

If you are using ProFile to print returns or to PDF to save to a USB stick to print on a computer that does not have the tax software, please read the following instructions as it will save you time, paper and possibly a little frustration at your clinic.

1. Printing out of ProFile – Which File Type Should you Print?

T1 General - Condensed Return

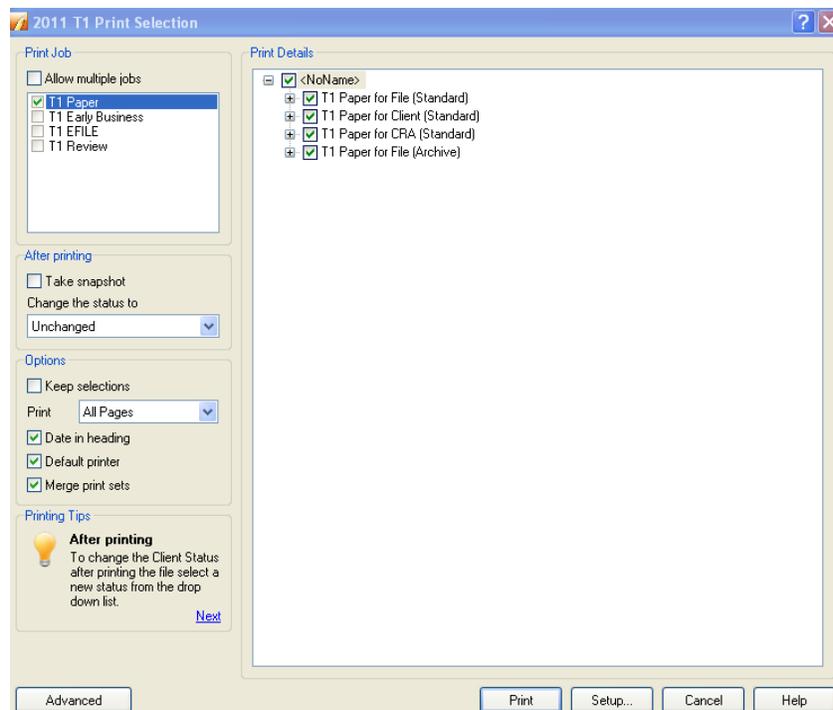
Commencing with the 2011 tax year, the Canada Revenue Agency (CRA) developed a new version of the T1 General return called the "T1 General - Condensed" that is generated via software. This three-page condensed version of the T1 General return is identified on page 1 as the "CRA version" and is created with a new keying field summary form, "Form T1-KFS", which contains the required field codes and related values printed in a condensed format. The T1 General - Condensed return, Form T1-KFS, and any additional required forms and schedules not included on Form T1-KFS is printed by the software and results in less paper requirements, thereby supporting sustainable development, and also realizing savings in mailing and storage costs.

If you must file a client's return via paper, and the software you are using creates a condensed version of the T1 General, print only the T1 General - Condensed return to send to the CRA. If you choose to also print another version of the return, do not send that version to the CRA. The T1 General - Condensed return as generated by the software contains all of the information required to process the return. **Please take note, if any or all of a single client's "regular" T1 General is sent to the CRA along with the T1 General - Condensed return, the processing of the return will be delayed.**

