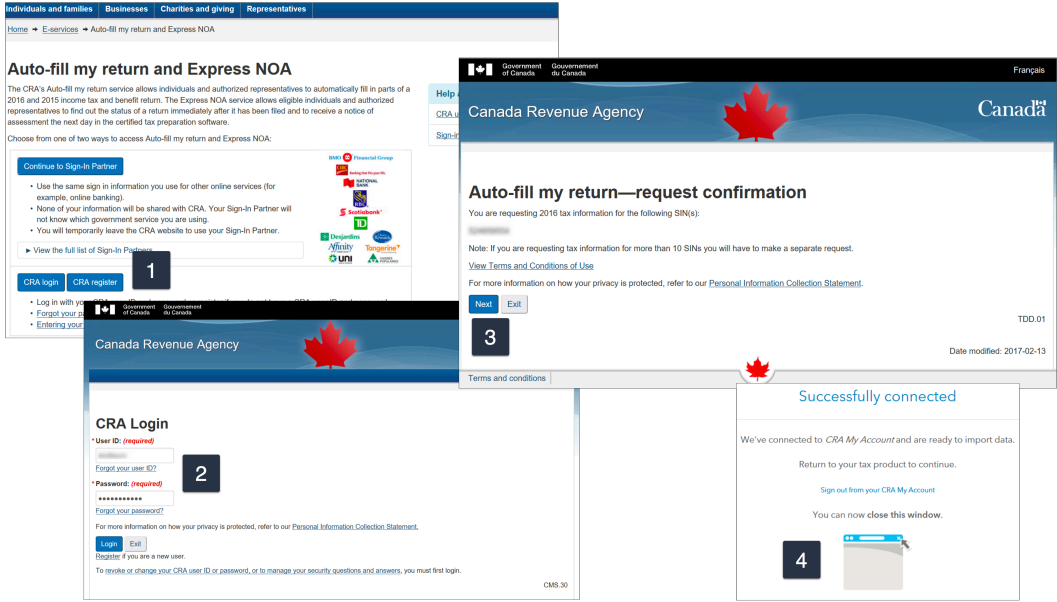


- With a client file open in ProFile, click *File>Import CRA Data*

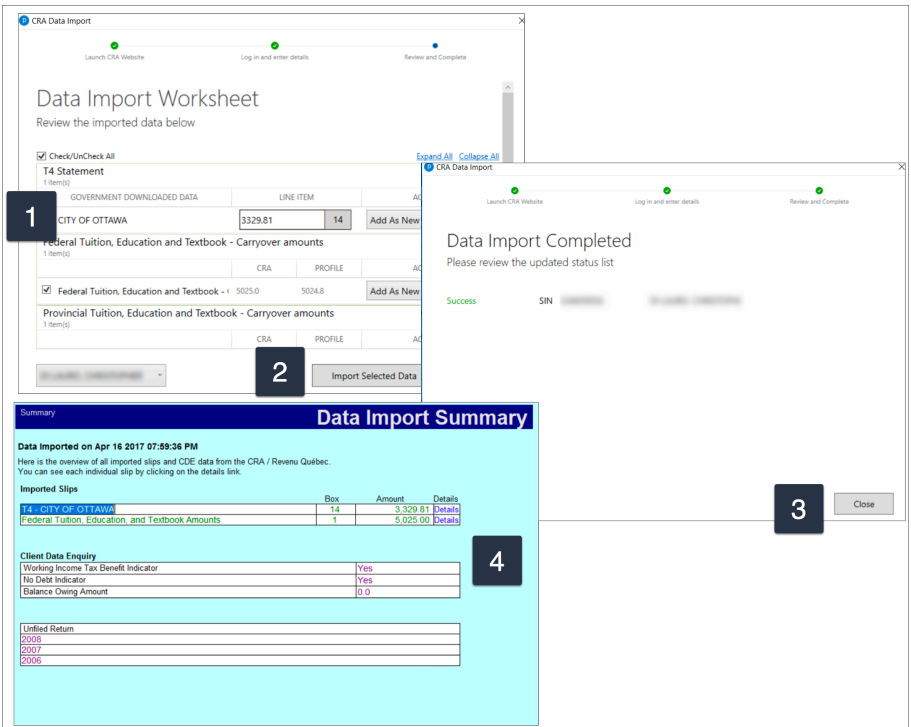
- Click *Launch CRA Website*



- 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

Save 2016 T1/TP1 As

1. Cosan, Jane 2. Cosan, Javier 3. Cosan, Maria
Cosan, Maria (555555556)

Client Status: 8 Completed Locked

EFILE Status: 2 Eligible

SEND Status: 2 Eligible

TP1 Status: 1 Not eligible

T1135 Status: 1 Not eligible

DCN: 4123414123412412341

Invoice: Time: 00:00:00

Discounted? CRA Errors 2139

Preparer: MDL Partner:

File Name: (Documents\My ProFile Data\2016 T1\Cosan, Maria REFILE.16T)

Online Backup: [Activate Online Backup](#)

Password: Save Cancel
Confirm: Help Advanced >>

- 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 **1**

Name **2**

Date of ReFILE **2**

Is this an amended tax return? 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:

Canada Revenue Agency / Agence du revenu du Canada

Information Return for Electronic Filing of an Individual's Income Tax and Benefit Return

when completed
Tax Year : 2016 R 2

Part A - Identification and address as shown on your return (mandatory)

First name: Maria, Last name: Cosan, Social insurance number: 555 555 556
 Mailing address: 12 Main St, PO Box: RR, City: Anytown, Prov./Terr: ON, Postal code: M4A 1A2

Part B - Declaration of amounts from your General Income Tax and Benefit Return (mandatory)

Total income (line 150): 11,921.00
 Taxable income (line 290): 11,921.00
 Refund (line 484): 1,215.04
 Total federal non-refundable tax credits (line 350 of Schedule 1): 1,991.39
 Balance owing (line 495): 0.00

Part C - Optional sign up for new Canada Revenue Agency (CRA) services

Want to go paperless? Give CRA your email address and your CRA mail will be delivered electronically in My Account

Want instant CRA assessment results and your Notice of Assessment faster? Tick this box:

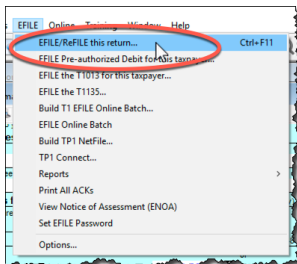
Want to Pre-authorize CRA to withdraw a specified amount from your bank account? Fill in the info below:

Signature: [Signature], Year Month Day: 2017-10-08
 One time payment for your Individual income tax (T1), to be withdrawn on [yyyy-mm-dd] for the amount of 0.00

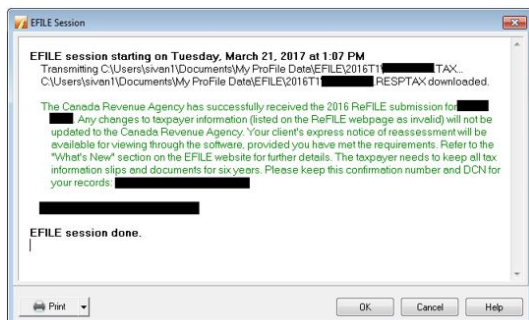
Want to ReFILE like you EFILE? Tick this box:

Part D - Authorizing an electronic tier to represent you

- 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.

The screenshot shows the 'Info' form in ProFile. The 'T1 EFILE/ReFILE confirmation number' field is highlighted with a red oval. Other fields include 'TP1 Net file confirmation number', 'T1135 EFILE confirmation number', 'T1013 EFILE confirmation number', and 'T1PAD confirmation number'. The form also contains various tax-related questions and checkboxes.

- 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

The screenshot shows the 'Properties' dialog box in ProFile. The 'Date' field is highlighted with a red box, and the 'Action' field is highlighted with a red box. Arrows point to the 'Initial EFILE of return' and 'ReFILE of return' labels.

