INTUIT ProFile® Tax

ProFile 2022-2023

User Guide

Contents

About this User Guide

Why a User Guide?

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

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

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

Review our support article for in-season and holiday hours and closures.

System Requirements for ProFile

- Internet connectivity is required for activation, licensing, automatic updates, and additional ProFile features (for example, EFILE)
- Network/workstation install UNC path is not supported
- Operating system Windows 10™, Windows 11, Windows Server 2016 and 2019
- .NET 4.8 installation & registration are required

Note: Apple products are not supported.

To get the best results from your software, review our online system requirements article.

Getting Started with ProFile

Downloading and Installing ProFile

An Internet connection is required to download and install ProFile. In addition, you must have administrator rights for the computer on which you wish to install ProFile.

Download ProFile

1. Navigate to the ProFile download page.

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

3. Follow the necessary instructions. In many cases, the requirement will include the download of the ProFile installation file (called **gpsetup.exe**).

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

The download may take several minutes.

Install ProFile

1. Locate the saved **gpsetup.exe** installation file.

2. Double-click the file to begin the installation.

3. Follow the dialogue boxes when prompted to install ProFile.
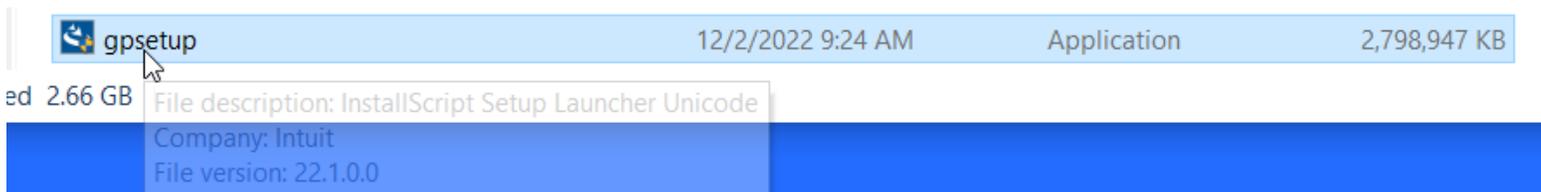
Activating ProFile

Note: An Internet connection is required to activate ProFile. In addition, you must have administrator rights for the computer on which you wish to install ProFile.

Activating from the ProFile icon:

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

2. Double-click the ProFile icon.

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

3. Enter your Product Code and License Key and select the **Activate** button.

The product code and license key activate; ProFile displays a confirmation message. Once activated, you can close the confirmation window.

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

5. Select the **I'm Done** button after all product codes have been entered. Activation may take a few minutes to complete.

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

You have successfully activated ProFile.
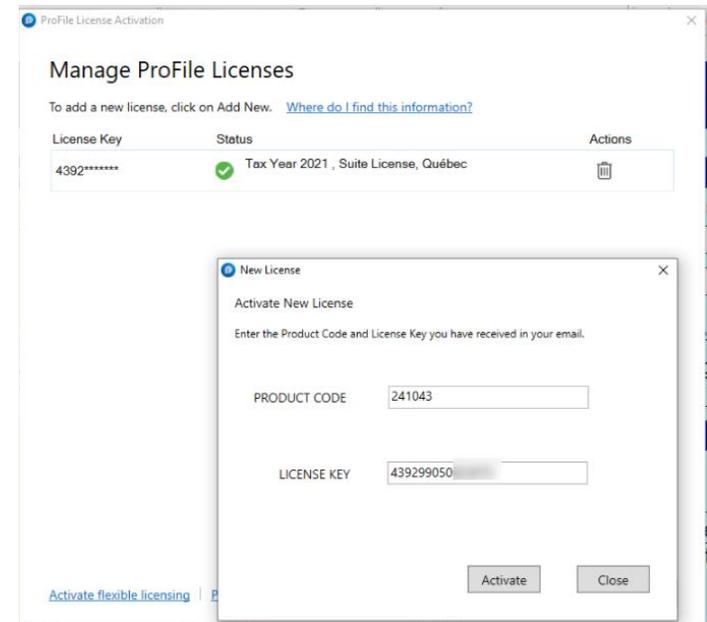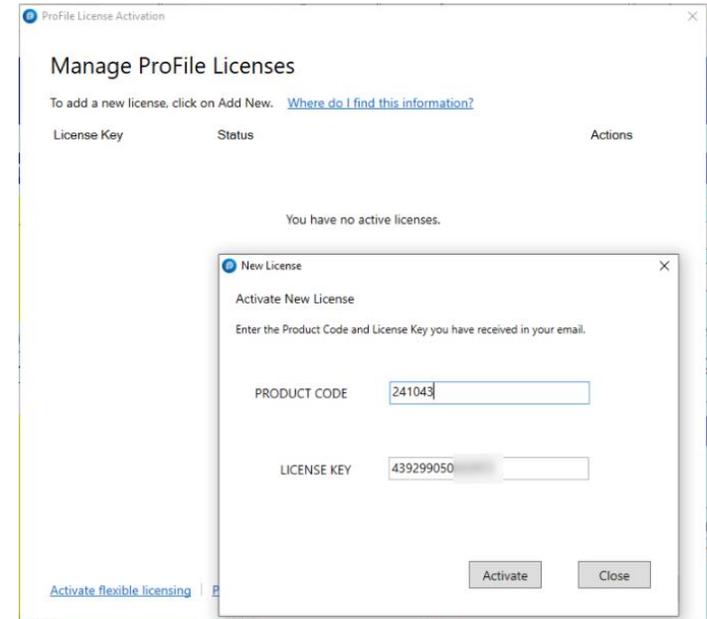
QuickStart Menu in ProFile

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

QuickStart menu tabs

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

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

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

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

Turn off the QuickStart menu:

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

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

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

3. To re-establish the QuickStart menu later, select the **QuickStart** option under the **Help** toolbar menu.
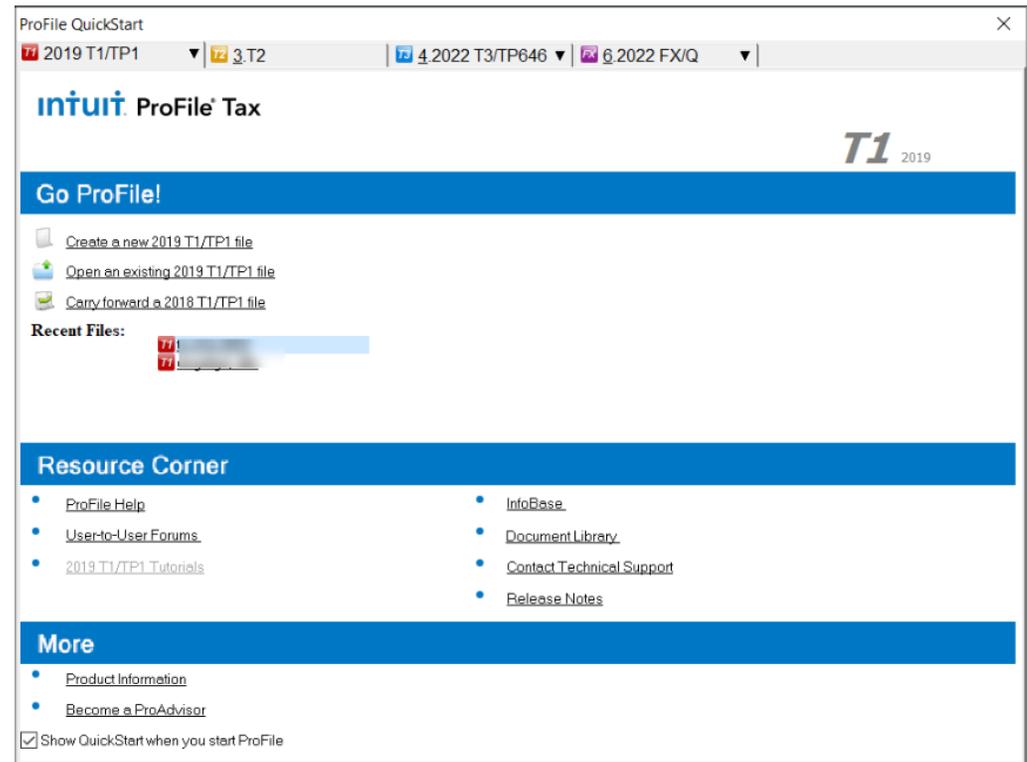
Using a Trial License in ProFile

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

What is included with a trial license?

A trial includes access to all the modules and features ProFile has to offer, except for filing completed tax returns. These features include:

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

Getting a trial license:

1. Visit the free trial section of the ProFile website.

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

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

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

Welcome to ProFile!

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

Are you a student?   ○ Yes ○ No

First Name

Last Name

Company Name

Email Address

Phone Number

What tax software do you currently use?

Please Select   ▼

How many personal returns do you prepare annually?

How many business returns do you prepare annually?

Start My FREE Trial

Using the Start Screen in ProFile

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

The top toolbar menu

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

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

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

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

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

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

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

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

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

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

Setting Preparer Information in ProFile

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

1. Select the **Environment…** option from the **Options** drop-down menu in the top toolbar.

The **Environment Options** window displays.

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

3. Complete the necessary fields.

4. Select the **OK** button.

The preparer information saves.

Automatically updating preparer information changes:

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

1. Select the **Module…** option from the **Options** drop-down menu.

2. In the **General** tab, scroll down to the **Options** section.

3. Activate the **Update preparer information on Info form** checkbox.

4. Select the **OK** button; the setting saves.

Managing ProFile's Password-Protection Function

Frequently Asked Questions

What modules support access to password-protected files?
Access by features to password-protected files applies to T1, T2, T3, and FX modules.

What tax years support access to password-protected files?
Access by features to password-protected files applies to tax years 2015 and onwards.

What features currently support access to password-protected files?
Currently the Hub and Corporate Linking features support access to password-protect files. More features will support access in future ProFile releases.

Applying generic password protection to files:

Applying a generic password permits all future or updated files to be accessible by ProFile's features.

1. Open ProFile.

2. Navigate to the **Security** tab.

3. Select the **Allow password protection for return(s)** checkbox.

4. Select the **Create a generic password for return(s)** checkbox; the **Enter Password** and **Confirm Password** fields activate.

5. Enter a password and confirm it.

Note: Select the **Show Password** link to display the password as it is entered. Select the link again to conceal the password.

Managing ProFile's Password-Protection Function, Continued

6. Select the **Enable the following features access to password-protected files** checkbox.

7. Select the feature to permit access to password-protected files (for example, Hub and/or Corporate Linking).

8. Select the **OK** button; the password-protection feature activates. Users can now apply password-protection to files.

Applying password-protection for files:

1. Complete a new file in ProFile.

2. Select the **Save As…** option under the **File** drop-down menu in the top toolbar; the **Save As** window displays.

3. Select the **Use generic password** checkbox in the bottom-left corner of the window.

    Note: Select the **Show password** link to display the password as it is entered. Select the link again to conceal the password.

4. Select the **Save** button; the file saves with the new generic password and is readable by the selected ProFile features.

Note: Be sure you choose a password that you can remember. If it is lost, it cannot be recovered, even by Intuit.

Related Articles

Review our support article for additional details.

Setting up for EFILE in ProFile

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

Setting up for EFILE:

1. Select the **Set EFILE Password** option from the **EFILE** drop-down menu in the top toolbar.

The **EFILE Wizard** displays.

2. Select the **Next** button to proceed.

3. During the Set EFILE Password process, users will require the following:

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

4. Select the **Finish** button when all applicable information is entered.

Note: If you are using an Options Package, save the options package **after** entering in the new EFILE information.
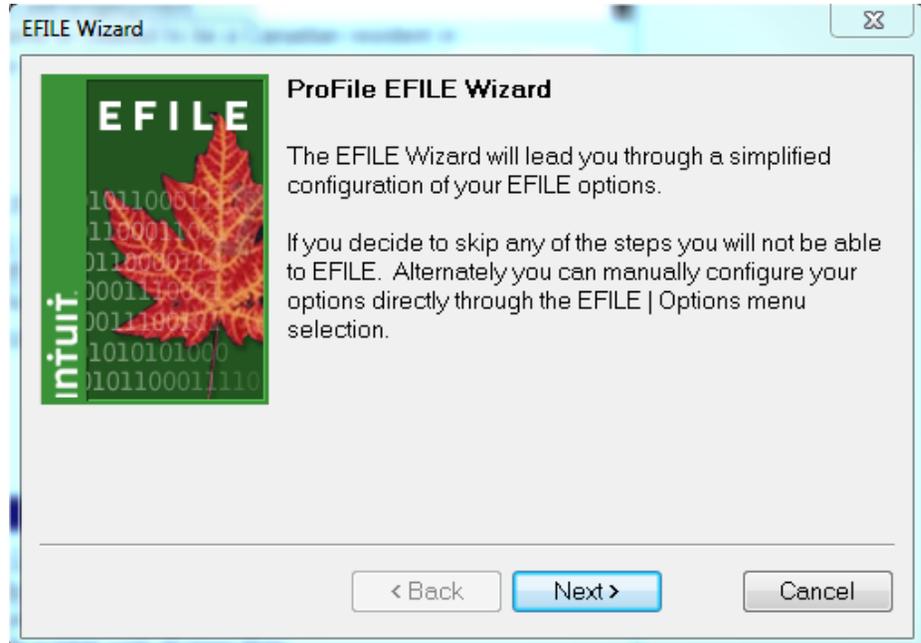
Creating a New File in ProFile

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

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

Creating a new file:

1. Open ProFile.

2. Select the **New** option from the **File** drop-down menu in the top toolbar.

A list of available modules displays in the menu.

3. Select the desired module; a new return opens in ProFile.
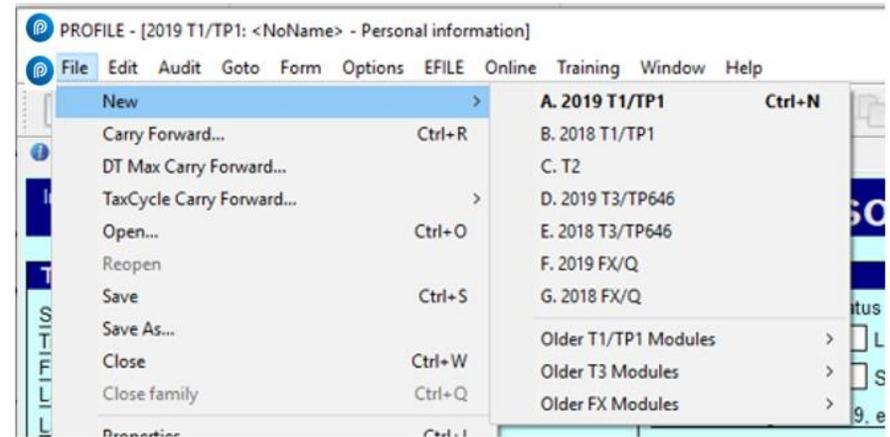
Creating Older Files:

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

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

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

2. Select the desired module; a new return opens in ProFile.
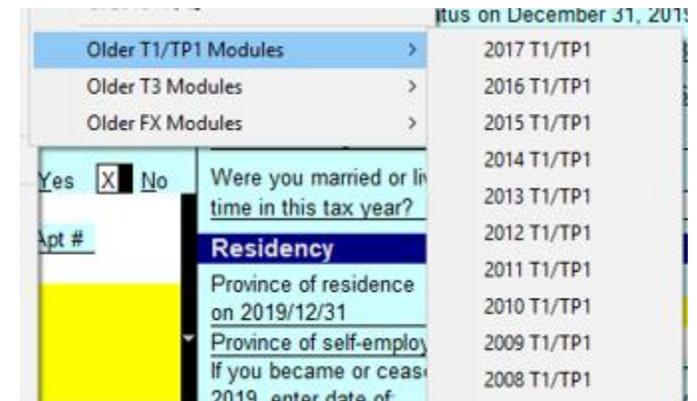
Fast Reopening of Files

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

Fast reopen of returns:

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

A list of recently opened returns displays.

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

Note: Preparers can also review a list of recently opened returns under the **File** menu in the top ProFile toolbar.
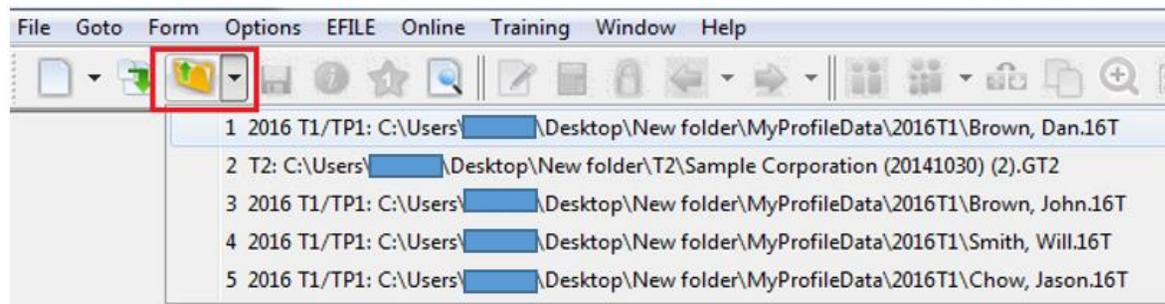
Using Form Explorer in ProFile

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

Starting the Form Explorer:

1. Open ProFile.

2. Open a return (for example, a T1).

3. Select the **Form Explorer** option from the **Goto** drop-down menu in the top toolbar.

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

Using the Form Explorer:

1. Select a view option from the top-right menu buttons. View options include:

   - **List** displays all forms in the return

   - **Detail** displays details and/or status about all forms in the return

   - **Key** searches the return for keywords (for example, **RRSP**)

   - **Line** displays each line in every form in the return.

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

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

3. Select the **Print** button to print any form from the Form Explorer.
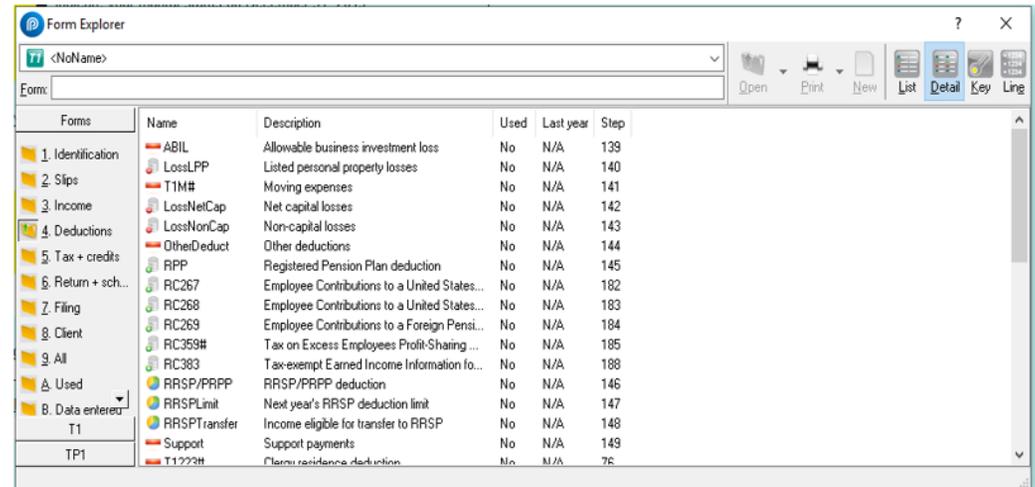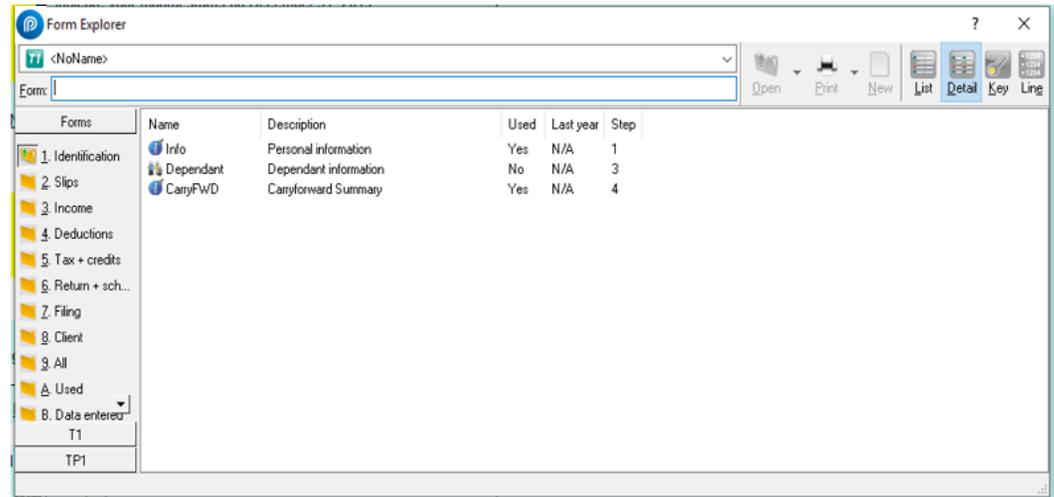
Carry Forward Files in ProFile

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

Carry forward files in ProFile:

1. Select the **Carry Forward…** option from the **File** drop-down menu in the top toolbar.

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

3. Select the specific file to carry forward.

4. Select the **Carry forward** button.

The selected file carries forward.

Carry forward other supplier's files

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

Review our full support article on carrying forward other supplier's returns.
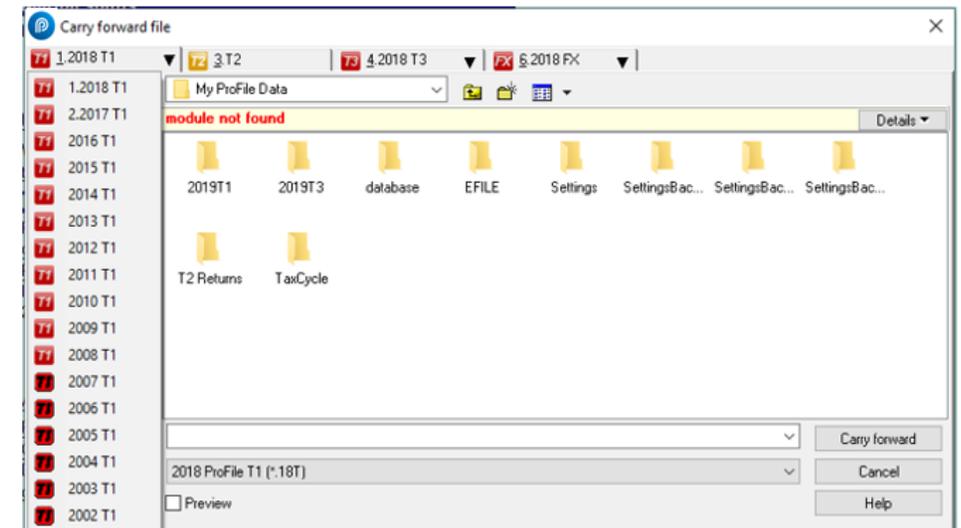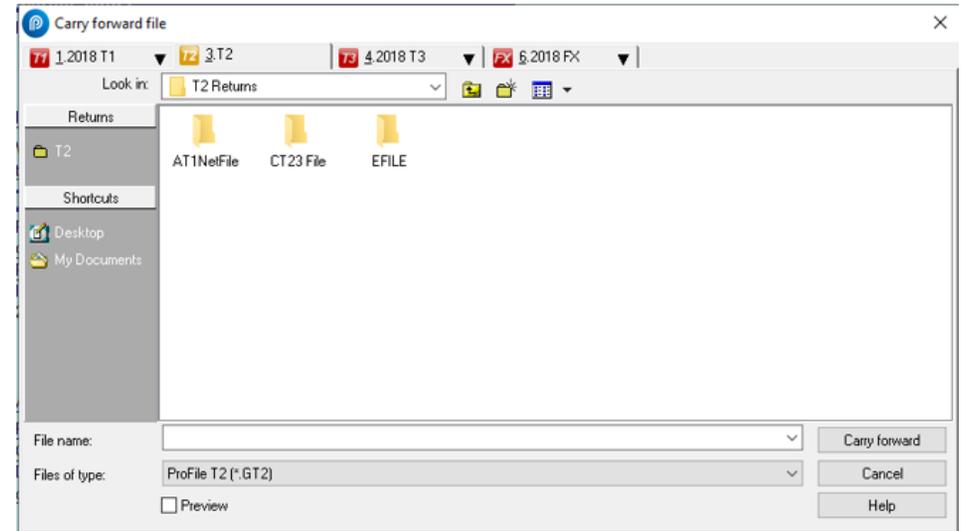
Carry Forward Files in ProFile, Continued

Carrying forward multiple files using the Client Explorer database

If the preparer used ProFile in the previous tax year…

1. Select the **Client Explorer** option from the **Goto** drop-down menu in the top toolbar.

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

2. Select the **Filter** button, the filter option window displays.

3. Use the filter options to identify which files to carry forward. For example, if you only want to carry forward T1 files from the year 2018, select the **T1** module tab, then the **2018**-year designation.

4. Select the **Apply Filters** button. The files matching the selected filter options display.

5. Select the files to carry forward. To select all files, right-click in the window and choose **Select All** from the pop-up menu; all files are highlighted.

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

The file(s) carry forward.

Related Article:

Review our support article on carrying forward files using the Client Explorer database.

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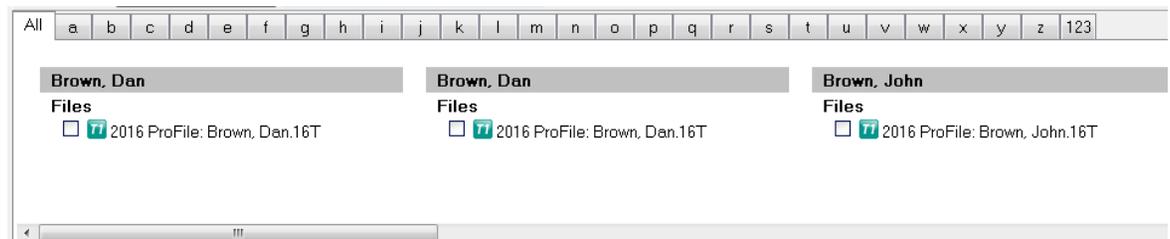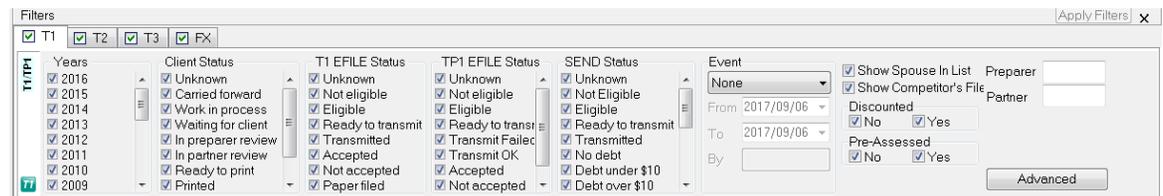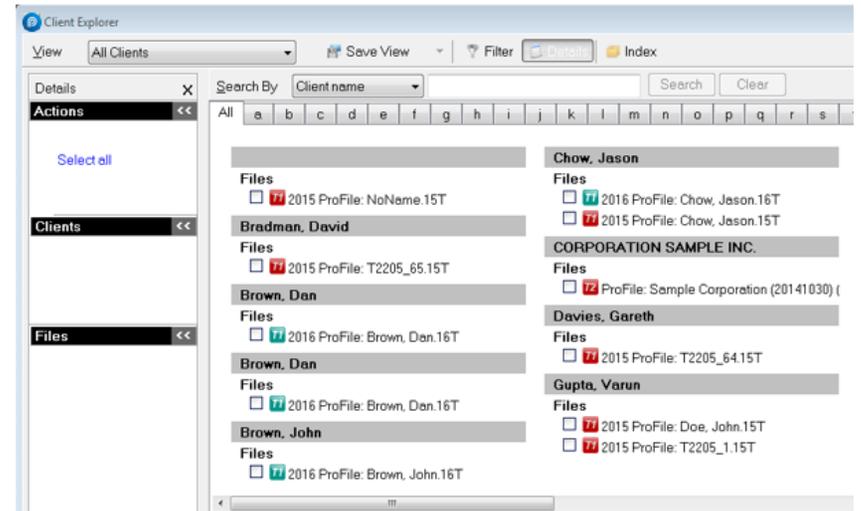
Checking Your Version of ProFile

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

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

Checking ProFile version:

1. Open ProFile.

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

The **About** window displays.

3. Review the ProFile version number (for example, **2022.4.0**).
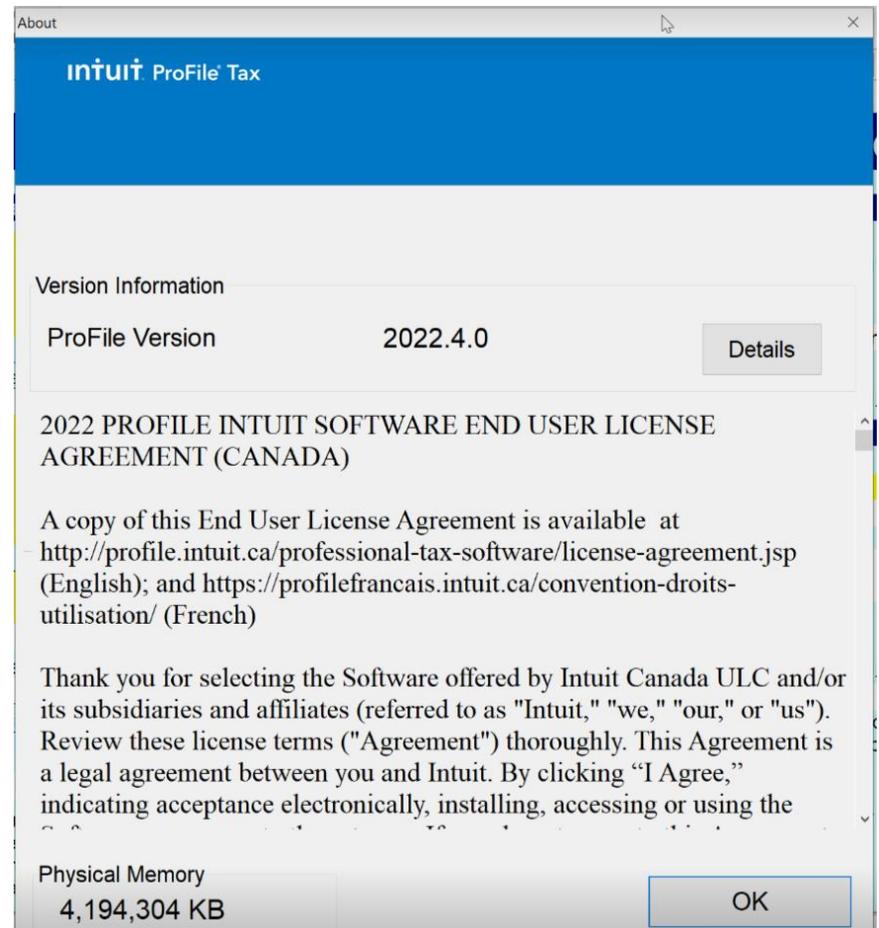
Updating ProFile to the Latest Version

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

Updating ProFile:

1. Open ProFile.

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

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

3. If no updates are available, select the **OK** button to close the window.

A new version of ProFile is available

Version 2022.2.0.577 is now available.

Here's what is included:

Introduction

Version 2022.2.0

Download the latest release of the ProFile Suite, version 2022.2.0.
Some forms for the 2022 taxation year are not released by CRA at this time. In-product forms include a "[
Note: We recommend that discounters in provinces that provide refundable tax credits do not use this re

T1/TP1 highlights include:

Learn more about the updates. Read the release notes

⚠ Don't forget to back up before you update
• If you're already backed up, press 'Next' to continue with the update
• If you don't normally make backups, we can help you back up files to a local or network drive during the update in the next steps (Click Next to continue) ⓘ

Cancel   Next

Using ProFile Notification Services

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

Start-Up Notifications

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

ProFile in-application Notification Centre

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

Information Call-out

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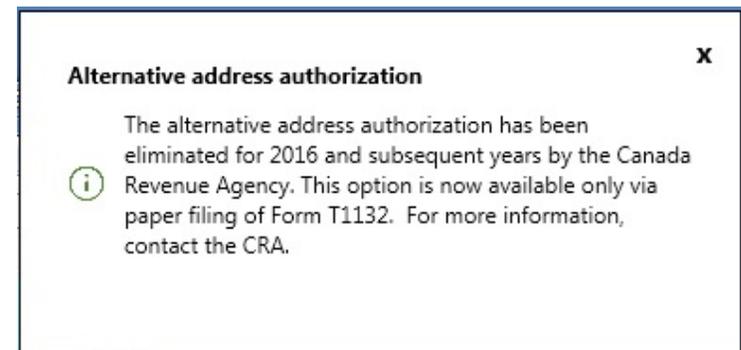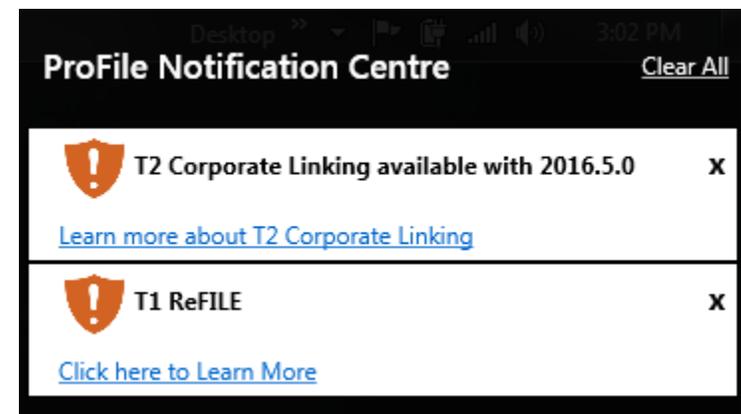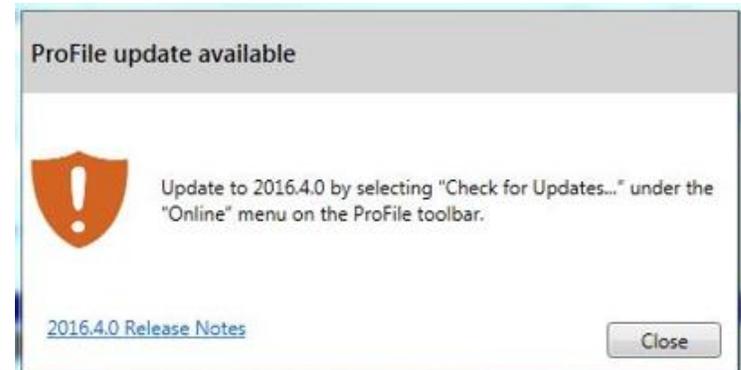
Using Options in ProFile

Setting Environment Options in ProFile

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

The following list includes the most-commonly used options:

Edit tab

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

Display tab

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

File tab

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

Preparer tab

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

Discounter tab

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

Trustee tab

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

Audit tab

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

System tab

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

PDF tab

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

Using File Pathing in ProFile

About file pathing

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

Managing file paths:

1. Select the **Environment…** option from the **Options** drop-down menu in the toolbar.

2. Select the **File** tab in the **Environment Options** window.

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

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

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

Changing file path:

1. Select the file directory to change.

2. Select the **Show path** [...] button.

The **Browse** window explorer displays.

