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Ressources humaines et Développement des compétences Canada

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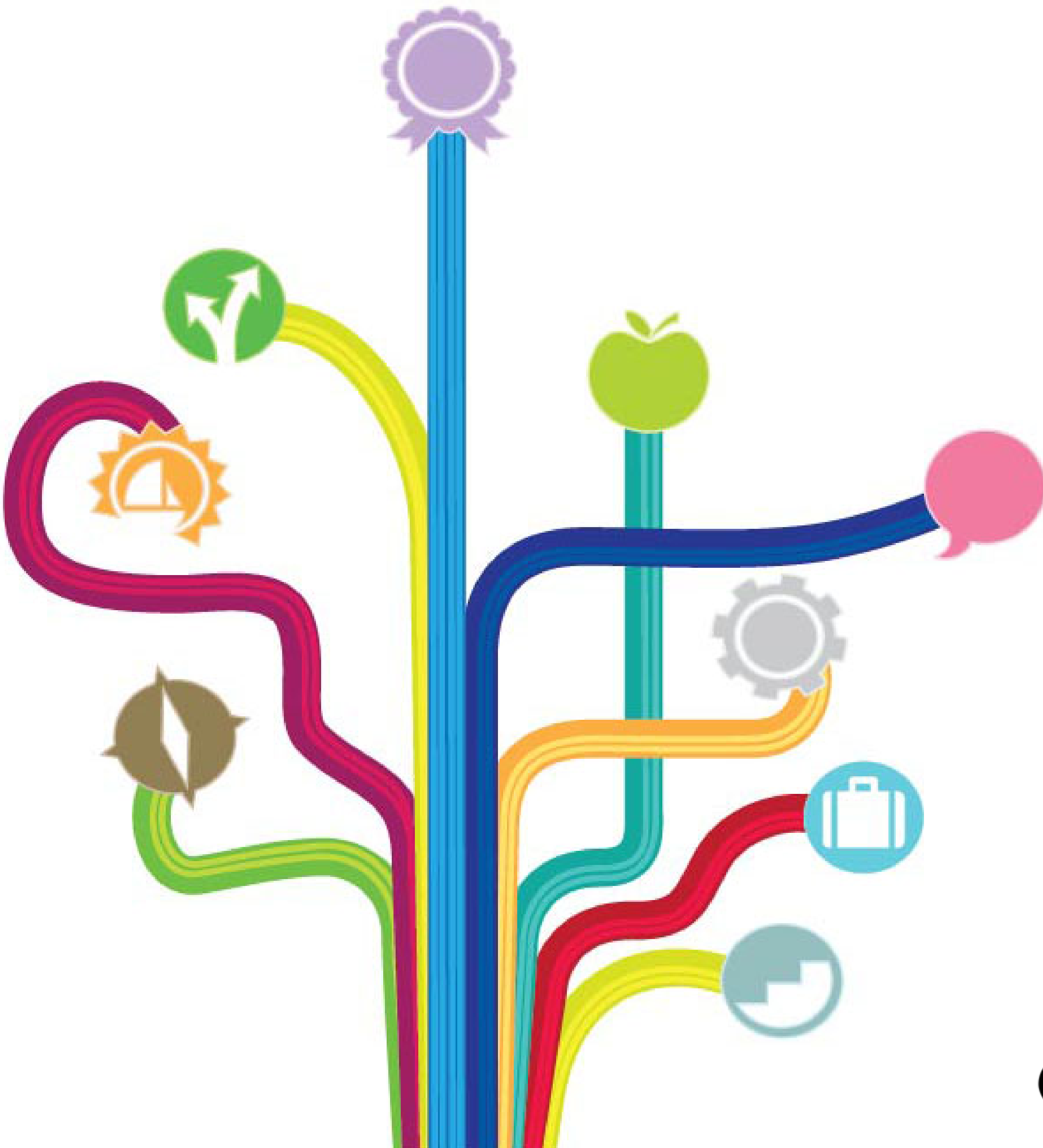
Service Canada College@HRSDC

Tax Information Slips (TIS) – Intranet

Participant's Guide



Canada

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Section 1 – About this Training Guide

1.1 Purpose

This guide has been designed to familiarize you with the GOL Support Services, Tax Information Slip Online (TISO) application. It will provide you with the necessary background and knowledge to use this application.

1.2 Target Audience

The TISO Intranet component of this guide is designed for Service Canada employees expected to answer questions related to TISO and who are expected to process tax slip requests using the TISO application.

