

# Using ProFile to EFILE T1 Returns

## Registering for EFILE

Here are instructions for how to register for EFILE:

1. To register for EFILE, go to [CRA EFILE](http://www.cra.gc.ca/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.

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## EFILE registration - identify business and return types

### Identification information

\* Business type *(required)*

- ☐ Proprietorship
- ☐ Corporation
- ☐ Partnership
- ☐ Branch Office
- ☐ Volunteer (by CRA invitation only)
- ☐ Charitable Organization
- ☐ Public Trustee

\* Name of proprietorship, partnership, or corporation (official or registered name of the organization) *(required)*

Business name - if different from above

\* Contact name - responsible for electronic filing *(required)*

\* Phone *(required)*

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.*

This section provides instructions on how to EFILE returns with ProFile.

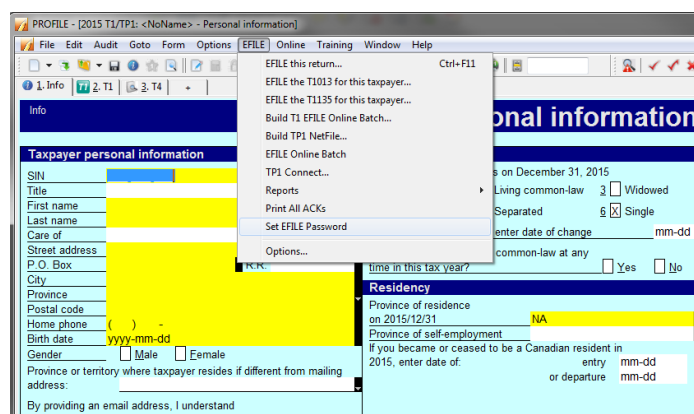
Note: There are two ways to EFILE using ProFile – single return or batch filing T1.

## Using ProFile to EFILE T1 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 Set EFILE Password.

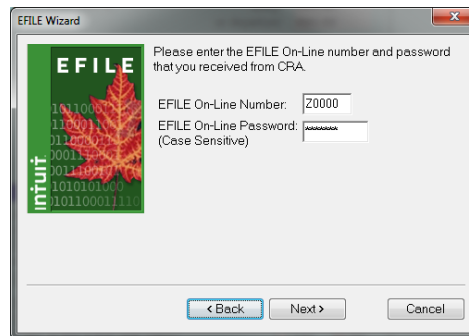


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*Note: Depending upon which version of ProFile you have purchased, not all options will display.*

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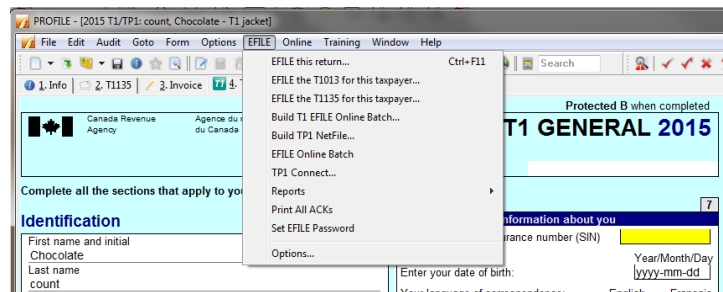
2. A dialog box will appear. Follow the prompts and enter the EFILE On-Line Number and EFILE On-Line Password; note is case sensitive. The EFILE Number and Password are those that were provided to you by the CRA and used to automatically identify you when performing an EFILE submission. Enter this information in the appropriate fields as noted below:



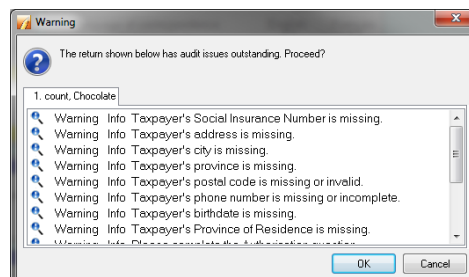
\*\*\*Note if you are using an Options Package you need to save the options package after entering in the new EFILE information.

## Single Return EFILE Submissions

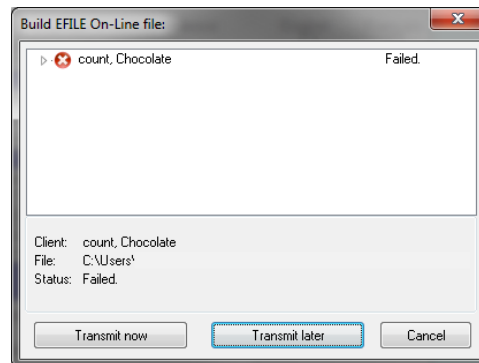
1. Open a completed T1 return in ProFile and select EFILE > EFILE this return.



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 image below 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.



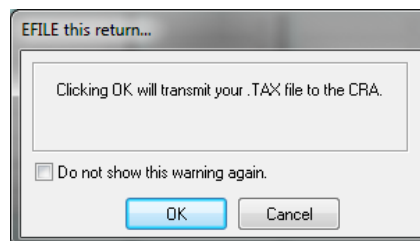
4. Once you are ready to file the return, have resolved all of the audit issues, and built a successful On-Line file, left click on the Transmit Now button to continue the process.