3. Select a new location from the **Browse** window; select the **OK** button.
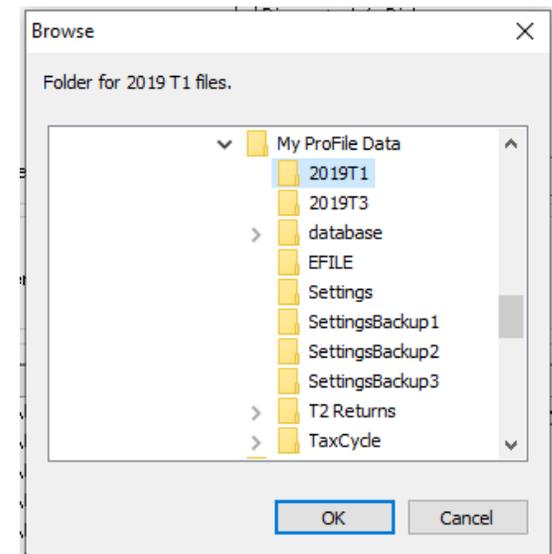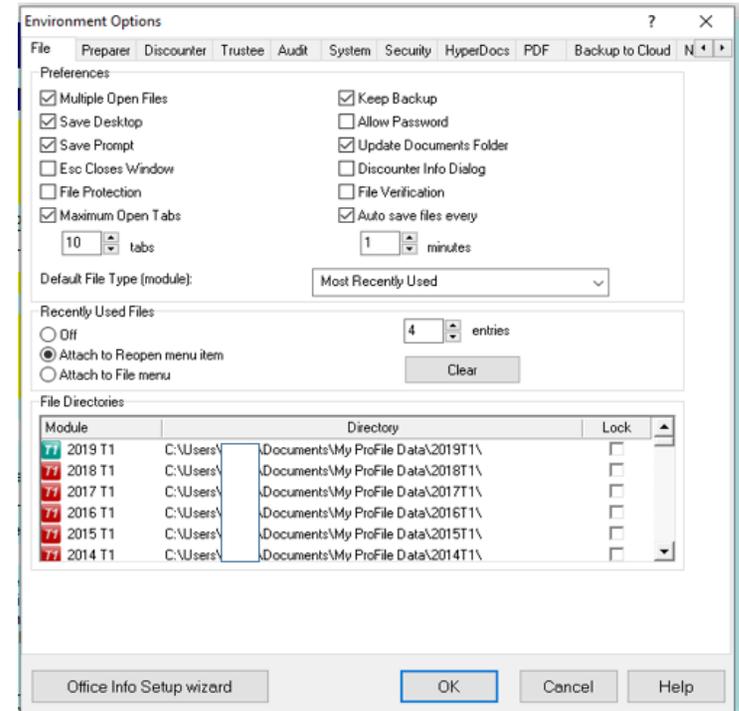
Using Module Options in ProFile

Module options overview

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

Select the **Module…** option from the **Options** drop-down menu in the top toolbar.

Setting module options

Each module tab includes an active down arrow; select the arrow to display the available tax years for the module display.

Tabs

General tab

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

Data Locking tab

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

Variance tab

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

Disclaimer tab

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

T1/TP1 Review tab

The T1/TP1 Review tab allows the setting of the Variance Thresholds, using the criteria of Dollar and/or Percentage.
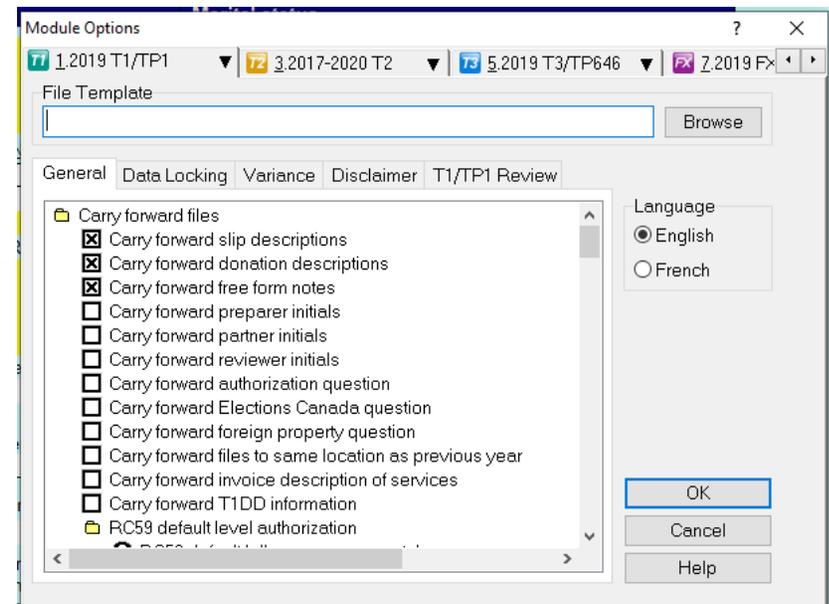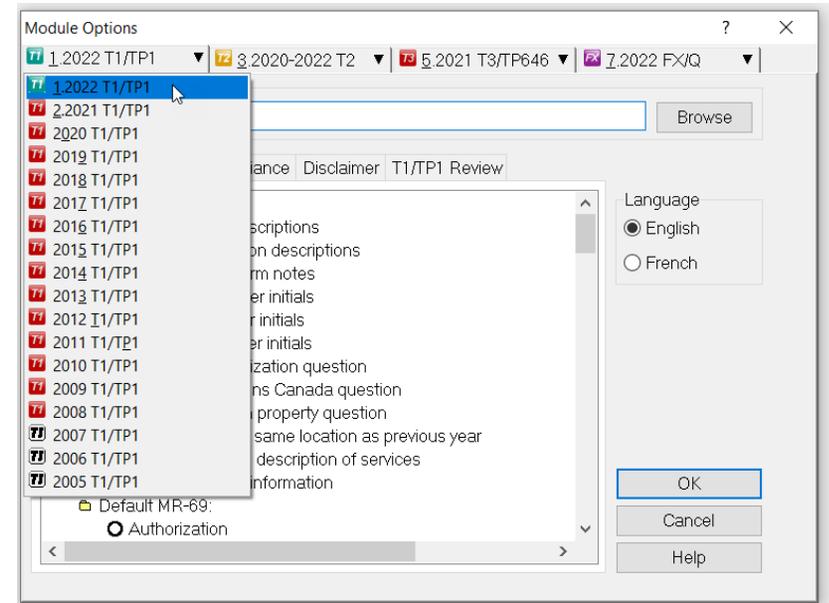
Using Templates in ProFile

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

Selecting templates:

1. Select the **Templates** option from the **Options** drop-down menu in the top toolbar.

The **Template Editor** window displays.

Using templates

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

Both French and English templates are provided.

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

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

Tip: Press **F1** on any field in the Template Editor to learn more about its function.
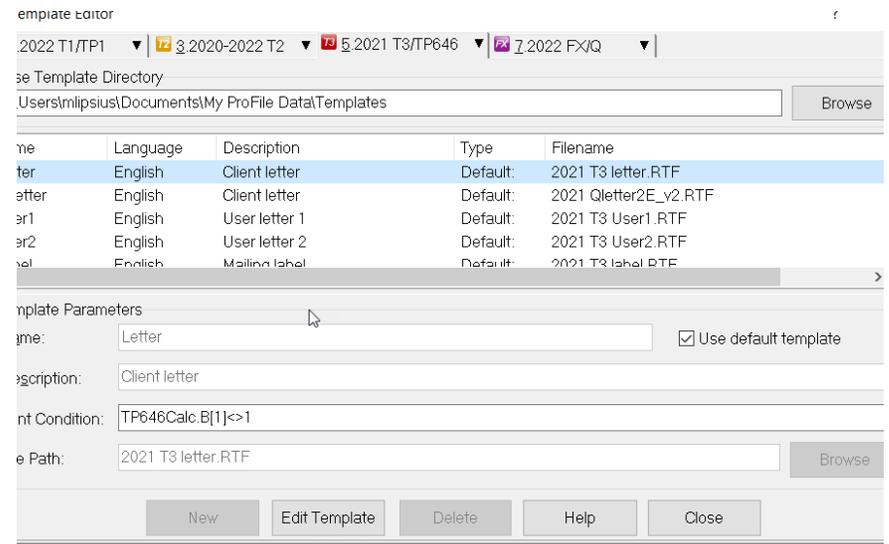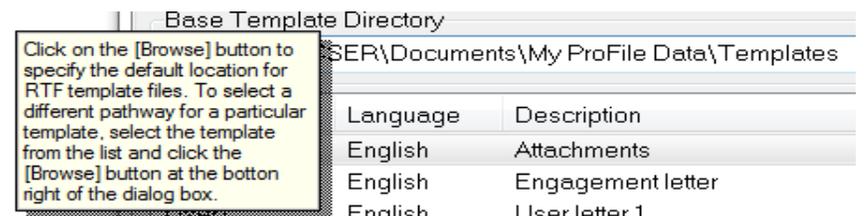
Using Form Selection in ProFile

Form selection overview

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

Selecting templates:

1. Select the **Form Selection** option from the **Options** drop-down toolbar menu.

The **Form Selection** menu displays.

Using form selection

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

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

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

At any time, you can restore your defaults by selecting the **Set Defaults** button.

Tip: Press **F1** on any field to learn more about its functionality.
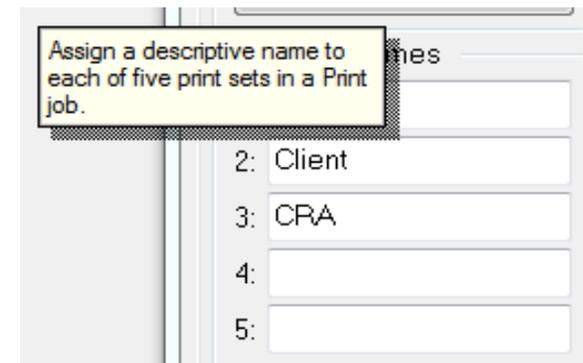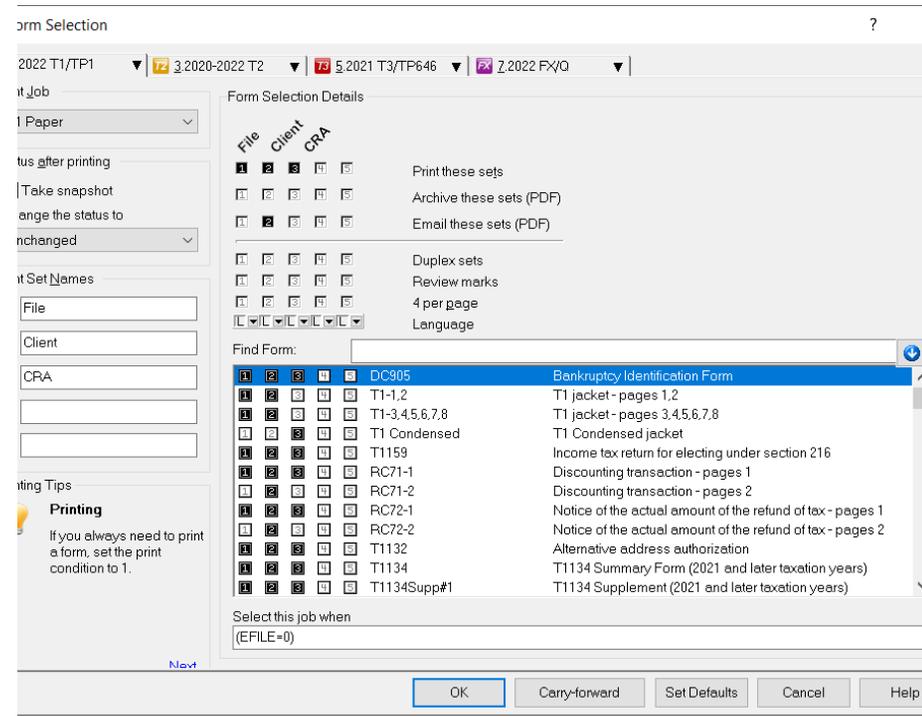
Setting Pricing in ProFile

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

Getting started with pricing:

1. Select the **Pricing…** option from the **Options** drop-down menu in the top toolbar.

The **Pricing Schedule** window displays.

Pricing options:

1. Select the module for which to set pricing options for (for example, T1). The current and previous tax year pricing displays.

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

3. Select the invoice type: **Detailed**, or **Brief**.

4. Select the invoice methodology: by **Schedule** or **Hour**.

5. Insert **costs for services** (for example, basic charge, capital gains, etc.)

6. Select the **OK** button to save the pricing information.

Carry forward pricing:

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

1. Select the previous tax year (for example, **2019 T1/TP1**). Review the pricing for services.

2. If the same pricing is to apply to the current tax year, select the **Carry Forward** button.

3. Select **OK** when asked to carry forward prices to the current tax year.

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

Using Flexible Licensing in ProFile

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

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

What is a Seat?

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

What is required to use Flexible Licensing?

Flexible licensing requires:

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

Can I still work offline?

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

What does Flexible Licensing cost?

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

How many machines can I install ProFile on?

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

Is Flexible Licensing going to be ON by default?

No. The flexible licensing option is activated manually.

Flexible Licensing: Enable during Activation

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

Enabling Flexible License during Activation:

1. Enter your product code and license key during activation.

2. Select the **Next - Setup Flexible Licensing** button.

The **Flexible Licensing Settings** window displays.

3. Select the **Enable flexible licensing on this computer** check box. Select either the **Manual** or the **Automatic** mode button to activate your choice.

4. The Manual mode displays the choice of two additional options:

    ○ **Prompt me every time when I close ProFile** – selecting this option results in ProFile prompting the user to suspend your license when closing the application

    ○ **Don't prompt me. I'll do it manually** – selecting this option requires the user to suspend their license manually themselves when closing the application

5. Select the **Save** button to save your preferences.

Flexible Licensing: Suspending the License Automatically

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

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

Suspending the License Automatically:

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

The **Flexible Licensing Settings** window displays.

2. Select the **Enable flexible licensing on this computer** box.

3. Select the **Automatic** mode button.

4. Select the **Save** button to save your preferences.

5. Close the ProFile application, either by selecting the **X** icon on the application or by selecting the **Exit** option under the **File** menu.

The ProFile application closes.

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

ProFile Flexible Licensing Settings

intuit ProFile® Tax

Flexible Licensing Settings

You can update your settings for Flexible Licensing below. Click save to update your settings.

Flexible licensing temporarily suspends a ProFile license on one computer in order for the license to be activated on another computer. Learn More. Learn More

☐ Enable flexible licensing on this computer

⦿ Manual - This option will require you to confirm that you would like to suspend your ProFile licenses when you close ProFile.

Pick one
○ Prompt me every time when I close ProFile   ⦿ Don't prompt me. I'll do it manually.

○ Automatic - This option will automatically suspend and activate your licenses when you open and close ProFile.

You can access these settings by clicking the **Help > Configure Flexible Licensing** menu item above.
Please Note: In order for this functionality to work your computer must be connected to the internet.

Save

X

Your licenses have been successfully suspended on this computer.

See You Later!

ProFile will now close ..

Flexible Licensing: Suspending the License Manually

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

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

Suspending the License Manually:

1. Save any files being used in ProFile.

2. Select the **X** icon in the top-right corner of ProFile or select the **Exit** option under the **File** drop-down menu.

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

3. Select the **Yes** option.

A message displays, confirming the license suspension can proceed.

A confirmation message displays when the license is suspended.
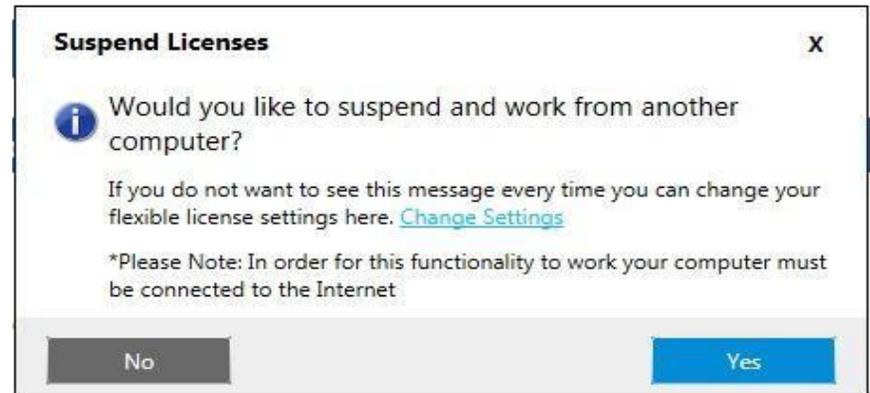
Using the Client Explorer Database in ProFile

Setting Client Explorer as the ProFile Database

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

Setting Client Explorer as database:

1. Open ProFile.

2. Select the **Database** option from the **Options** drop-down menu in the top toolbar.

The **Database/Client Explorer Options** window displays.

3. Select the **Use Client Explorer** option, the Client Explorer menu displays.

4. Select the **Personal Server** or **Shared Server option.**

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

6. Select the **Setup Wizard** button to create a shared server.

7. Select the **Advanced button** to explore additional options, including the handling of clients with no SIN.

8. Select the **OK** button when completed.

The Client Explorer is set as the database option.
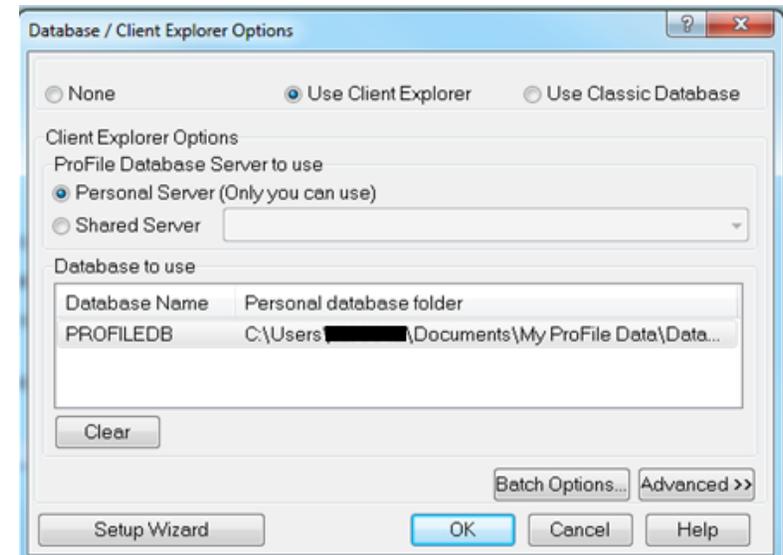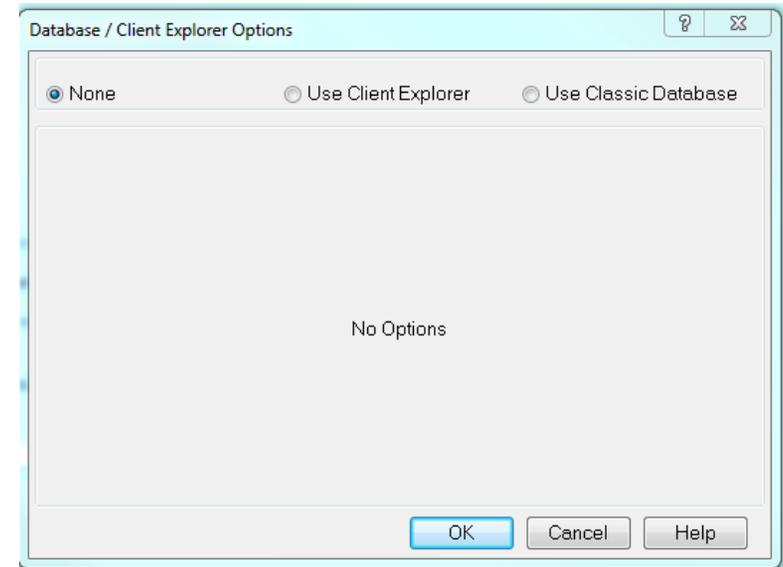
Using Filters in Client Explorer

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

Viewing Filter options:

1. Select the **Client Explorer** option from the **Goto** drop-down menu in the top toolbar.

A list of all available returns for clients displays.

2. Select the **Filter** button.

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

Options for filtering display in individual tabs and include:

- Available tax years
- Modules (for example, T1, T2, etc.)
- Client Status
- EFILE status
- SEND status
- EVENT
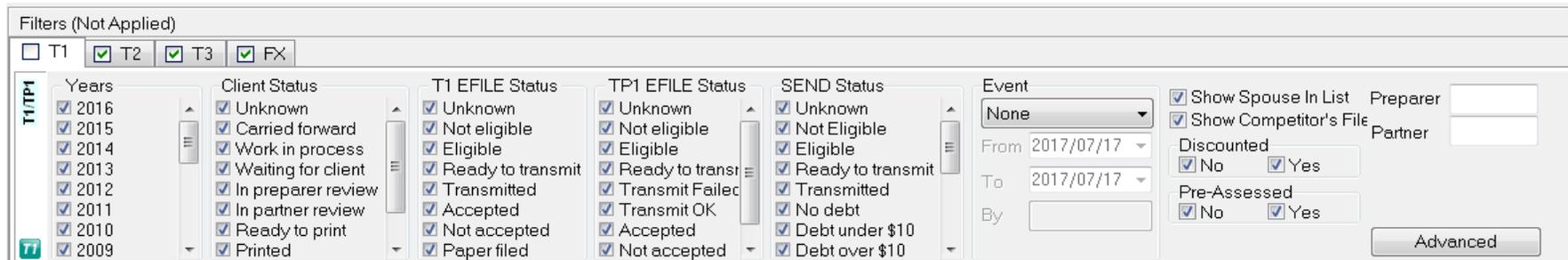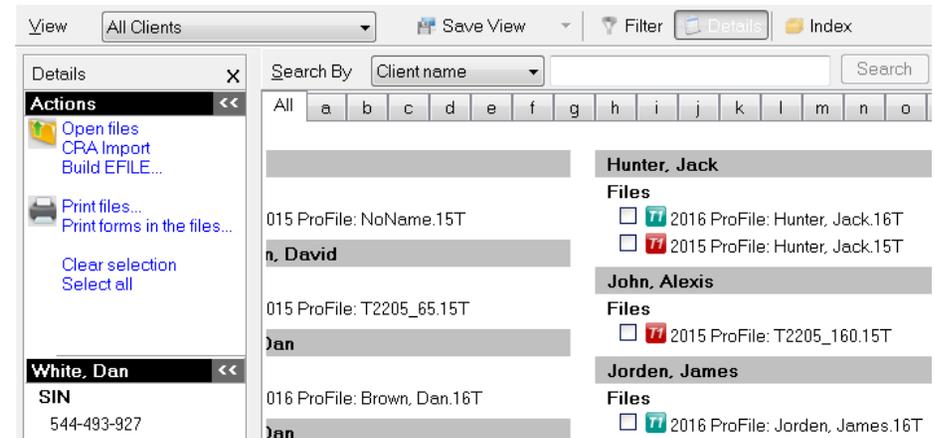
Using Filters in Client Explorer, Continued

Using Filters in Client Explorer: T1 EFILE Filtering Example:

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

1. Select the **Client Explorer** option from the **Goto** drop-down menu in the top toolbar.

2. Select the **Filter** button; the filter window displays at the bottom of the window.

Selecting forms:

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

2. Select the checkbox for the current year (for example, **2019**) on the **T1** tab and clear the checkboxes for all other years by unchecking them. This displays only the 2019 tax year.

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

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

Applying filters:

1. Select the **Apply Filters** button.

2. Select the **All** tab in the Client view.

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

Printing Reports in Client Explorer

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

Note: A query applies only to returns of a single type (for example, 2019 T1 returns).

Setting Client Explorer Report Parameters and Data:

1. Open **Client Explorer** in ProFile.

2. Filter returns by the necessary parameters (for example, tax year, status, etc.).

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

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

5. Select the **Options** button, the **Report Options** window displays.

6. Select the **Fields** tab.

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

7. Select the data to be listed under each report heading.

Running a Client Explorer report:

1. Select the **Save** button in the **Report Options** window; the report parameters save.

2. Select the **OK** button, the **Report Options** window closes.

3. Select the **Print** option from the **Create Report** window.

The report compiles and is sent to the designated printer.
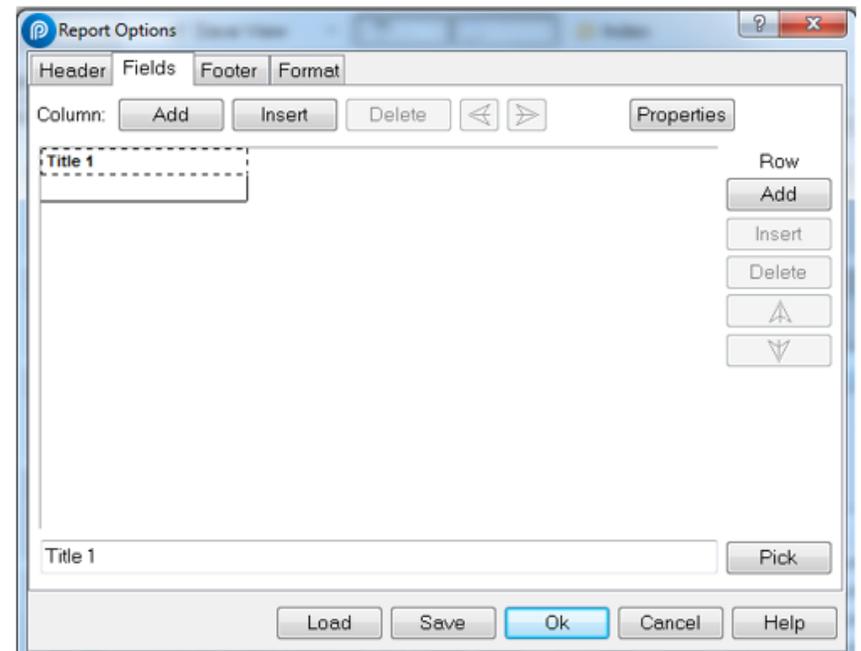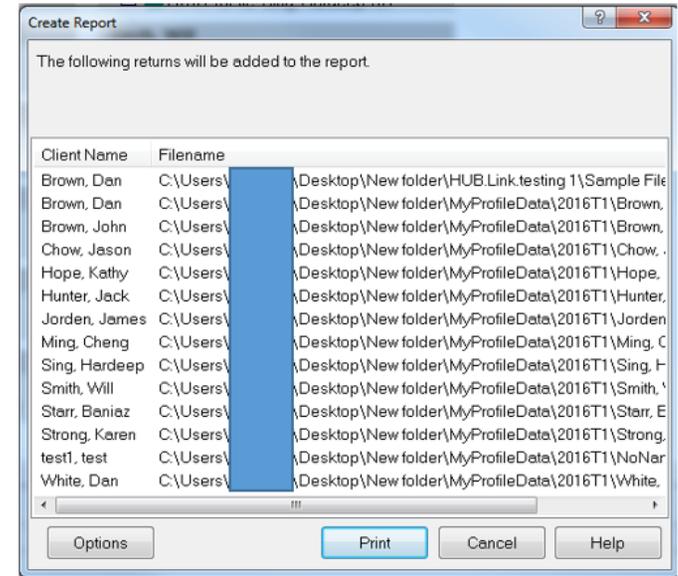
Using Mailing Labels in Client Explorer

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

Choosing a mailing label:

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

The **Label Selection** window displays.

2. Select the return type (for example, **T1**) and tax year (for example, **2019**) from the tab menu.

3. Select the **Label Type** from the drop-down menu.

Creating a new mailing label:

1. Select the **New Label** button; the **Label Details** fields activate and populate.

2. Enter the specific measurements for the label in the **Label Details** fields.

3. Save the name of the new label in the **Label Details** field (for example, **T1 2019 Label**).

4. Select the **OK** button; the label saves and the window closes.
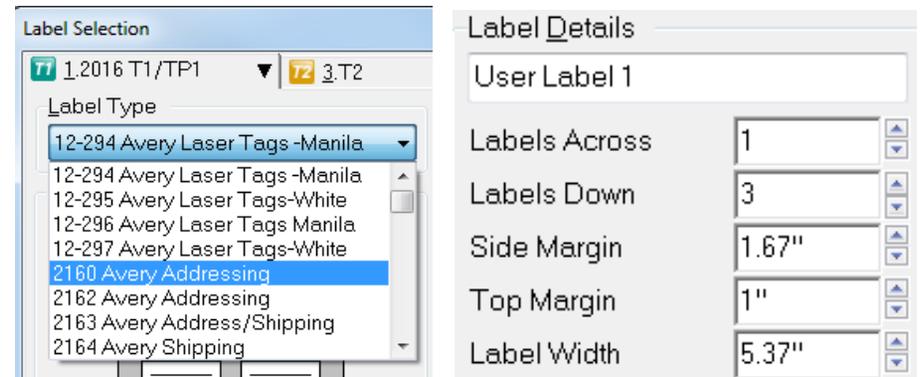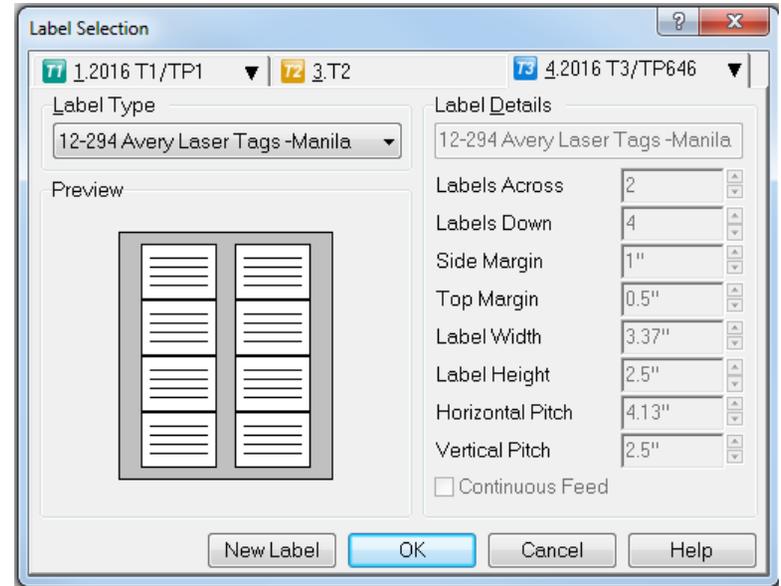
Using Mailing Labels in Client Explorer, Continued

Printing mailing labels:

1. Open the **Client Explorer** database in ProFile.

2. Select the client for which the label will apply.

3. Select the **Print Mailing Labels** option under the **Database** drop-down menu in the top toolbar, the **Print Labels** window displays.

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

5. Select the checkbox for **Print only one label for coupled return?** if required.

6. Select the **OK** button; the label(s) print.
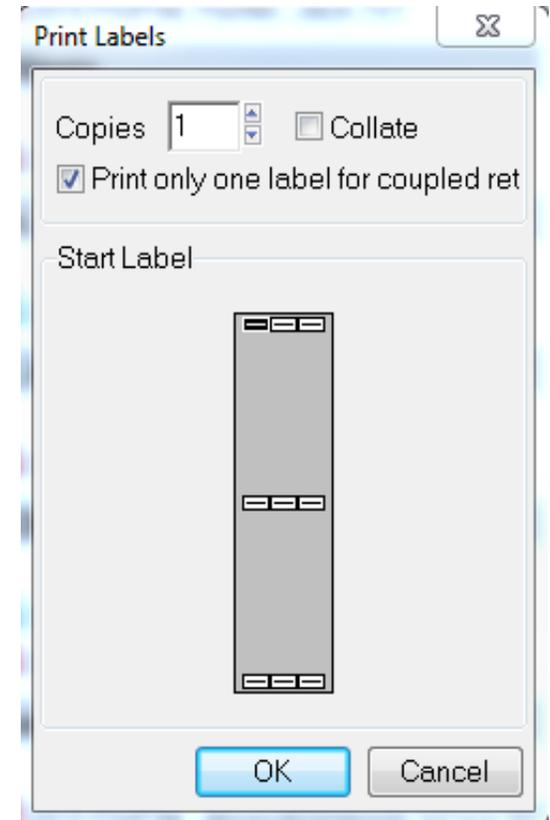
Batch EFILE in Client Explorer

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

Batch and transmit files:

1. Open **Client Explorer** in ProFile.

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

The list of eligible files displays.

3. Select the files to include in the batch transition.

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

The build window displays.

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

6. Select the **OK** button.

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

7. Select the red **X** to display the issue with the **Failed** return. Select the **Transmit now** button; the files transmit to CRA; you can also select the **Transmit later** option.
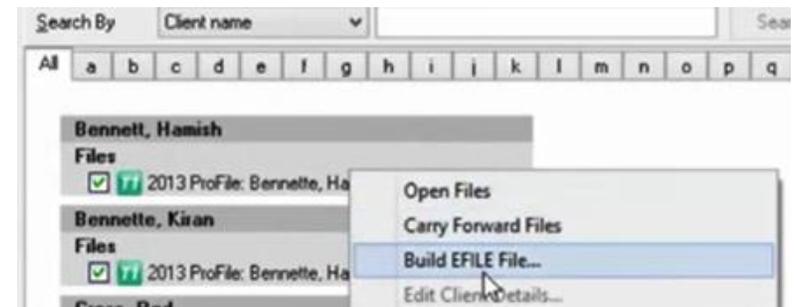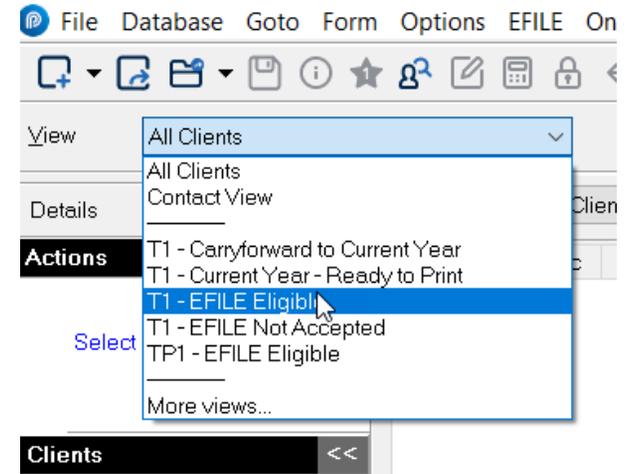
Batch EFILE in Client Explorer, Continued

Transmit batch files at a later time:

1. Select the **Transmit later** button when prompted during the batch process.

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

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

3. Select the files to EFILE and select the **OK** button.

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

4. Select the red **X** to display the issue with the **Failed** return.

Note: CRA stipulates a two-second pause between the EFILE of each file; this may result in a slower-than-expected process to EFILE for customers with many files in a batch.
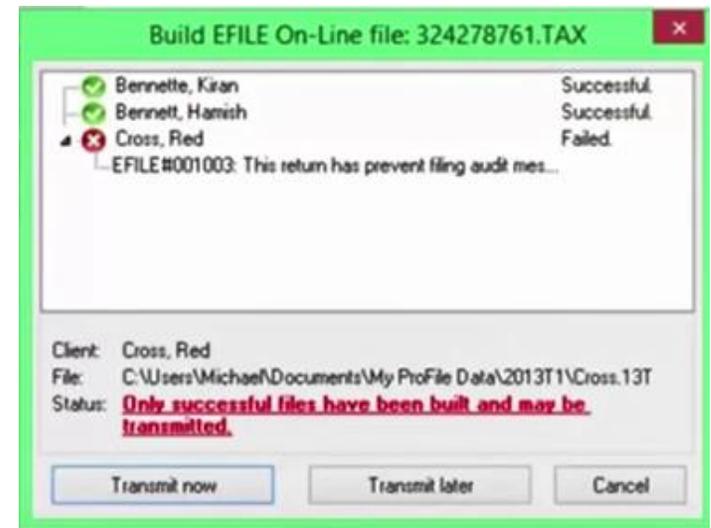
Carry Forward TaxCycle Returns in ProFile

Carry Forward TaxCycle Returns in ProFile

What years are supported for conversion?

T1 module supports T1 2018 files. T2 module supports T2 2016 and later files.

Is there a limit on how many files can be converted?

There is no limit on how many files can be converted.

Who can convert TaxCycle client files to ProFile?

File conversion is available to current year customers only.

How long will it take to convert my client files to ProFile?

In most cases client files are migrated within an hour, depending on the number of client files uploaded. Users receive an email from ProFile indicating when the conversion is complete.

What data gets converted during the conversion process?

The conversion process does not produce a complete or accurate prior year tax return for side-by-side comparison. ProFile converts pertinent data to next year's tax return; conversion is not a 1:1 transfer of data to reproduce the same tax return for the same year.

The converted files provide a starting point intended to be transferred to the next year's tax program and the data in the converted file should not be changed in the prior year tax program.

How is this different from other carry forwards?

TaxCycle carry forward works differently from other carry forwards. A technology is used that allows for faster field mappings and an improvement in comparison between TaxCycle and ProFile returns. The result is a faster and more-accurate carry forward experience.

How long are my client files saved on Intuit's network?

Client data is used for conversion purposes only. After the data is converted, a copy is maintained for conversion backup purposes and is destroyed after a 30-day period.

Ensure you download your files within 30 days of conversion, or you will need to repeat the conversion process. See section "Download converted client data" below for the steps in the download process.