1.3 Prerequisites

As this guide only deals with the functional requirements of this application, it is expected that users of this guide already have extensive background knowledge related to Employment Insurance, Canada Pension Plan and Old Age Security tax slips.

1.4 Learning Objectives

The TISO Intranet component is used to respond to tax slip related inquiries. Using the TISO application tool, you will be able to:

- Stop or start a client's CPP and/or OAS and/or EI tax slip mailing;
- View a history of when a client's mailing was stopped or started and whether the change was made by the client or a Service Canada Benefits Officer (SCBO) or a Citizen Service Officer (CSO);
- View original, replacement and amended T4's, NR4's, and Credit Slips from February 2003 to present; and
- Re-issue and amend CPP tax slips.

1.5 Working with this Guide

This guide has been designed to demonstrate how the TISO application functions. Since you are already able to respond to client inquiries, we will only focus on how this application will affect your daily functions.

Included are examples of screen shots with detailed explanations of the process and other related information.

1.6 Completion time

This guide will take you approximately one and a half hour to complete.

1.7 Comments and suggestions

If you have any comments or suggestions about this module, please send an email to the Operational Training Team at Service Canada College at the following email address:
NC-OTG_INQUIRIES-GFO_DEMANDES-GD

Section 2 – Introduction to Tax Information Slip On-Line (TISO)

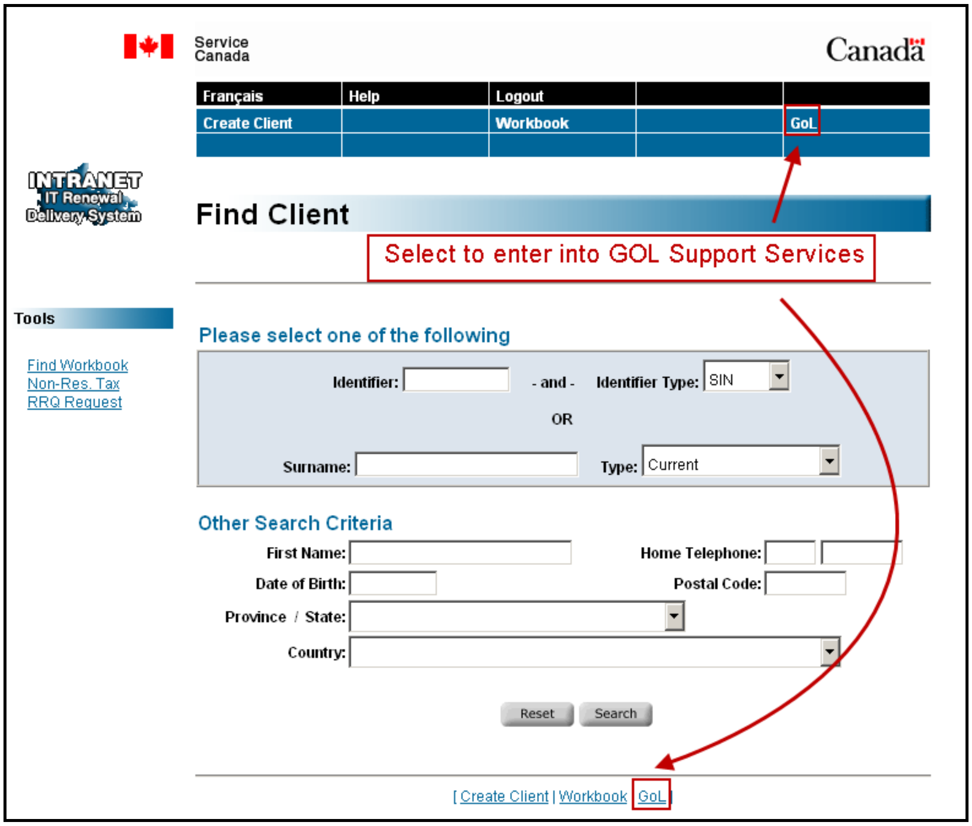
2.1 Login

Tax Information Slip On-Line (TISO) is the Government On-Line (GOL) Intranet Support Service that displays data for each client using the My Service Canada Account (MSCA) application.

TISO will enable you to respond to client inquiries, to view the details of a client's tax slip, allow you to start/stop the mailing of the tax slip and re issue and amend tax slips for CPP.

To access TISO you must first access the ***GOL Support Services*** screen through the ITRDS system.

From any screen in the ITRDS, select **GOL** in the top navigation bar or the **GOL** link at the bottom of your screen.



