

Using ProFile to EFILE T1 Returns

Changes to EFILE

The Canada Revenue Agency (CRA) has implemented some changes to EFILE. **If you accept payment to prepare more than 10 T1 General income tax and benefit returns or more than 10 T2 corporation income tax returns per year, you must file those returns electronically.** If you do not comply with this change, you will be charged by the CRA \$25 for every T1 submission over 10 returns and \$100 for every T2 submission over 10 returns.

In order to adhere to these changes, you will need to register for an EFILE number if you have not already done so. **We strongly recommend completing your registration sooner rather than later.** While EFILE registration typically only takes a few days to process through the CRA, it can take up to 30 days while the CRA conducts a suitability screening of EFILE applicants.

Registering for EFILE

Here are instructions on how to register for EFILE:

- 1 To register for EFILE, go to [CRA EFILE](#) and fill in the form – it's free to register.

- 2 EFILE registration questions are straightforward (business name, address, business number – see image below). You will be asked for a very brief description of the security methods you will use to protect the confidential information found on the returns you will file electronically. The CRA provides the following examples:

- specialized security software removable hard drives stored under lock and key
- hard-disk encryption programs
- operating systems with built-in security
- password protection
- keyboard locks.

- 3 Once your EFILE registration process is complete, you'll receive your EFILE number and password via email. **NOTE** The CRA can take up to 30 days to conduct a suitability screening of the EFILE applicant.

Using ProFile to EFILE T1 Returns

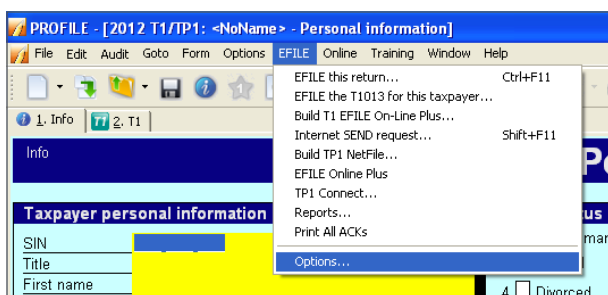
This section provides instructions on how to EFILE returns with ProFile. Note: There are two ways to EFILE using ProFile – single return or batch filing.

NOTE The CRA has decreased the maximum number returns to batch EFILE to 30 returns.

Configuring ProFile

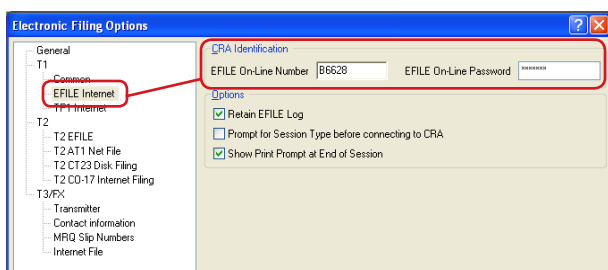
Before submitting a T1 return, in ProFile you will need to input your EFILE Number and Password. Complete the following steps:

- 1 In ProFile, select **EFILE** and then **Options**.



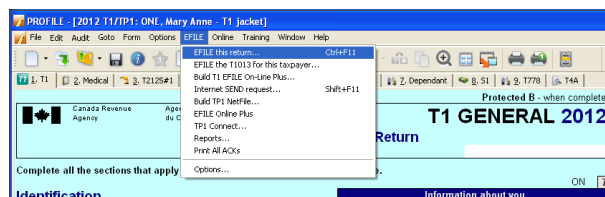
NOTE Depending upon which version of ProFile you have purchased, not all options will display.

- 2 A dialog box will appear. Under **T1**, select **EFILE Internet** from the menu displayed on the left of the screen. The **EFILE Number** and **Password** are those that were provided to you by the CRA and used to automatically identify you when performing an EFILE submission. Enter this information in the appropriate fields as noted below.

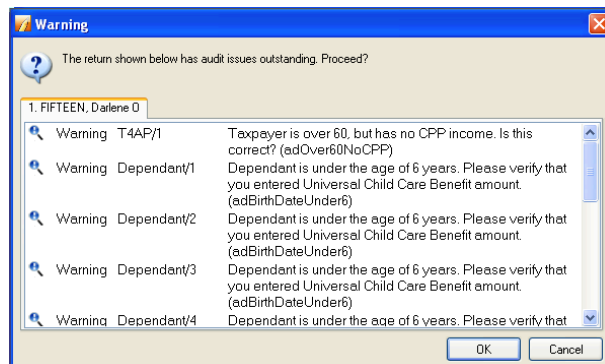


Single Return EFILE Submissions

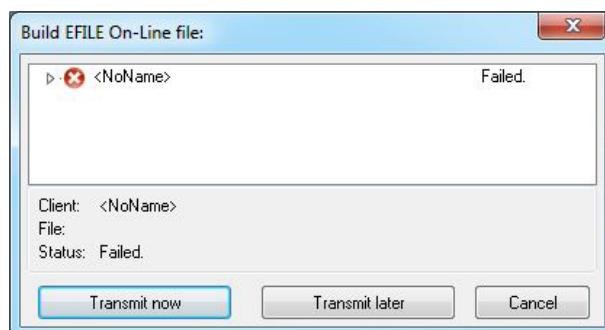
- 1 Open a completed T1 return in ProFile and select **EFILE** > **EFILE this return**.