Carry Forward TaxCycle Returns in ProFile, Continued

Why were some of my files not converted?

There can be several reasons why a TaxCycle client file did not convert:

- The file may not have been in the correct folder
- The file may have been locked or password-protected
- The file may be corrupted
- The file may be missing critical data

The affected files can be corrected and resubmitted.

What fields are supported and unsupported?

Supported fields include:

- All taxpayer information, including taxpayer, spouse, dependents, corporation, etc.
- All-important carryover amounts that can be obtained
- 5-year, comparative summary, installments schedule
- Capital cost allowance
- Loss carryover amounts

Unsupported fields include:

- Quebec TP1 and CO17 tax information
- Amounts that are not relevant to next-year tax preparation
- Some provincial credit carry forward amounts

Carry Forward TaxCycle Returns in ProFile, Continued

Copying TaxCycle client data:

1. Create a new folder under your computer's C: drive titled **conversiondata**. This folder may already exist on your C: drive if you have already updated ProFile to version 2019.2.0 or later.

2. Navigate to the folder containing the TaxCycle client files to carry forward. You can find this location under **Options > Files and Folders** in your TaxCycle software.

3. Remove any locks or password protection from the files to carry forward.

4. Copy and paste the files to carry forward to the new C:\conversiondata folder you created.

Submit client data for carry forward:

1. Select the **File** menu in ProFile.

2. Select the **Submit Client Data for Carry Forward…** option under the **TaxCycle Carry Forward…** menu.

The **Sign In** window displays.

3. Sign into your ProFile account.

If you do not yet have a ProFile account, select the **Create an account** link at the bottom of the **Sign In** window.

Note: You may be prompted to log in to your ProFile account a second time during the conversion process: this is a normal behavior.

A secure connection is established.
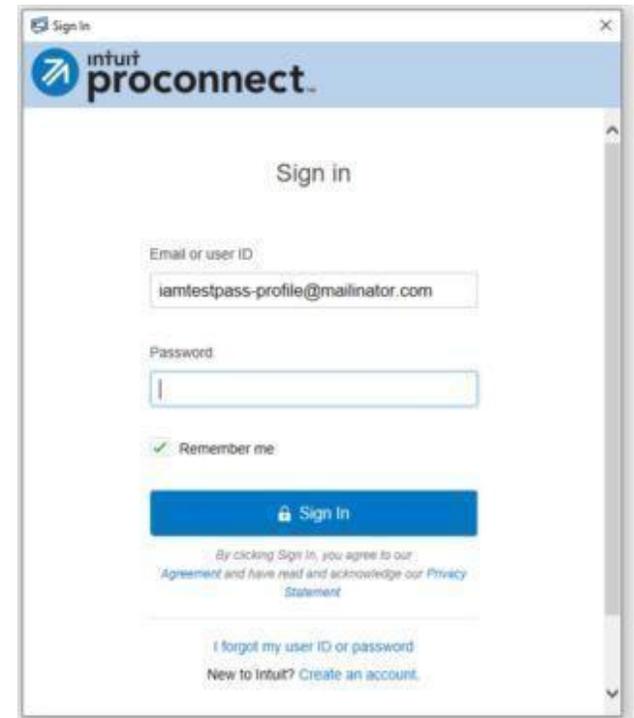
Carry Forward TaxCycle Returns in ProFile, Continued

The **Intuit Competitor Carryforward Wizard** displays.

4. Select the **I am ready** button to proceed. The module selection window displays.

5. Select the applicable module from the drop-down menu, corresponding to the files to undergo conversion for the carry forward process (for example, **TaxCycle T1**).

Note: Each module's files must be converted separately; it is not possible to convert T1 and T2 files at one time.

6. The carry forward wizard reads and displays files matching the selected module from the **C:/conversiondata** folder.

7. Select all files to undergo conversion prior to carry forward.
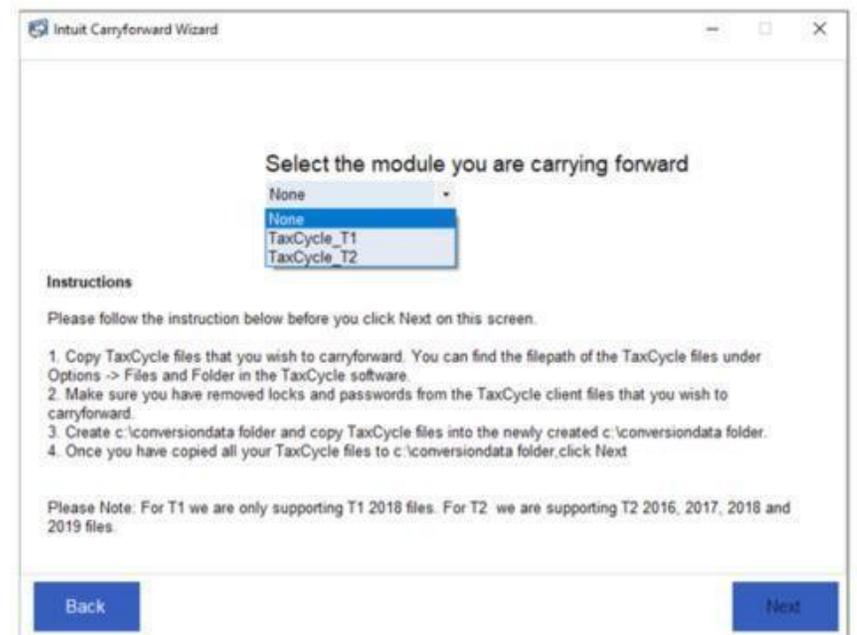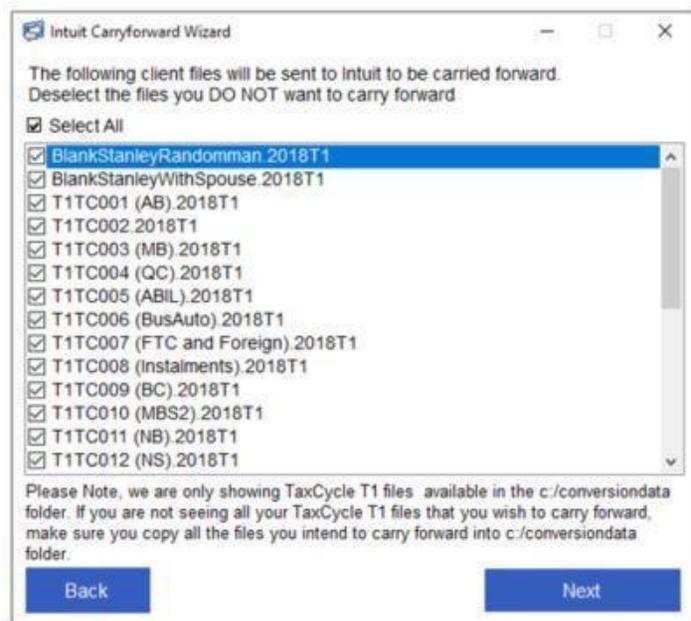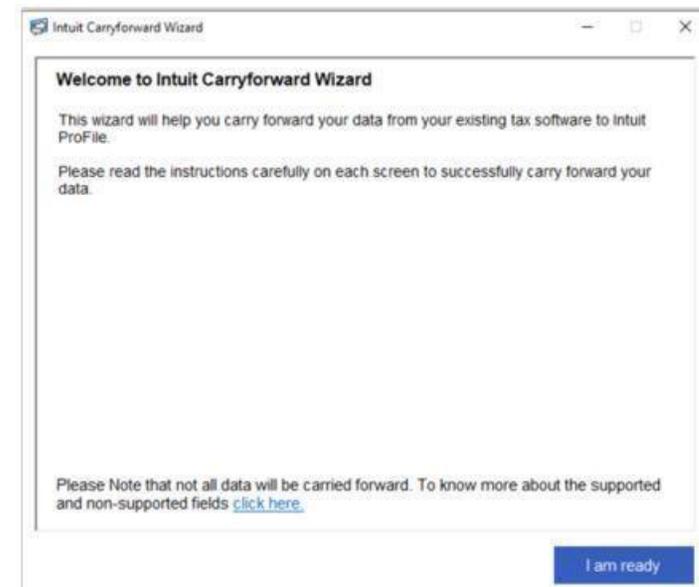
Carry forward TaxCycle returns in ProFile, Continued

Note: Only files in the **C:/conversiondata** folder display for selection. If you do not see a file that should be converted, ensure it has been copied to the folder.

8. Select the **Next** button; the selected files begin conversion. Most jobs will complete within minutes, so you can minimize this window and work in ProFile as the upload/conversion takes place.

ProFile emails a notice that conversion has begun.

9. You can select the **Cancel Job** button at any time to cancel the conversion. Conversion may take several minutes depending on file size and the number of files being converted.

A progress bar displays conversion progress.

A **Conversion complete** message displays when the files are successfully converted.

ProFile converts the TaxCycle files to a ProFile-compatible format.

ProFile emails a notice that conversion is complete.

10. Select the **Close** button.

The **Conversion summary window** displays.
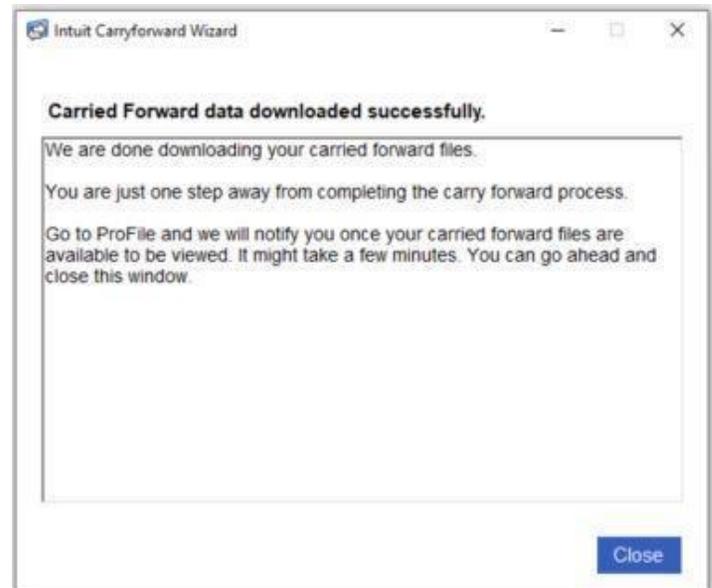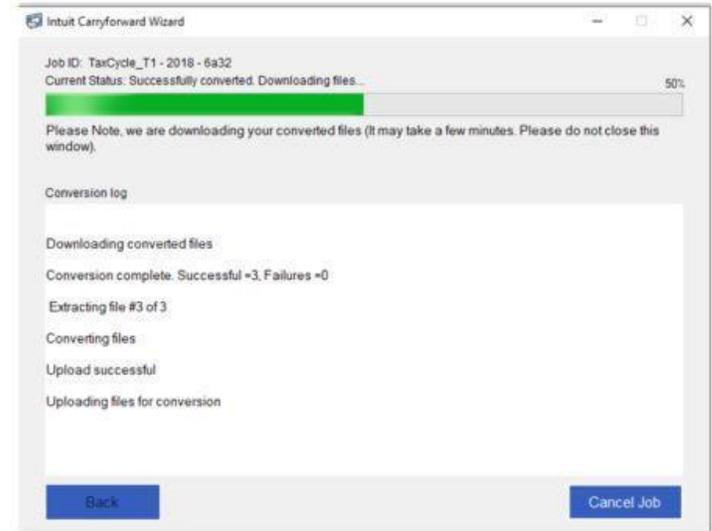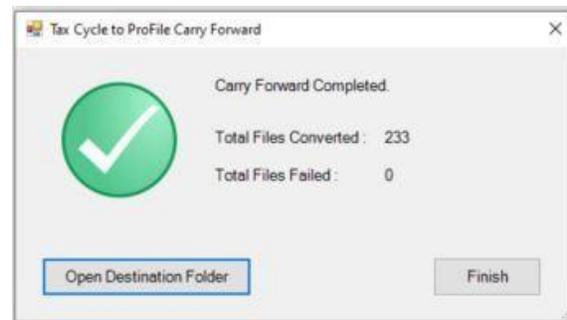
Carry forward TaxCycle returns in ProFile, Continued

11. Select **Open Destination Folder** to review the converted files in the TaxCycle folder; the location will be **C:\Users\[local user]\Documents\My ProFile Data\TaxCycle\[module].**

12. Select **Finish**.

Note: It is not currently possible to customize the file path destination for the input (the conversion data folder) or the output (My ProFile Data\TaxCycle) folders. If you need to save files on a network or other location, you must move them to the desired location following the conversion.

You may now open the client files in ProFile for further work or electronic filing.

Review our full support article for information on troubleshooting errors and downloading converted client data.

Batch Carry Forward Files

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

1. Open **Client Explorer** in ProFile.

Client Explorer displays a list of tax return files.

2. Select the **Filter** button; the filter menu displays at the bottom of the Client Explorer window.

3. Select files to carry forward (for example, **all T1 files**) and the previous year (for example, **2019**) from the checkbox menu.

4. Select the **Apply Filters** button; the filter displays all files meeting the selected criteria.

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

6. Select the **Carry Forward Files** option on the left-side menu.

The files carry forward.
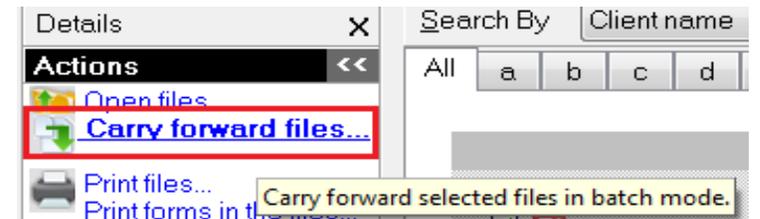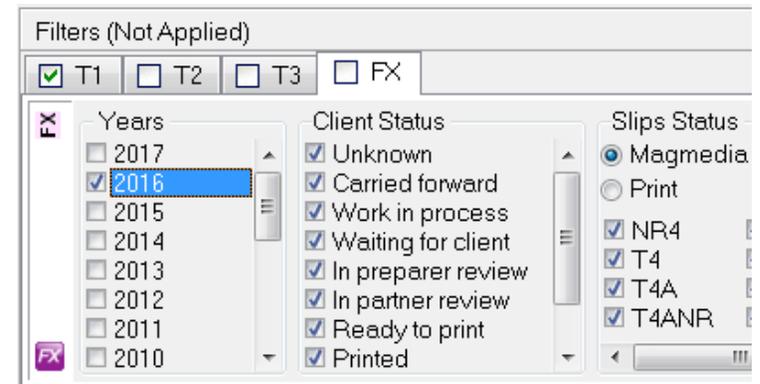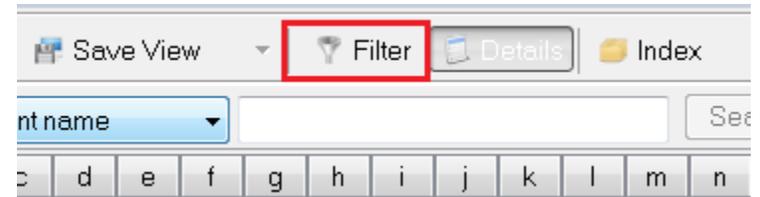
Batch Printing Forms in Client Explorer

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

Printing forms for a group of clients:

1. Open **Client Explorer**.

2. Select the designation for clients in the drop-down list (for example, **T1 - EFILE Eligible**); the clients matching the designation displays.

3. Select the clients to batch print.

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

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

The files print.
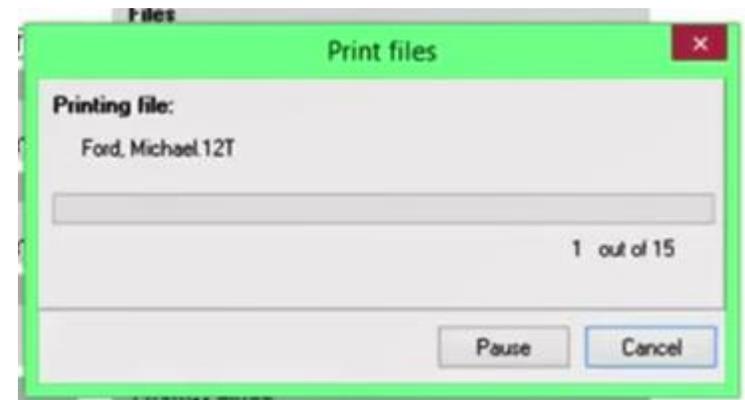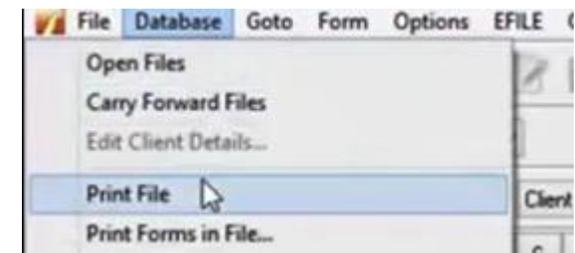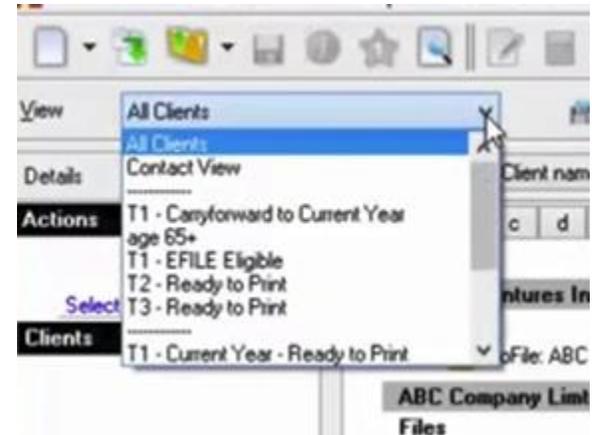
Batch Printing Forms in Client Explorer, Continued

Printing the same forms from each file:

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

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

Printing forms:

1. Select the designation for clients in the drop-down list (for example, **T1 - EFILE Eligible**); the clients matching the designation displays.

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

All forms are selected.

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

The **Print Selected Forms** window displays.

4. Enter the name of the form to print (for example, **t2038**).

Note: To print several forms, enter them all with a semicolon as a divider between each form (for example, **t2038; t2036**).

5. Select the **OK** button, the forms print.
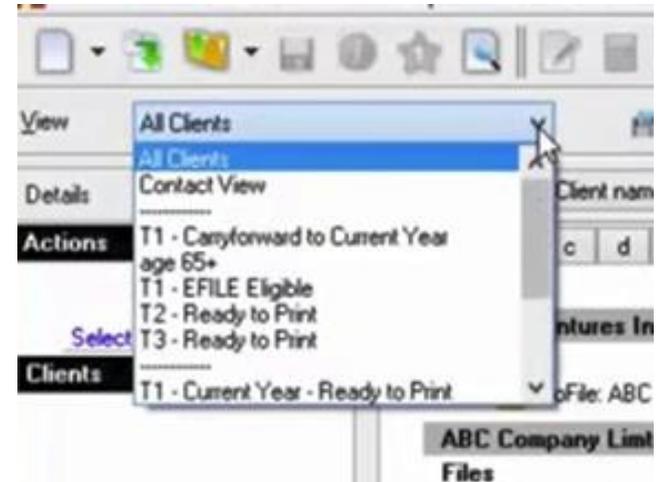
Using Queries in Client Explorer

Note: A query applies only to returns of a single type (for example, 2019 T1 returns). The Client Explorer's query function allows preparers to produce a list of files with specific values for batch printing or to include on a report. Queries can also select data to export or to select files that require mailing labels.

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

Query example:

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

Running a query:

1. Set **Client Explorer** as the database option in ProFile.

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

3. Select the **Filter** button, a list of options displays.

4. Select the module to be queried (for example, **T1**) and tax year to be queried (for example, **2019**).

5. Select the **Advanced** button, the **Advanced Filters** window displays.

6. Select the **New** button; the **Advanced Filters** window expands to display the Add button and three Conditions for queries.

7. Select the **Add** button; the **Add Condition** window displays.
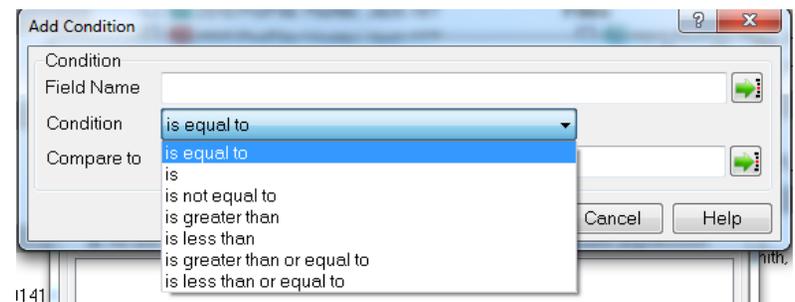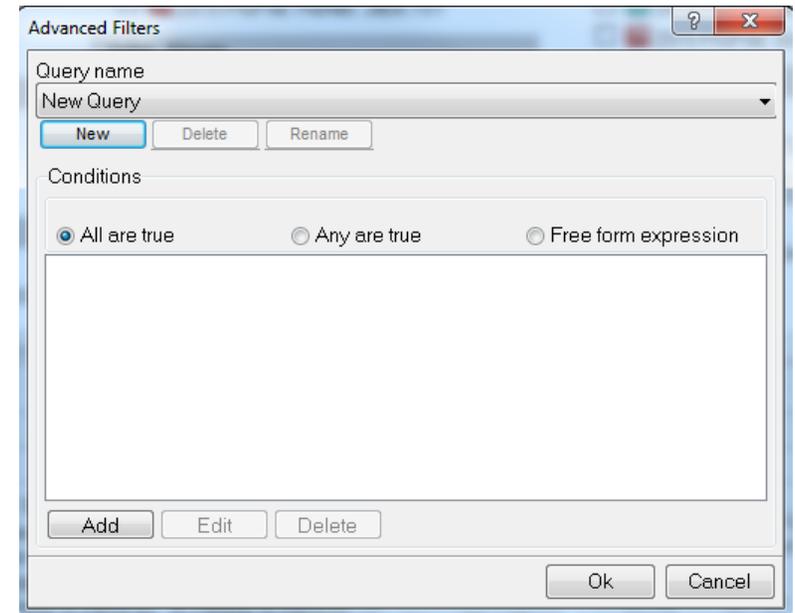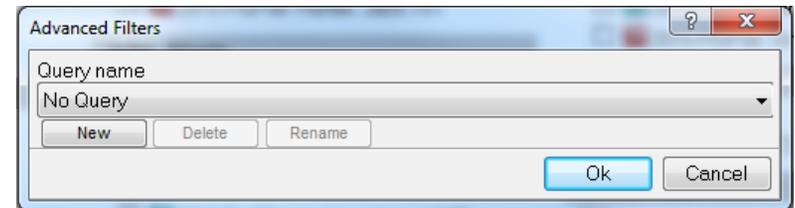
Using Queries in Client Explorer, Continued

Setting conditions for queries

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

1. Select the drop-down menu in the **Condition** field of the **Add Condition** window; a list of conditions displays.

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

3. Select the drop-down menu in the **Compare to** field of the **Add Condition** window; a list of conditions displays.

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

5. If this query will be used again later, enter the query name in the **Field Name** field (for example, **Invoices less than 10K**).

6. Select the **Add** button; the newly created query saves in the query list.

7. In the Client Explorer, select the **Apply Filters** button. The query runs and displays results.
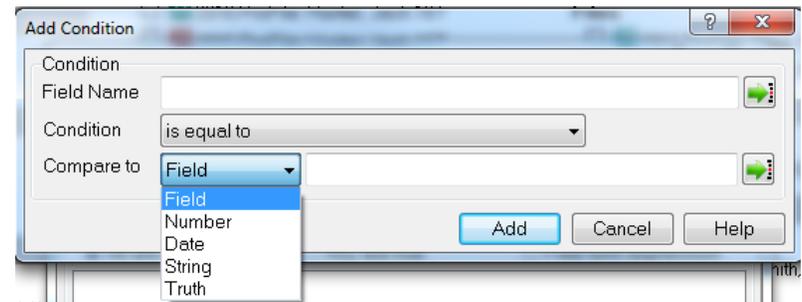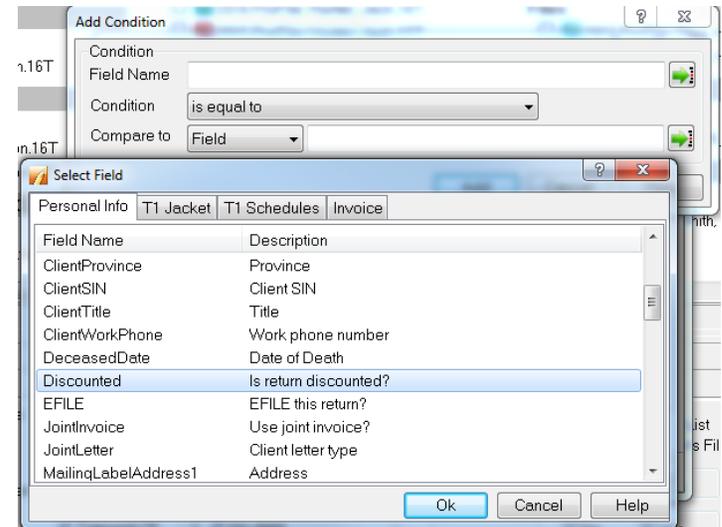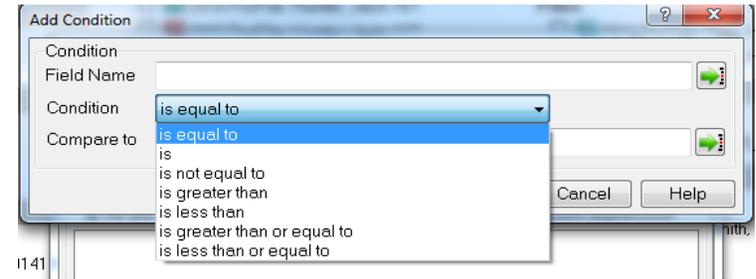
Using Intuit's Hub and Link

Overview of ProFile Hub

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

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

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

What modules does Hub support?

Hub supports T1 and T2 modules.

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

Yes.

How does Hub work with Inuit Link?

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

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

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

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

How much do Hub and Link cost?

Hub and Link are complimentary with 2016 ProFile and onwards. Customers need to have purchased a ProFile T1 or T2 module.

Initial Setup of Hub

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

Setting up Hub:

1. Open the ProFile application.

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

The **ProFile Hub Set Up** window displays.

3. Select the **Enable ProFile Hub** check box.

4. The options menu for Hub set up becomes active.

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

6. Select the **Browse** button in the **Where are your client files stored?** section.

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

8. Select the **Read files** button.

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

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

The list of client returns displays.
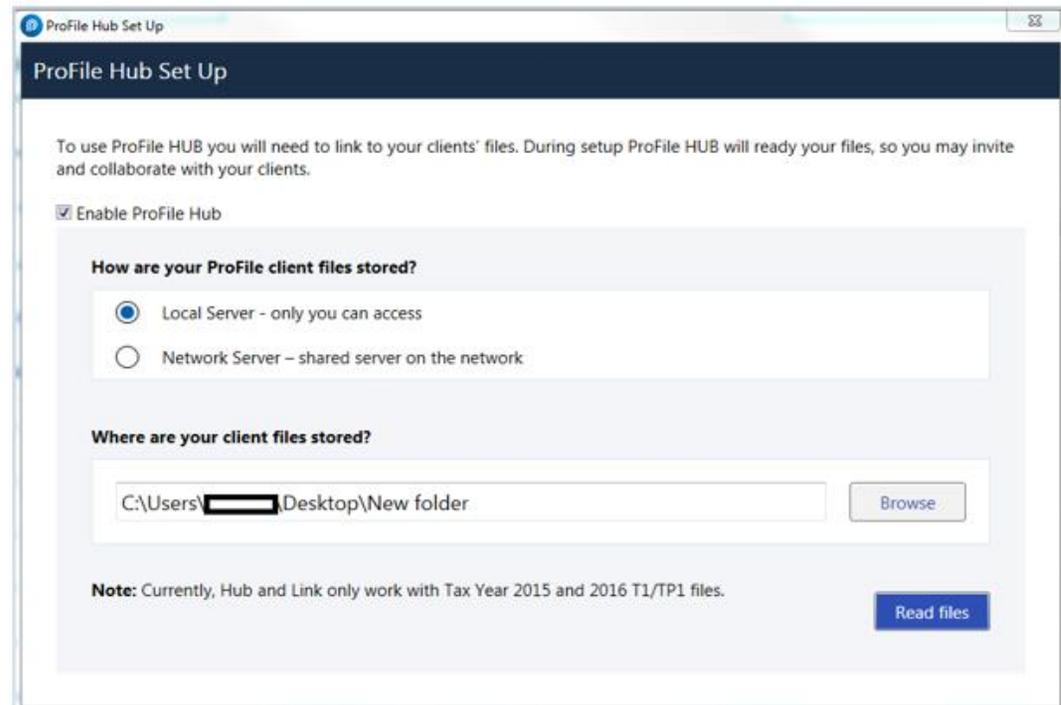
Import Data via Auto-Fill my Return (AFR) in Hub

Note: A completed **T1 Authorize a representative submission** is required before a preparer can import data to Hub via AFR.

Importing Data in Hub:

1. Open ProFile.

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

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

4. Identify the client to undergo data import.

5. Select the **Run CRA Import** link in the **CRA IMPORT** column.

A prompt displays inquiring to the completion of a **T1 Authorize a representative.**

6. Select the **OK** button to proceed.

The ProFile **CRA Data Import** window displays.

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

Using Filters in Hub

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

Setting filters in Hub:

1. Open ProFile.

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

Hub opens, displaying a list of clients.

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

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

The **All year**s designation also displays.

5. Select the applicable option to filter.

The filtered results display in the client list.

Using Checklists in Hub

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

Reviewing a checklist:

1. Open ProFile.

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

3. Hub opens, displaying a list of clients. Identify the client that requires a checklist for (for example, **Brown, Dan**). Select the **Invite** button associated with the client.

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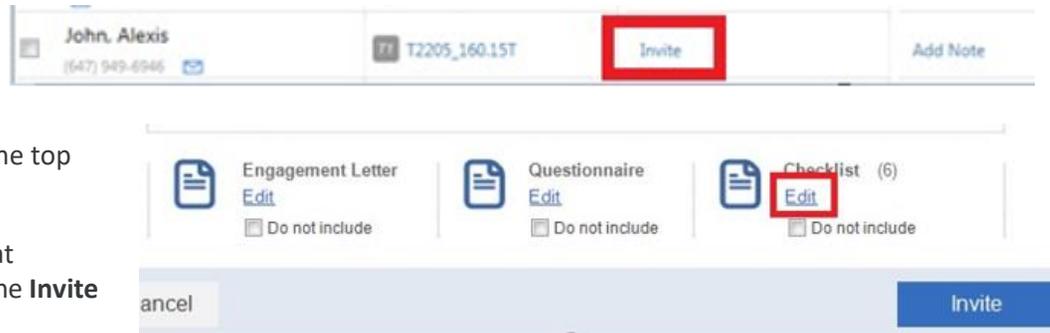
The **Edit Document Checklist** window displays.

The checklist details the client, the individual requests made to the client (based on the previous year's requests) and the action that can be undertaken.
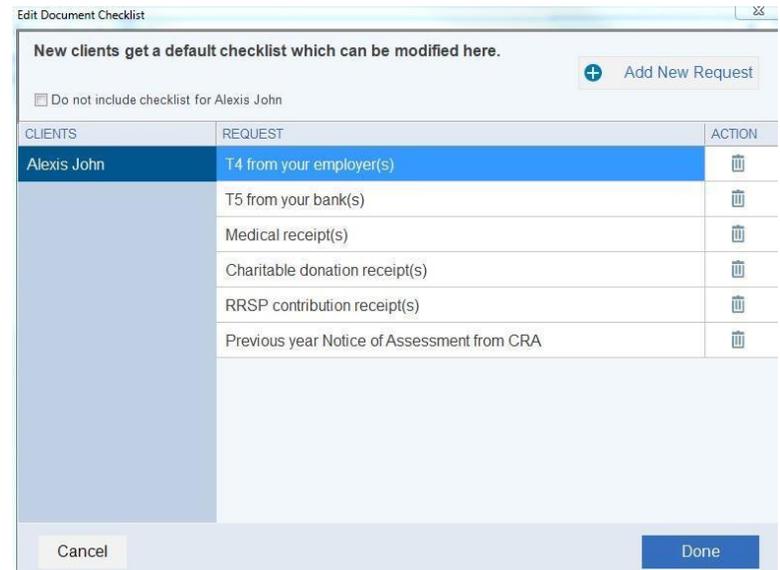
Using Checklists in Hub, Continued

Deleting an existing checklist entry:

1. Identify the checklist entry to be deleted.

2. Select the **trash can icon** next to the checklist entry under the **ACTION** menu; the entry deletes.

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

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

3. Select the **Done** button. The checklist updates and the **Edit Document Checklist** window closes.

4. Select the **Invite** button in the **Invite Clients to Use Link** window.

The invitation with the checklist is sent to the client.

Adding a new checklist entry:

1. Select the **Add New Request** button in the **Edit Document Checklist** window.

A new blank checklist entry field is created.

2. Enter the new checklist entry (for example, **Travel receipts**).

3. Select the **Done** button. The checklist updates and the **Edit Document Checklist** window closes.

4. Select the **Invite** button in the **Invite Clients to Use Link** window.

The invitation with the checklist is sent to the client.

REQUEST	ACTION
T5 from your bank(s)	🗑
Medical receipt(s)	🗑
Charitable donation receipt(s)	🗑
RRSP contribution receipt(s)	🗑
Previous year Notice of Assessment from CRA	🗑
	🗑

Engagement Letter	Questionnaire	Checklist (6)
Edit	Edit	Edit
☐ Do not include	☐ Do not include	☐ Do not include

Cancel | Invite

Using Questionnaires in Hub

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

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

Opening a questionnaire template:

1. Open ProFile.

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

Hub opens, displaying a list of clients.

3. Identify the client to whom you want to send an engagement letter (for example, **Brown, John**).

4. Select the **Invite** button associated with the client.

	CLIENT NAME	FILE NAME		INTUIT LINK		CRA IMPORT	COMMENTS
☐	Brown, Dan ✉	T1 Brown, Dan.16T	🔍	Invite Pending		Run CRA Import	Add Note
☐	Brown, John ✉	T1 Brown, John.16T	🔍	Invite		Run CRA Import	Add Note
☐	Chow, Jason	T1 Chow, Jason.16T	🔍	5/12	▬▬▬	Run CRA Import	Add Note
☐	Hope, Kathy	T1 Hope, Kathy.16T	🔍	Invite		Run CRA Import	Add Note
☐	Hunter, Jack	T1 Hunter, Jack.16T	🔍	Invite		Run CRA Import	Add Note
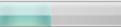
ProFile Hub — Action | All years | Search a client or a file

Using Questionnaires in Hub, Continued

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

5. Select the **Edit** link from the **Engagement Letter** option.

The **Edit Questionnaire** window displays.

6. Users can undertake the following actions:

    ● Edit the existing questions
    ● Remove an existing question
    ● Create new questions
    ● Assign an answer type
    ● Delete a question
    ● Create a new questionnaire template

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

Related Articles

Review our support articles related to Hub.

Using Engagement Letters in Hub

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

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

- Use an existing engagement letter from a template
- Create a new engagement letter

Using an existing engagement Letter:

1. Open ProFile.

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

Hub opens, displaying a list of clients.

3. Identify the client to whom you want to send an engagement letter (for example, **Brown, John**).

4. Select the **Invite** button associated with the client.

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

5. Select the **Edit** link from the **Engagement Letter** option.

Using Engagement Letters in Hub, Continued

The **Edit Engagement Letter** window opens.

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

7. Select the template to be edited and sent to the client (for example, **Letter of Engagement**).

The template-editing window displays.