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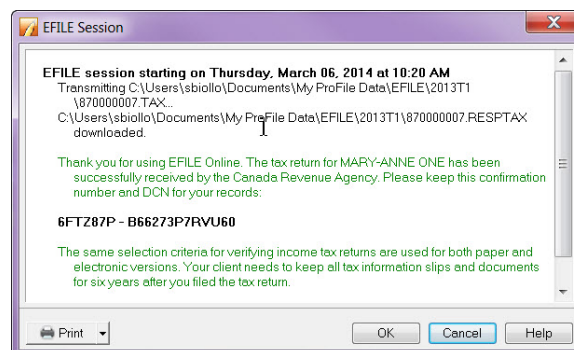
***Note: ProFile will create a \*.tax file containing the data to be submitted to the CRA. The file name will consist of the client's nine-digit Social Insurance Number followed by an extension of ".tax".***

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



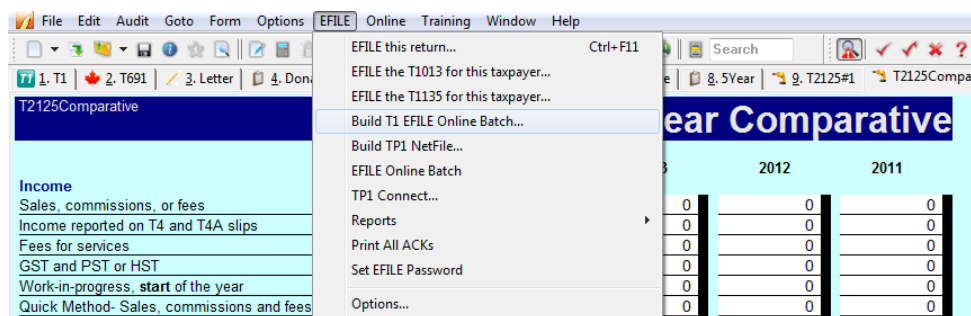
Once the file has been sent and validated by the CRA, a confirmation number will be displayed as well as a message regarding the results of the transmission.



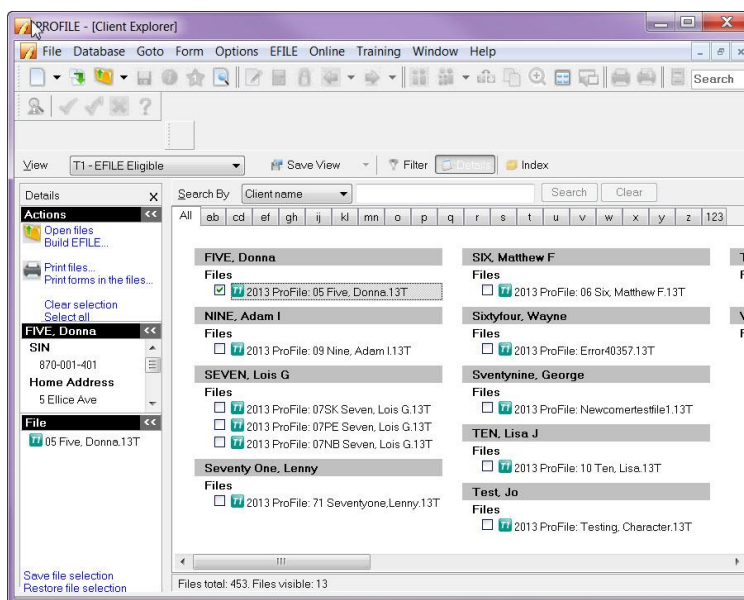
# Batch Returns EFILE Submissions

*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.*

1. If you want to save time by submitting a batch of T1 returns, you can use ProFile's EFILE Online Batch feature. Select EFILE and then Build T1 EFILE Online Batch.

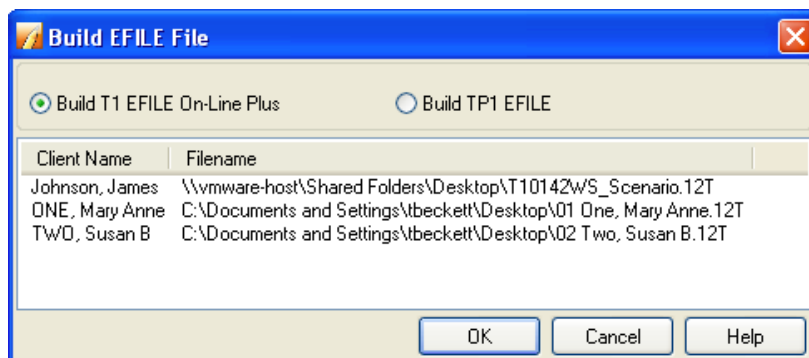


2. Selecting this option will open a special view that lists all of the returns that are eligible for EFILE. The view in Client Explorer looks like this:



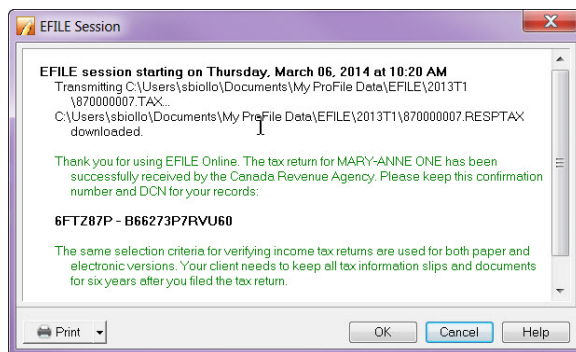
## Changes to EFILE

3. 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 when you're done.

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



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.