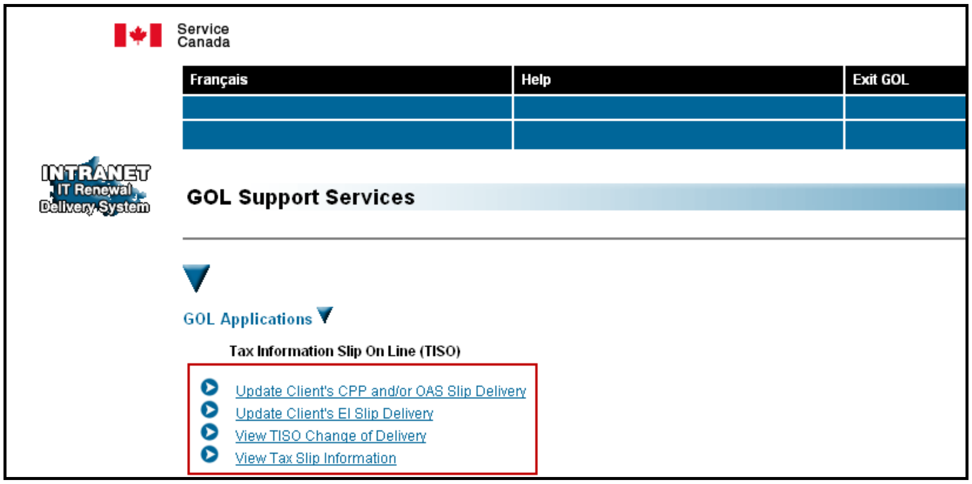
This will bring you to the ***GOL Support Services*** screen.

This training guide will only explain how to use the Tax Information Slip On-Line (TISO) application of GOL. For other training guides on GOL Support Services, go to the following intranet site: http://intracom.hq-ac.prv/sc-college/eng/nodd/training/program/technology/msca_gvnt_online.shtml

2.2 TISO section

The Tax Information Slip On-Line (TISO) section is divided in four parts:

- Update client's CPP and/or OAS slip delivery:
  - Start the client's mailing; or
  - Stop the client's mailing.
- Update client's EI slip delivery:
  - Start the client's mailing; or
  - Stop the client's mailing.
- View TISO Change of Delivery.
- View Tax Slip Information:
  - Replacement/Duplicate;
  - Amendments.



Take Note*: Remember to authenticate the client. If the information supplied by the client is exactly the same as it appears on our files, the client is considered authenticated and you can process the client's request.*

2.3 Year end processing message

There is a "blackout"' period for Tax Information Slip On-Line. Once processing of the tax slip has begun, any changes that the client makes to turn the mailing on or off will not take effect until the following year. The blackout period is usually from the first week in February until March 31st.

Therefore, if a client who has their mailing turned off goes into TISO to turn their mailing on, sometime on or after February 1st of a current year up to March 31st, they will still need to access and print their tax slip online.

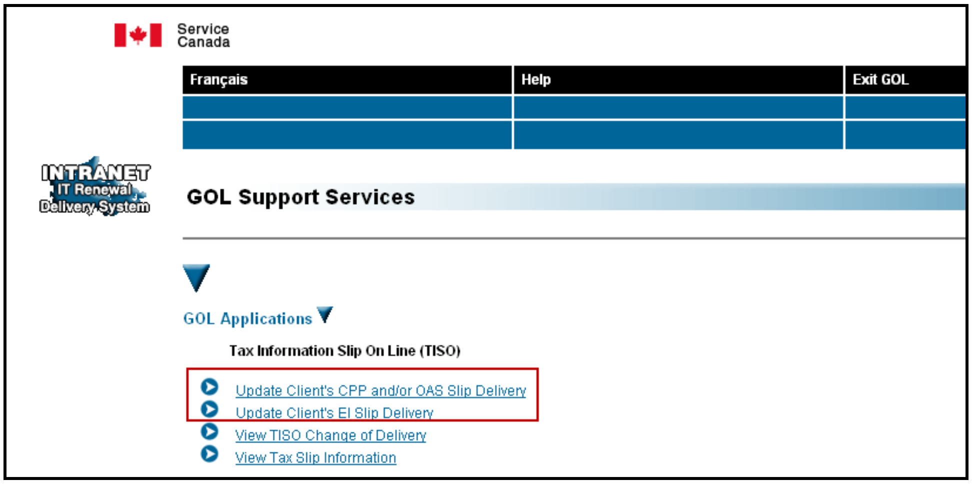
The system cannot make changes to the client's file once it has been sent for print. This change in the mailing will only take effect the following year.