8. Make any edits in the template-editing window.

9. Select the **Add** button above the editing window to save any changes.

10. Select the **Done** button; the engagement letter saves.

11. Select the **Invite** button in the **Invite Clients to Use Link**; the engagement letter is sent to the client.
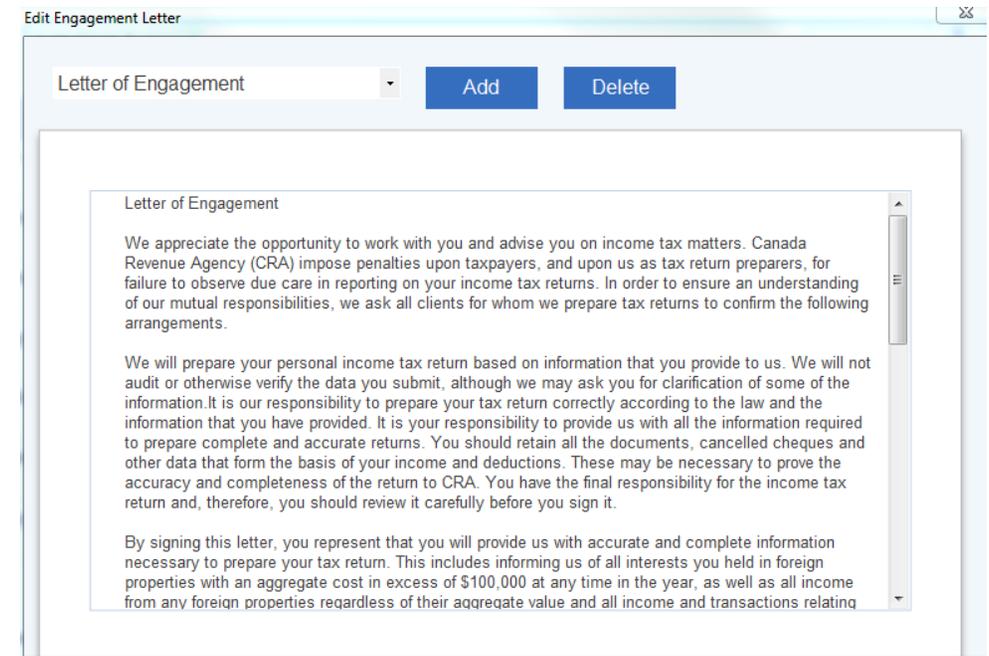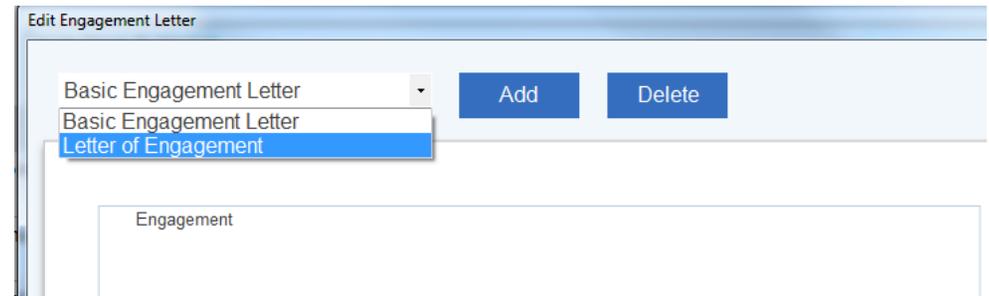
Using Engagement Letters in Hub, Continued

Adding a new engagement letter:

1. Open ProFile.

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

Hub opens, displaying a list of clients.

3. Identify the client to whom you want to send an engagement letter (for example, **Brown, John**).

4. Select the **Invite** button associated with the client.

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

5. Select the **Edit** link from the **Engagement Letter** option.

Using Engagement Letters in Hub, Continued

The Edit Engagement Letter editing window displays.

6. Select the **ADD** button above the letter content.

The **New Engagement Letter** window displays.

7. Enter the name of the new template in the field (for example, **Receipt Request Letter**).

8. Select the **OK** button.

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

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

10. Select the **Done** button; the template saves.

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

11. Select the **Invite** button in the **Invite Clients to Use Link**; the new engagement letter is sent to the client.
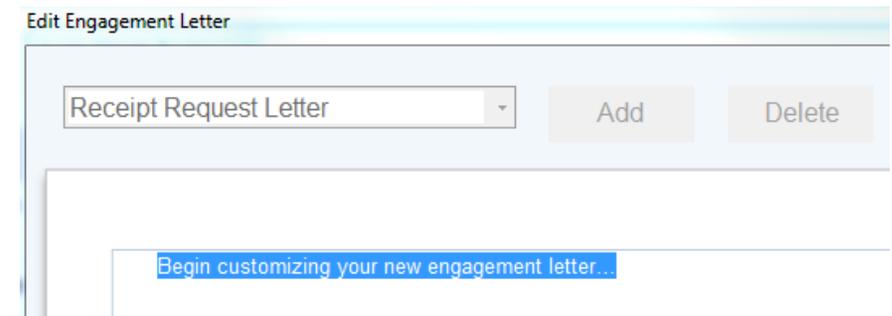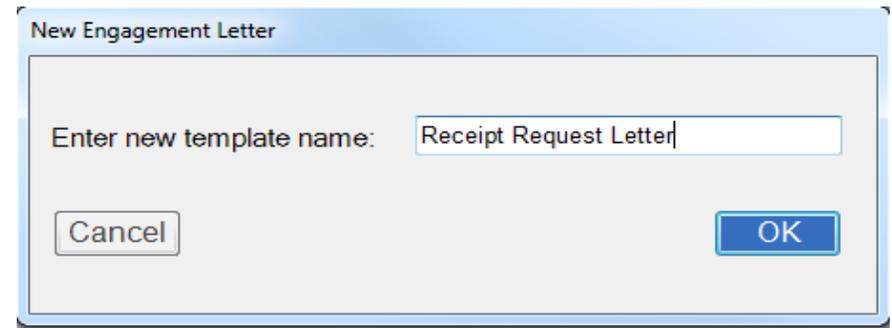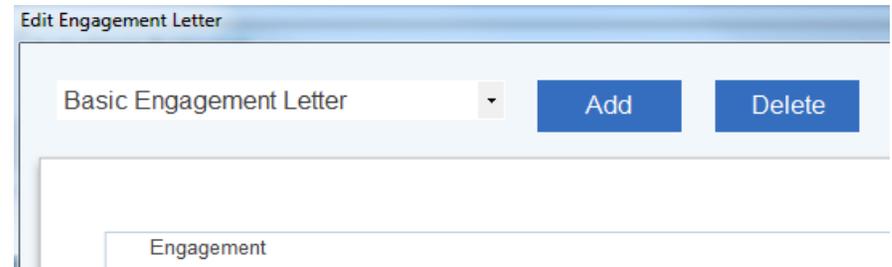
Overview of ProFile Link

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

What are the benefits of Link?

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

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

How much does Link Cost?

Link is complimentary with 2016 ProFile and later years. Customers need to have purchased a ProFile T1 or T2 module.

How do I review documents my client has provided?

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

Accountant View in Link

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

Tax year selection: Filter the client list by the appropriate tax year.

Clients: Displays clients that have been added to Link.

Firm Settings: Details the firm information, notification settings, and template options.

New Features: Details new Link features as they become available.

Learning Library: Opens an external link to the Link Learning Library.

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

Client details: Lists the name, progress, activity, and actions for each client in Link.

Client activity: Details recent client activity, such as acceptance of invitations or completed tasks.

Invitation Reminder: Sends clients a reminder that a previous invitation is still pending.

Add New Client: Adds a new client to the client list.

Adding a Client to Link's Accountant View

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

Navigating to Hub:

1. Open ProFile.

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

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

A list of clients in Hub displays.

4. Select the appropriate module (for example, **T1 Module**) from the drop-down menu in the top left corner of Hub.

The list of Hub clients filters.

For T1 clients:

1. Create a new **T1 Individual** client return in ProFile.

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

3. Select the **Invite** link under the **Intuit Link** column for the new client.

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

Adding a Client to Link's Accountant's View, Continued

For non-T1 clients:

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

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

1. Navigate to the **Link** website.

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

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

3. Select the **Add New Client** button from the right-side menu.

The **Add Client** window displays.

4. Indicate if the client is an **Individual** or **Organization**.

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

6. For an **Organization** populate the **Organization Name** and **Email** fields. **Work Phone** is an optional field.

7. Select the **OK** button; the client is added to the client list.

Sorting Client List in Link

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

Categories for sorting include:

- NAME
- TYYY PROGRESS (for example, **TY19 PROGRESS**)
- LAST ACTIVITY

Example: Sorting alphabetically by NAME

1. Log in to the Intuit Link site.

2. Select the **Clients** link on the left-side menu.

The list of clients displays.

3. Select the text within the column header (for example, **NAME**).

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

 Note: Users must Select the text itself, not the space surrounding the text to sort the order list.

Using Email Templates in Link

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

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

Creating custom Email templates

1. Log in to the Intuit Link site.

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

3. Select the client.

4. Select the **Firm Settings** option from the left-side menu.

The **Firm Settings** display.
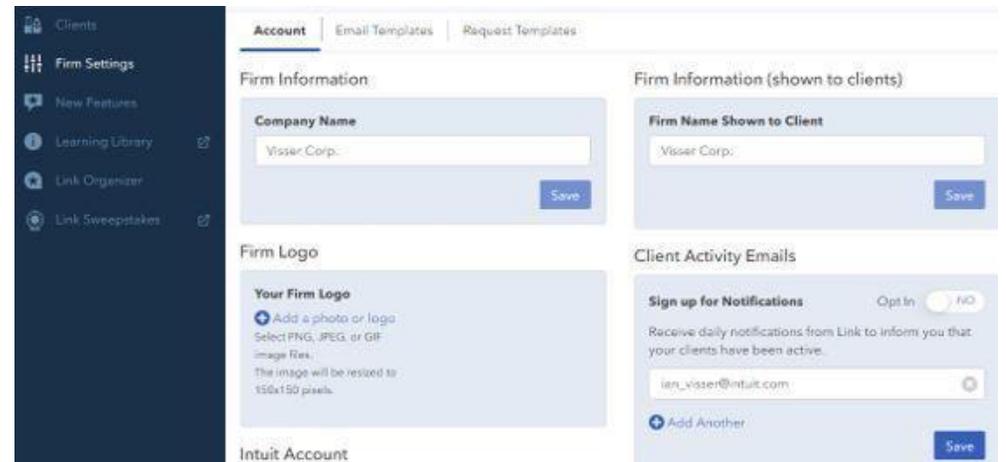
## Using Email Templates in Link, Continued

5. Select the **Email Templates** link in the menu bar.

6. Select the **New Template** button.

7. Complete the **New Template** fields:

   - **Template Name** gives the new template a name (for example, "Due Date Email")

   - **Email Subject** gives the email a title that a client will see in their inbox (for example, "A due date is approaching for return forms")

   - **Email Body** is the text that a client will see in their inbox (for example, "This is a reminder that March 15th is the due date for all return forms to be provided")

8. Select the **Save** button.

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

| Account | **Email Templates** | Request Templates |

Email Templates

⊕ New Template

Template Name

Due Date Email

Email Subject

A due date is approaching for return forms

Email Body

This is a reminder that March 15th is the due date for all return forms to be provided

Keywords

Client Nam ▾   Add Keyword

Cancel   Save

Using the Active Auditor in ProFile

Using the Active Auditor in ProFile

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

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

Accessing the Active Auditor:

The Active Auditor is accessed two ways:

- Select the **Active Auditor** icon in the top toolbar menu
- Right-click on any form and select the option **Show Auditor** from the menu

Selecting Active Auditor options:

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

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

2. Select the **Audit** tab, the **audit options** window displays.

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

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

Preferences settings

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

Note: ProFile recommends the Show Auditor Tabs option be selected to provide the clearest feedback and indication of errors on forms.
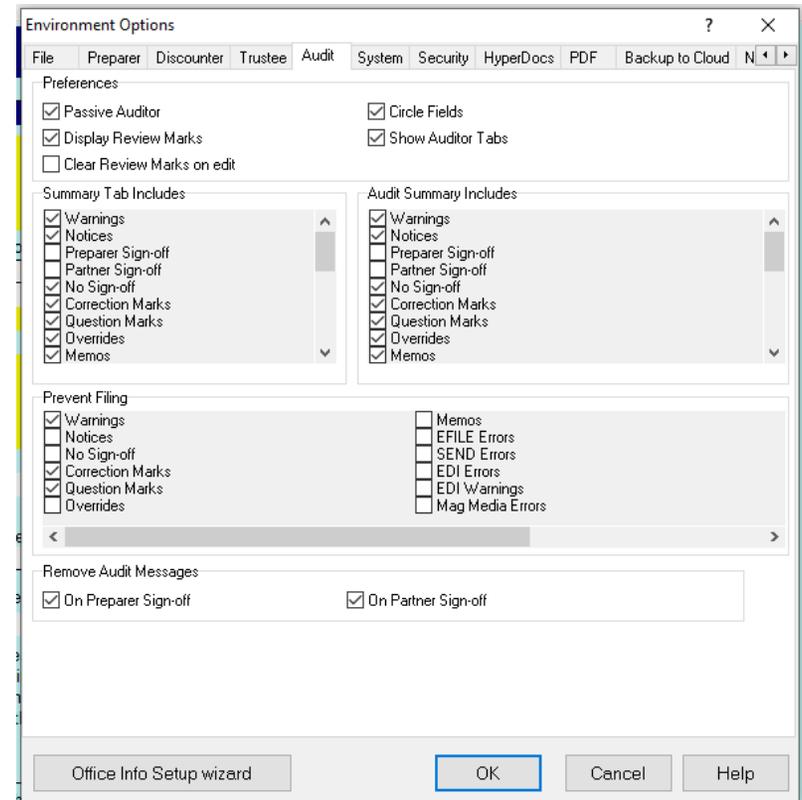
Using the Active Auditor in ProFile, Continued

Summary Tab Includes settings

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

Prevent Filing settings

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

Remove Audit Messages settings

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

Note: ProFile recommends one or both options be selected. Otherwise, error messages in the Active Auditor cannot be cleared to allow filing.

Clearing Active Auditor messages:

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

1. Double-click on an error warning in the tab.

The error circles in red on the form.

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

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

In such cases the individual selected in the Remove Audit Messages section of the Audit tab can sign-off, or approve, the error.
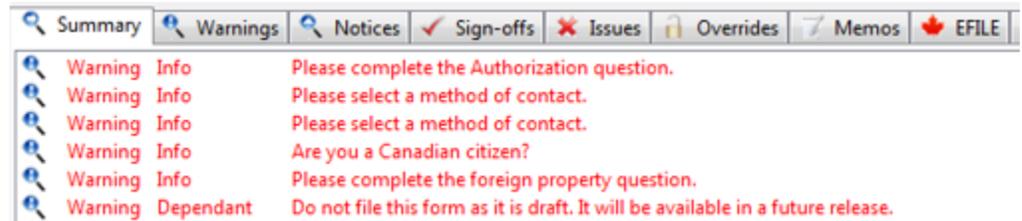
Using Review Marks in ProFile

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

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

Types of review marks

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

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

Using review marks:

1. Open the return that requires review marks.

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

3. Select the appropriate field in the return to apply the review mark; the review mark appears over the black status box to the right of the field.

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

Using Additional ProFile Features

Using Intuitive Copy in ProFile

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

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

Using Form copy and paste:

1. Open ProFile.

2. Complete the necessary statement in the client file.

3. Select the **Copy Form** option from the **Edit** drop-down menu in the top toolbar.

4. Open the data file for the partner.

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

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

7. Edit/complete the populated form for this client.

Intuitive Copy and Paste:

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

1. Finalize all business statement data.

2. Select the **Intuitive copy** option from the **Edit** drop-down menu in the top toolbar; the statement's data copies.

3. Open the business statement in the partner's file.

4. Select the **Intuitive paste** option from the **Edit** drop-down menu in the top toolbar, the copied data pastes into the partner's statement.

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

Attaching Tapes in ProFile

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

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

Attaching a tape:

1. Open a file in ProFile.

2. Select a field to attach a tape.

3. Right-click and select the **Attach Tape** option from the menu.

The Tape window displays.

4. Enter a **description** (for example, **Shirts**) into the left-side field of the table.

5. Enter a **value** (for example, **$500.00**) into the right-side field of the table.

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

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

The background color of the field changes to green when a field has a tape attached.
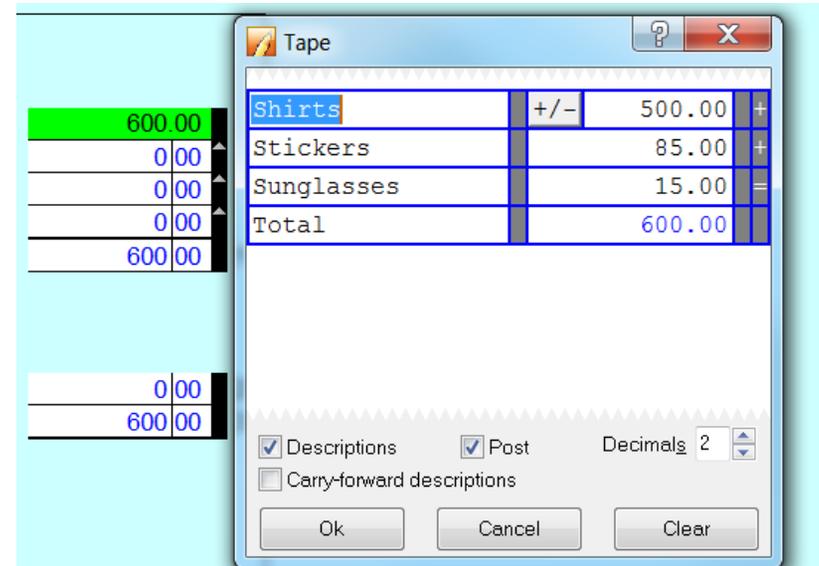
Note: Only the sum of a tape - not individual entry details - are printed or transmitted with the tax return data. The details and descriptions are for preparer reference only.

Attaching Tapes in ProFile, Continued

Clearing an Attached Tape:

1. Open the file with the attached tape in ProFile.

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

3. Right-click and select the **Attach Tape** option from the menu.

The **Tape** window displays.

4. Select the **Clear** button, the tape clears.

5. Select the **OK** button; the window closes and the tape clears from the field.

Copying a Tape from One Field to Another:

1. Open the file with the attached tape in ProFile.

2. Select the field with a tape attached.

3. Right-click and select the **Copy Memo/Tape** option from the menu.

4. Select the destination field for the copied tape.

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

The tape attaches to the destination field.

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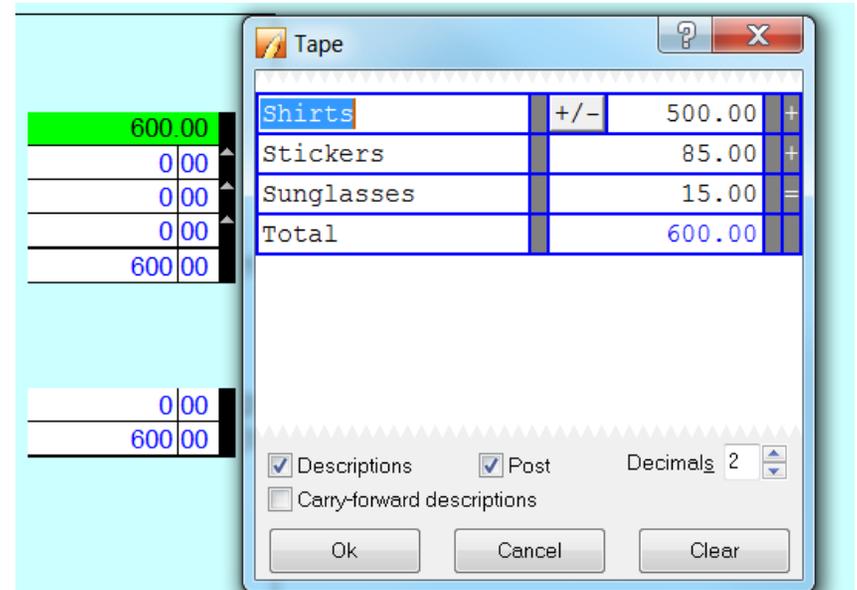
Attaching Memos in ProFile

Preparers can attach memos to fields on all ProFile forms. Memos are short notes and reminders, like sticky notes. Memos are useful for leaving notes or reminders for partners or reviewers to read.

Note: Memos do not print or transmit over the Internet with a tax return file or affect the calculation of a return.

Memo text displays in a pop-up window when hovering the mouse over a field with a memo.

Fields with attached memos also appear in the Memo and Summary tabs in the Active Auditor.

Attaching a memo:

1. Right-click in a field and select the **Attach memo** option from the menu.

The **Memo** window displays.

2. Enter the memo content into the text field in the **Memo** window.

3. Select the **OK** button.

The memo is attached. The color background of the field changes to green.

Clearing a memo:

1. Right-click in a memo field and select the **Attach memo** option from the menu.

2. Select the **Clear** button.

3. Select the **OK** button.

The memo text clears from the form field.
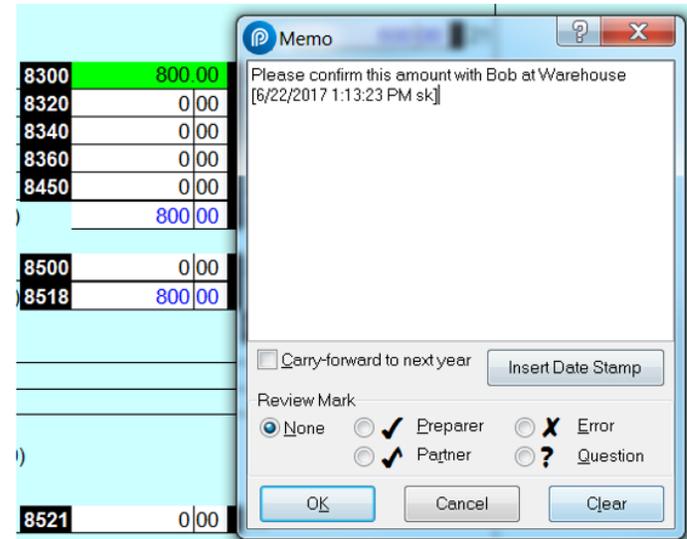
Attaching Hyperdocs in ProFile

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

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

Attaching HyperDocs:

1.   Open a form in ProFile.

2.   Select the field to attach a HyperDoc.

3.   Select the **HyperDocs…** option from the **File** drop-down menu in the top toolbar.

The **HyperDocs** window displays.
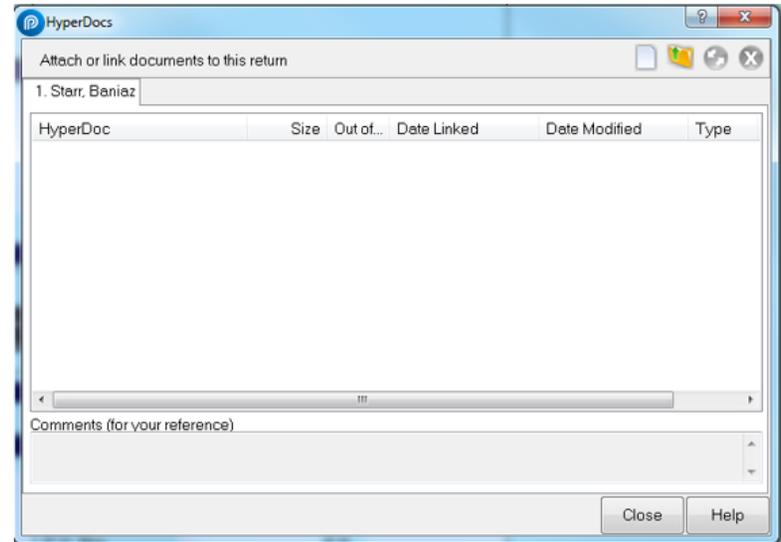
4.   Select the **Add** button in the top-right corner of the window.

5.   Navigate to the location of the document to attach. Select the document and select the **OK** button.

The **options** window displays.

6.   Select one of the options presented:

   ●   **Embedded** documents open in read-only state and cannot be edited in ProFile

   ●   **Linked** documents open from the source and can be edited in ProFile; any changes are saved in the source document in the file location

7.   Select the **OK** button; the document attaches to the field as a HyperDoc. The field displays in green color, indicating the HyperDoc attachment.
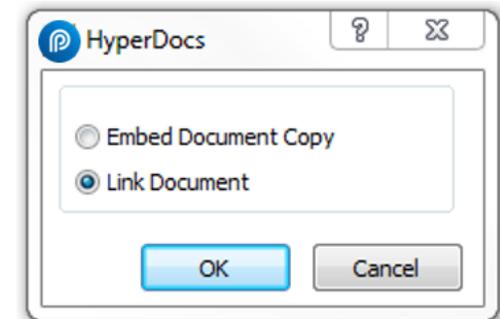
Attaching Hyperdocs in ProFile, Continued

Detaching HyperDocs from a field:

1. Right-click on the field with the attached HyperDoc.

2. Select the **Detach HyperDoc** option from the menu.

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

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

Removing HyperDocs from a form:

1. Select the **Hyperdocs…** option from the **File** drop-down menu in the top toolbar.

The **HyperDocs** window displays.

2. Select the document from the HyperDoc list of attached documents.

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

3. Select the red **X** logo.

4. Select the **Yes** button to confirm the removal of the document.

The document detaches from the form.
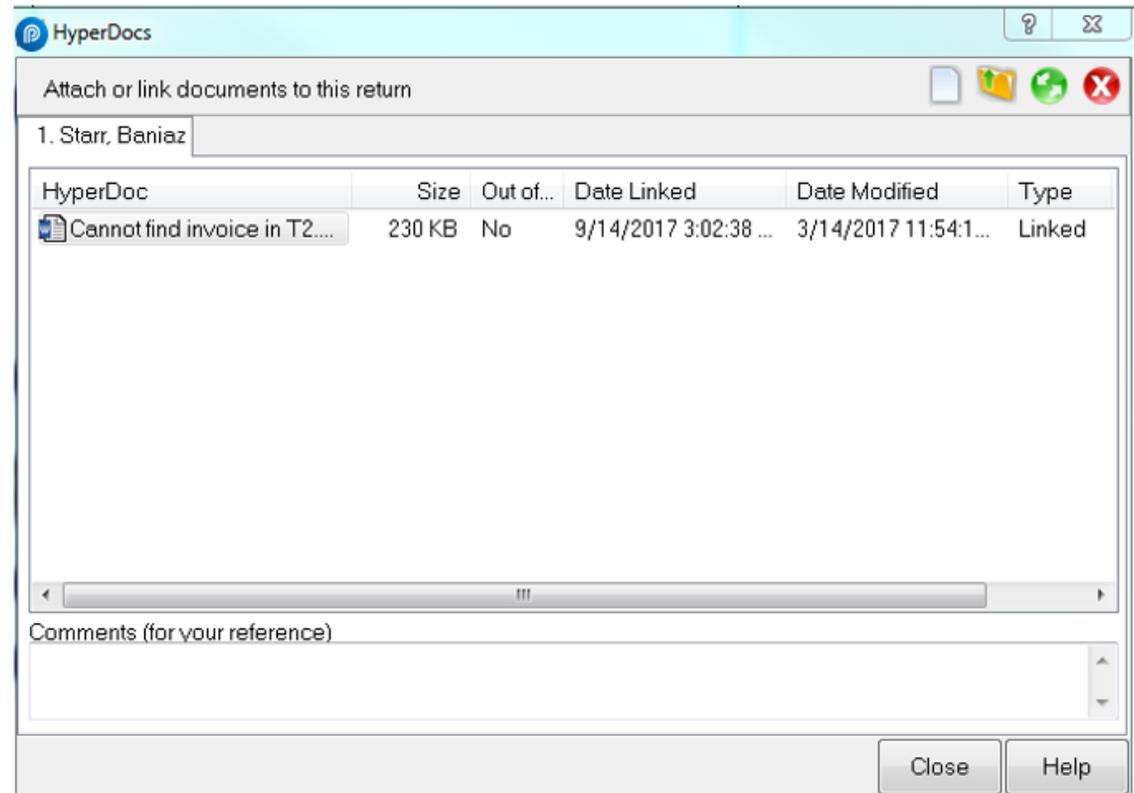
Attaching Documents for EFILE of TP1 Returns with the Attach a Doc Feature

When are attachments transmitted?

Revenu Quebec (RQ) allows the transmission of supporting documentation via ProFile's Attach a Doc feature after an amended return has been sent but before a notice of assessment (NOA) has been returned by RQ.

What file types are supported?

The following file types can be transmitted as attachments:

- .pdf
- .jpg
- .jpeg
- .tiff
- .tif

What is the maximum attachment size?

The maximum attachment size is 20 megabytes (MB); this is an RQ limitation.

Is there a limit to the number of attachments transmitted?

Submissions are limited to 25 attachments each; this is an RQ limitation.

Review our support article on using the Attach a Doc feature for TP1.

Setting up Data Monitors in ProFile

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

Selecting fields for data monitoring

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

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

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

To monitor a data field to the Data Monitor:

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

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

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

Line 236 minus line 257 (if negative, enter "0")			This is your **taxable income.** 260	35,000 00			
Modified		EFILE:	Not eligible	Balance/Refund	(1,246.03)	TP1 EFILE Status	Not eligible	Combined balance	(1,246.03)
Subtotal -own RRSPs	0.00	T4:14: Employment income f...35,000.00		0.00	Contributions to the QPP	1,630.13	Insurable salary or wages u... 35,000.00
Dependant's net income for ...11,000.00	Dependant mentally or physically inf...1	Amount from TP1 line 275 f... 11,000.00	Disability amount	7,766.00	Maximum available for transfer (... 0.00 +
TP1H:84: Enter . Also enter on line...0.00	Base amount	11,138.00	S5:5106: Dependant's net inc...11,000.00		4,392.00	S1:315: Caregiver amount	4,392.00
S1:406: Federal tax	902.96	**T1:101: Employment inco... 35,000.00**					

Related Articles:

Review our support article on adding more than four data monitors.

Review our support article on transferring data monitors to a new computer.

Using Multiple Windows in ProFile

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

Opening multiple windows outside ProFile:

1. Open two or more returns in ProFile.

2. Select the **tile window** icon in the ProFile top toolbar.

The returns open in individual windows on the desktop.

3. Select the **tile window icon** in each individual window to collapse the return back into ProFile.

Opening multiple windows inside ProFile:

Open two or more returns in ProFile.

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

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

Toggling between multiple open returns:

1. Select the **Window** drop-down menu in the top toolbar.

Any open returns display at the bottom of the menu; the active window is marked with a check mark.

2. Select any return listed in the menu to display it.
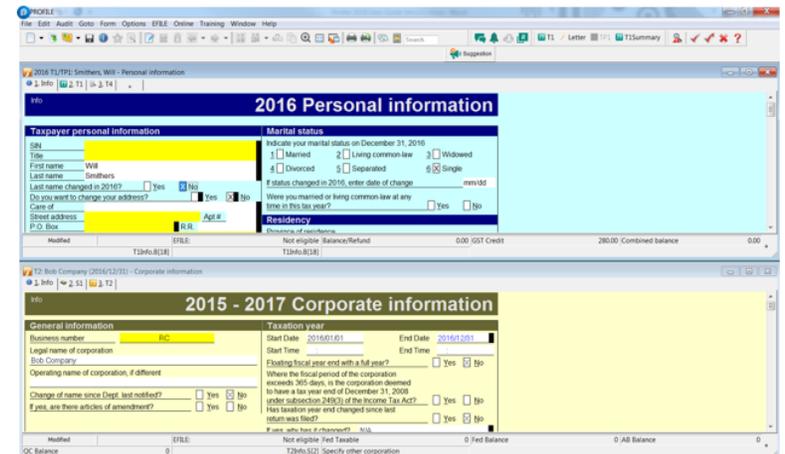
Viewing EFILE Reports in ProFile

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

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

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

The **Open EFILE Report** window displays.

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

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

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

4. For other file types, select the option and select the **Open** button; ProFile displays the report information.

5. Select the **Print** button from the report to print a copy for your records.
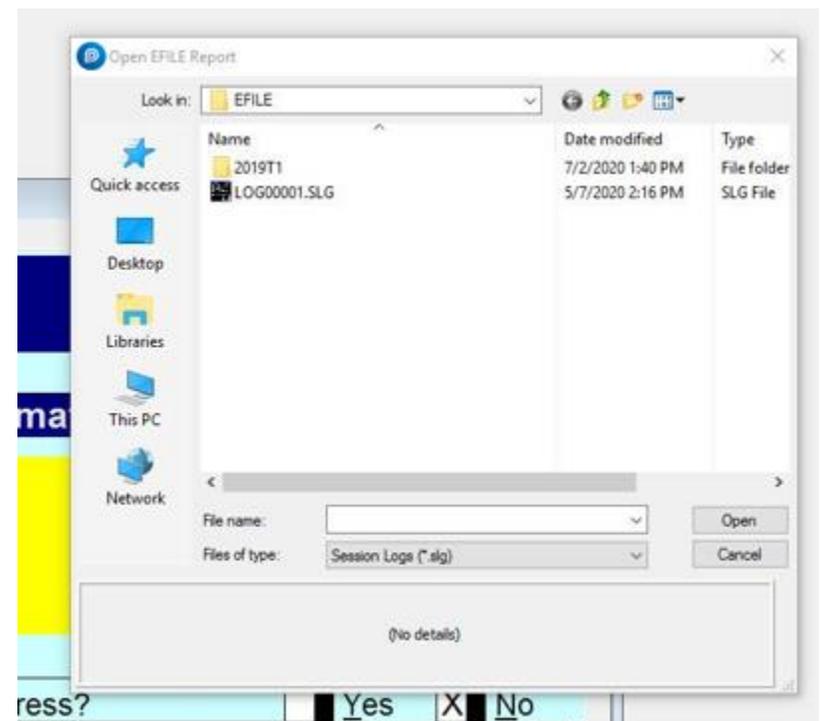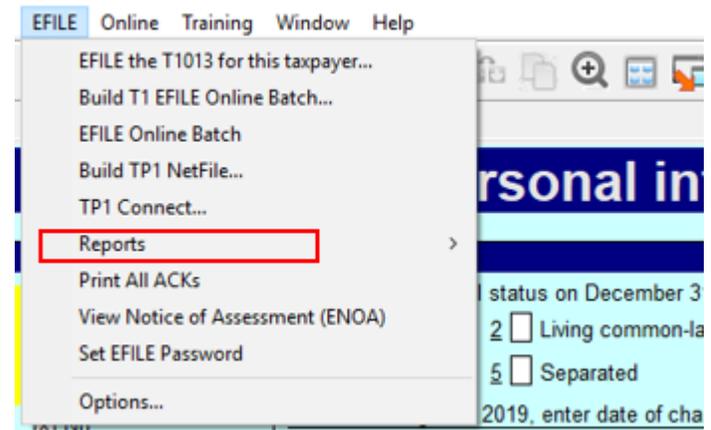
Viewing EFILE Reports in ProFile, Continued

Setting up a shared EFILE folder

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

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

For T1/TP1 returns:

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

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

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

4. Select the **Browse** button; the **EFILE Directory** window displays.

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

6. Select the **OK** button.

7. Select the **OK** button in the **EFILE options** window; the folder is assigned.

For T2 returns:

1. Select the **T2 EFILE** option under the **T2** section of the **General** menu.

2. Select the **Browse** button; the **EFILE Directory** window displays.

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

4. Select the **OK** button.

5. Select the **OK** button in the EFILE options window; the folder is assigned.
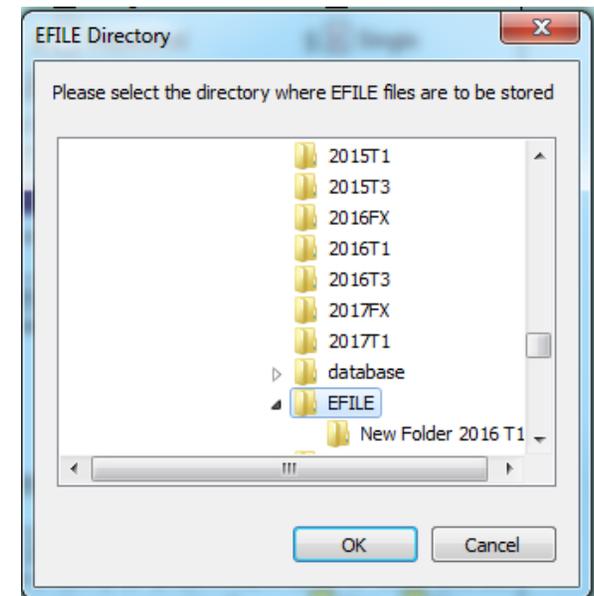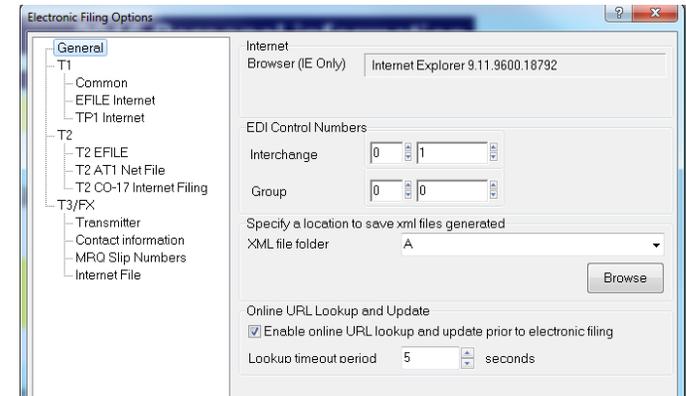
What Can Undergo EFILE in ProFile

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

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

Review the full list of forms and years that can undergo EFILE from ProFile.