To print the T1 Standard Income Tax Return

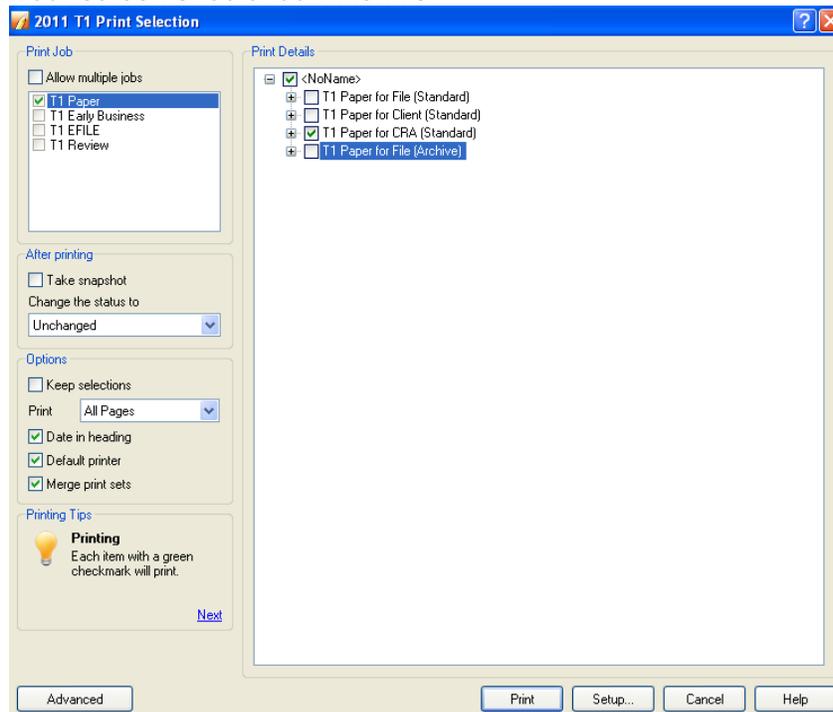
If you are able to print directly out of ProFile it is important to know which type of return you should print as some of the options will print more details than necessary and waste more paper than needed.

To print go to File/Print. Your screen should look like this



Deselect all of the print options other than “T1 Paper for CRA (Standard)”

Your screen should look like this:

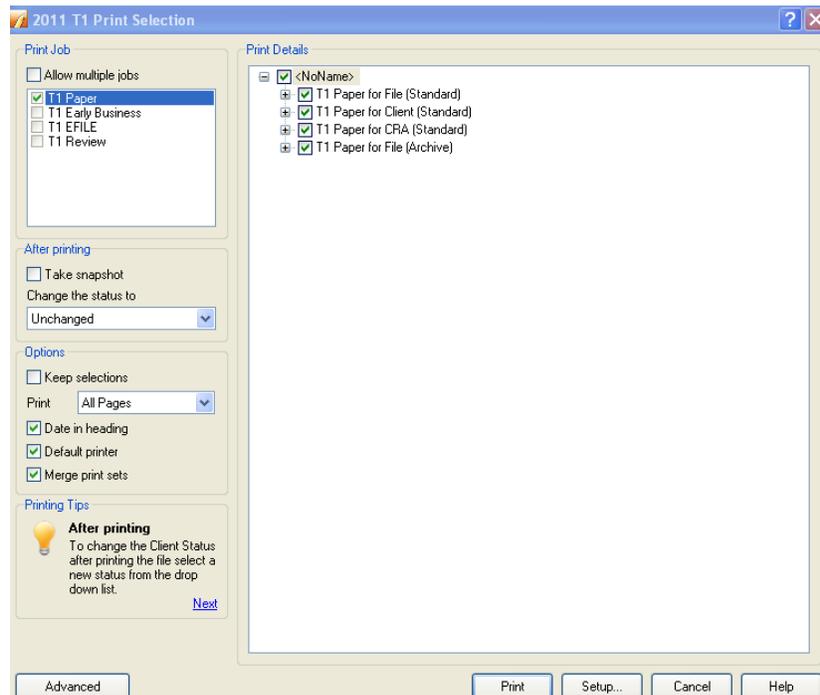


Print two copies of the return. Provide one copy to the client for mailing to CRA and the second copy for their records.