Take Note*: The client data is sent to a printing company that prints the T4's. If a client requests to have their name added or taken off the mailing list after it has already been sent out for print, the changes will only take effect in the next year.*

Section 3 – Components of TISO

3.1 Update Client's CPP and/or OAS or EI Slip Delivery

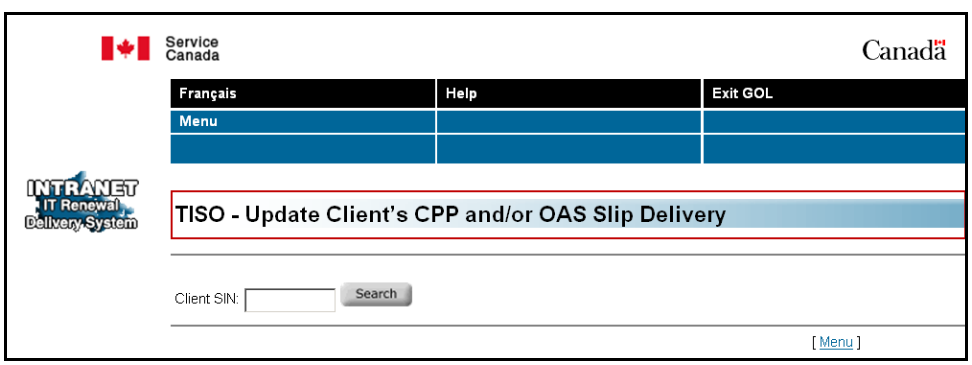
The process to stop or start mail delivery is the same for both CPP/OAS and EI. In all cases, you will use the ***Tax Information Slip On-Line*** screen displayed below.



To update a client's tax slip delivery, select the appropriate link, either **Update Client's CPP and/or OAS Slip Delivery** or **Update Client's EI Slip Delivery**.

3.1.1 Search Client

Depending on the link that you select, you will be directed to the ***TISO – Update Client's CPP and/or OAS Slip Delivery*** screen.

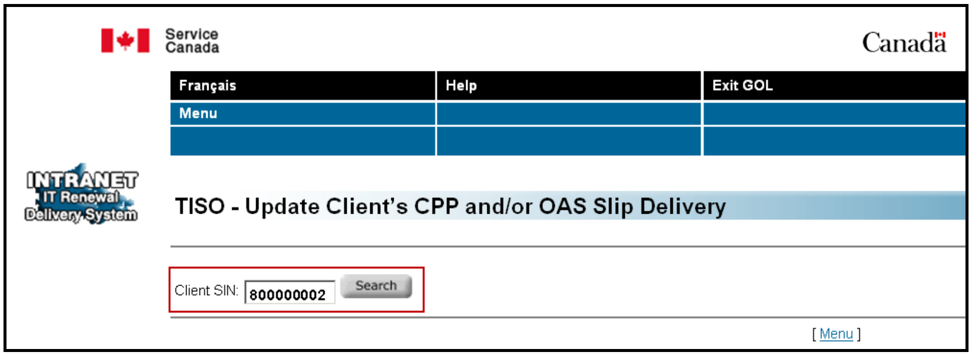


or to the ***TISO – Update Client's EI Slip Delivery*** screen.

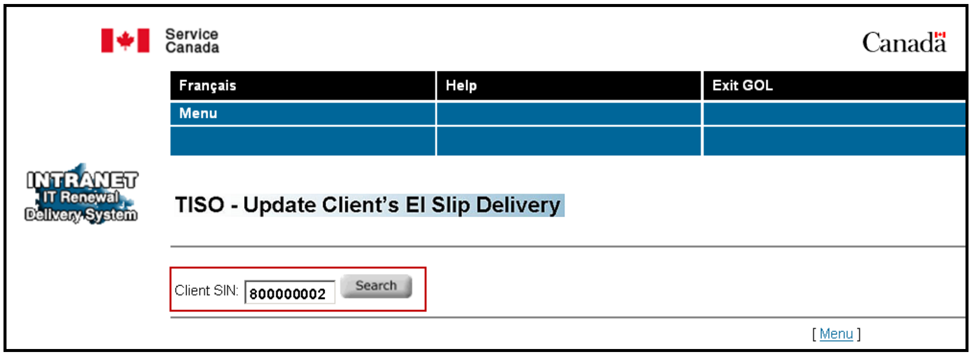
To locate the client's CPP and/or OAS or the EI slip delivery information:

- Enter the client's SIN; and
- Select the **Search** button.