Managing T1 Returns in ProFile

Overview of T1 Module in ProFile

What is a T1?

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

It has five sections for personal and income information:

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

Submission Dates for T1:

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

If April 30 falls on a weekend, the following Monday becomes the deadline.

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

Late payment results in penalties being applied by the CRA.

Authorizing or Cancelling a Representative for T1

For tax year 2019 and going forward preparers need to use the form **Authorize a Representative** or **Cancel a Representative** for EFILE.

The T1013 form **Authorizing or Cancelling a Representative** was previously used to authorize a representative to access a taxpayer's tax information via the CRA. This process has now been replaced.

Review our support article detailing the current method of authorizing or cancelling authorization.

Using T1135 EFILE for T1 in ProFile

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

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

Finding the T1135:

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

The initial question is in the **Filing** section of the T1 **Info** tab.

EFILE the T1135:

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

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

3. Select the **OK** button; the T1135 transmits to CRA, and a confirmation number is provided.

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

Related Articles

Common questions regarding T1135 are found on the CRA website.

Using CRA Data Import with AFR for T1 in ProFile

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

Acquiring AFR permissions

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

- The taxpayer can access CRA's **My Account** service. Preparers request that the taxpayer enter the Rep ID to authorize the preparer as an individual, a Group ID to authorize a group of representatives, or a business' Business Number (BN) to authorize all employees of a business
- Request the permission of the taxpayer via a **T1 Authorize a representative** submission

Importing data with AFR:

1. Open or create a T1 return.

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

3. Select the **Launch CRA Website** button; the CRA's **Represent a Client** window launches in a separate browser window.

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

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

6. ProFile's **Data Import Worksheet** window displays. The default display setting is the basic view. Select the **+** icon next to each statement to reveal the expanded view, which displays more details.

7. Review the data and forms to be imported; if correct, select the **Import Selected Data** button. Select the **Close** button.

8. To review the data imported, select the **Data Import** tab in ProFile's Auditor.
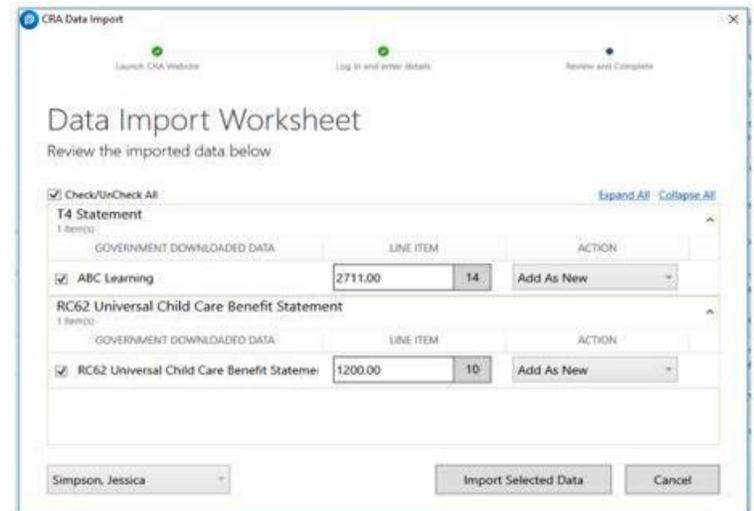
Using ReFILE for T1 in ProFile

If you are an EFILE service provider, you can use ReFILE to send T1 adjustments online for tax years 2017, 2018, 2019, 2020, and 2021 on behalf of your clients. The ReFILE service allows you to change the same lines that individual taxpayers can with the Change my Return service in My Account.

Who can use ReFILE?

Preparers can use the ReFILE service under the following conditions:

- You have a file for tax years 2018, 2019, 2020, and 2021
- You have level 2 authorization from your client
- The initial return was filed online via EFILE
- The initial return was assessed
- You have acquired a new sign-off of a revised T183 from client

What tax years does ReFILE support?

ReFILE is supported for 2018, 2019, 2020, and 2021 tax years with the latest ProFile version.

Undertaking the ReFILE process

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

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

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

4. Open a **T1ReFILE** form.

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

6. Select the **Yes** option in the **Is this an amended tax return?** field.

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

8. Select the **EFILE/ReFILE this return** option from the **EFILE** drop-down menu in the top toolbar. You will get a new confirmation number on the return's **Info** page.
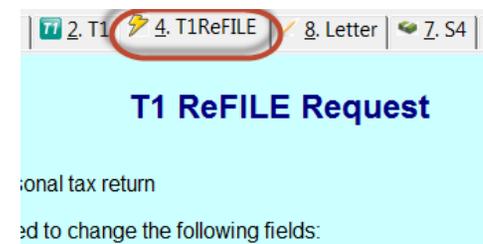
Using a Direct Deposit Request in ProFile

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

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

Regarding Direct Deposit service

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

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

Eligible deposit types

The form is for the following types of deposits:

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

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

Using Pre-Authorized Debit (PAD) for T1 in ProFile

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

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

Completing the PAD Form:

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

2. Select the **Form Explorer** option from the ProFile **GoTo** menu.

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

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

4. Change the **Do you wish to set up Pre-Authorized Debits (PAD) for current year tax owing** value from **No** to **Yes**:

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

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

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

Total amount owing		25,779 31
Total amount you would like to pay through PAD (single one time payment)	Pay in full ☒	25,779 31

7. Enter a payment date; the date must be between five business days (not including holidays) and one year in advance of the current date.

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

The PAD form is completed.

Using Pre-Authorized Debit (PAD) for T1 in ProFile, Continued

Completing the T183 Form:

1. Select the **Form Explorer** option from the **GoTo** drop-down menu in the top toolbar.

2. Search for **T183** and open the **T183 form** from the results.

Note: Most of the content for the T183 form sources from the preparer information entered under the **Options > Environment…** menu.

3. Complete the T183 form.

EFILE the PAD Form from the T1:

1. Return to the taxpayer's T1 form that underwent EFILE.

2. Select the **EFILE Pre-authorized Debit for this taxpayer…** option from the **EFILE** drop-down menu in the top toolbar.

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

Additional information

Read the CRA guide on PAD for more information.

Review a detailed support article on PAD for ProFile customers.

Completing a T1 Adjustment

ProFile can automatically calculate the T1-ADJ form in the event an adjustment is required.

Note: ProFile recommends using the ReFILE feature where possible: it is a faster and easier-to-use experience when compared to undertaking a T1 adjustment. Use T1 adjustment where ReFILE is not an option.

In addition, note that a T1-ADJ form cannot be electronically filed.

Using form T1-ADJ:

1. Open a T1 client data file that you created and have previously filed (to retain the original tax return, select the **Save As** option from the **File** drop-down menu in the top toolbar and save the return with a modified name).

2. Select the option **Snapshot/variance** from the **Audit** drop-down menu in the top toolbar; the **Snapshot/variance** window displays.

3. Select the **New** button; a new entry displays in the **Active:** list.

4. Name the snapshot something that identifies why the return is being adjusted (for example, **Additional T3 slip**) and select **OK**. This records amounts in key fields that ProFile will check for variance after the return adjusts.

5. Navigate to the form or slip that requires adjustment and key in the new values.

6. Use the **Form Explorer** (or press **<F4>**) to open a copy of the **T1ADJ**. ProFile allows unlimited copies of this form to be made, so additional adjustments to the return can be filed as necessary.

7. Right-click on the form and select the **New** option from the menu to create another copy.

8. Right-click on the **T1-ADJ** form and select the **Adjust from [snapshot name]** option with the name of the snapshot.

9. ProFile compares the original return to the revised data. The software automatically detects the impact on all relevant fields, and completes the table with line numbers, names and changed amounts. This only applies to fields with CRA line numbers.

10. There is a free-form area on the T1-ADJ where **Other details or explanations** are provided. To create separate paragraphs in this section, use **<Shift + Enter>** to start each new paragraph.

11. Print a copy of the T1-ADJ and mail it to the CRA; there is no need to submit a full return.
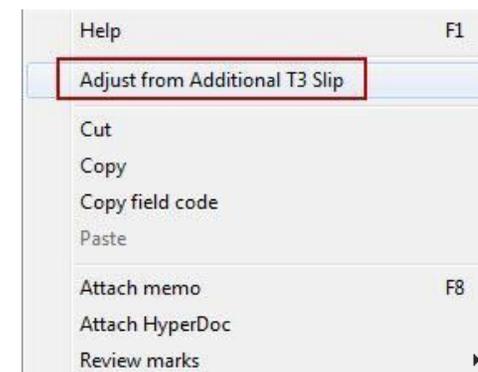
Completing a T1 Adjustment, Continued

Mailing form T1-ADJ

The CRA maintains an up-to-date list of all tax centers where T1-ADJs can be mailed.

Review the CRA list here.

Related Articles

Review our support article on adjusting a T1 for additional details.

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

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

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

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

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

Making the initial ENOA request:

1. Open the return that ENOA is being sought for.

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

3. If this is a spousal return, select a specific spouse from the drop-down menu, then select the **Launch CRA Website** button

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

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

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

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

6. Select the **Close** button; it is now necessary to wait a minimum of 24 hours to repeat the request and acquire the full ENOA summary.

Related Articles: Review our support article for more information on ENOA and FAQ.
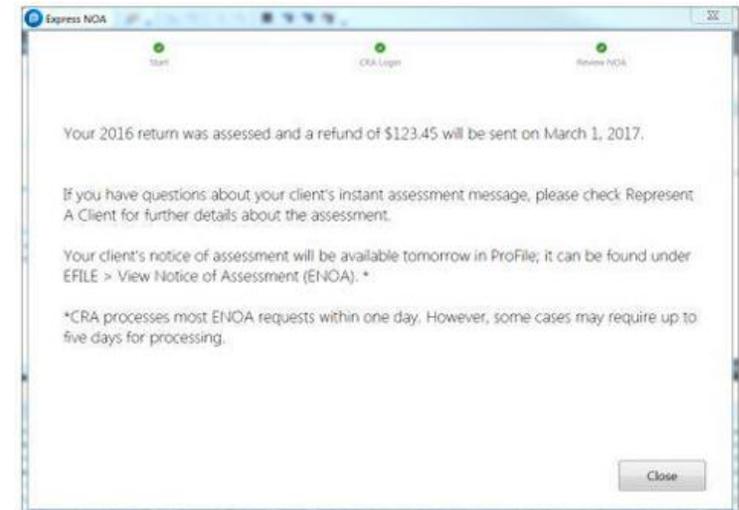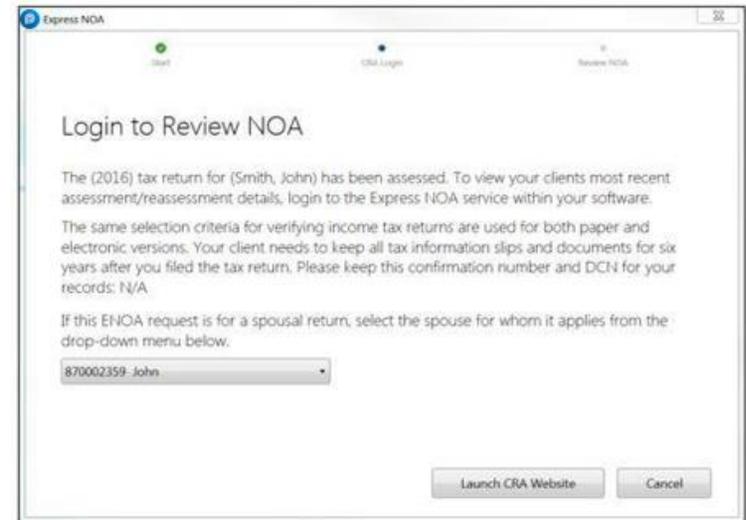
Using Couple's Returns for T1 in ProFile

Creating a couple's return:

1. Open or create the T1 return for the client.

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

3. Select the **Switch to spouse** [icon] button on the top toolbar menu; the **Couple Returns** window displays.

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

   ● Select **Create a new return for spouse** to open a new return for the spouse, or;
   ● Select **Open an existing return** to browse to a file on your hard drive and select it
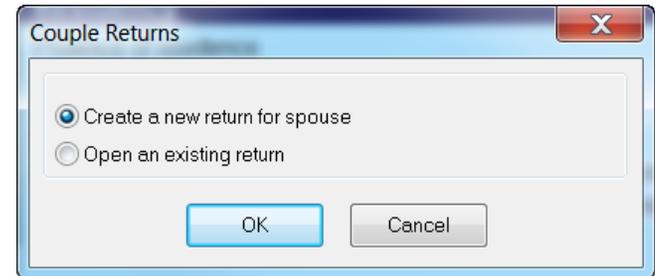
Note: After combining the data, ProFile will ask if you want to delete the original file for the spouse. Delete the file to avoid duplication or possible confusion of the original spouse's file and the same return in the new coupled file.

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

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

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

Uncoupling a couple's return:

1. Open the coupled return.

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

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

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

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

Using a Medical Expense form for T1 in ProFile

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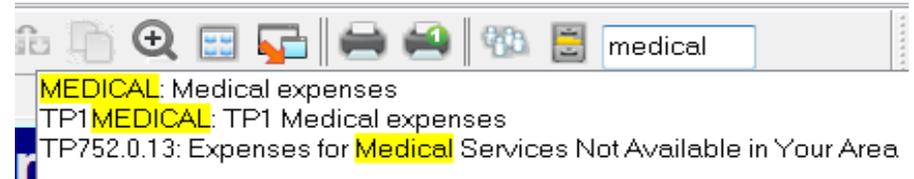
Opening the Medical Expense form:

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

2. Select the **Medical expenses** form displayed in the search results.

For a coupled return:

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

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

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

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

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

Using a Charitable Donations Form for T1 in ProFile

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

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

Carrying forward donations:

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

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

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

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

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

Transferring donations to a spouse:

1. Open the **donations form**.

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

The donations transfer to the spouse.

Adding Dependants for T1 in ProFile

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

Completing the "Dependant information" form:

1. Enter the term **dependant** into the ProFile search field in the top toolbar menu; select the form from the search results (for example, **Dependant information**).

2. Enter the dependant information in full.

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

Selecting family linking:

1. Select the **Module…** option from the **Options** drop-down menu in the top toolbar.

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

3. Select the **OK** button.

4. Identify the dependent in the **Dependant information** form that to link.

5. Right-click in one of the dependent's form fields; select the **Return for** option from the menu.

6. Select the **Yes** button when asked **Create a new return for?**

The new return is created for the dependant.

Family Linking for T1 Returns

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

- Linking family returns
- Working with linked files
- Printing linked files
- Saving linked files
- Sharing income between spouses
- Sharing data between family members
- Estimating Child Tax Benefits
- Open and close family files

Working with linked family files

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

If you prefer working with family files open together, open them all together when beginning to work on a set of family files. If files were closed together, (for example, **File** -> **Close family**) ProFile will open the returns together.

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

Switch between Family Members

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

Print Family Files

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

File Properties

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

Deactivate Family Files

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

Using S3 Principal Residence Form in ProFile

Starting with the 2017 tax year, preparers must complete forms T2091 and/or T1255 for each real estate property disposed of by taxpayers in the year, including their principal residence.

In case of multiple properties disposed of by the taxpayer in the year, complete forms T2091 and/or T1255 for each property.

How are the updated and new forms managed?

The preparer completes the Schedule 3 form and S3 Principal Residence Details Form.

The preparer completes the new T2091 and/or T1255 form and sends a copy to the client for their signature. Clients sign the new form and return it to the preparer.

The T1255 and T2091 forms each contain some data that transmits to CRA.

Complete the TP274 form if the client is a resident of Quebec.

Can a preparer enter data directly into the new T1255 or T2091 forms?

Data in the Description of property sections of the new T1255 and T2091 forms flows from the client information entered on the S3 Principal Residence Details form. Enter any remaining required data on the new forms manually.

Is it necessary to retain the T1255 or T2091 forms?

A signed copy of Form T2091 - Designation of a Property as a Principal Residence by an Individual (or Form T1255 for deceased taxpayers) must be kept by the taxpayer in the case the CRA asks for it.

Using S3 Principal Residence Form in ProFile, Continued

Undertaking the Workflow:

1. Complete the individual T1 **Info** pages for the residence owner and spouse (if applicable).

2. Open the **Schedule 3** form.

3. Select an option under **Line 179**.

Note: The following steps should be undertaken only for one spouse's return if the property is owned 50/50 between spouses.

4. Select the **S3PrincipalResidenceDetail** link located above the section.

The **S3 Principal Residence Detail** form opens.

Note: Each property that is disposed of automatically links to a T2091 form. Each property disposed of by the designated legal representative of a deceased taxpayer automatically links to a T1255 form.

5. Complete the **S3 Principal Residence Detail** form as required; note that the section **Designated by legal representative of deceased?** is automatically populated by the names of the residence owner and spouse (if applicable).

Using S3 Principal Residence Form in ProFile, Continued

If the **Designated by legal representative of deceased?** option is not selected, the **Description of property** section of the **T2091** form populates.

If the **Designated by legal representative of deceased?** option is selected, the **Description of property** section of the **T1255** form populates.

Completing the T2091 and/or T1255 Form:

If the residence was owned 100% by an individual in the relationship, the non-owner spouse does not complete a T2091 or T1255 form.

If the residence was owned in a 50/50 split, a T2091 or T1255 form must be completed for each spouse as follows:

- If option **1** in **Line 179 of Schedule 3** was selected, complete only the first page elements of the T2091 form that were not automatically calculated. If options **2** or **3** in **Line 179 of Schedule 3** were selected, it is necessary to complete the remaining elements of the form applicable to the specific situation, or:

- If option **1** in **Line 179 of Schedule 3** was selected, complete only the first page elements of the T1255 form that were not automatically calculated. If options **2** or **3** in **Line 179 of Schedule 3** were selected, it is necessary to complete the remaining elements of the form applicable to the specific situation.

Related Articles

Review our support article for additional details.

# Using Pension Split Optimization for T1 in ProFile

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

Completing T1032 form:

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

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

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

Utilizing the pension optimizer worksheet:

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

2. To view the amount that ProFile recommends that the taxpayer transfer to his/her spouse or common law partner, right-click on the worksheet and select the **Optimize split-pension income** option.
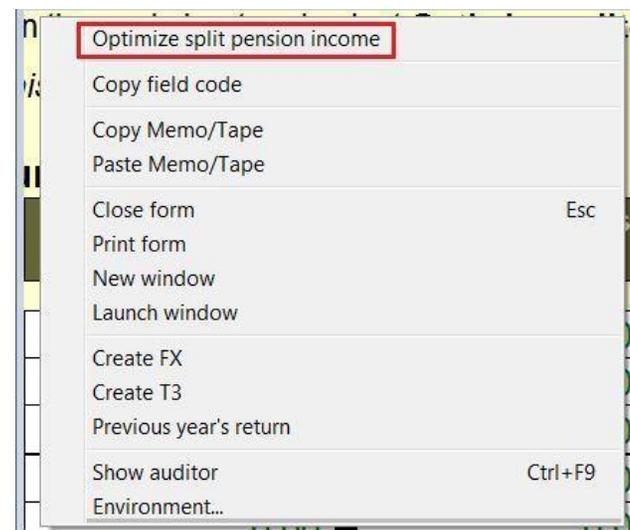
Utilizing scenarios in the Calculator section:

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

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

3. Press **Enter**. The calculator displays the **Total Payable and Balance Owing** for each individual, as well as combined totals for the couple.

Related Articles

Review our pension-splitting support article to learn more.

Using Business Statements for T1 in ProFile

There are multiple business statements in ProFile, including:

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

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

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

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

Deleting business statement sets (T4slip)

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

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

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

Related Articles

Review the **business statement** and **Asset details** entries in ProFile's **Help** feature for additional information.

Adding Motor Vehicles for T1 in ProFile

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

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

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

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

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

As you complete the Business Auto worksheet, ProFile automatically transfers the required information to the related Quebec business auto form (for example, T**P80Auto**, **TP1FishingAuto**).

Capital Cost Allowance (CCA)

Chart C of the Business Auto worksheet lets you calculate the Capital Cost Allowance (CCA). CCA amounts are transferred to the business statement's CCASummary or the CCA (assets owned by partner) table of the relevant business statement, depending on whether the vehicle is owned by the business. This is specified in the Owned by business? column of the Allocation of expenses table. For vehicles owned by a partner in a business, ensure that the **Owned by business?** column is set to **No** for the related business statement.

Sharing automobile expenses between spouses

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

Related Articles

Review our support article to learn more about CCA for motor vehicles.

Adding Assets and CCA for T1 in ProFile

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

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

Note: It is not possible to print the asset list form.

Entering asset information:

1. Complete a separate entry for each asset.

2. A list of assets appears in the panel on the left of the **asset details** form. Select one of these items to display the asset details for a particular asset.

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

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

T2125CCA	T2125 CCA
Please enter addition and disposition details on T2125Asset.	

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

Capital Cost Allowance (CCA) form

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

Using the Employment Expenses form for T1 in ProFile

Use form T777 to calculate allowable employment expenses.

There are four forms related to employment expenses:

- T777
- T777Details
- T777Other
- T777Auto

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

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

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

T777Auto#: Motor vehicle expenses:

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

1. Create a new T777Auto worksheet for each automobile.

2. Complete the expense details for the automobile.

3. Right-click on the form and select **New form** from the context-sensitive menu.

Using Comparative Summary for T1 in ProFile

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

- **Summary - Tax Summary (Federal):** This form displays all the non-zero line items of a single taxpayer's T1 return (each field that contains data in the return).

- **T1Summary - Tax Return Summary, TP1Summary - Tax Summary (Québec):** These forms display major items from the taxpayer's return

- **5Year - 5 Year Tax Summary (Federal), TP15Year - TP1 5 Year Tax summary (Québec):** This form displays the major items for a single taxpayer's last five years of tax returns.

- **Comparative - Comparative Tax Summary (Federal), TP1Comparative - TP1 Comparative tax summary:** This form compares the major items from this year's tax return to last year's tax return for a single taxpayer. If the return is carried forward using Profile, last year's amounts appear automatically on the comparative summary.

- **NRTC - Comparative NRTC Summary:** This form compares the non-refundable tax credits on the federal and provincial tax returns

- **T1Review - T1 Review, TP1Review - TP1 Review:** Like the Comparative Tax Summary, this form compares the major items from this year's tax return to last year's tax return for a single taxpayer, with a special focus on review. The form uses the variance thresholds specified under **Options -> Module…** -> **T1/TP1 Review** to highlight significant changes between current and prior year returns. It is also possible to adjust the variance threshold in the Review preferences section of the form. ProFile calculates the differences and displays them on the T1/TP1 Review tab in dollar and/or percentage amounts.

Using Comparative Summary for T1 in ProFile, Continued

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

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

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

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

Using Tax Planner for T1 in ProFile

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

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

Creating a T1 tax plan:

1. Enter the term **tax plan** in the ProFile search bar in the top toolbar.

2. Select the **PLAN: Tax planner** option from the search results; the tax planner displays.

3. Right-click on a form field and select the **New form** option from the menu.

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

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

Transferring data from the current year's tax return:

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

1. Open a completed T1 client file.

2. Open the tax planner from the **Client** category of the **Form Explorer**.

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

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

Using a Motor Vehicle Expenses Form for T1 in ProFile

Form T777 calculates allowable employment expenses.

Note: This applies for T7777 vehicles **only**.

Enter the term **T777** into the ProFile search bar in the top toolbar menu and select the appropriate result.

There are four forms related to employment expenses:

- **T777:** Enter employment expenses
- **T777Details:** Enter employment expenses for commission and non-commission employees
- **T777Other:** Enter expenses for musicians, forestry workers and apprentice mechanics
- **T777Auto:** Calculate automobile expenses related to earning employment income

T777Auto#: Motor vehicle expenses:

This form calculates automobile expenses related to earning employment income.

1. Create a new **T777Auto worksheet** for each automobile.

2. Complete the expense details for the automobile. Any number of copies of the form may be created. Right-click on the form and select the **New Form** option from the menu.

Filing a T1 for a Deceased Taxpayer in ProFile

Complete a return for a deceased taxpayer who is single :

1. Create a new T1 return in ProFile.

2. Navigate to the **Info** sheet.

3. Enter the date of the client's death in the **Date of Death** field under the **Taxpayer personal information** section.

The date of the client's death in the **Is this return for a deceased person?** section of the T1 sheet updates automatically.

If the deceased taxpayer is married, the status of the individual's spouse changes automatically to **Widowed** on the spouse's form.

Completing Special return for deceased taxpayer:

1. Enter the date of the client's death in the **Date of Death** field under the **Taxpayer personal information** section.

2. Scroll down the **Info** sheet to the **Special return for the deceased taxpayer (Other than "final return")** section.

3. Review the options in the section and select one if applicable.

Carrying forward a coupled deceased return

When carrying forward a coupled file in which a spouse files a deceased return for the previous taxation year, ProFile automatically carries forward only the return for the surviving taxpayer.

Managing T2 Returns in ProFile

Overview of T2 Module in ProFile

A T2 is the federal tax return for incorporated businesses (also called corporations). An incorporated business must complete a T2 return each year, even if there is no tax payable.

The form must be filed within six months of the end of each corporation's fiscal year.

The CRA requires that any T2 returns being filed electronically must be filed via the EFILE service.

Required information and material for T2 returns

For the best-possible experience, assemble the following information and materials prior to undertaking the T2 return:

- Prior-year financial statements and T2 return, if applicable
- Articles of incorporation
- List of product and services provided in percentages
- Obtain backup electronic copies of applicable bookkeeping (for example, QuickBooks, Simply accounting, MS Excel, etc.), trial balance sheet, income statement, general ledger, credit card and bank statements of the last month of the corporation year
- Corporate installment payments made during the year
- Copy of prior years' Notice of Assessment (NOA)
- Correspondence with any government relating to the corporation
- List of changes to the corporation from last year (for example, new director, shareholders, new assets, etc.)
- Business number of the corporation (review the incorporation documents or prior-year return)
- Address of corporation, including head office, mailing and location of books, if applicable (you can review the CRA My Account feature for this information)
- Fiscal year-end date of company
- Enter information and carry-forward the return in ProFile of the prior-year corporation return, if available
- Provide a signed business consent form to acquire access to the client's business information through the CRA (support article)

T2 Guide and In-Product Tutorial in ProFile

ProFile provides customers a T2 guide that includes a list of steps a user should understand to file a corporate return.

Note: The T2 guide covers basic steps for filing a T2 return but does not provide any tax-related advice or opinion. ProFile recommends reviewing the CRA website, contacting the CRA tax inquiry line, or consulting an accredited CPA firm for information regarding current tax laws. ProFile also recommends having any return prepared or reviewed by a professional accountant before filing.

Review our T2 Guide support article.

In-product T2 tutorial

ProFile provides an in-product T2 tutorial that walks a user through the basic functions of completing and filing a corporate return.

To access the tutorial:

1. Open a T2 return.

2. Select the **1. Getting Started** option under the **Training > T2** drop-down menu in the top toolbar.

The T2 tutorial opens below the top toolbar.

3. Select the **Next** button to proceed through the tutorial.
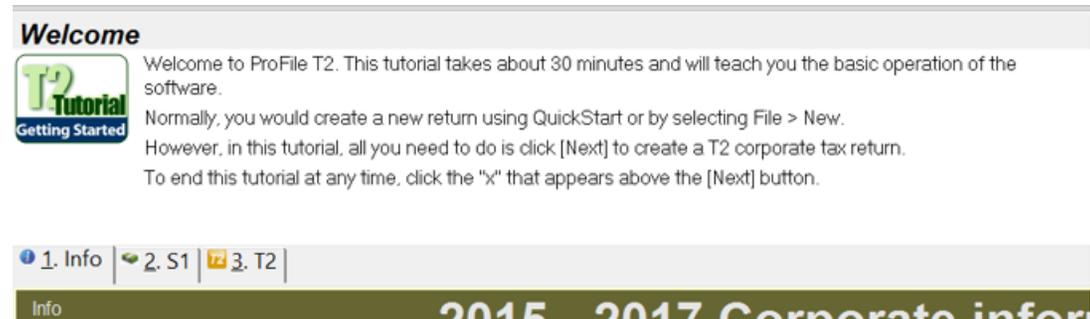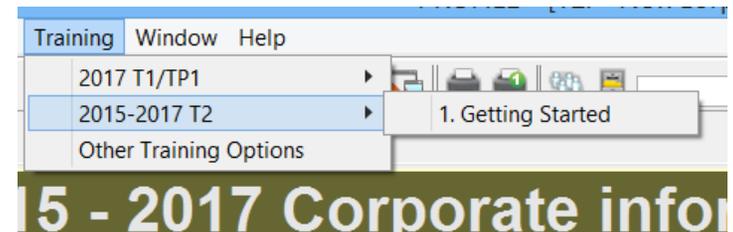
Using GIFI Import from Caseware for T2 in ProFile

The General Index of Financial Information (GIFI) is a comprehensive list of financial statement items where each item has a unique code. It allows a corporation to report its unique combination of accounts to the CRA.

**Importing GIFI from CaseWare to ProFile**

In Caseware:

1. Open Caseware.

2. Open the **Working Papers** client file from which to export.

3. Select the **GIFI** option from the **Export** menu, the **Export of Data to GIFI** dialogue box displays. Complete the fields of the dialogue box.

4. Select the **OK** button; the export processes and creates the GIFI file.

In ProFile:

1. Open a T2 return.

2. Select the **Import…** option from the **File** drop-down menu in the top toolbar.

3. Select the location where the Caseware-created GIFI file is stored.

4. Select the GIFI file; select the **Open** button. The **Import Successful** dialogue box displays an incorrect **X** icon.

5. Select the **OK** button.

The GIFI information imports to the T2 return.

Related Articles

Review our ProFile article on GIFI import from QuickBooks Online (QBOA).
Review our ProFile article on GIFI import from QuickBooks desktop to ProFile T2.
Review our Caseware article on exporting GIFI data for imports.

Using GIFI Import from QuickBooks Desktop for T2 in ProFile

Note: It is necessary to undertake QuickBooks integration prior to importing GIFI from QuickBooks Desktop. This guide includes a QuickBooks Integration section.

About GIFI Import

The General Index of Financial Information (GIFI) is a comprehensive list of financial statement items where each item has a unique code. It allows a corporation to report its unique combination of accounts to the CRA.

Importing GIFI from QuickBooks desktop:

1. Open a T2 return in ProFile.

2. Ensure that the ProFile T2 taxation year matches the corresponding year entered in QuickBooks.

3. Select the **Yes** option for the question **Complete return from GIFI?** in the **Filing** section of the ProFile T2 return.

4. Select the **QuickBooks Desktop Import…** option from the **File** drop-down menu in the top toolbar.

5. Set the **Year start** and **Year end** values in the **GIFI Data Import** window.

6. Select the **Continue** button.

7. Review the amounts being imported from QuickBooks to ProFile.

8. If correct, select the **Import** button.

Using GIFI Import from QBOA for T2 in ProFile

The General Index of Financial Information (GIFI) is a comprehensive list of financial statement items where each item has a unique code. It allows a corporation to report its unique combination of accounts to the CRA.

GIFI Import from QBOA:

1. Log in to the QBOA Firm containing the data to export.

2. Select the hyperlink text under the **Workpapers** column, or, if logged into the client file, click here.

3. In QuickBooks navigate to the **Workpapers** section for the client's books.

4. Review the **Working Trial Balance** and the **GIFI Mapping** to ensure that all the work is completed. If there are any unassigned codes, these can be mapped under the GIFI mapping section. To assign GIFI Codes review the list and select **Assign GIFI Codes**.

5. Select **Save GIFI codes** at the top-right corner.

In ProFile:

1. Select the **QBOA Import…** option from the **File** drop-down menu in the top toolbar.

2. Navigate to the GIFI file to import.

3. Select the GIFI file and select the **OK** button.

The GIFI information imports.
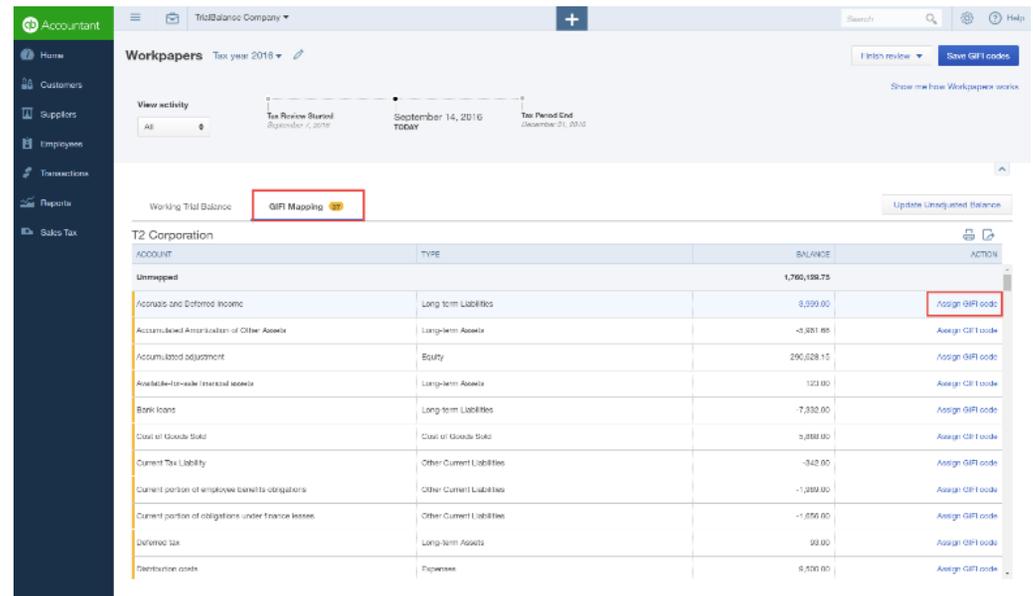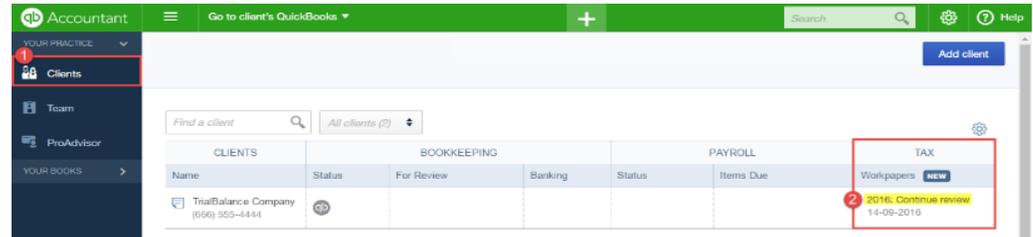
Using Amendments for T2 in ProFile

T2 amendments are carried out when a new piece of information demands that the original T2 be amended to reflect the new data.

Saving the original T2 return:

ProFile strongly recommends that the file be renamed before amending the return. This ensures the original T2 is not lost in the process of being amended.