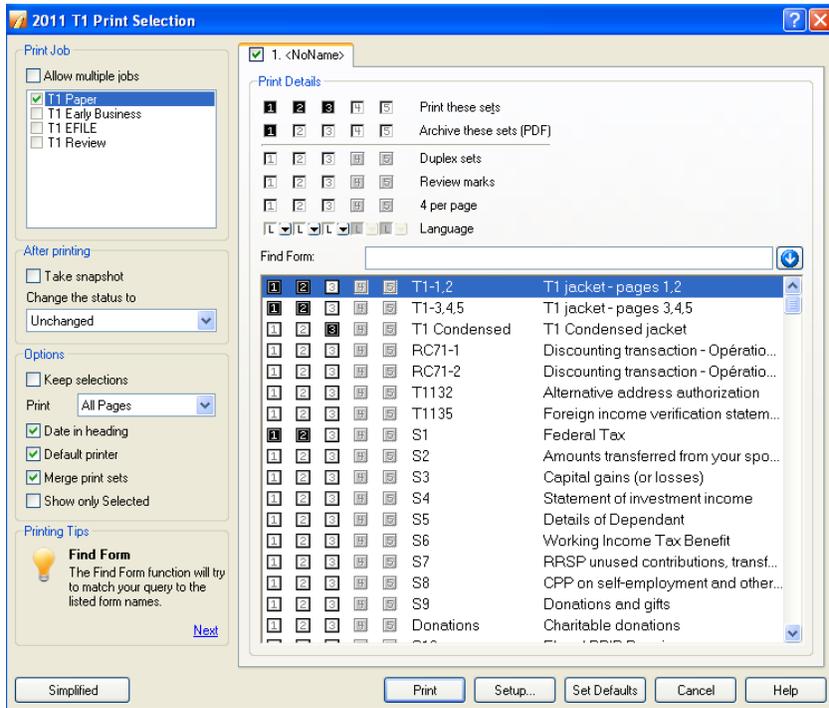
To Print the T1 Condensed Tax Return

If you wish to print the T1 Condensed, you must do the following:

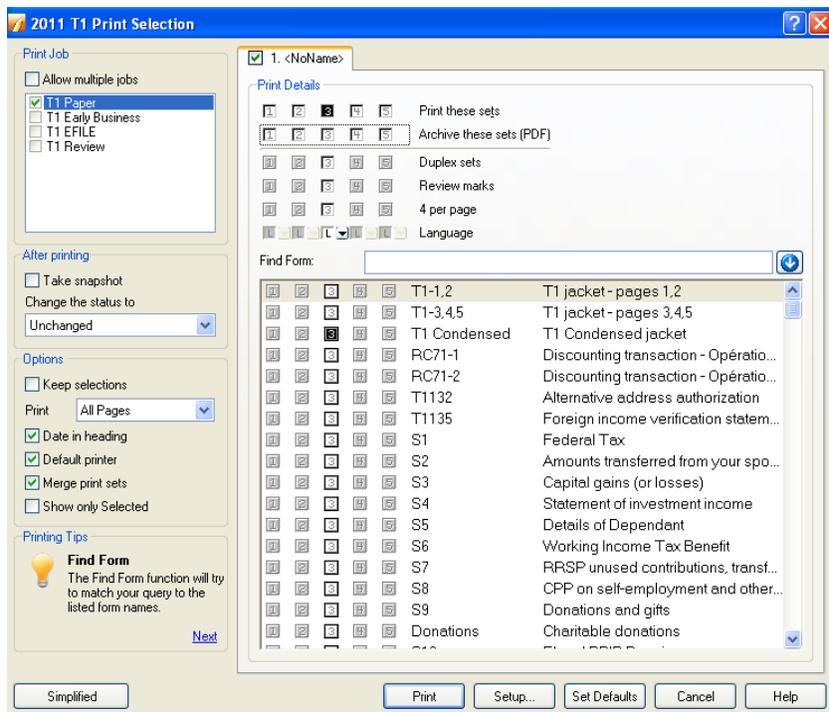
To print go to File/Print. Your screen should look like this:



Click on the “Advanced” button on the bottom left corner of the screen. Your screen should now look like this.



At the top of the screen, “Print these sets” is selected for column 1, 2 and 3. Unselect this option in column 1 and 2 by clicking on the cell. Also unselect “Archive these sets (PDF)” in column 1. Your screen should now look like this.