CPP/OAS – Search



EI – Search



Once you have selected the **Search** button, the ***TISO – Update Client's CPP and/or OAS Slip Delivery*** screen or the ***TISO – Update Client's EI Slip Delivery*** screen will be displayed (depending on your choice).

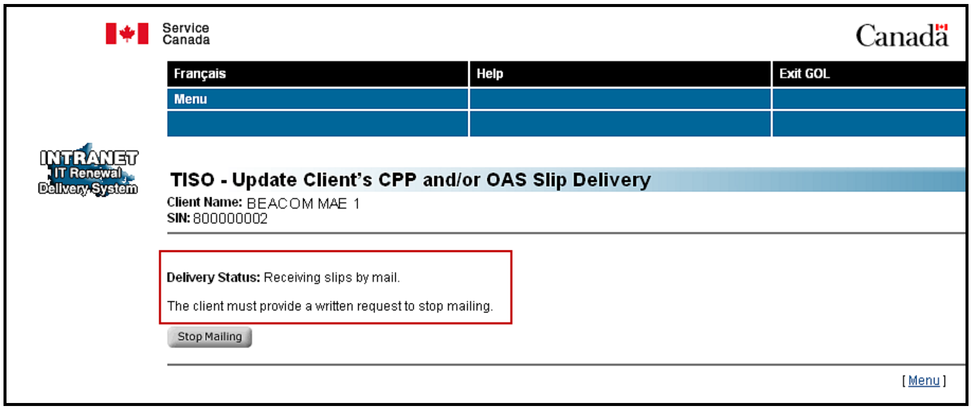
3.1.2 Delivery Status Messages

There are four possible Delivery Status messages:

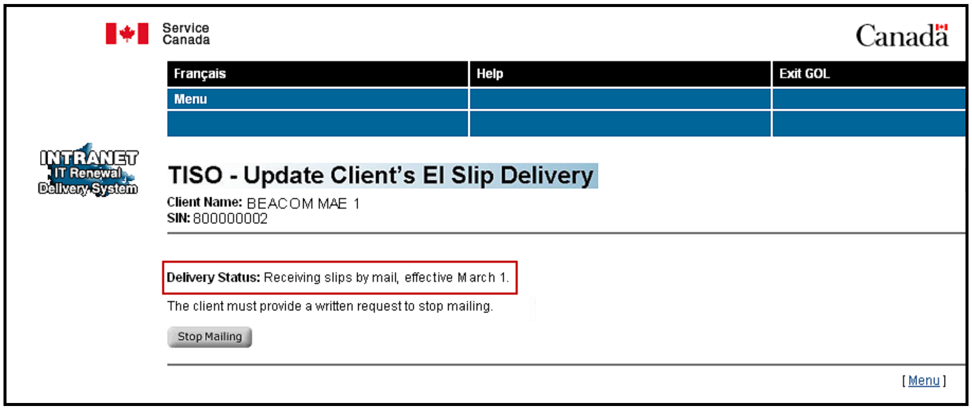
- Receiving slips by mail:
  - The client receives CPP and/or OAS or EI tax slips in the mail in February.
- Receiving slips by mail, effective March 1:
  - The client's mailing was started during the blackout period (see section 2.3). The start will not take effect until March 1, when the current year's mailing is complete. The client will not receive the current year's slips by mail.
- Not receiving slips by mail:
  - The client does not receive CPP and/or OAS or EI tax slips in the mail in February. The client must view and print slip(s) using the My Service Canada Account (MSCA) application.
- Not receiving slips by mail, effective March 1:
  - The client's mailing was stopped during the blackout period. The stop will not take effect until March 1, when the current year's mailing is complete. The client will receive the current year's slips by mail.

Here are 2 examples of Delivery Status messages:

CPP/OAS account

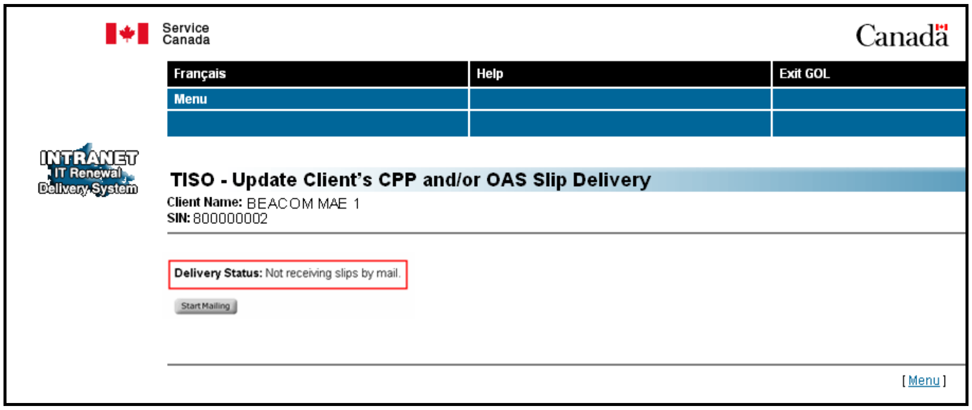


EI account



***Take Note**: In order to satisfy current Canada Revenue Agency (CRA) legislation, the client must provide a written request before you can stop the mailing of their tax slips.*