Date	Preparer	Action	Elapsed
16/11/23 10:...	SD	Modified	
16/11/28 11:...	SD	T1 EFILE Ready to Transmit	Initial EFILE of return
16/11/28 11:...	SD	Modified	
17/03/21 14:...	SD	T1 EFILE Ready to Transmit	
17/03/21 14:...	SD	T1 EFILE Accepted	ReFILE of return
17/03/21 14:...	SD	Modified	

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

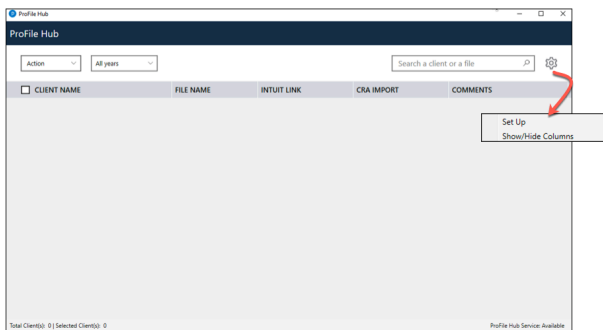
Hub is a dashboard within ProFile that gives you a bird's eye view of your client documents and information. You can access client contact information, check the status of a return and review any notes that may have been added.

Within Hub you have access to document management sources, such as Link, to help you gather information from your clients in one secure place.

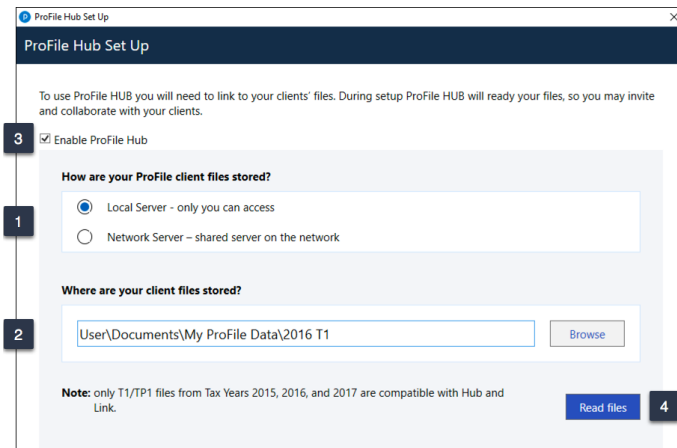
And now, CRA's Auto-fill my return is available through Hub.

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**

CLIENT NAME	FILE NAME	INTUIT LINK	CRA IMPORT	COMMENTS	STATUS	LAST SAVED
1 [Dropdown: 2016, All years, 2017, 2016, 2015]	[Redacted]	Invite	Apr-19-2017	Add Note	Completed	Oct 05, 2017
Cosan, Jane (905) 555-1212	Cosan, Jane and Javier COMPR...	Invite	Run CRA Import	Add Note	Work In Progress	Oct 04, 2017
Cosan, Maria (905) 555-1212 2	Cosan, Maria.16T 3	Invite 4	Run CRA Import 5	Add Note 6	Work In Progress 7	Oct 04, 2017 8
Cosan, Jane (905) 555-1212	Cosan, Jane and Javier ESSENTL...	Invite	Run CRA Import	Add Note	Work In Progress	Oct 04, 2017
Shrieve, Michael (613) 999-9999	Shrieve, Michael and Martina.16T	Invite	Run CRA Import	Add Note	Work In Progress	Oct 02, 2017
Shrieve, Ralf (613) 999-9999	Shrieve, Ralf.16T	Invite	Run CRA Import	Add Note	Work In Progress	Oct 02, 2017
Taxpayer, Amy (613) 555-5555	Taxpayer, Amy and TaxPayer...	Invite	Run CRA Import	Add Note	Carried Forward	Oct 01, 2017

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.

2016 Personal information

Taxpayer personal information

SIN: 444 444 442
 Title: Ms
 First name: Jane
 Last name: Cosan
 Last name changed in 2016? Yes No
 Do you want to change your address? Yes No
 Care of: Yes No
 Street address: 12 Main St
 P.O. Box: Yes No
 City: Anytown
 Province: ON
 Postal code: M4A 1A2
 Home phone: (905) 555-1212
 Birth date: 1971-04-30
 Date of Death: yyyy-mm-dd
 Gender: Male Female
 Province or territory where taxpayer resides if different from mailing address: Yes No
 By providing an email address, I understand I am responsible for providing and accepting the Terms and Conditions. Yes No
 Email address: jane@cosan.ca

Marital status

Indicate your marital status on December 31, 2016
 1 Married 2 Living common-law 3 Widowed
 4 Divorced 5 Separated 6 Single
 If status changed in 2016, enter date of change mm-dd