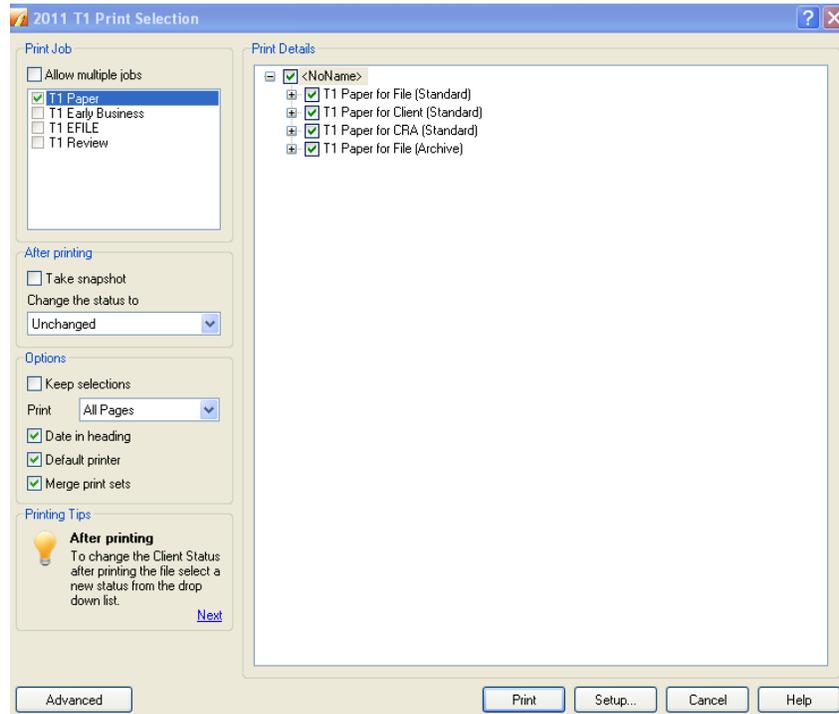
Print two copies of the return and provide one copy to the client to mail to CRA and one copy to the client for their records.

2. Archiving a PDF in ProFile

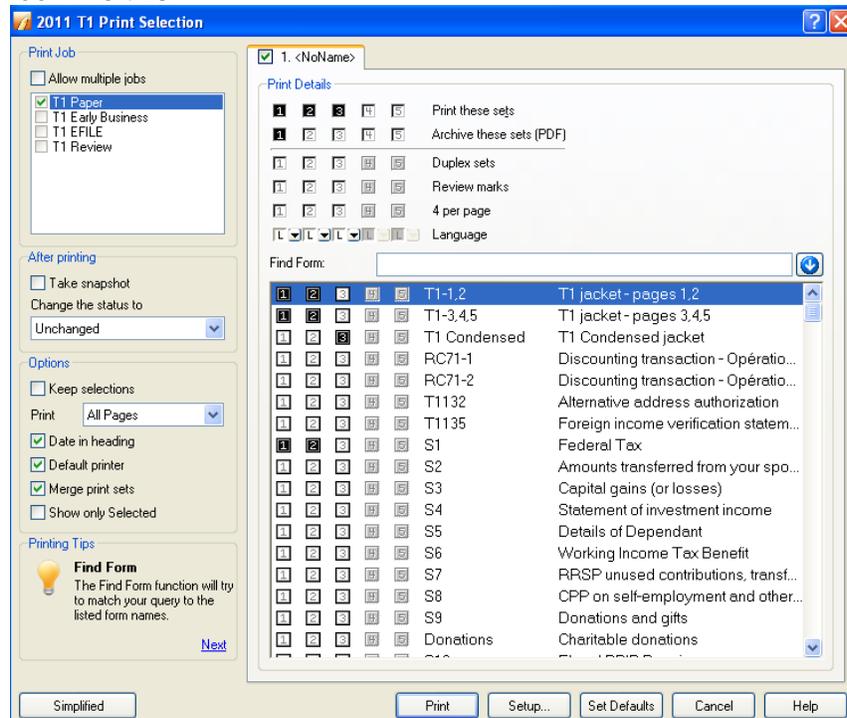
Saving a ProFile file as a PDF isn't as intuitive as you might think. Here are the steps you need to take when using T1Basic to create a PDF.

Once you have completed the T1 return, do the following:

Go to File/Print. Your screen should look like this.