3.1.3 Change Delivery Method – Start Mailing



To change the delivery method:

- Verify that the data displayed matches the client data;
- Select the **Start Mailing** button to have the mailing of tax slip started; or
- Select the **Stop Mailing** button to have the mailing of tax slip stopped.

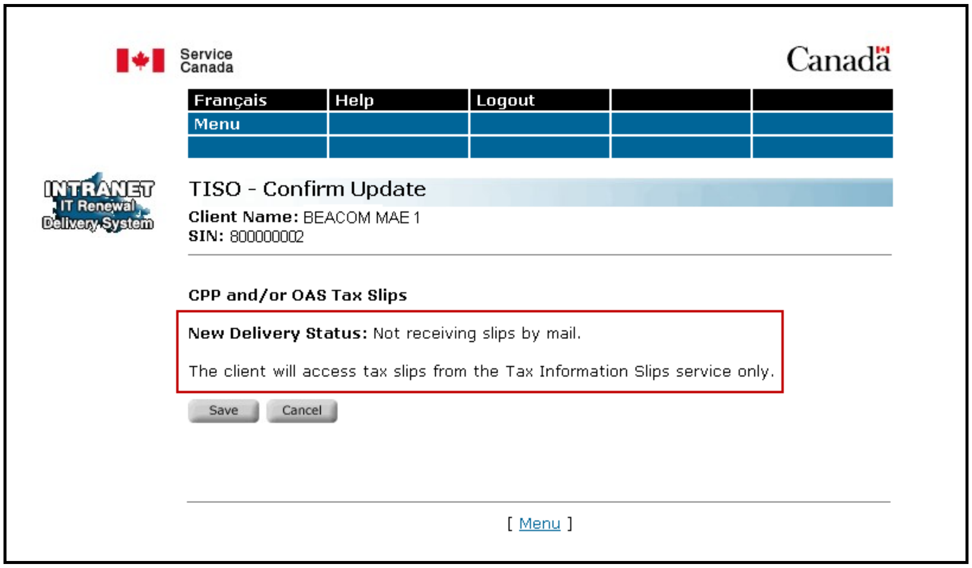
You must be aware that the **Stop Mailing** button may not be available to you if you were not assigned the ability to stop mailing in your user profile. For instance, in CPP/OAS, this role is reserved for members of a specific unit.

***Take Note**: If you leave the system idle for more than 15 minutes, you will automatically be logged out. If you log out before you have completed your transaction, the initiated change will be lost.*

3.1.4 Confirm Update Screen

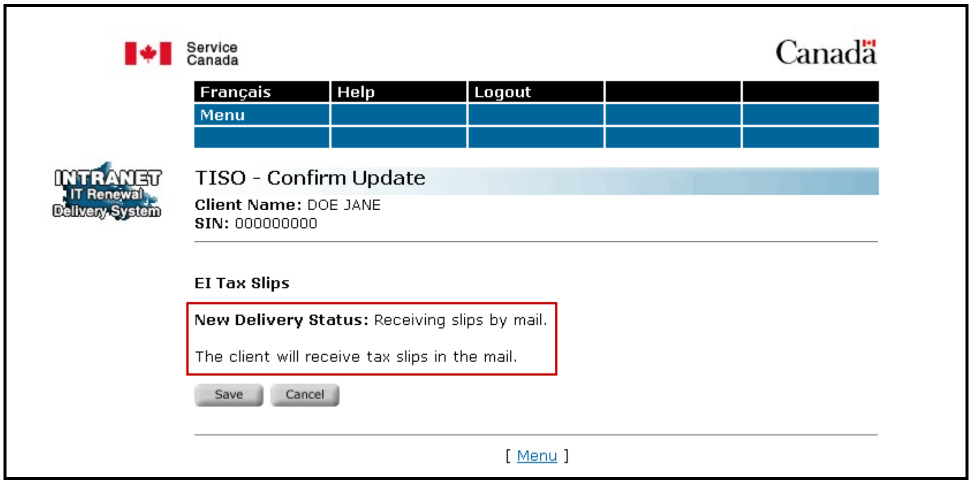
Before the change is made to the ITRDS, the ***TISO – Confirm Update*** screen is displayed.