Were you married or living common-law at any time in this tax year? Yes No

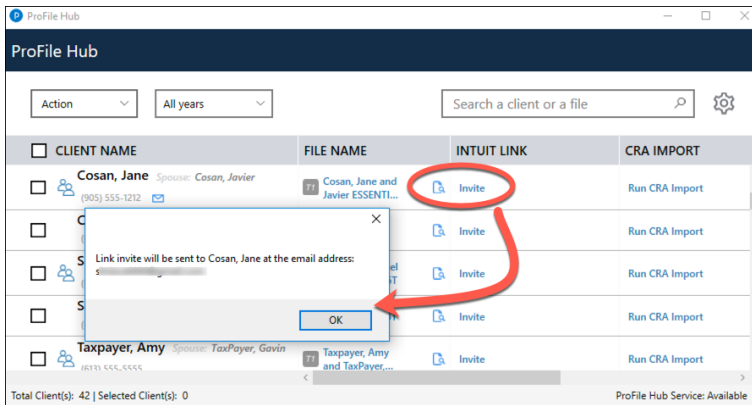
Residency

Province of residence on 2016/12/31: Ontario
 Province of self-employment: Yes No
 If you became or ceased to be a Canadian resident in 2016, enter date of entry or departure mm-dd

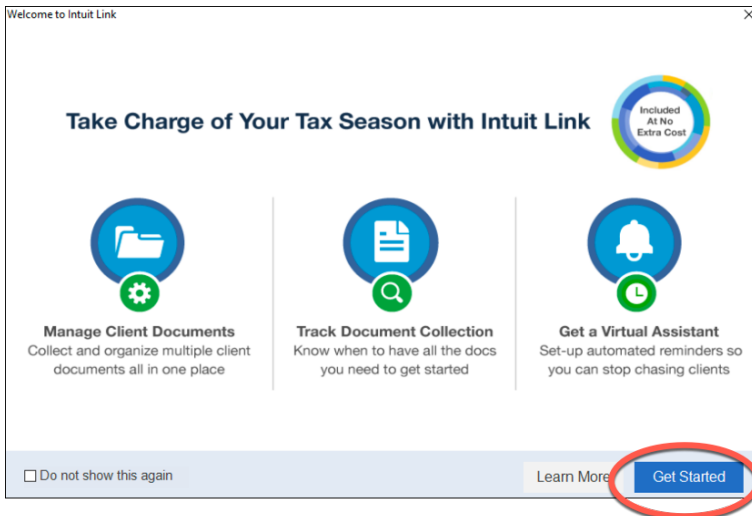
Are you a non-resident? Yes No
 Residency status: Resident
 Country (other than Canada): Yes No
 Did you dispose of a property (or properties) in 2016 for which you are claiming a principal residence exemption? Yes No

To launch Link:

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

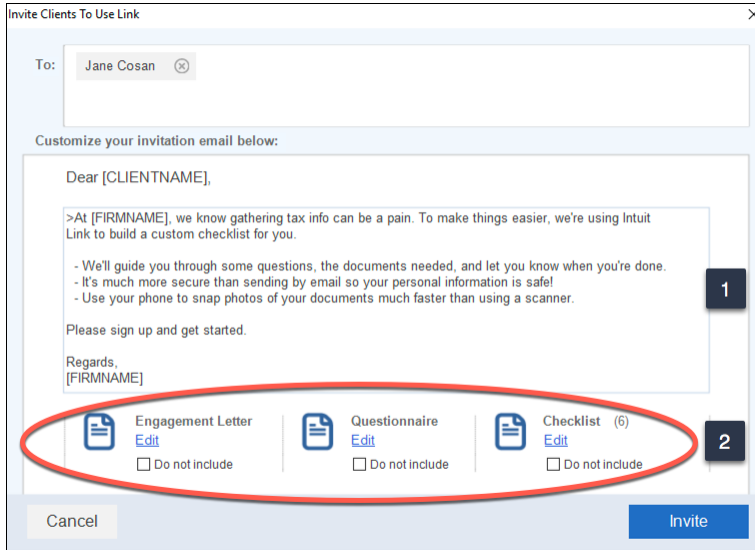


Click *Get Started* in the splash screen that opens



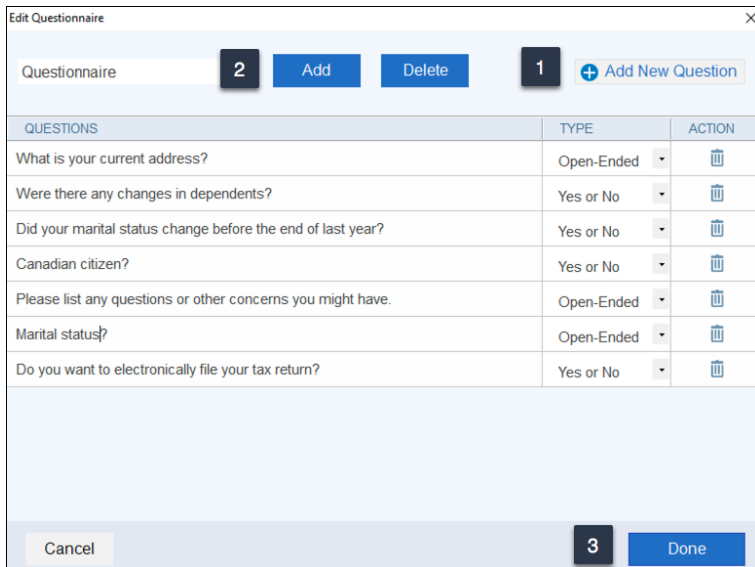
From the window below, you can choose to:

- 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.

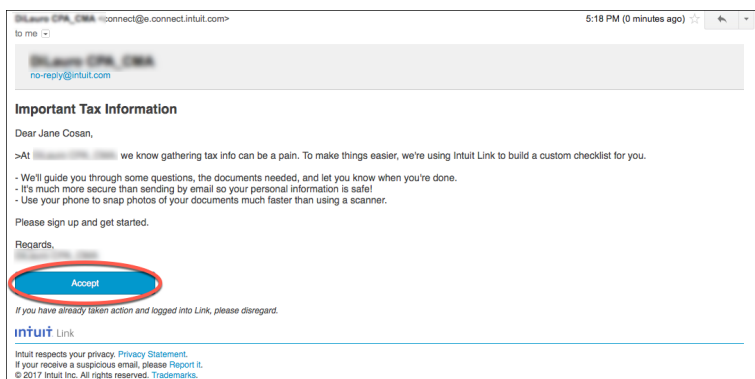
CLIENT NAME	FILE NAME	INTUIT LINK	CRA IMPORT
<input type="checkbox"/> Cosan, Jane Spouse: Cosan, Javier (905) 555-1212	<input type="checkbox"/> Cosan, Jane and Javier COMPR...	<input type="button" value="Invite Pending"/>	<input type="button" value="Run CRA Import"/>
<input type="checkbox"/> Cosan, Maria (905) 555-1212	<input type="checkbox"/> Cosan, Maria.16T	<input type="button" value="Invite"/>	<input type="button" value="Run CRA Import"/>

Total Client(s): 42 | Selected Client(s): 0
ProFile Hub Service: Available

What your client sees

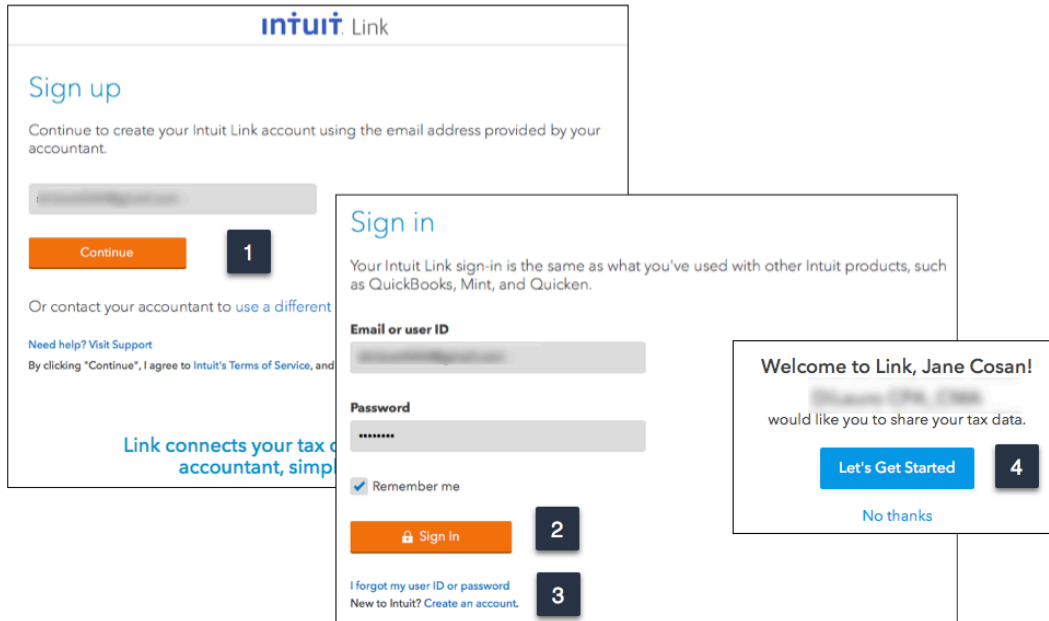
Here is the email your client receives.