- 2 ProFile will audit the T1 return and provide a summary of potential issues that may result in the EFILE submission being rejected. If the return being submitted contains potential issues, a dialog box similar to the following will be displayed: To avoid this, use the auditor in ProFile before you EFILE, making sure that all warnings are cleared.



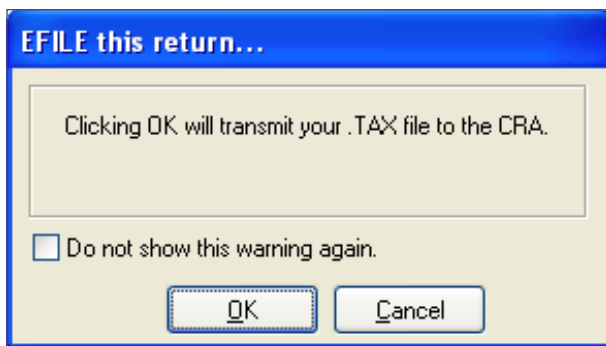
- 3 Clicking **OK** will continue the EFILE process. Clicking **Cancel** will stop the EFILE process to allow you to clear the audits before submitting. It is important to resolve the error messages before going any further or the On-Line file will fail to be created. Once the error messages are resolved, the On-Line file will be successful.



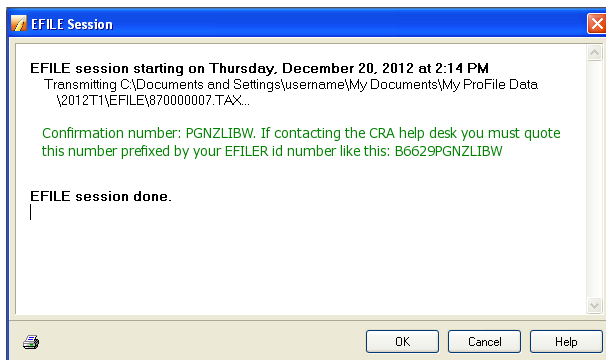
- Once you are ready to file the return, have resolved all of the audit issues and built a successful On-Line file, Left click on the Transmit now button to continue the process.

NOTE ProFile will create a *.tax file containing the data to be submitted to the CRA. The file name will consist of the client's nine-digit Social Insurance Number followed by an extension of ".tax".

- A confirmation box will appear prior to sending the .tax file to the CRA. Click **OK** to transmit the T1 return.



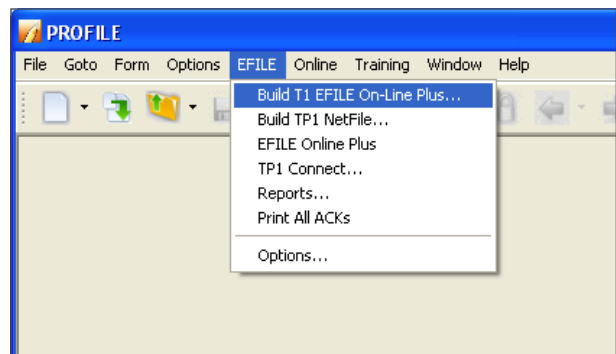
Once the file has been sent and validated by the CRA, a confirmation number will be displayed as well as a message regarding the results of the transmission.



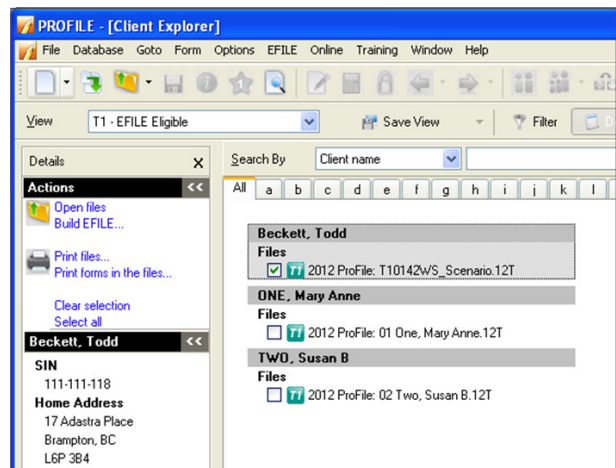
IMPORTANT If the transmission is unsuccessful, an alternate screen will appear which lists the errors encountered in the return. If you receive this message after submitting a return through EFILE, The errors will appear in the auditor on the return (Ctrl + F9). Once all of the errors are addressed, go to **File > Properties**, remove the checkmark from the CRA Errors box and then resubmit your return. If this still does not resolve the problem, please contact ProFile support at 1-800-452-9970.