Confirm Update – Stop Mailing



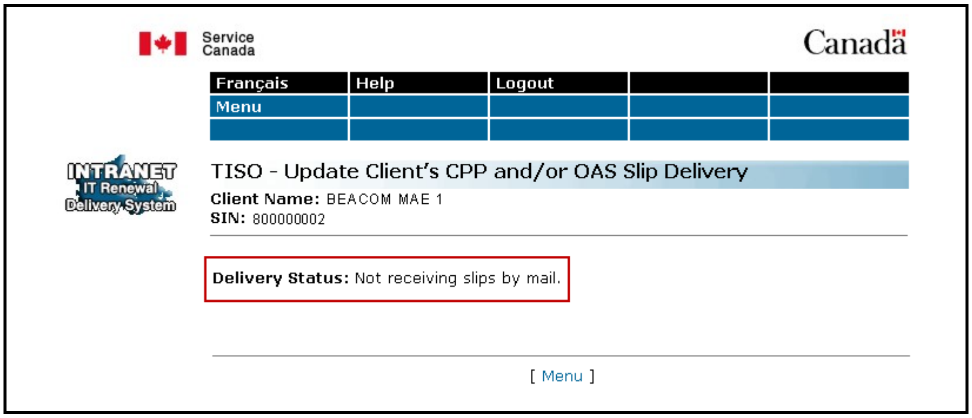
After reviewing the client's data, you will be given the option to **Save** or **Cancel** the initiated change.

Confirm Update – Start Mailing

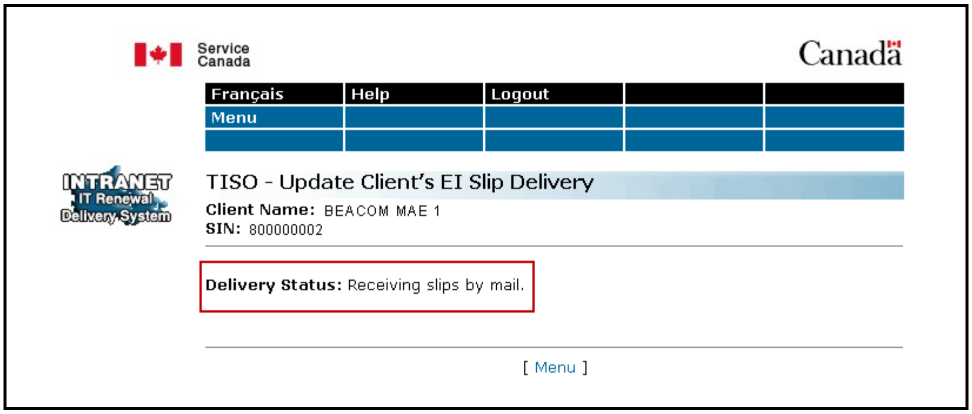


Select the **Save** or the **Cancel** button to confirm or cancel the changes.

Stop mailing confirmation message



Start mailing confirmation message



From this page, you will have the following options from the top navigation bar:

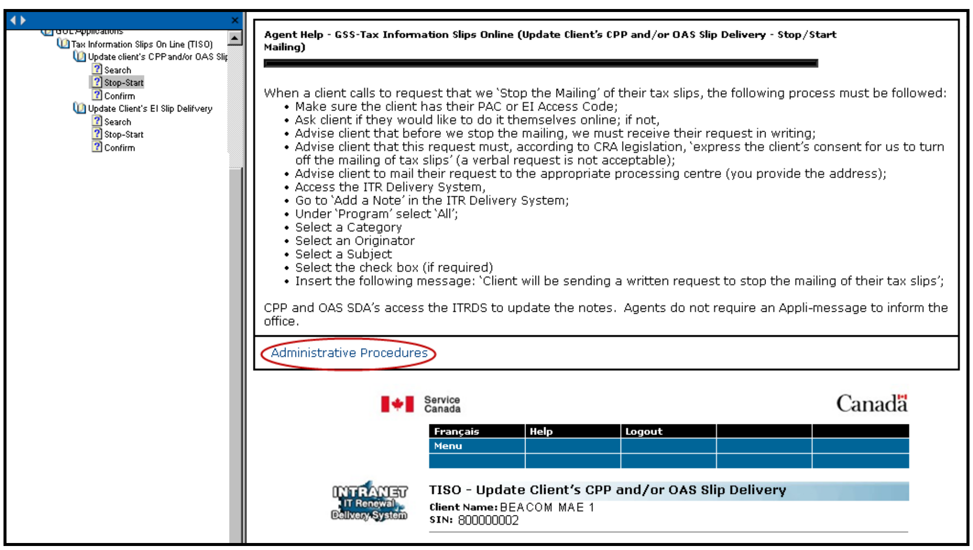
- Toggle language;
- The **Help** link;
- The **Menu** link to access other GOL products; or
- The **Logout** link.