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



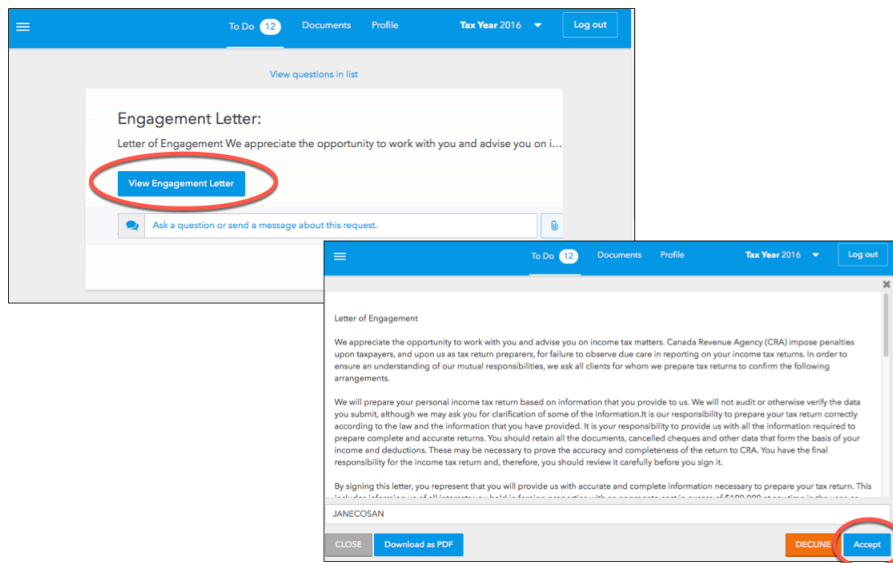
After your client clicks *Accept* in the window above:

- 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

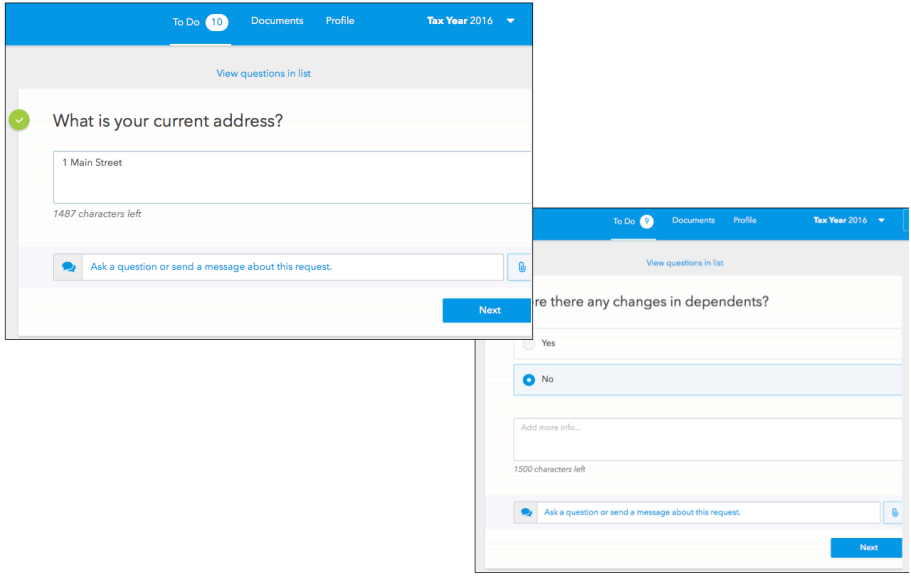


You client now only needs to scroll through the documents and answer the questions that you sent.