1. Open the T2 return that requires amendment.

2. Select the **Save As...** option from the **File** drop-down menu in the top toolbar.

3. Save the T2 return as **[Your Corp Name]_amended**.

Amending the corporate information page:

1. Select the **Info** tab in the T2 return.

2. Set the following values in the **Filing** section:

   - **Is this an amended return?** is set to **Yes**
   - **Internet file this return?** is set to **Yes**

3. Select the **Yes** value on **line 997** of the **T2 Adjustment** worksheet.

4. Enter a description of the amendment in the field of **line 996**.

Restrictions

The following fields cannot be amended under this process; ProFile displays a warning message if an amendment is submitted regarding one of these fields. These fields must be amended via the CRA's website:

- Head office address change
- Mailing address change
- Location of books and records change
- Direct deposit information
- Language of correspondence

Using Form T1044 in T2 module

Form T1044 Non-Profit Organization (NPO) Information Return is for non-profit organizations as described in paragraph 149(1)(I) of the Income Tax Act, and organization described in paragraph 149(1)(e) of the *Act*.

Search in ProFile for **T1044** to find the form.

Using T1134 EFILE for T2 in ProFile

ProFile users can electronically file the T1134 - Information Return Relating to Controlled and Not-Controlled Foreign Affiliates for your client in the T2 module.

The T1134 return can undergo EFILE before or after filing the T2 return.

EFILE the T1134 Return:

1. Open the T1134 return undergoing EFILE.

2. Select the **EFILE the T1134** option from the **EFILE** drop-down menu in the top toolbar.

3. Select the **OK** button when presented with a request for confirmation.

Note: Select the **Do not show this warning again** option to avoid seeing the confirmation message in subsequent EFILE efforts.

4. Clear any audit messages before transmitting the form.

If the return transmits successfully, ProFile displays a confirmation number. Retain this number for your records.

If the return transmission is unsuccessful, ProFile displays the errors identified by the CRA. Correct any errors and resubmit the return.

Amending a T1134 Return for a Supplementary Deletion:

Note: An amended return is only filed electronically if the original return was filed electronically. ProFile users can electronically amend a T1134 return that underwent EFILE and needs to be deleted.

1. Open the Supplementary to be deleted.

2. Select the **Delete Form** option from the **Form** drop-down menu.

3. Select the reason for deleting the Supplementary from the drop-down menu:

   ● Duplicate
   ● Filed in error
   ● Other

The Supplementary is marked as **Deleted** for transmission to CRA.

EFILE form MR-69 in ProFile for T1 and T2

The MR-69 form is the **Authorization to Communicate Information or Power of Attorney** form in ProFile.

ProFile users can upload a signed copy of the MR-69 for RQ to retain in their records using ProFile version 2019.3.0 or later.

[Review our support article](#) on the process for T1 and T2.

Submitting and Cancelling a Business Consent

Prior to ProFile release 2019.3.0, preparers used forms RC59 and RC59X to submit and cancel a Business Consent with CRA. Forms RC59 and RC59X were updated in ProFile release 2019.3.0 to allow electronic approval of two services: authorization to access client information via online, phone, and mail methods, and the cancellation of existing client access, respectively.

Review our support article on the new process for submitting and cancelling a Business Consent.

Using the T2 Print Interface Experience

The T2 print interface uses dynamic menus; this means that only when you select a function (print, email, archive) will the related menu options display in the print interface. This helps keep the print interface clean and simple, as you see only the options for the function activated.

Using the new print interface is currently an optional experience. Preparers can still find the previous print interface in ProFile.

Select the **Print Setup** option from the **File** drop-down menu in the top toolbar.

Select off the selection of the **Enable new T2 print menu** option box and select the **OK** button, the old print interface menu displays.

Accessing the T2 print interface:

1. Ensure you are using the latest ProFile release.

2. Open the existing T2 return.

3. Select the **Print Setup** option from the **File** drop-down menu in the top toolbar, the **Print Setup** menu displays.

4. Select the **Enable new T2 print menu** option box and select the **OK** button, the new print interface menu displays.
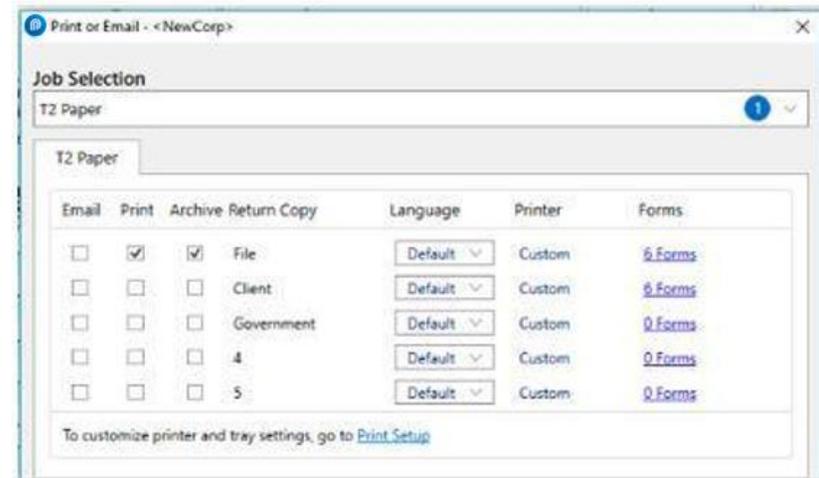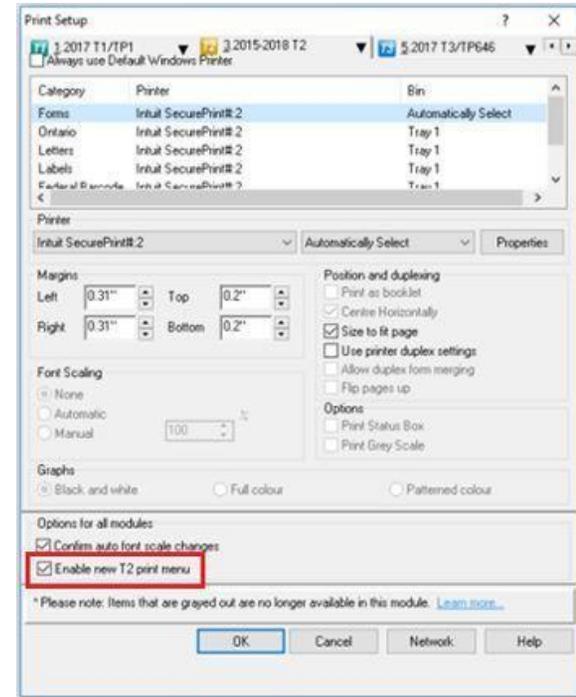
Using the Revamped T2 Print Interface Experience, Continued

Using the Job Selection section

The Job Selection section allows preparers to navigate between types of returns and assign parameters for print, email, archiving, and language. The Job Selection drop-down menu populates automatically with print details based on the open T2 return.

Preparers can select a single return type to print, archive, or email from the drop-down list (for example, **T2 Paper**).

Alternatively, preparers can select multiple types of returns to print or email from the drop-down list (for example, **T2 Paper** and **ATI1**).

The details of the selected items display.

The details presented include email, archive, and print options for each item in the return, as well as language preferences and assigned printers.

Using the Archive PDF section:

Preparers can set the file location and file name for archived forms in the new printer interface.

1. Select the **Archive** option under the job selection to access the **Archive PDF Options** menu in the new print interface.

2. Preparers can select two options for archived PDF locations:

   - Select the **Same folder as client file** option. This places the PDF in the same folder as the existing client file, or:
   - Select the **Specify a folder** option; select the **Browse** button to select a folder for the archived PDF file.

Note: The default archive locations pre-populate from the **PDF** tab in the **Environment Options** window.

3. Select the **Continue** button to save the selections.
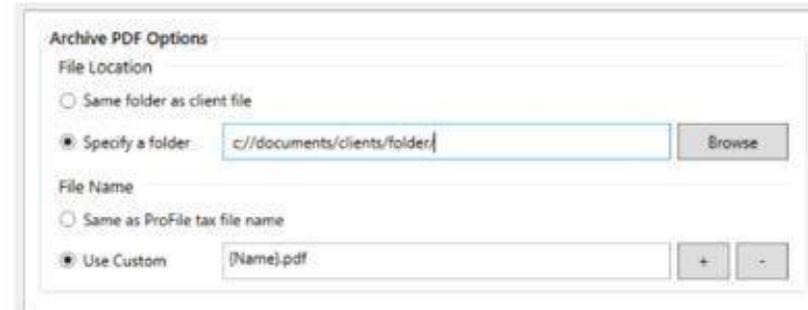
Using the Revamped T2 Print Interface Experience, Continued

Preparers can select two options for archived PDF file names:

- Select the **Same as ProFile tax file name** option, this names the archived PDF with the same file name as the tax file, or:
- Select the **Use Customer** option; use the **+** and **-** buttons to assign file name parameters such as name, month, day, time, yearend, and more:

Select the **Continue** button to save the selections.

Using the Email Options section:

Preparers can set parameters in the Email Options section for email templates and email addresses.

1. Select the **Email** option under the job selection to access the **Email Options** menu in the new print interface.

2. Select the available email template from the drop-down menu.

Note: Email templates source from the designated ProFile **Templates** folder.

3. The client email address – as set on the return – automatically populates in the **Email Address** field. If no client email address is set on the form, enter the address manually.

4. Select the **Continue** button to retain email settings.

The preparer's email program opens a new draft email with the template and client email already entered.

Related Articles

Review our support article for additional details.

Using EFILE with Web Access Code (WAC) for T2 in ProFile

Corporate returns can undergo EFILE using a Web Access Code (WAC). In some cases, a preparer may not have a need to undertake a request for an EFILE number and the WAC provides a quick, convenient alternative.

ProFile allows users to apply for and receive a WAC online through a ProFile web service, without having to call the CRA Corporation Internet Filing Helpdesk.

Alternatively, users can enter a WAC if already acquired from an earlier EFILE effort/request.

Applying for a WAC:

1. Select the **Transmit this return…** option from the **EFILE** drop-down menu in the top toolbar.

2. ProFile reviews the T2 return for any outstanding warning. If there are no auditor warnings, ProFile displays a green checkmark.

3. Select the **OK** button.

The **Corporation Internet Filing** window displays.

Select the method of filing the return

- **I want to request a Web Access Code and file this tax return:** This automatically makes a request to CRA for the specific return to undergo EFILE, based on the return's information.

- **I already have a Web Access code for this tax return:** The user enters their existing WAC from a previous EFILE effort/request.

4. Select the **Accept** button; the return transmits using the WAC.

Attaching Documents for EFILE of T2 Returns with the Attach a Doc Feature

CRA allows corporations to transmit supporting documentation via ProFile's Attach a Doc feature within 24 hours of the EFILE of a T2's initial or amended return.

The following file types can be used as attachments:

- .pdf
- .doc
- .docx
- .xls
- .xlsx
- .rtf
- .txt

- jpg
- .jpeg
- .tiff
- .tif
- .xps

What is the maximum attachment size?

The maximum attachment size is 150 megabytes (MB); this is a CRA limitation.

Is there a limit to the number of attachments transmitted?

Provided the attachments are transmitted within 24 hours of EFILE of the T2 return, there are no limitations to the number of attachments that can be transmitted.

Can I make attachments prior to the T2 return being transmitted?

Yes, but the T2 return must be transmitted first before the attachments.

Related Articles

Review our support article on using the Attach a Doc feature for T2.

Corporate Linking for T2

T2 filers can now link data from a related or associated corporation into the RAC Details form of another corporation using ProFile's Corporate Linking function.

Any changes to the data of a related/associated corporation found within a RAC Details form highlights and can synchronize easily.

Who can use Corporate Linking?

Any ProFile customer who has the T2 module is eligible to use Corporate Linking.

For which tax years is Corporate Linking applicable?

Corporate linking is available for T2 returns in the 2015-2018 module or later.

Will Corporate Linking work for OnePay and Trial licenses?

Yes.

Linking a Related or Associated Corporation to a T2 Return

1. Open the T2 return.

2. Select the + icon on the ProFile top toolbar menu to link a related/associated corporation.

3. Navigate to the folder containing the return being linked.

4. Select the T2 return file of the related/associated corporation being linked.

Corporate Linking for T2, Continued

The details of the related/associated corporation display.

5. Select or unselect the related/associated corporation's data.

6. Select the **Confirm** button.

All selected related/associated data is imported and linked.

The RAC Details of the newly linked corporation displays, and the designation **Linked** is assigned for it in the left-side display menu.
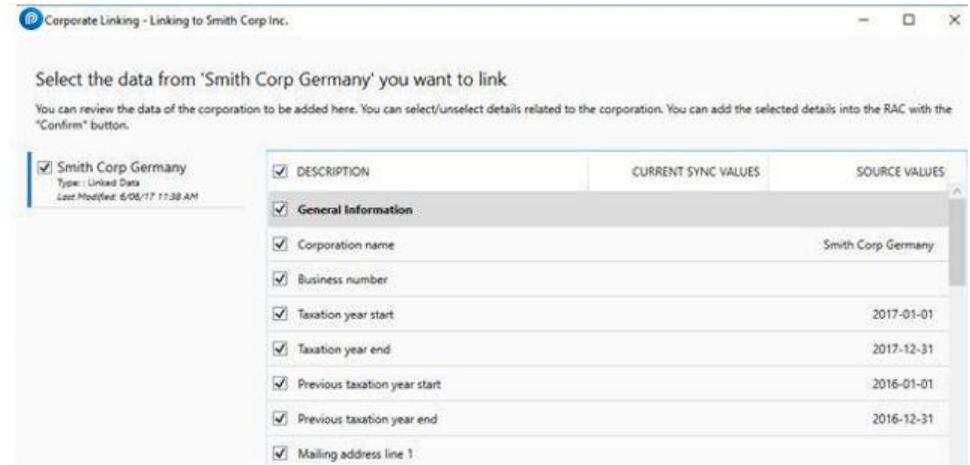
Reviewing Related/Associated Corporation Status

The status of related/associated corporations that are linked - or have been linked previously - to a corporation is displayed in the left-side menu of the linking window.

The following designations can apply to related/associated corporations:

Linked: The related/associated corporation is linked.

Manual: The related/associated corporation is not linked, but the RAC Details information exists and may be linked.

Broken: The related/associated corporation was previously linked but has since been renamed or moved from its former location (for example, the original file folder or directory). To relink the related/associated corporation, locate the file and select the Confirm button or revert to the original file name.

Related Articles

Review our support article for additional details and troubleshooting tips.

Managing T3 Returns in ProFile

Overview of T3 Module in ProFile

About T3 tax forms

A T3 Statement of Trust Income Allocations and Designations indicates investment income from mutual funds in non-registered accounts and from certain trusts. In Québec, the form is a relevé 16. The income may come from individual investments or from an estate trust as inheritance tax.

Amounts present in box 51 and/or 39 indicates a dividend tax credit is available.

T3 slips show income from interest, dividend, and capital gains. All these types of income are taxed at different rates.

Receiving the T3 tax slip

In most cases, T3 tax slips are received around March 31.

Key Forms for T3 in ProFile

There are some key T3 forms to be mindful of when completing a trust return:

Beneficiary form

Use the Beneficiary details form to enter information for trust beneficiaries. Amounts flow from the Beneficiary details form to the corresponding T3, NR4 and RL16 slips. ProFile also uses the Beneficiary details form to complete Schedule 9 in the trust return.

Allocation worksheet

Use the Allocation worksheet to indicate how the trust allocates income to beneficiaries. If the trust is claiming expenses at line 41 of the return, apply the expenses to specific types of income before allocating income to the beneficiaries. The trust gets a deduction on the T3 jacket for income that is allocated to the beneficiaries.

Some of the trust income may be taxed in the trust. Specify for each type of income the amount that the trust will retain. ProFile displays the remaining income as the amount to be allocated to the beneficiaries.

On the Allocation form, preparers may also need to enter certain T3 slip amounts, such as a retiring allowance, death benefit, or foreign business income.

Data Entry and Flow for T3 in ProFile

The T3 Info form contains sections for general information, trust type, and other basic details of the trust.

Prepares will report the income and deductions of the trust. Enter these details on the various income and deductions forms, schedules and on the T3 Jacket (which has some edit fields with no supporting schedules).

There are numerous data entry forms, including business and rental statements, dispositions on Schedule 1, and T3, T5 income received by the trust.

If the trust is allocating income to its beneficiaries, the forms in the Beneficiaries tab of the Form Explorer become important.

Any income not allocated to beneficiaries is taxed on Schedule 11, which transfer to page 4 of the T3 jacket.

About the Allocation worksheet

The Allocation worksheet is used to complete the slip amounts for beneficiaries.

Use this worksheet:

- To indicate how you wish income to be allocated to the beneficiaries: the default is each one gets an equal share of the income. If not the case, choose **Other** and enter the percentage applicable to each beneficiary on the **Beneficiary details** worksheet. If Other is selected, the percentage field on each slip of the Beneficiary worksheet becomes an input field; otherwise, it is calculated based on the equal allocation to all beneficiaries.

- If the trust has claimed expenses at line 41 of the return, the expenses must be applied to specific types of income before the income can be allocated to a beneficiary. These expenses must be applied manually: an audit message will appear if these expenses have not been entered.

- To retain some of the income to be taxed in the trust. You can specify which type of income and how much is to be retained by the trust.

- To specify amounts for certain boxes of the T3 slips that is not automatically completed by ProFile T3. For example, details related to foreign income and tax paid. Also, if the trust is allocating a retiring allowance or death benefits, those amounts must be specified here.

Data Entry and Flow for T3 in ProFile, Continued

About the Beneficiary worksheet

On the Beneficiary worksheet, enter details such as name, address and residency of the beneficiary. The slip amounts at the bottom of this form are calculated using amounts from the Allocation worksheet multiplied by the percentage applicable to the particular beneficiary (percentage is on the Beneficiary worksheet).

Navigating on the Beneficiary worksheet

On forms like Beneficiary, where there are an unlimited number of slips, navigation is simplified with the following shortcuts:

- Use the horizontal scroll bar at the top of the slip table to navigate.

- **<Ctrl + Enter>** takes you to the top of the next slip

- **<Shift + Ctrl + Enter>** takes you to the previous slip

- **<Ctrl + Right Arrow>** and **<Ctrl + Left Arrow>** take you to the next or previous column (and scroll to the next or previous slip accordingly)

Using the Beneficiary worksheet

The information on the Beneficiary worksheet transfers to the T3 and NR4 slips. These slips are for reporting and preview purposes only: data cannot be edited on these forms.

The data from the T3 and NR4 slips is posted to the T3 Summary and NR4 Summary.

Schedule 9 is a summary of the amounts allocated/designated to the beneficiaries. ProFile completes this form using the amounts from the "Beneficiary" worksheet. The trust gets a deduction for the total income allocated to beneficiaries at line 928 of this schedule.

Review the T3 jacket and manually enter data into any fields not automatically calculated by ProFile T3 (especially the questions on the first two pages).

Using EFILE Slips for T3 in ProFile

About T3 slip EFILE

A T3 Trust return must still undergo paper filing. However, the Slips Summary can undergo EFILE with the related slips.

Note: Always print or retain a PDF copy of the CRA confirmation of an EFILE when completed. ProFile does not retain a report or record of which slips are transmitted.

Transmitting slips:

1. Prepare the T3 slip in ProFile.

2. Open the **Beneficiary details** form and select the **Type of slip** being transmitted.

3. Select the **Transmit** option under the **EFILE** drop-down menu in the top toolbar.

4. Select the appropriate option under the **Data type** drop-down menu and select the **OK** button.

ProFile builds the XML file and automatically launches the CRA transmission window.

5. Review the CRA disclaimer, login, and submit the .xml file.

6. The file submits; select the **Print** icon on the browser window to print the confirmation number.

7. Select the **Close** button.

XML File a T3 Return in ProFile

Preparers using ProFile release 2017.2.5 and later can transmit eligible Trust Returns using the Canada Revenue Service's (CRA) Internet file transfer service.

How does the XML filing for a T3 return work?

Transmitting an XML file electronically to the CRA is different from the EFILE process.

An XML generates based on the information provided on the T3 return; this XML file transmits to the CRA via ProFile.

The CRA issues a confirmation number following submission to confirm the receipt of the XML file.

The preparer inserts the CRA confirmation number on the T3 return.

What are the requirements for the XML filing of a T3 return?

The CRA maintains a detailed list of restrictions for filing a T3 return electronically.

Review the list prior to undertaking an XML filing.

What tax years are eligible for the XML filing of a T3 return?

XML filing for T3 returns occurs for 2017-2020. A T3 return undergoing XML filing cannot have a year-end date prior to January 1, 2017. Returns later than 2020 can be EFILED.

XML File a T3 Return in ProFile, Continued

Preparing a T3 return for XML filing:

1. Open ProFile.

2. Prepare the T3 return.

3. Resolve any error messages displayed under the **MagMedia** tab of the Active Auditor.

If the information on the return is complete, valid, and eligible for the Internet file transfer service, the **Internet file this return?** question in the return's **Filing** section checks automatically.

Note: If the return is not valid, the question remains unchecked and prevents the XML file from transmitting. See section **Using the T3 EFILE** below for resolution.

Using the T3 EFILE

Beginning with the release of 2021.3.0, returns with a year end of 2021 or later will be able to be electronically filed using CRA EFILE credentials. Returns are still required to not have any exclusions on the T3Efile worksheet.

A newer section on the **Info** page under Filing will default to **Yes** if a T3 is eligible for EFILE and **No** if not.

Slips and summaries must still be transmitted via XML filing.

1. To EFILE the return, select **EFILE** in the menu bar and then **Transmit T3 return**.

The interface displays.

2. Select the type of T3 you are filing and select **Next**.

If your T3 file has EFILE errors, you'll see a rejection box outlining what needs to be corrected.

Returns are submitted to CRA in JSON format. The JSON along with the acceptance or rejection message will be stored in the folder selected in the **T3 EFILE -> Options** directory.

The confirmation number displays on the **Info** page if successfully transmitted.

XML File a T3 Return in ProFile, Continued

XML filing a T3 return:

1. Open the populated T3 return.

2. Select the **Transmit T3 Return option** from the **EFILE** drop-down menu in the top toolbar; the **Transmit T3 Return** window displays.

3. Select a **return type** (for example, **T3 Return**).

4. Select the **OK** button; the XML file builds.

If successful, a message indicating the processing and completion of the XML build displays.

5. Select **OK**.
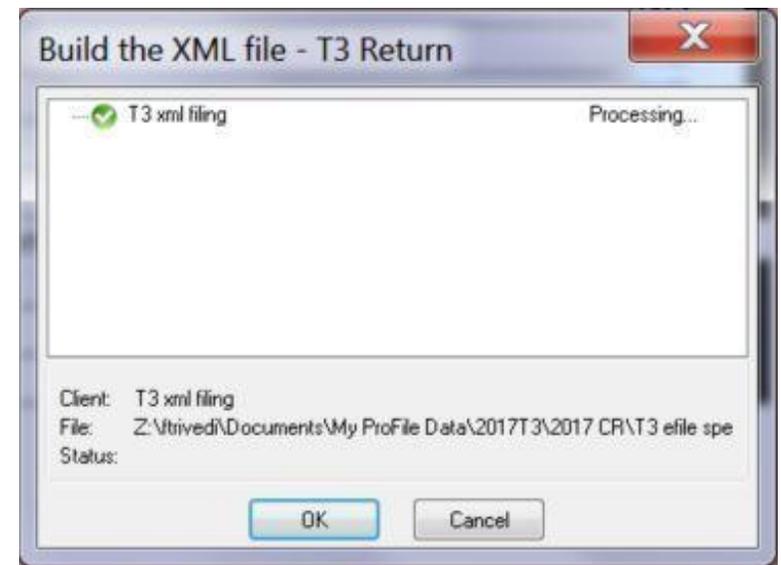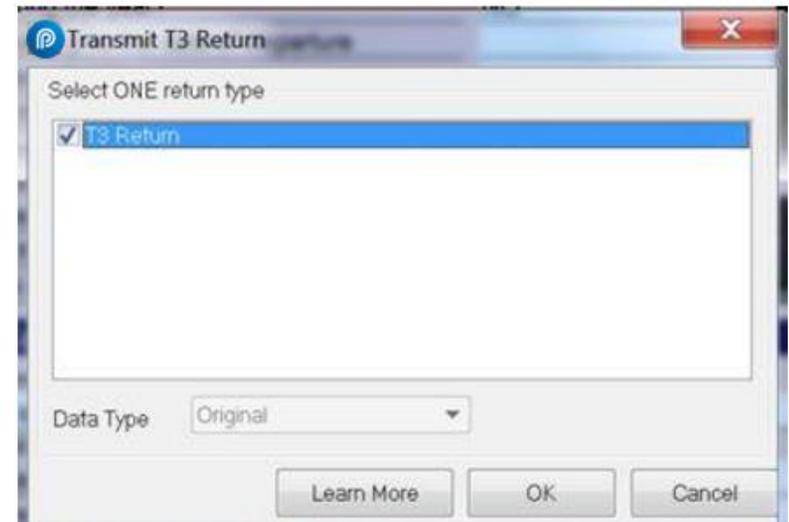
XML file a T3 Return in ProFile, Continued

ProFile automatically opens the CRA transmission window.

6. Enter the preparer account number and Web access code when prompted.

7. Select the **Next** button; the **Internet file transfer – attach your return** window displays.

Note: The XML file path already populates in the directory field. To search for a different XML file, select the **Browse** button.

8. Select the **Submit** button; the XML file transmits to the CRA.

The CRA provides a confirmation number following transmission.

9. Manually enter the confirmation number in the **Confirmation Number** field of the T3 return's **Filing** section.

10. Save the return.

Related Articles

Review our support article for additional details.

Early Filing Next Year for T3 in ProFile

The next year's T3 module in ProFile is not available until the year after. For example, when the 2019 T3 module is the last one released and you need to prepare a T3 return with 2020 year-end, the 2020 T3 module is not available until January of 2020. In this situation, the previous year's T3 module is used for preparing next year's T3 return.

New tax rate implementation

New tax rates are implemented in the previous year's T3 module to handle preparation of next year's T3 returns. Entering the appropriate year-end on the **Info** page initiates the applicable tax rates for that year. T3 returns filed using the previous year's tax forms are acceptable to CRA, and they will reassess the return if required.

Preparing next year's T3 return using the previous year's T3 module:

1. Save a duplicate copy of the previous year's T3 return to be used as the next year's T3 return.

2. Open the previous year-end T3 return in ProFile.

3. Enter the appropriate year-end for the trust return T3 to be prepared; this initiates the applicable tax rates for next year.

4. Delete the information pertaining to the previous year-end, keeping what is required for the next year-end.

5. Enter the T3 data required for filing the next year's trust return, allocate income to beneficiaries, and create the T3 slips.

6. Print the T3 trust return using **File -> Print** and print T3 slips using **File -> Print Slips**.

7. Save the T3 trust return with a different file name to identify the tax rates for that year.

Managing Form Expert (FX) Module in ProFile

Overview of Form Expert (FX) Module in ProFile

FX & FX/Q includes a comprehensive set of tax forms that are fully interactive, automatically performing all calculations.

The forms include:

- T4, T5, T5018, T5008, T5013, RL1, RL3, RL15, and more
- Partnership Information Return and Schedules (T5013 Schedules and TP600 for Québec)
- Charity & Non-Profit Organization forms (T3010 and TP-985.22 for Québec)
- Additional GST/HST/QST, TD1, RCA, Non-resident and Recourse forms
- Federal, Québec and provincial rollover forms (T2057, T2058, T2059, TP529, TP614, AT107, AT108 and AT109)
- BC Logging Tax Return of Income (FIN542 and FIN571)
- Other forms (for example, RC199, CPT30, T3D, T3RI, etc.)

Related Articles

Review our list of ProFile forms and tax slips that can be filed electronically.

EFILE Slips for FX Module in ProFile

Note: ProFile does not retain a report or record of which slips are transmitted. Always print or retain a PDF copy of the CRA confirmation of an EFILE when completed.

EFILE original and amended slips:

1. Navigate to the **Info** tab of the return.

2. Ensure the **Yes** option is selected for the question **Are you magnetic media or internet filing slips?** The option to EFILE slips will not appear unless this option is selected.

3. Select the **Properties…** option from the **File** drop-down menu in the top toolbar; the **FX/Q File properties** window displays.

4. Set the **EFiling status** in the **Slips Status:** section to **Ready to file**.

5. Select the **Transmit slips** or a **T5013 return option** from the **EFILE** drop-down menu in the top toolbar, the **Internet File Slips** window displays.

6. Select the slip to undergo EFILE.

7. Select the appropriate option under the **Data type** drop-down menu and select the **OK** button.

ProFile builds the XML file and automatically launches the CRA transmission window.

8. Review the CRA disclaimer, log in, and submit the .xml file.

9. The file submits; select the **Print** icon on the browser window to print the confirmation number.

10. Select the **Close** button.
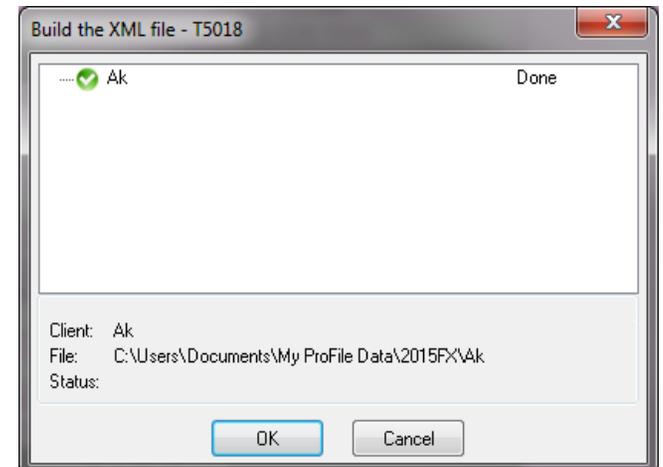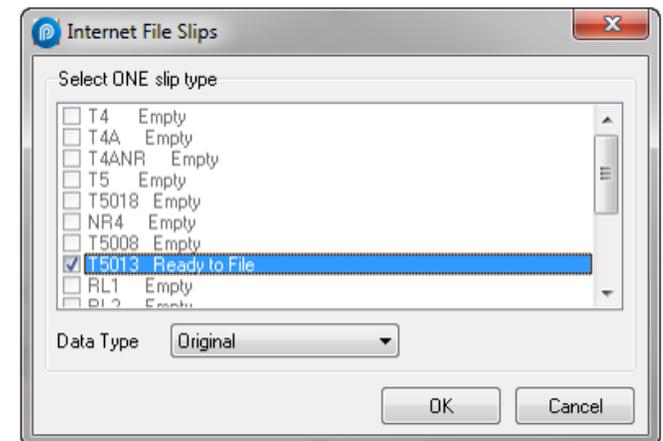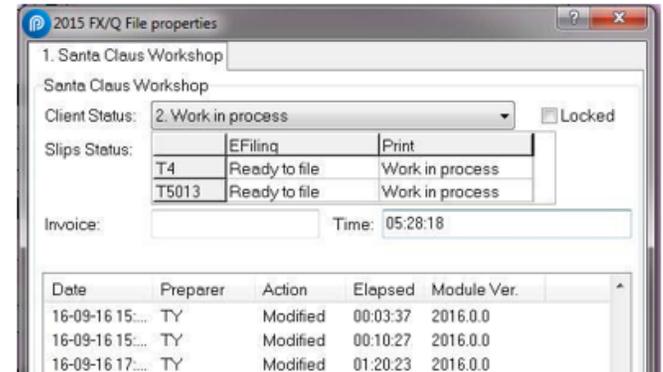
Batch EFILE Slips for FX module in ProFile

Multiple FX slips can undergo a batch transmit slips at one time using the Client Explorer database.

Starting the Client Explorer database:

1. Select **Database…** from the **Options** drop-down menu in the top toolbar; the **Database/Client Explorer Options** window displays.

2. Select the **Use Client Explorer** option.

3. Select the **OK** button.

4. Select the **Client Explorer** option under the **GoTo** drop-down menu in the top toolbar.

The **Client Explorer** displays.

Filtering and selecting returns:

1. Select the **Filter** button; the filter window displays at the bottom of the window.

2. Select the checkbox on the **FX** tab and clear the other module tabs by unchecking them.

3. Select the checkbox for the desired tax year (for example, **2019**) on the **FX** tab and clear the checkboxes for all other years by unchecking them.

4. Select the appropriate checkboxes in the remaining sections of the **FX** tab to filter for slip details; clear the other options by unchecking them.

5. Select the **Apply Filters** button; a list of slips that meet the set slip criteria displays.

6. Select the slips to EFILE.
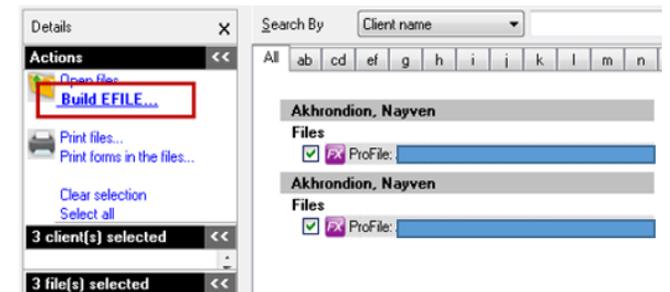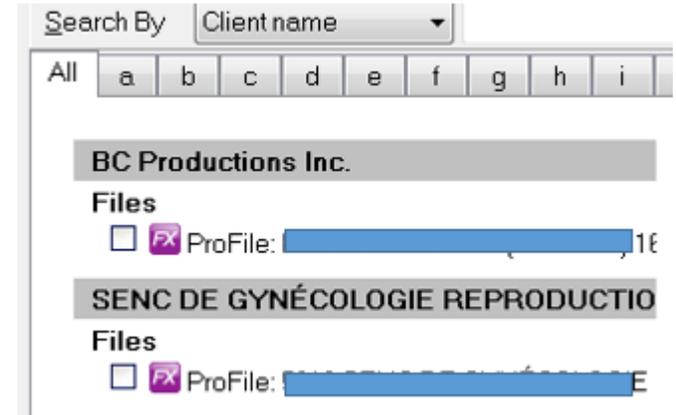
Batch EFILE Slips for FX Module in ProFile, Continued

Building the EFILE Link:

1. Select the **Build EFILE…** link in the top-left **Actions** menu.

The **Build the XML file** window displays.

2. Select the slips to undergo EFILE (for example, **T4**).

3. Select the **OK** button.

The XML file builds and the **CRA Internet File Transfer** window opens.

Transmitting the XML file to CRA:

1. Log onto the CRA slip transmission website.

Note: Transmission of the XML file requires an FX Web Access Code (WAC). If this is the first time internet filing slips, a WAC request must be made to the CRA. Ensure that you print a confirmation copy provided by the CRA for your submission records.

2. Complete the XML transmission process.

Transmitting RL Slips for Form Expert (FX) in ProFile

Included in the 2018.2.0 and later ProFile release is a revised method for transmitting RL Slips for the FX module to Revenu Québec.

The new process eliminates the need to attach an .xml file to the RL slip transmission and instead transmits the information directly to Revenu Québec.

Setting credentials prior to transmission:

1. Select **Options…** under the **EFILE** menu in the top toolbar.

The **Electronic Filing Options** window displays.

2. Select the **MRQ Slip Numbers** option under **T3/FX** on the left-side menu.

3. Enter the Magnetic Media slip numbers.

4. Select the **Transmitter** option under **T3/FX** on the left-side menu.

5. Enter the **Québec Transmitter Number**.

Transmitting RL Slips for Form Expert (FX) in ProFile, Continued

6. Select the **Contact information** option under **T3/FX** on the left-side menu.

The **Contacts** window displays.

7. Enter all requested contact information in the **Accounting** section; this is essential to avoid transmission errors. Requested contact information in the **Technical** section is optional to provide.

8. Select the **OK** button; the contact information saves.

9. Select the **Environment…** option from the **Options** drop-down menu in the top toolbar.

The **Environment Options** window displays.

10. Navigate to the **Preparer** tab.

11. Populate the fields under the **Preparer** section; this is essential to avoid transmission errors.

12. Enter the **Identification Number** in the tab.

13. Select the **OK** button; the settings save.

Transmitting RL Slips for Form Expert (FX) in ProFile, Continued

Transmitting slips:

Note: The new RL slip transmission process means that an .xml file no longer generates and stores on the user's computer. The information transmits directly to Revenu Québec.

1. Open the return.

2. Select the **Transmit RL slips** option under the **EFILE** drop-down menu in the top toolbar.

The **Transmit RL slips** window displays.

3. Select the slip or slips to transmit.

4. Set the slip type in the **Type** column.

5. Select the **Next** button.

The **Ready to transmit** window summarizes the slip details.