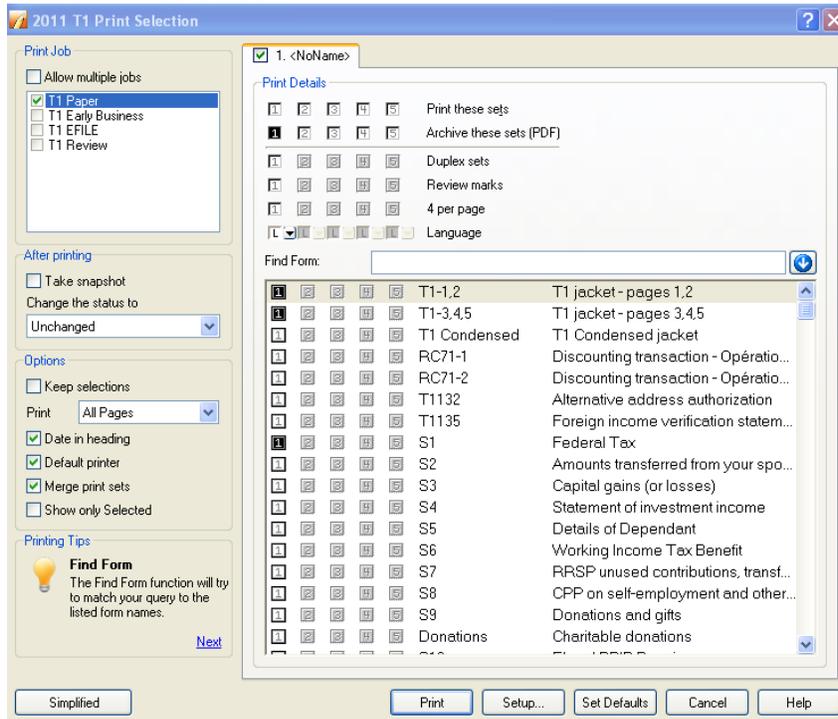


Click on the “Advanced” button on the bottom left corner of the screen. Your screen should now look like this.

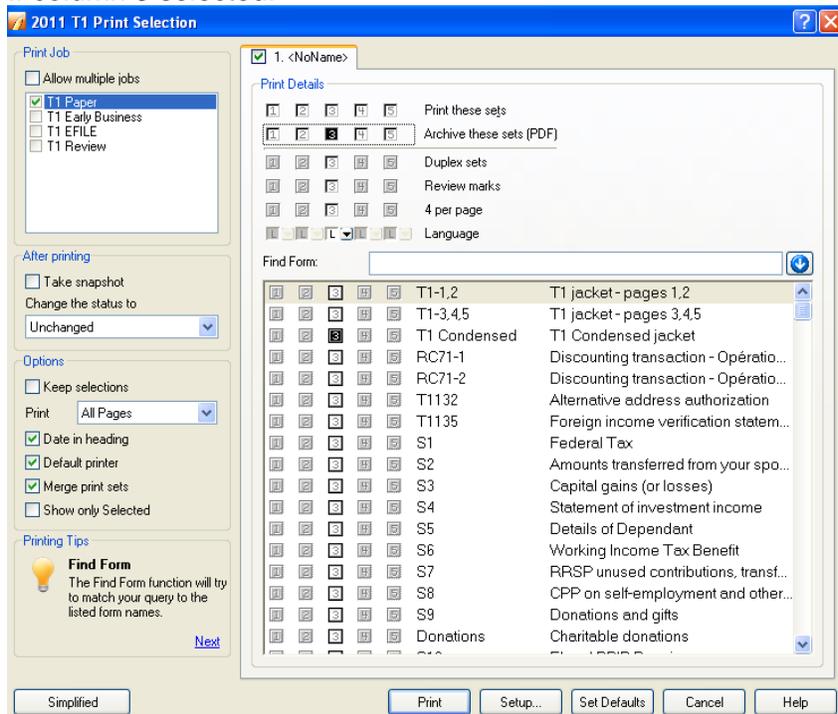


At the top of the screen, "Print these sets" is selected for column 1, 2 and 3. Unselect all of these options by clicking on the cell. The option to select on the row entitled "Archive these sets (PDF)" will depend on whether you wish to print the T1 Standard return or the T1 Condensed return. If you wish to print the T1 Standard return, select column 1. If however, you wish to print the T1 Condensed return, select column 3. After you have made your selection, your screen will look as follows:

If column 1 selected:



If column 3 selected:



Press the print button. The file will be saved as a PDF in the same file where the Profile return is stored. If uncertain where the directory is, you can use the search function. The name of the PDF file will be the name of the tax return file so it is always a good idea to save the tax return file before trying any of these print options. Once you have found the PDF file, you can transfer to a memory stick, take to the computer connected to the printer, open the PDF file using adobe and print the return. Again, you will need to print two copies of the return, one for the client to mail to CRA and one for the clients records.