- 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...

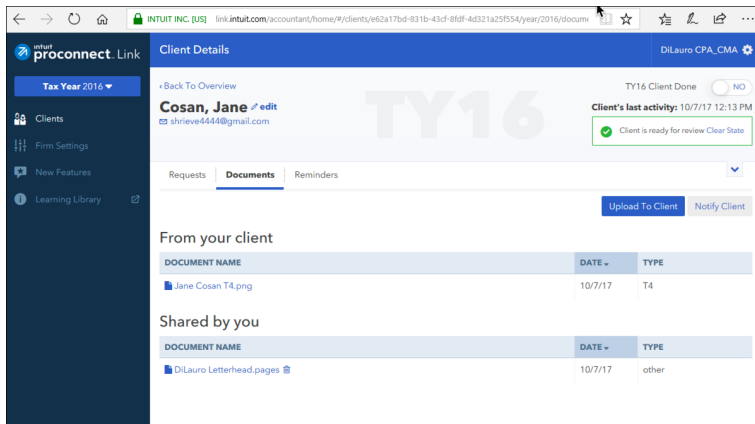
- Hub keeps track of your client’s Link status and updates you with the number of addressed questions and accepted documents

CLIENT NAME	FILE NAME	INTUIT LINK	CRA IMPORT	COMMENTS	STATUS	LAST SAVED
Cosan, Jane (953) 552-3272	Cosan, Jane and Javier COMPRES...	7/12	Run CRA Import	Add Note	Work In Progress	Oct 07, 2017
Cosan, Jane (953) 552-3272	Cosan, Jane and Javier ESSENTI...	Invite	Run CRA Import	Add Note	Work In Progress	Oct 06, 2017
Cosan, Maria (953) 552-3272	Cosan, Maria.16T	Invite	Run CRA Import	Add Note	Work In Progress	Oct 04, 2017
Shrieve, Michael (813) 999-9999	Shrieve, Martine and Martine.16T	Invite	Run CRA Import	Add Note	Work In Progress	Oct 02, 2017

- 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

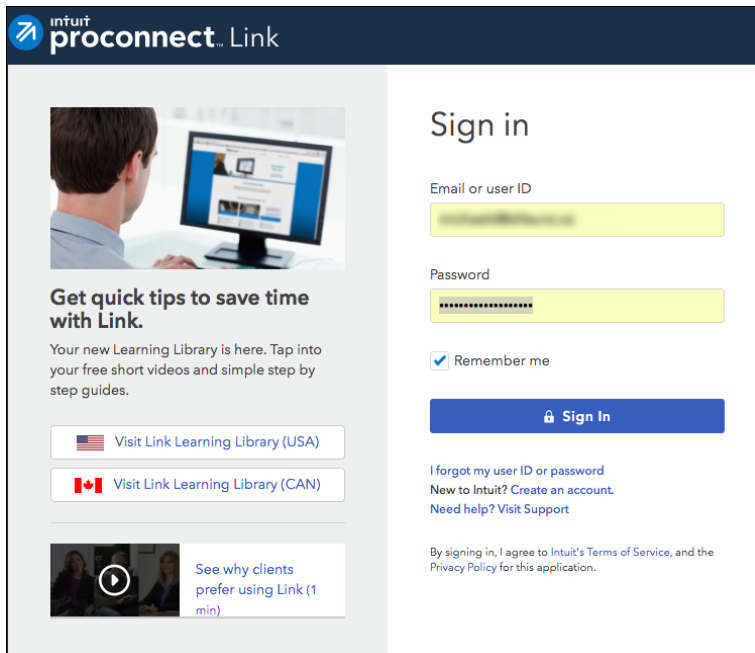
TYPE	REQUEST	RESPONSE	DATE	STATUS	ACTIONS
Document	T4 from your employer (s)	Jane C. Cosan T4.png	4 minutes ago	Completed	Message
Question	Please list any questions or other concerns you might have.	None	8 minutes ago	Completed	Message
Question	Do you want to electronically file your tax return?	Yes	8 minutes ago	Completed	Message
Question	Did your marital status change before	No	8 minutes ago	Completed	Message

- 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. smart Link

proconnect Link

Tax Year 2016

Clients

Firm Settings

New Features

Learning Library

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 shieve444@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

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

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

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

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

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