6. Ensure all slip details are accurate before transmitting.

7. Select the **Transmit** button; the slip transmits.

A confirmation displays when the transmission completes successfully.

Note: Please be aware that there is no retention of slip submissions or results by ProFile.

Related Articles

Review our support article for additional details, including reviewing and printing a transmission confirmation number.
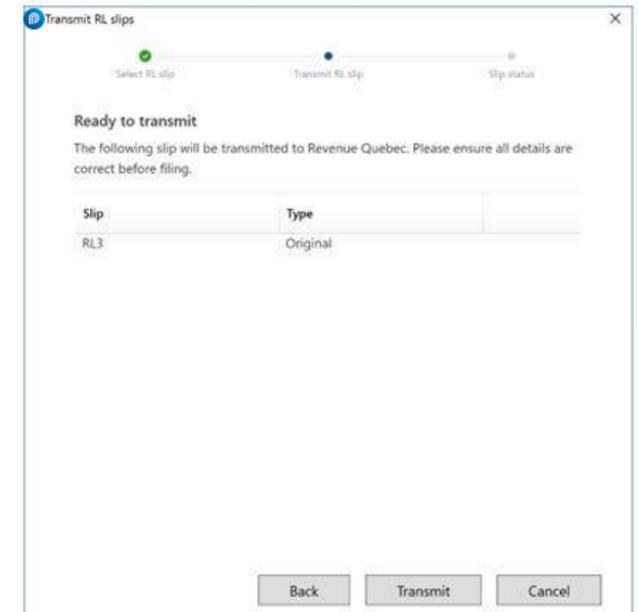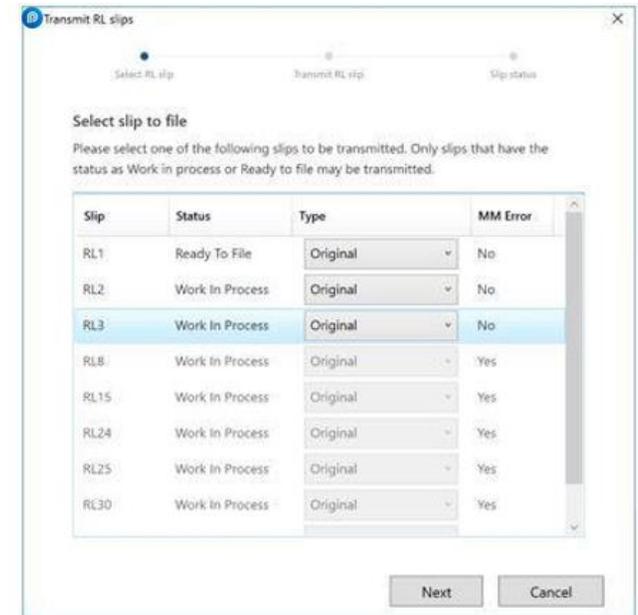
Transmitting Amended Slips for Form Expert (FX) in ProFile

Preparers can electronically file an amended slip through the FX module.

Note: ProFile does not retain a report or record of which slips transmit. Always print or retain a PDF copy of the CRA confirmation of an EFILE when completed.

Transmitting an amended slip:

1. Open the applicable return in ProFile (for example, a T4).

2. Under the **Slip type?** section, set the type to **AMENDED.**

3. Make all the necessary changes to the slip.

4. Select the **Properties…** option under the ProFile **File** drop-down menu in the top toolbar.

5. Set the **Slip Status** for **Magmedia** to **Ready to File**.

6. Select the **Internet File Slips** option under the ProFile **EFILE** drop-down menu.

7. Check the box of the slip to be transmitted (for example, **T4**).

8. Change the data type to **Amended** in the **Data Type** drop-down menu.

9. Select the **OK** button; the amended slip transmits.

ProFile builds the XML file and automatically launches the CRA transmission window.

10. Review the CRA disclaimer, log in, and submit the .xml file.

11. The file submits; select the **Print** icon on the browser window to print the confirmation number.

12. Select the **Close** button.

Transmitting a Cancelled Slip for Form Expert (FX) in ProFile

Preparers can electronically file a cancelled slip through the FX module.

Note: ProFile does not retain a report or record of which slips are transmitted. Always print or retain a PDF copy of the CRA confirmation of an EFILE when completed.

Transmitting a cancelled slip:

1. Open the applicable return in ProFile (for example, a T4).

2. Under the **Slip type?** section, set the type to **CANCELLED.** When transmitting, the slips automatically revert to a value of **0**.

3. Select the **Properties…** option under the ProFile **File** drop-down menu in the top toolbar.

4. Set the **Slip Status** for **Magmedia** to **Ready to File**.

5. Select the **Internet File Slips** option under the ProFile **EFILE** drop-down menu.

6. Check the box of the slip to transmit (for example, **T4**).

7. Change the data type to **Cancelled** in the **Data Type** drop-down menu.

8. Select the **OK** button; the amended slip transmits.

ProFile builds the XML file and automatically launches the CRA transmission window.

9. Review the CRA disclaimer, login, and submit the .xml file.

10. The file submits; select the **Print** icon on the browser window to print the confirmation number.

11. Select the **Close** button.

Verifying Client Data for Form Expert (FX) in ProFile

Verifying Client Data before filing slips in FX module

Before transmitting a slip or return information with EFILE, ensure that the file is complete and accurate. ProFile includes audit and review tools that can help.

FX Module:

1. Ensure the question **Are you magnetic media or internet filing slips?** on the **Info** form is set to **Yes**.

2. Ensure any messages in the **Active Auditor**, especially those in the **Mag Media** tab, are resolved. Double-click the message in the **Auditor** to identify the area that needs reviewing.

3. When undertaking the initial EFILE of a slip, preparers enter the transmitter number in the EFILE wizard. If a transmitter number has not been provided, use the default **MM000000**.

4. If transmitter information must be changed in the future, select **EFILE -> Options -> Transmitter** under the **T3/FX** section. Information can be updated as required.
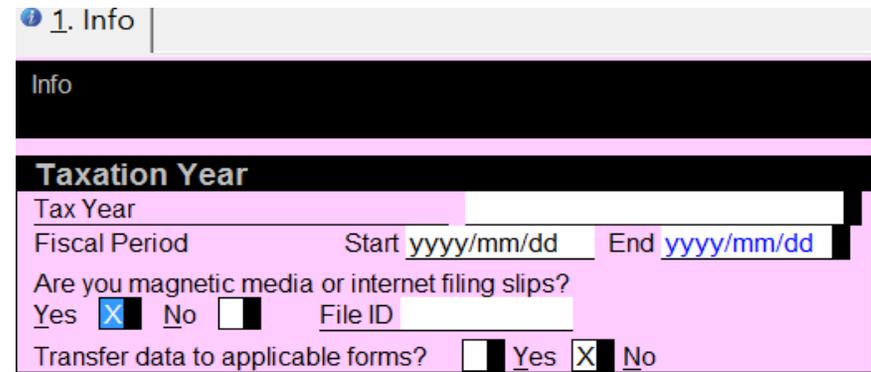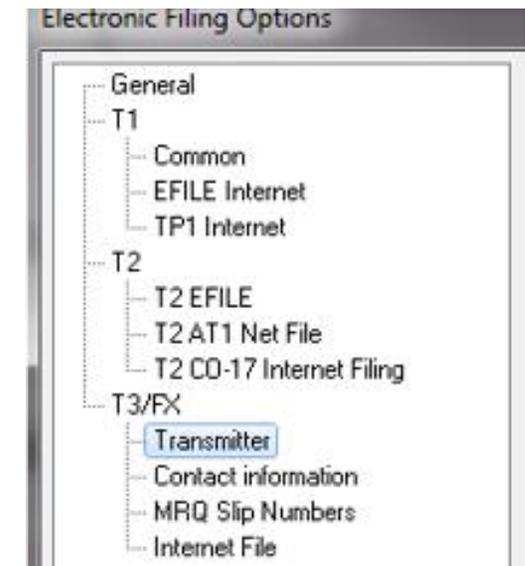
Verifying Client Data for Form Expert (FX) in ProFile, Continued

When ProFile builds an XML file suitable for transmission, it flags slips and information in which there are issues that prevent the XML file from being built. View a summary of the problems affecting a file by selecting the (**+**) symbol adjacent to a failed file. Hover the mouse over the message to read the full text.

A common cause of invalid XML files is the use of overrides on fields that are included in the information that is to be sent (for example, when overriding a field instead of using amounts that ProFile calculates or carries from another form.) Avoid using the override feature whenever possible.

Note: ProFile cannot identify the location of any error; it is necessary to locate the error yourself as a user.
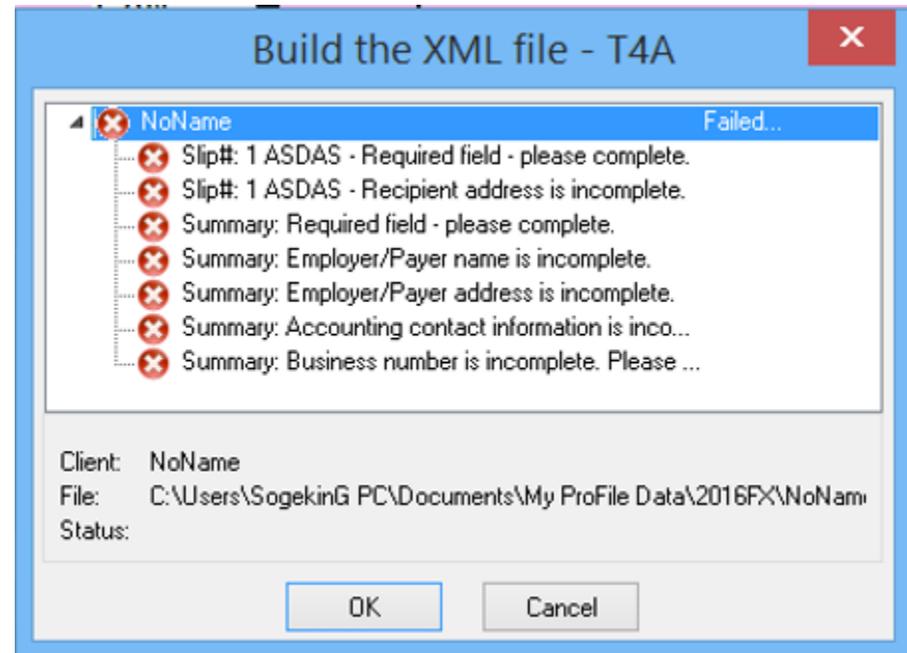
Print Setup for Form Expert (FX) in ProFile

1. Select the **Print Setup…** option from the **File** drop-down menu in the top toolbar.

The **Print Setup** window displays.

2. Select the correct year for the module, the available print settings display.

3. Applicable forms, jackets, letters, and more that are applicable to the module list under the **Category** column.

4. Select each available category and set/approve the margin settings, font scaling, position, duplexing, and other printing values.

5. Select the **OK** button to save the print setup settings.
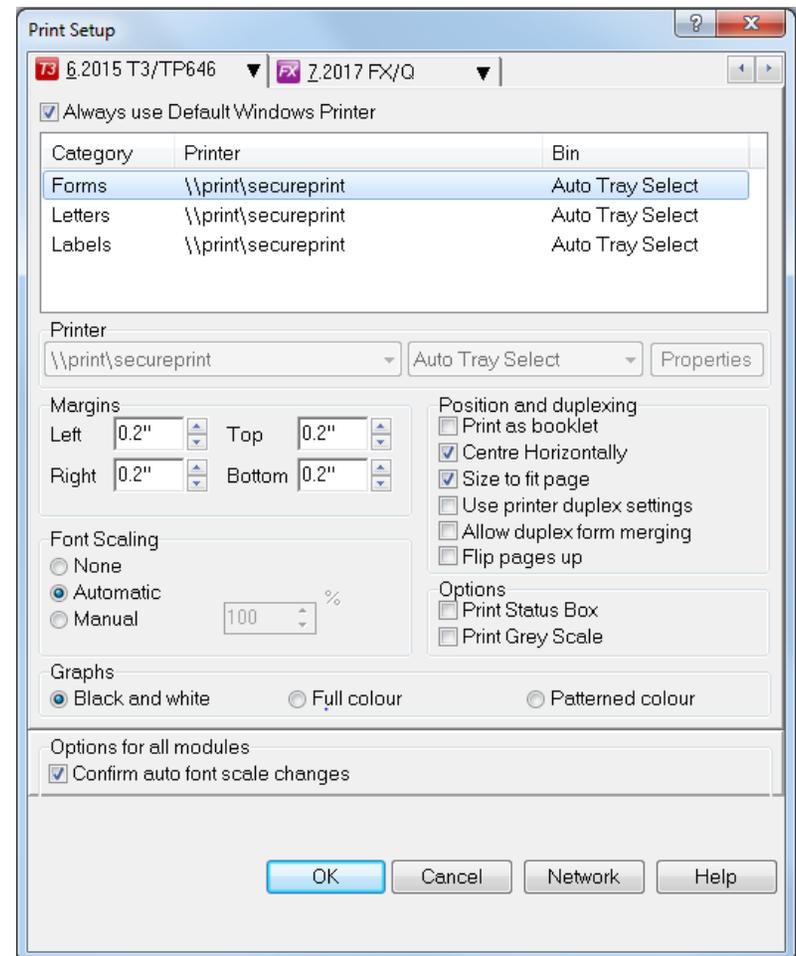
Purchasing and Using ProFile 20

Using ProFile 20

ProFile 20 is a bundle of 20 returns that provides a more cost-efficient alternative to preparers than buying individual OnePay returns. It is best suited for preparers who have 20 or fewer T1/TP1 returns to file.

ProFile 20 supports T1/TP1 returns for tax years 2015, 2016, 2017, 2018, 2019, 2020, 2021 and 2022.

ProFile 20 customers are charged a return ONLY when they EFILE a return or print a return using the T1 Condensed setting.

Getting started

Visit our ProFile 20 website or call our sales team at **1-844-861-3599** to purchase ProFile 20.

Accessing ProFile 20:

ProFile 20 customers receive an email containing their Product Code and License Key.

1. Open ProFile.

2. Select the **Manage Licenses** option from the **Help** drop-down menu in the top toolbar; the **License** wizard displays.

3. Select the **Add New License** button, the **ProFile License Activation** window displays.

4. Enter the **Product Code** and **License Key** from the email and select the **Activate** button.

The ProFile license activates. You can now print and EFILE T1/TP1 returns using ProFile 20.

Am I charged a ProFile 20 return if I just prepare a return?

No. ProFile 20 customers can prepare as many T1/TP1 returns as they like without being charged.

Does ProFile 20 work with Flexible Licensing?

Yes.

Using ProFile 20, Continued

How many ProFile 20 licenses can I buy at one time?

Only a single ProFile 20 license may be purchased at one time.

If more than 20 returns need to be filed or printed, preparers can purchase another ProFile 20 license when all returns are used or opt for OnePay or the purchase of the unlimited version.

Will I get a refund for unused ProFile 20 returns?

No, there are no refunds provided for unused ProFile 20 returns.

Can I use the remaining returns on my ProFile 20 for the next year? For example, can I use the 2018 license for 2019 returns?

No. In this example, any remaining ProFile 20 returns would need to be used to EFILE or print 2015, 2016, 2017 or 2018 returns.

Will I be notified how many ProFile 20 returns I have remaining when submitting or printing a return?

An assessment window displays the remaining number of ProFile 20 returns when a return is used.

Will I be informed when all ProFile 20 returns have been used?

A notification window indicates when all ProFile 20 returns have been used:

Related Articles

Review our support article for additional details.
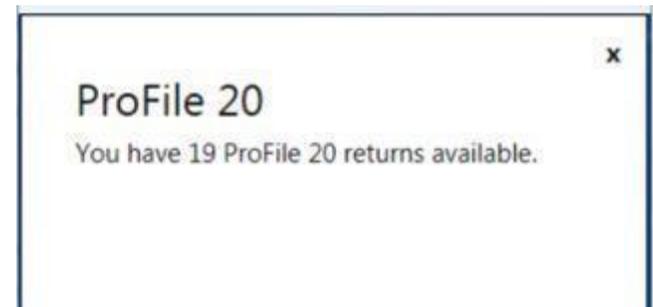
Managing Printing in ProFile

Print Setup in ProFile

1. Select the **Print Setup…** option from the **File** drop-down menu in the top toolbar.

The **Print Setup** window displays.

2. Select the correct year for the module, the available print settings display.

Applicable forms, jackets, letters, and more that are applicable to the module are listed under the **Category** column.

3. Select each available category and set/approve the margin settings, font scaling, position, duplexing, and other printing values.

4. Select the **OK** button to save the print setup settings.
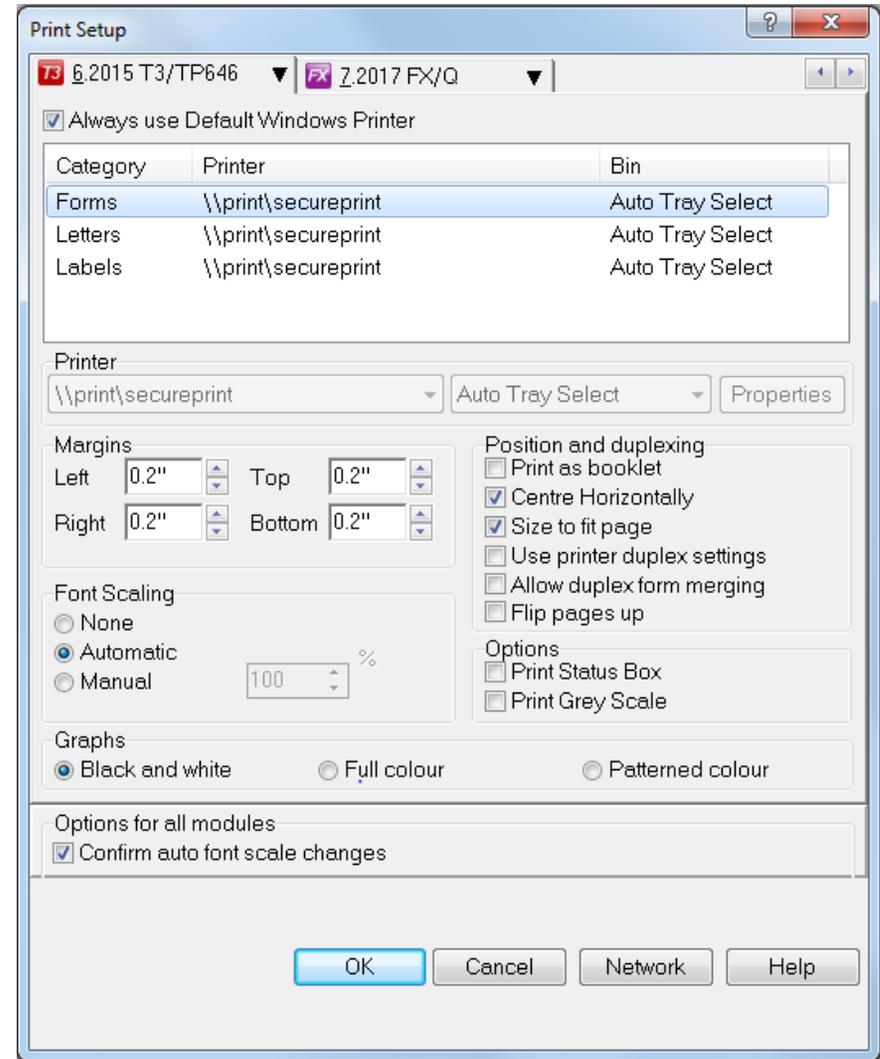
Printing Different Copies

ProFile users can set the print job options for returns and forms.

Setting print job options:

1. Open the return in ProFile.

2. Select the **Print…** option from the **File** drop-down menu in the top toolbar.

The **Print Selection** window displays.

3. The **Print Job** section in the top-left corner of the window displays the print job types (for example, **T1 Paper**).

Note: The province of residency selected on the return determines the available print jobs. For example, setting **Quebec** as the province of residency displays TP1 print jobs.

4. Set the print job settings along the section on the left side of the window.

Advanced and simplified settings:

1. Select the **Advanced** button in the bottom-left corner, the advanced print job options display.

2. To return to the simplified view, select the **Simplified** button in the bottom-left corner.

Printing jobs:

1. Select the **Set Defaults** button to set the selected print job options as the default.

2. Select the **Print** button to print the print job.
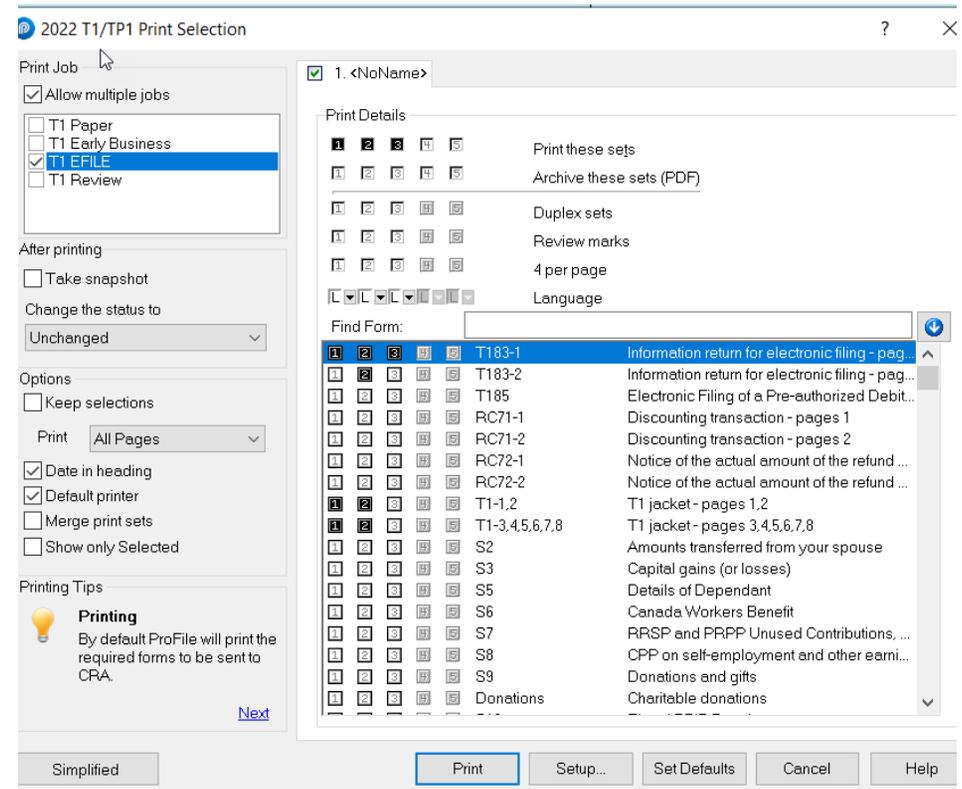
Printing to PDF in ProFile

Setting print to PDF options:

1. Open the return.

2. Select the **Print/Email PDF…** option from the **File** drop-down menu in the top toolbar.

The **Print Selection** window displays.

3. Several options for PDF printing are available, including:

- Setting the print job type in the top-left menu (Print Job)
- Setting print job options under the Options section
- Setting the print job resolution under the Resolution drop-down menu
- Emailing the print job to an email address entered in the email field

4. Set the necessary options for PDF printing.

Previewing the PDF:

1. Select the **Preview** button, a preview copy of the PDF displays.

2. Review the form for any issues or needed corrections.

Advanced menu option:

1. Select the **Advanced** button.

The window expands to display the advanced print to PDF options.
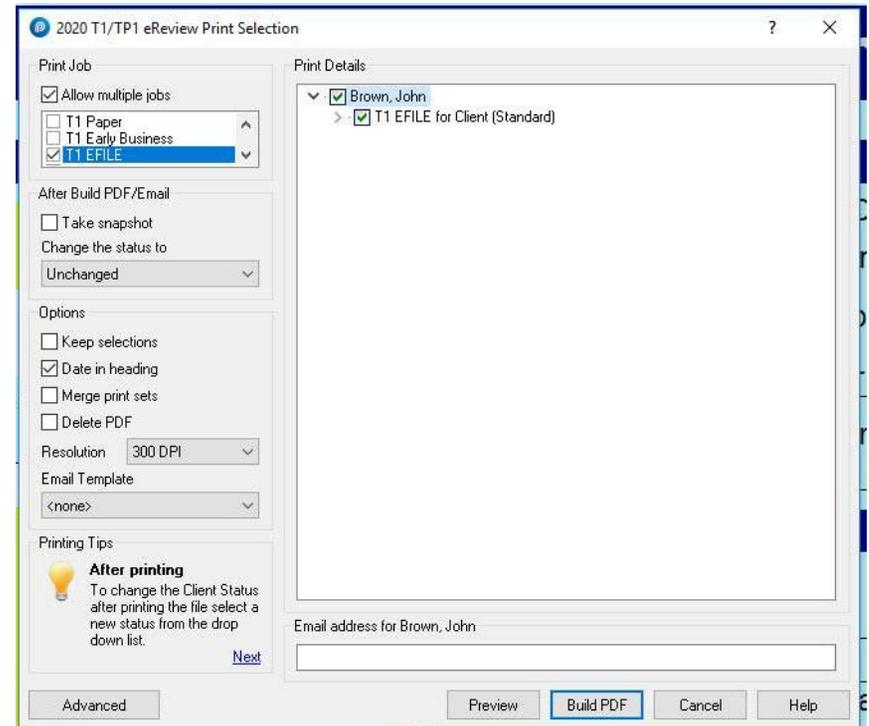
Printing to PDF in ProFile, Continued

Building the PDF:

1. If there is an email listed in the **Email Address** field, delete the address.

The **Build PDF** button activates.

2. Select the **Build the PDF** button; the PDF creates and the path/file name displays.

3. Select the **OK** button; the build of the PDF completes.

Related Articles:

Review our support article to learn more about the Archive PDF functionality.
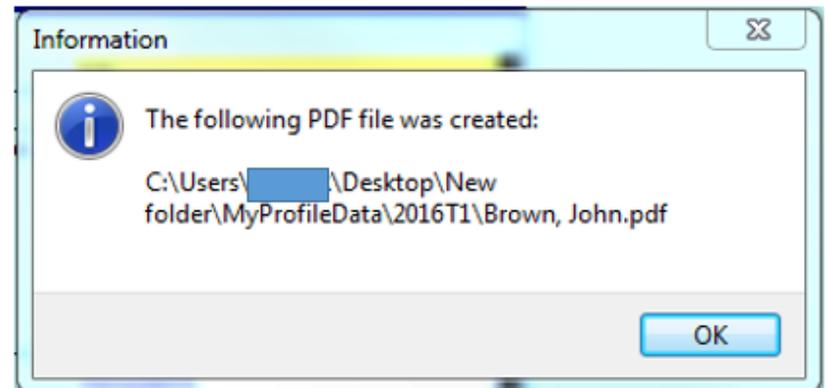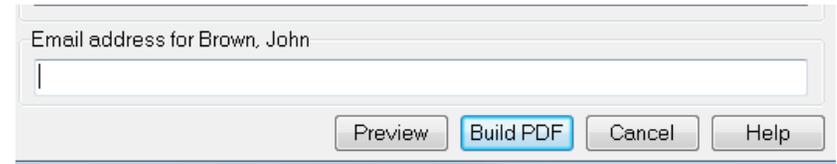
Setting up Duplex Printing in ProFile

Duplex printing allows preparers to print returns on both sides of a single sheet of paper.

Setting Duplex Printing Options:

1. Open ProFile.

2. Select the **Print Setup** option from the **File** drop-down menu on the top toolbar; the **Print Setup** window displays.

3. Select the desired tax year and module from the tab menu at the top of the window (for example, **1. 2019 T1/TP1**).

A list displays below the tabs, detailing available forms, letters, and more.

4. Uncheck the **Always use Default Windows Printer** above the **Category** heading.

5. Select the first item listed under the **Category** heading (for example, **T1 jacket**).

6. Select the **Properties** button under the **Printer** heading.

The **Print properties** window displays.

7. Select the duplex printing option from the options presented; note that this option may vary in name based on the individual printer manufacturer. In the example below, the duplex printing option is titled as "2 on 1 (2 sided)".

8. Select the **OK** button. In the **Print Setup** window, check the **Use printer duplex settings** box; this activates the duplex settings. Repeat the duplex printing configuration for each applicable option under the **Category** list (for example, **T1 forms**, **Letters**, etc.)
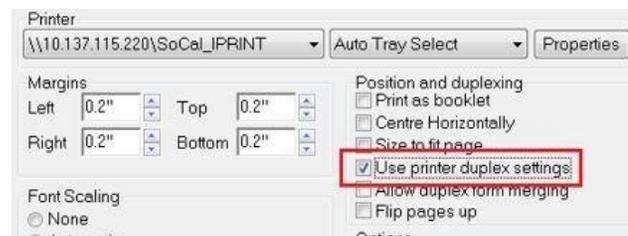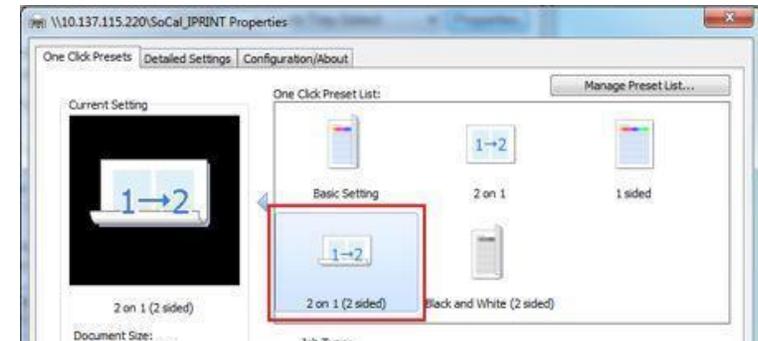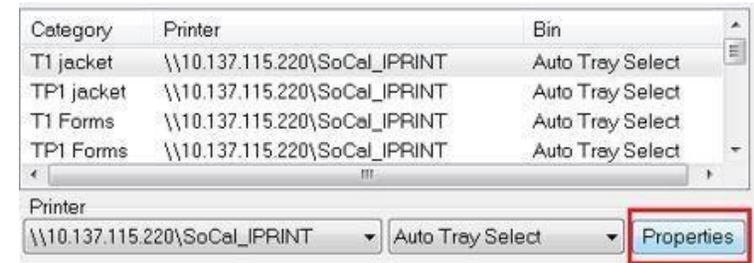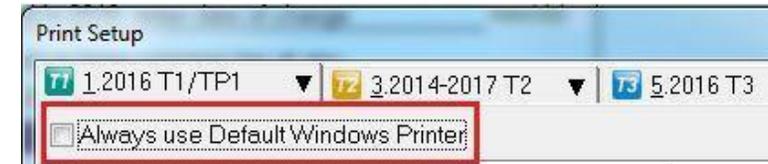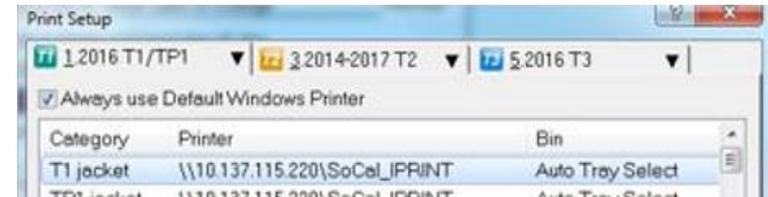
Printing Slips in ProFile

When sending a slip to print from ProFile, the printout may be cut off, print a blank page, or not print at all. This is due to the slips' official size conflicting with the printer settings.

Changing default slip print settings:

1. Select the **Print Slips Setup...** option from the **File** drop-down menu in the top toolbar. The **Slips Print Setup** window displays.

2. Select the tax year from the module drop-down menu in the top bar.

3. Select the slip type from the tab menu (for example, **T4PS**). Update and apply the necessary print slip settings.

4. Select the **Test** button to test print the settings.

5. Select the **OK** button; the settings save.

Printing the slip:

There are four printing options available under the File drop-down menu in the top toolbar:

- Print...
- Print / Email PDF...
- Print Slips...
- Print Slips / PDF

Each option opens a print settings window. Update and apply the necessary print slip settings.

Select the **Print** or **Build PDF** button; the slip prints or builds a PDF file.

Reviewing the printed slip (if PDF printed):

1. Open the generated PDF in the PDF-viewing software (for example, Adobe Acrobat); ensure that the PDF is set to fit on the page.

2. Select the desired paper size under the **Page Setup** option.

3. Match the desired paper size under the **Printer Properties** option.
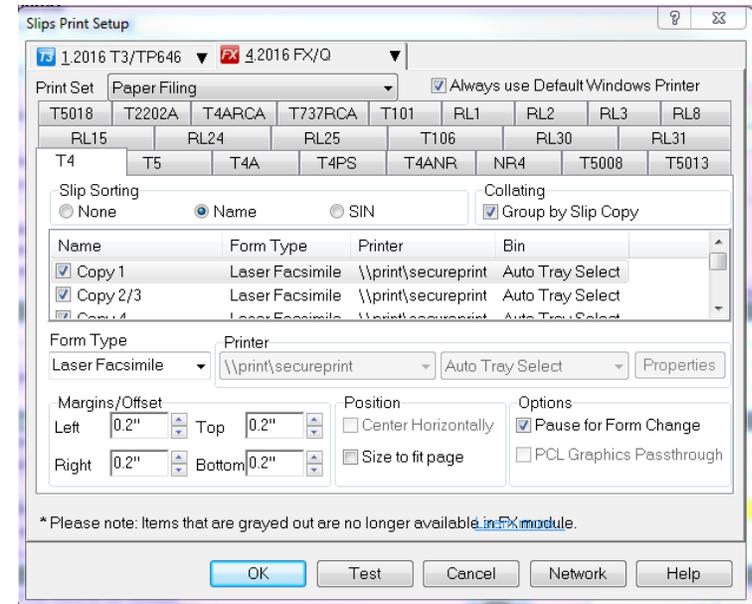
Managing Software Integration in ProFile

QuickBooks Integration

It is easy and convenient to integrate QuickBooks with ProFile. Select the applicable activity below.

Integrate ProFile and QuickBooks

The integration process allows ProFile to display as an integrated application in QuickBooks.

Review our support article for more information.

Importing data from QuickBooks to ProFile (T2)

The import data process imports amounts from QuickBooks into ProFile.

Review our support article for more information.

Using Adobe Sign and DocuSign

Electronic signatures (or "eSignatures") are a new way to ask clients for signatures and other inputs on forms and documents in ProFile. ProFile users can track which requests have been completed and which are still outstanding in one convenient dashboard after requests have been sent to your customers.

Intuit supports two products that allows you to request signatures and other inputs directly from ProFile without having to track individual emails or files: Adobe Sign and DocuSign. Both are third-party partners of Intuit. Separate fees may apply, and a paid ProFile license is required for both Adobe Sign and DocuSign.

Learn more about setting up and using Adobe Sign and DocuSign.

QBOA Software Integration in ProFile

QBOA integration is undertaken via the Workpapers.

Workpapers is a collection of tools in QBOA that allows accountants/bookkeepers to quickly and efficiently complete year-end work for their client.

Accessing Workpapers:

Log in to the QBOA Firm containing the data to be exported.

Select the hyperlink text under the Workpapers column.

Preparing data to be exported in QBOA:

1. Open QuickBooks.

2. Navigate to the Workpapers section for the client's books.

Note: Only tax year 2015 and forward are supported.

3. Review the **Working Trial Balance** and the **GIFI Mapping** to ensure all necessary work is complete.

4. Map any unassigned codes under the GIFI mapping section.

5. Navigate through the GIFI codes list and select **Assign GIFI Codes** to assign; a row displays under the line to be mapped.