Batch Returns EFILE Submissions

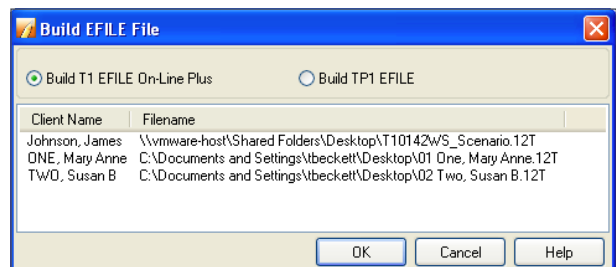
- If you have purchased ProFile Premier, you can save time by submitting a batch of T1 returns, using ProFile's **EFILE Online Plus** feature. Select **EFILE** and then **Build T1 EFILE On-line Plus**.



- Selecting this option will open a special view that lists all of the returns that are eligible for EFILE. The view in Client Explorer looks like this:

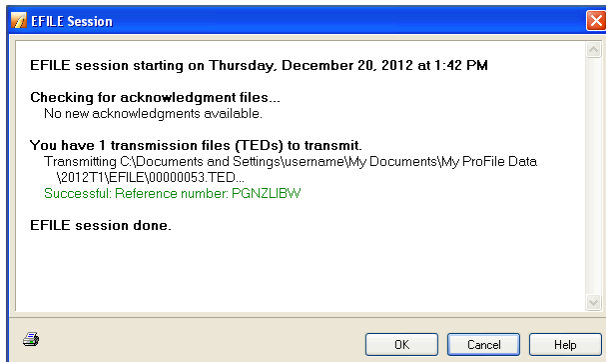


- To EFILE more than one return, simply select the checkbox beside each of the returns and click **Build EFILE** in the **Actions** section on the left of the screen. A confirmation box will then appear listing the selected returns.



4 Select **OK** to continue with the process. A .ted file (similar to a .tax file) will be created in your EFILE directory, containing the information for all of the returns being submitted in the batch.

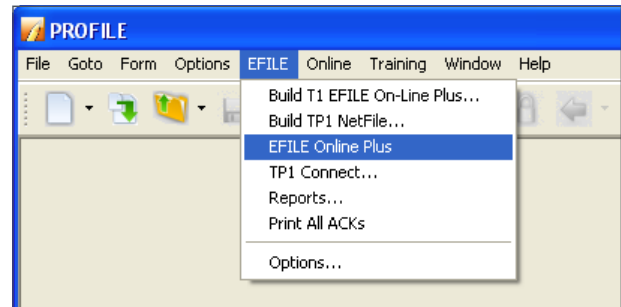
5 A successful transmission will result in a confirmation box similar to this:



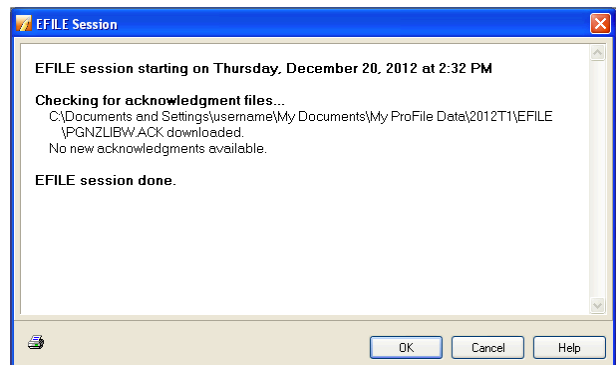
6 The dialog box above also references Acknowledgement files. These Acknowledgements are files that provide either an acceptance or rejection for individual returns submitted within a batch. ProFile processes these files in the background, so you would only rarely need to interact directly with the files.

Important: Acknowledgements do not reflect the state of the current batch of returns being submitted, but are for previous batches filed using the batch method. If a batch file is rejected (as with single returns described above), the dialog shown will be populated with error codes and descriptions to provide guidance on how to resolve the errors. Note that when batch filing, it's possible that while the transmission of the batch of returns was successful, the actual return data could still be flawed, in which case you will receive a "Rejection" acknowledgement next time you batch EFILE or check for acknowledgements.

You can check for acknowledgements of previously sent returns by going to **EFILE** and selecting **EFILE Online Plus**.



This will open a session and check for acknowledgements without sending any new return information. A dialog box will indicate the results of the check for acknowledgements.



Dialog always ends with "No new acknowledgements available" even if it has downloaded one or more acknowledgment files. In the dialog box above, you can see that one acknowledgement has been retrieved. The name of the acknowledgement file corresponds to a "batch id" or reference number that was provided in the web service's response to the initial batch submission.

More EFILE Information

For more information about EFILE and EFILE Online Plus please visit the [CRA's website](#).

If you have any questions, don't hesitate to reach out to us at community.intuit.ca/profileaccounting