6. Select the GIFI code from the list.
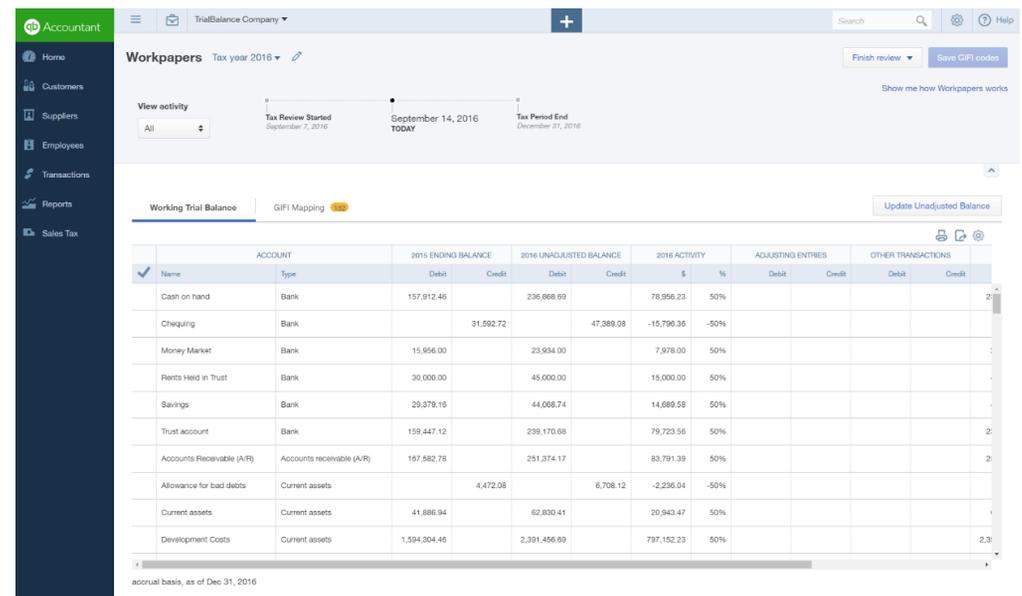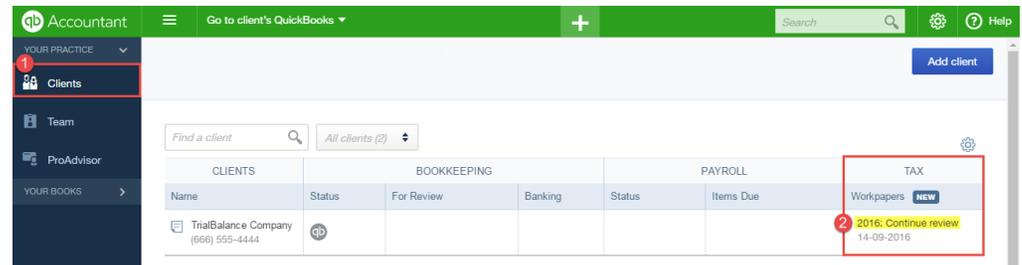
QBOA Software Integration in ProFile, Continued

7. Once complete, select **Save GIFI codes** in the top right corner; the information saves in the GIFI File format.

8. Open ProFile.

9. Create a T2 return or open the existing T2 return associated with the QBOA firm.

Importing the GIFI from ProFile:

1. Select the **QBOA Import** option under the **File** drop-down menu in the top toolbar.

2. Select **OK**; the process completes.

Managing Intuit Accounts in ProFile

Inuit "One Account" Login

The Intuit "One Account" tool allows access to several Intuit products and services with a single log in and password.

One Inuit products and services

The One Account tool provides access to the following:

- ProFile Link
- ProFile support community
- QBOA
- QBO
- TurboTax Online

One Account access:

Customers can create a One Account when accessing a supported service for the first time.

The **One Account** login window displays when accessing a supported service.

Select the **New to Intuit? Create an account** link at the bottom of the login window to create a new account.

Using Backup to Cloud Feature in ProFile

Using Backup to Cloud Feature in ProFile

Backup to Cloud is a new ProFile feature replacing the existing ProFile Review function.

ProFile users can safely and securely backup an unlimited number of files and returns on the virtual Cloud and retrieve the stored files at any time.

What is the Cloud?

The Cloud is ProFile's online repository that provides unlimited file storage and is available for backup and retrieval 24-hours per day.

What type of files can I back up?

Users can backup files for any module (T1, T2, T3, or FX) to the Cloud.

Note that only T1 and T2 module files can undergo backup to Cloud via Hub. Other modules, such as T3 and FX, can only undergo backup via the **Save As…** option in ProFile.

What years are supported?

Backup to the Cloud only supports the current year module, not previous years.

Is there any limit to the number of files I can back up at one time?

Users can back up 80 files at one time to the Cloud.

Do I need to make a new Intuit account to use the backup to Cloud feature?

No, users can use the same Intuit account used for ProFile Review.

I backed up a file to the Cloud…is the original file on my hard drive deleted?

No, the original file is still stored on your hard drive where it was.

I deleted a file in the Cloud…is it gone forever?

The file only deletes from the Cloud; it does not delete from the local storage directory.

Using Backup to Cloud Feature in ProFile, Continued

Setting options for backup to Cloud:

The **Backup to Cloud wizard** displays upon starting ProFile.

1. Select the **Environment Options** link to set options for backup, the **Environment Options window displays**.

2. Navigate to the **Backup to Cloud** tab.

3. Select the **Enable backup to Cloud for this computer** option.

4. Select the **Automatically back up returns on saving** option to enable auto-backup; this is not a mandatory option, but it ensures that any time the file is saved on the desktop that it is also backed up to the Cloud.
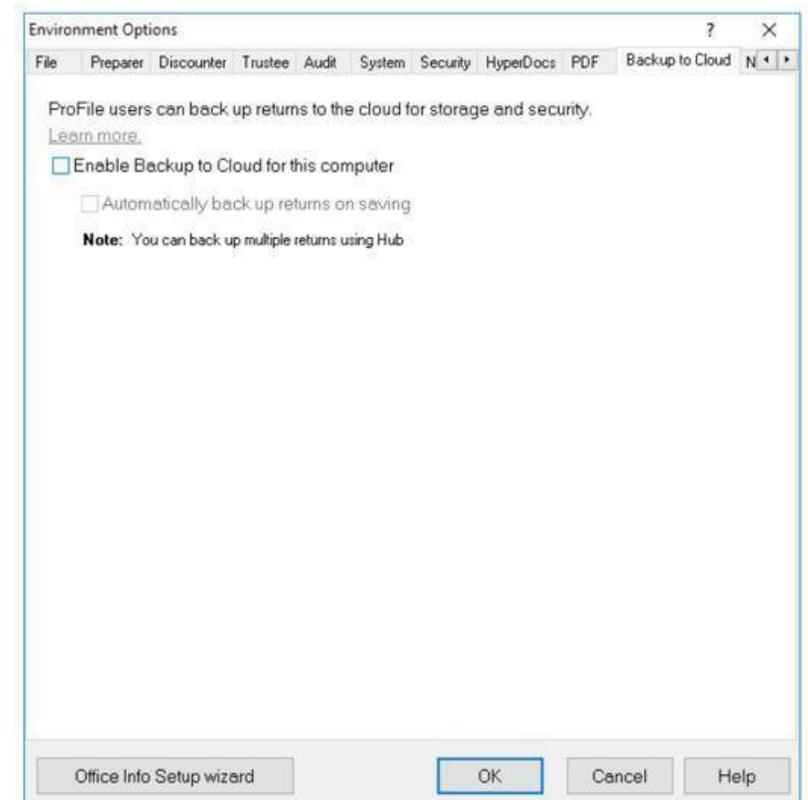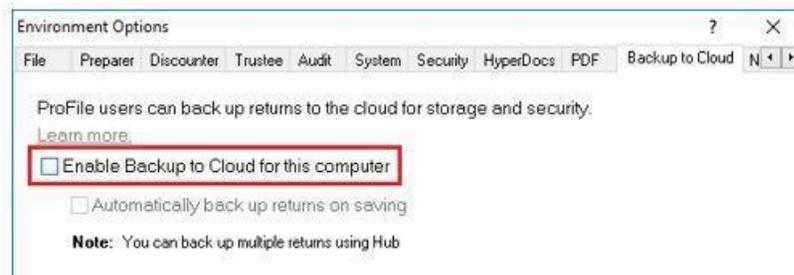
Using Backup to Cloud Feature in ProFile, Continued

Backing up a file to the Cloud:

1. Open the file to upload in ProFile.

2. Select the **Save As…** option from the **File** drop-down menu in the top toolbar.

The **Save As** window displays.

3. If you selected the automatic backup option during setup, you now see a backup option when saving the file.

Note that the **Enable backup for this file** option is already selected.

4. Select the **Ready to backup** option.

5. Select the **Save** button.

A confirmation message indicates the backup has been successful.

If you did not select the automatic backup option during setup, you will see an option when saving the file in the future to back up to the Cloud or save only to the desktop.

6. Users can either select the **Enable backup for this file** option or leave it unselected.

7. Select the **Save** button; the file is saved either to the desktop only or to both the desktop and the Cloud.

A confirmation message indicates the backup has been successful.

Related Articles

Review our support article for more information on backing up multiple files, reviewing files, and downloading or deleting files from the Cloud.

189
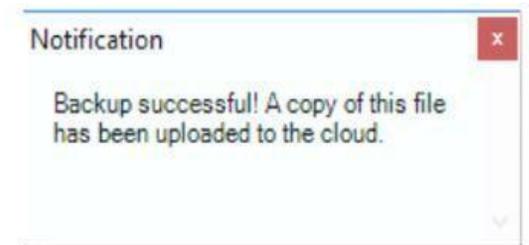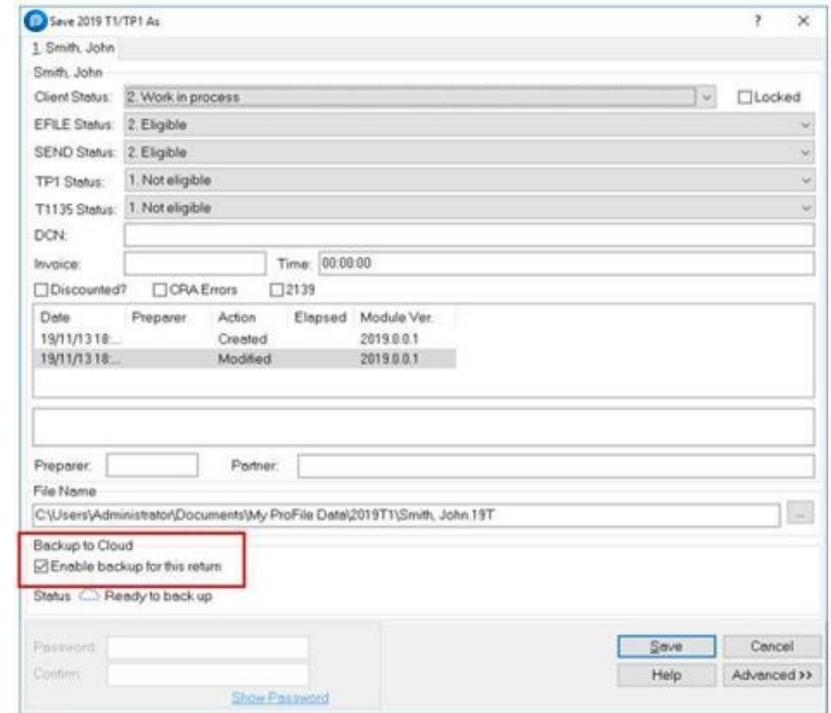
Managing OnePay in ProFile

Overview of ProFile OnePay

OnePay is a one-time license that allows a ProFile customer to file a single T1, T2, or T3 return. It is an alternative to purchasing a full ProFile license, which allows for unlimited returns.

OnePay is best suited for:

- An existing ProFile customer whose license has expired, but still needs to file a return or returns

- A new ProFile customer with a limited number of returns to be filed

- A resident of Quebec at the end of the fiscal year, and only the Federal module has been purchased and not the Quebec TP1 or the Quebec T646*

- A ProFile customer with a business registered in Quebec*

*In the event of the OnePay purchase for Quebec, the preparer is required to NetFile the TP1 separately from the Federal. They also require a NetFile QC Number and Access Code. For more information, visit Revenu Québec.

Note: If the taxpayer resides in any other Province and has an RL-1, the TP1 return is not necessary. The RL-1 information may be entered in the T4 form.

Purchasing ProFile OnePay

OnePay is purchased only from within ProFile. An internet connection is required to complete the purchase via our secure web page.

Note: If purchasing a OnePay for a recurring client, carry forward the return(s) before purchase.

1. Open the necessary return in the appropriate module (for example, **T1**).

2. Select the **Star** icon from the top toolbar menu in ProFile or select the **Purchase OnePay...** option from the **File** menu.

The product selection wizard displays.

3. Select the **Get Started** button under the **OnePay** option.

The license purchase menu displays.

4. Click the **Add to cart** button to purchase a license based on the required module(s).

5. Select the **Proceed to checkout** button when prompted to purchase.
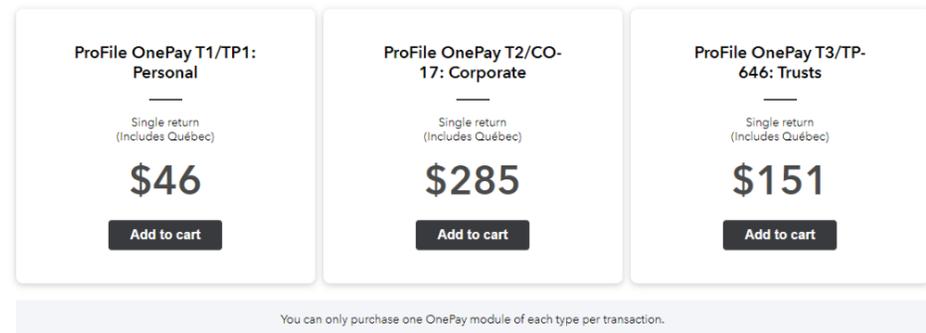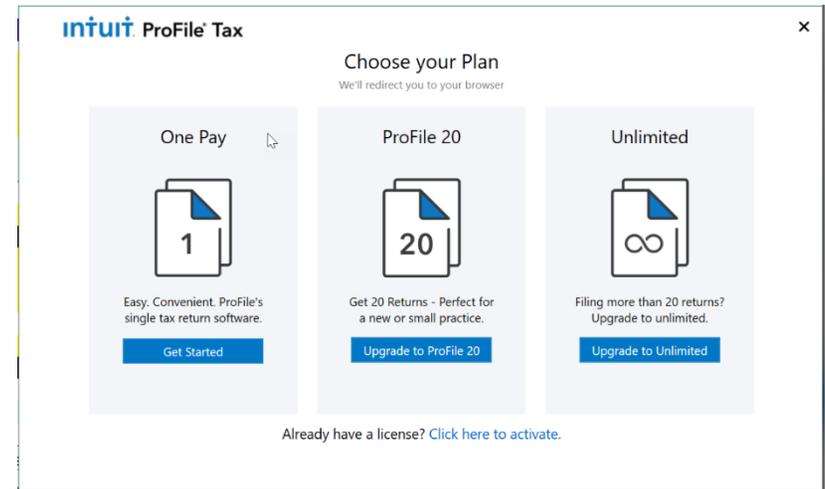
Purchasing ProFile OnePay, Continued

6. Enter the necessary company and billing information.

7. Select the **Continue** button, the **Payment Information** window displays.

8. Enter the necessary payment information and select the **Continue** button.

The **Review Your Order** window displays.

9. Review the payment and purchase information. If correct, select the **Place Order** button.

The confirmation window displays the OnePay order and cost.

10. Select the **close this window** link in the top bar; the link is highlighted in the screenshot.

The OnePay payment wizard closes.

11. The preparer returns to ProFile and to the return being filed.

Troubleshooting ProFile OnePay

I am being prompted to purchase OnePay.

If a ProFile customer attempts to populate a form for any module (for example, T1, T2, or T3) without an existing valid ProFile license, the OnePay purchase wizard displays.

Can I use Auto-fill my Return (AFR) with OnePay?

Yes. Prior to using AFR with OnePay the preparer requires:

- An EFILE account
- A representative ID
- EFILE a T1 Authorize a representative request

Review the CRA article to learn more about authorizing or cancelling a representative.

I downloaded a trial version of ProFile, but when I try to evaluate the software, the OnePay Wizard appears, asking me to purchase a return.

When installing a ProFile Trial version, make sure you insert the new Product Code and License Key in the License window.

I am seeing a TRIAL watermark written through all the forms when I print the return using a OnePay license.

This happens because the Trial license and the OnePay are both activated in ProFile at the same time and the Trial license is overriding the OnePay.

In ProFile:

1. Navigate to the **Help** -> **License** -> **Details** option.
2. Select the **Trial License** option.
3. Select the **Delete Selected License** option.
4. Close the **Licensing** windows
5. Open the file to print by navigating to the **File** -> **Open** option.
6. Print normally.

If you have removed a Trial License and still get a trial watermark, call support for assistance.

Troubleshooting ProFile OnePay, Continued

I received an error message at the end of a OnePay purchase transaction.

When purchasing OnePay through ProFile's OnePay Purchase wizard, the following error may appear:

"Your online purchase transaction was not completed. Please go back and review your selections".

This is not a ProFile error, but could be resulting from one of the following situations:

- High security settings on the computer (see solutions below)
- A network disruption (check your network is functioning)
- The transaction timed-out (retry the transaction to completion)

The following are solutions that may resolve the high security setting issue:

- Check ProFile version is the latest
- Check Windows Update for any recent OS updates
- Set firewall/antivirus exception for ProFile
- Set SSL/TSL security
- Allow pop-ups
- Clear your cache and browsing history
- Check for Proxy settings
- Check .NET version is the latest

Can I purchase more than a single OnePay?

When purchasing One-Pay, only one unit can be purchased at a time. If a quantity greater than one is entered in the Quantity field, you will be charged for that quantity but will only receive one license.

Managing ProFile Security Settings

Using Options Packages in ProFile

An options package is a file that preserves customized ProFile settings. These can include office details, printing options, database settings, and template and module settings.

Creating an options package means that your ProFile settings can be used by you or by others without having to recreate any preferences.

How do I use the option package?

An options package can be used a few different ways:

- Saved on a shared network/server where everyone has access to it
- Saved on a terminal server where everyone has access to it
- Saved locally to a single computer that is not on a shared network/server

Depending on which use is selected, multiple users can work with ProFile in the same consistent manner, or an individual user can work with ProFile in a manner specific to themselves.

Types of options packages

There are three types of options packages in Profile: **individual**, **shared**, or **custom**:

Individual options packages save on an individual computer and are loaded when ProFile launches.

Shared options packages save to a network/shared server where one or more individual computers have access to the package. This is the ideal option if you are using a network environment, Client Server, or Terminal Server environment.

Custom option packages allow the same ProFile options to be utilized even if an individual computer is disconnected from a network/server/terminal server. A Profile user creates custom options packages in different locations and instructs ProFile which to use.

Creating an Options Package in ProFile

1. Start ProFile.

2. Select **Options Administration…** from the **Options** menu, the **Options Administration** window displays.

3. Set the necessary options for the package (for example, template use, pricing, database, etc.), these selections will become the settings in the new options package.

4. Select the options package type (**1**, **2**, or **3**).

5. Check the option **Include preparer and discounter name with Option packages**, if applicable.

6. Check the option **Prompt to save changes**, if applicable. This feature applies only to package types 2, 3, and 4 and selecting the option prompts the user to save any changes made to an options package when closing ProFile.

Note: Any changes made to an options package prior to ProFile being closed are **not** saved if the **Prompt to save changes** feature is not activated. Users must explicitly use the **Save** function to save any changes or they will be lost when closing Profile.

7. Select the **New** button.

The **New Settings** window displays.

8. Enter the name of the new options package.

9. Select the **OK** button.

The new options package file saves to the designated location and displays in the **Options Packages** list.
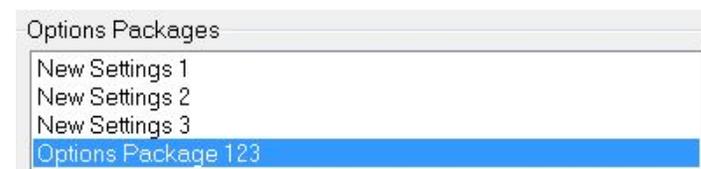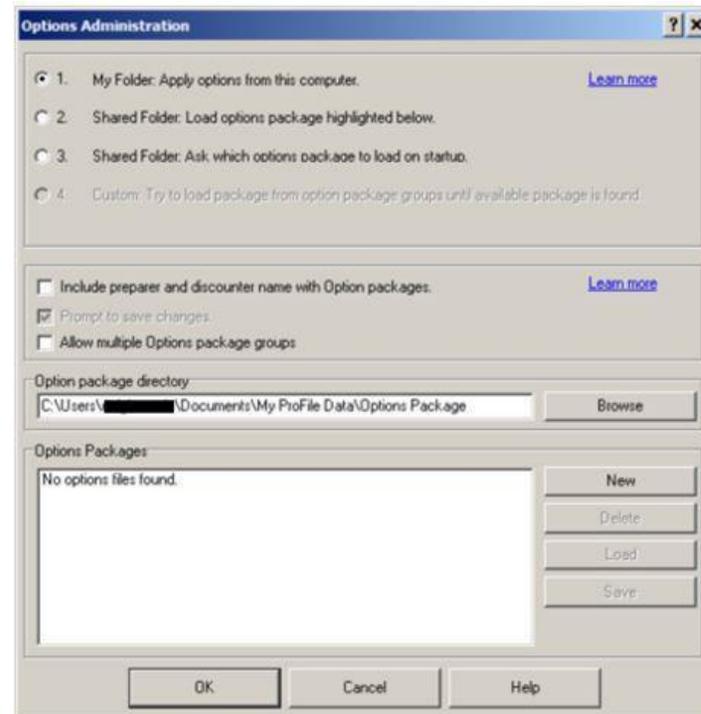
Managing Options Packages in ProFile

Options package management includes several tasks that can be undertaken, including:

- Creating a new options package
- Loading an options package
- Updating an existing options package
- Deleting an options package
- Transferring an existing options package

Related Articles

Review our support article to learn more about how to manage option packages.

Using Multiple, or Custom, Options Packages in ProFile

A computer that is utilizing an options package on a network/server/terminal server will lose access to it if the computer disconnects from the network/server/terminal server.

However, ProFile can be set to access an alternate local options package (or packages) on the individual computer's hard drive as a substitute to the network/server/terminal server options package. ProFile will first search for the designated options package on the network/server/terminal server; if that options package is not available ProFile will search for the next options package on the list.

Note: ProFile does not synchronize changes between options packages. Any changes to a local options package while disconnected from the network/server/terminal server are not saved in the network/server/terminal server options package.

Managing files in multiple options packages

When the laptop connects to a network/server/terminal server, users should use the options package stored on the network/server/terminal server.

When the laptop disconnects from the network/server/terminal server users can specify an options package stored locally on the laptop itself.

However, be aware that by having two different sets of options you are using two different databases. Files created or changed when you disconnect from the network/server/terminal server will not be listed in the database stored on the network/server/terminal server.

Creating and assigning multiple options packages

ProFile users who will disconnect at some future time from a network/server/terminal server and continue working will need to create at least two options packages: one for connected network/server/terminal server use and one for when disconnected from the network/server/terminal server. This allows the disconnected work to use the same options package settings as that on the network/server/terminal server.

Related articles

Review our support article to understand more about using multiple options packages.

Password Protecting Options and Options Packages in ProFile

Any options package can be password-protected. This prevents unauthorized users or other preparers from altering the options package.

This feature protects both the **computer options** and the **options package**.

Password protecting options packages:

1. Select the **Options password…** item from the **Options** drop-down menu in the top toolbar.

The **Set Options/Delete Password** window displays.

2. Enter a password in the **Password:** field of the **New password** section.

3. Enter the same password again in the **Confirm:** field.

4. Select the **OK** button.

The password saves and the options package file is protected from alterations and deletion. A prompt requesting the password displays any time changes are made to the settings.

Note: This password applies to Options packages only; it is **not** an EFILE password.

Data/File Locking in ProFile

Data locking automatically locks a return to prevent any changes from occurring after the return's status is set.

Setting the data locking options:

1. Open ProFile.

2. Select the **Module…** option from the **Options** drop-down menu in the top toolbar menu.

The **Module Options** window displays.

3. Select the appropriate module and year from the tab menu in the top of the window (for example, **2019 T1/TP1**).

4. Select the **Data Locking** tab.

5. Select the appropriate option under the **Client Status** list.

6. Select the appropriate option under the **EFILE Status** list.

Note: One or more options may be selected from the lists.

7. Select the **OK** button.

The file locks when the selected criteria occur.
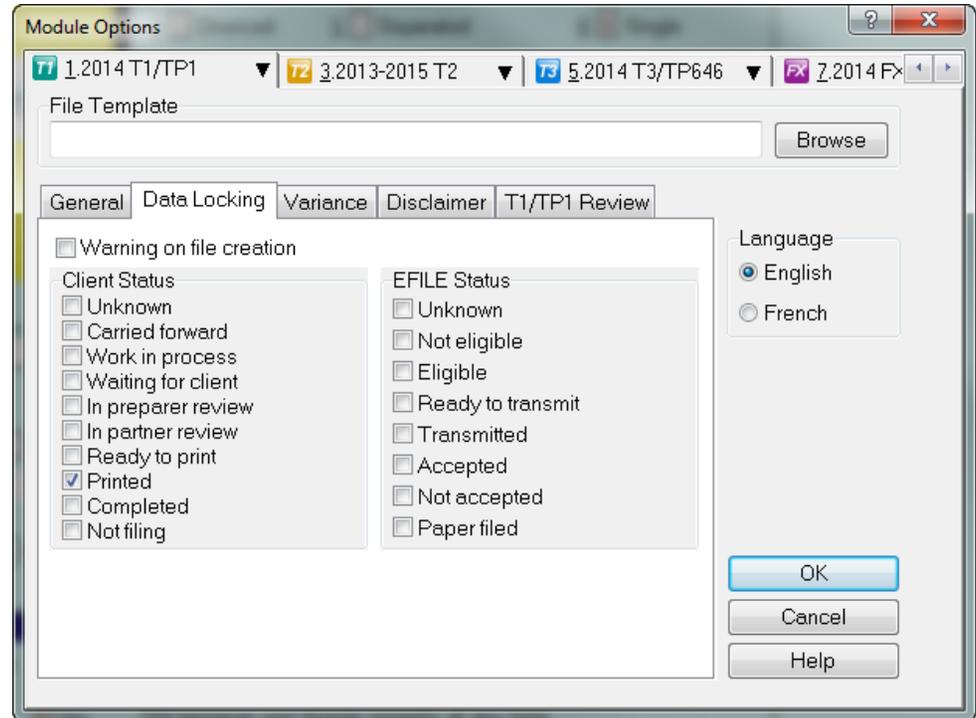
Data/File Locking in ProFile, Continued

Setting the Print locking options:

1. Select the **Form Selection…** option from the **Options** drop-down menu in the top toolbar menu.

The **Form Selection** window displays.

2. Select the appropriate module and year from the tab menu in the top of the window (for example, **2019 T1/TP1**).

3. Select the drop-down menu arrow in the **Status after printing** section; the menu expands.

4. Select the appropriate option from the menu.

5. Set the appropriate options for each module.

6. Select the **OK** button.

After the return is printed, the return locks to the selected status.
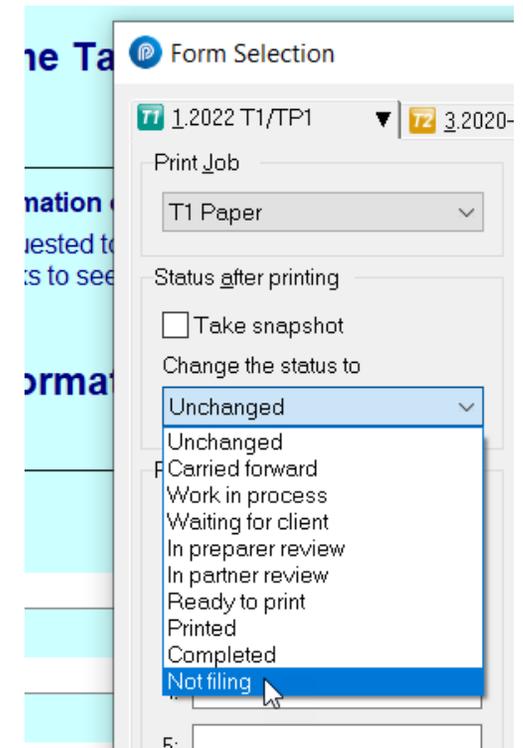
PDF Locking in ProFile

Data locking automatically locks a return to prevent any changes from occurring after the return's status is set.

Setting the PDF locking options:

1. Open ProFile.

2. Select the **Environment…** option from the **Options** drop-down menu in the top toolbar menu.

The **Environment Options** window displays.

3. Select the **PDF** tab.

4. Select the appropriate option under the **PDF Security** option list:

- None
- Client Name + SIN/BIN/TAN/PN
- Client Name + DOB/Fiscal EndDate
- User Specified

Setting Owner Password:

The Set Owner Password option provides an additional level of security to prevent a locked PDF from being edited.

1. Enter a password in the **Set Owner Password** field; users will require this password to open a file, in addition to any password set in the **PDF Security** option list.

2. Select the **OK** button; the PDF locking selection applies.
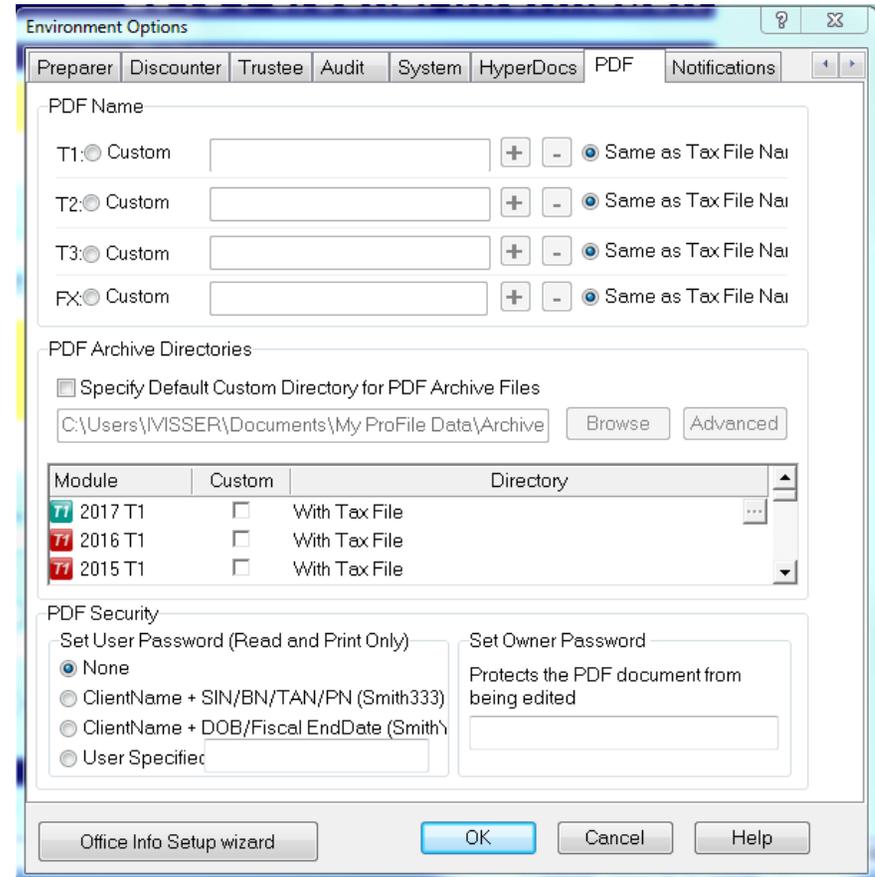
Keyboard Shortcuts in ProFile

If a preparer processes a large volume of client files, there is an advantage to learn the keyboard shortcuts for common functions in ProFile.

Action	Shortcut Command
Attach tape	<Ctrl+F8>
Back to previous form	<Alt+F7>
Carry forward a file	<Ctrl+R>
Clear highlighter	<Ctrl+H>
Clear review mark on field	<Ctrl+Alt+0>
Close current window	<Ctrl+F4>
Copy field	<Ctrl+C>
Correction required mark	<Ctrl+Alt+3>
Create a new file	<Ctrl+N>
Cut field	<Ctrl+x>
Display jump list	<Shift+F6>
Display previous audit message	<Shift+F9>
Ditto key	(back apostrophe)
EFILE this return	<Ctrl+F11>
Instant SEND	<Shift+F11>
End review	<Ctrl+E>
Exit ProFile	<Alt+F4>
Explorer Keyword view	<Shift+F7>
Explorer Line view	<Shift+F4>
Federal/Quebec toggle	<Shift+F5>
File properties	<Ctrl+I>
Form help	<Shift+F1>
Next checklist form	<Ctrl+Alt+PgDn>
Next Edit window form	<Ctrl+Tab>
Next file	<Ctrl+F6>
Next page on form	<Ctrl+PgDn>
Next section on form	<Alt+PgDn>
Non-zero T1 summary	<Ctrl+F10>
Open an existing file	<Ctrl+O>

Keyboard Shortcuts in ProFile, Continued

Action	Shortcut Command
Open form in new window	<Ctrl+Alt+F6>
Open the Tape dialog box.	<=>
Override format	<Ctrl+F2>
Partner sign-off	<Ctrl+Alt+2>
Paste field	<Ctrl+V>
Pause / start timer	<Ctrl+T>
Preparer sign-off	<Ctrl+Alt+1>
Previous checklist form	<Ctrl+Alt+PgUp>
Previous Edit window form	<Ctrl+Shift+Tab>*
Previous page on form	<Ctrl+PgUp>
Previous section on form	<Alt+PgUp>
Print file(s)	<Ctrl+P>
Question review mark	<Ctrl+Alt+4>
Quick-print audit messages	<Alt+F9>
Quick-print T1 summary	<Ctrl+Alt+F10>
Quick-print T183 form	<Alt+F11>
Quick-print tax summary	<Alt+F10>
Save the file	<Ctrl+S>
Show/hide auditor	<Ctrl+F9>
Snapshot/Variance	<Alt+F8>
Switch to family member	<Alt+F5>
T1, T2, T3 jacket	<Ctrl+J>
Toggle T1/TP1	<Shift+F5>
Toggle T2/AT1 RSI	<Ctrl+F5>
Top of next slip	<Ctrl+Enter>
Top of previous slip	<Ctrl+Shift+Enter>
ProFile Help	F1
Override	F2
Client Explorer	F3

Learning More About ProFile

ProFile Community and Support Site

The ProFile Community and Support Site is available to serve our valuable customers more effectively. You can now search both our support articles and forum questions at the same time, to return the best possible answer to your product question.

Available 24 hours a day, our Community and Support Site has more than 1,200 articles designed to improve your ProFile experience.

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Hello! Welcome to ProFile Tax Support.

Find ProFile help articles, Community discussions with other ProFile users, video tutorials and more.

🔍 Search for anything

Account management

Login and password
Data and security
Install, upgrade, and register

More   +

After filing

Amend a return
Error codes
Print or save

More   +

Credits and deductions

Business expenses
Medical expenses

More Topics

Sending Feedback About ProFile

ProFile users can conveniently provide feedback on ProFile's functionality or suggest an enhancement to the product.

All feedback is reviewed by the product owner, developer, or analyst.

Opening the feedback window in ProFile:

1. Select the **Send Feedback** option under the **Help** drop-down menu in the top toolbar or select the **Suggestion** button in the top toolbar.
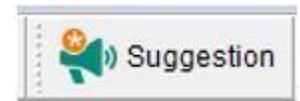
The **ProFile Feedback** window displays.

2. Describe your idea in the feedback field; you can be as specific as you like.

3. Enter your email so ProFile can contact you in case more details are required.

4. Select the **Submit** button when finished.

The **Additional details** window displays.

Additional ProFile Resources

Training and Tutorials Site

Whether you are a new ProFile user or an experienced professional, you can enhance your skills with our training resources, video tutorials, and Tips & Tricks site. Updated regularly, this site includes both core and advanced information to help throughout the return preparation process.

Webinars Calendar

Keep learning with our informative webinars, held every Tuesday and Thursday throughout the year. Live webinars take you through the finer points of ProFile, and if you have any questions, our experts are there online with you, ready to answer.

You can join an upcoming webinar through the calendar.

In-Product Help

The in-product Help utility provides an easy way to learn about forms, slips, schedules, ProFile's functions, and many other topics. Simply press the <F1> key from anywhere in ProFile to launch the Help utility.

Live Chat

Inside the ProFile software (and on many of our support pages) you will find the Live Chat option. This quick and convenient tool lets you immediately begin speaking to one of our support representatives online, without having to wait on the phone or interrupt your work. Available during our regular support hours.