At any time during your TISO session, you are able to return to the ***GOL Support Services*** menu by selecting the **Menu** link located in the top navigation bar or at the bottom of the screen. However, if you do this while processing a transaction, the transaction will be lost.

3.1.5 Process for Stop Mailing Tax Slips

Due to current CRA legislation you must follow the process described below to *stop* mail delivery of tax slips on behalf of a client.

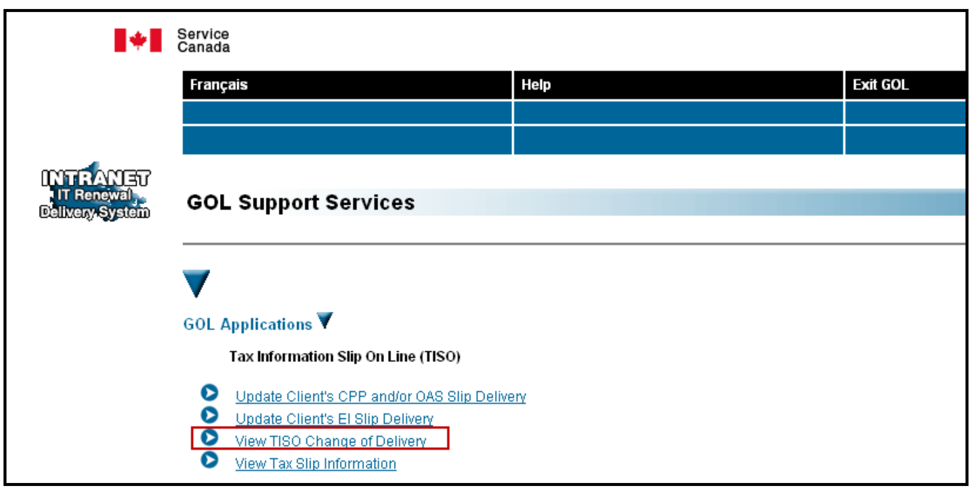
SDA ASSIST: To view the procedures for both CSO's and PSO's to stop mailing of tax slips, go to SDA Assist. Select the **Administrative Procedures** link followed by the **How Agents Stop Mailing of Tax Slips** link.



3.2 View TISO Change of Delivery

This option allows you to view the history of when a client's mailing was stopped or started and whether the change was made by the client or by a SCBO or a CSO.

This option will be accessed from the ***Tax Information Slip On-Line*** screen.



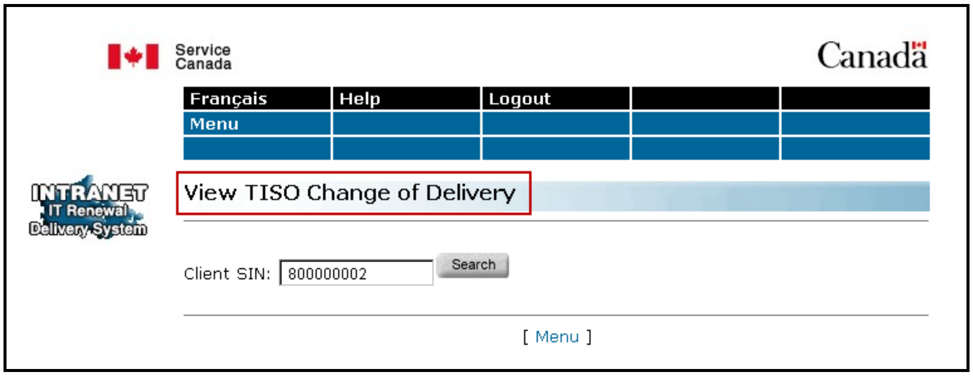
To view the history of a client's mailing, select the **View TISO Change of Delivery** link.

The ***View TISO Change of Delivery*** screen will then be displayed.

3.2.1 Search Client

To locate the client's ***Transaction Details*** screen:

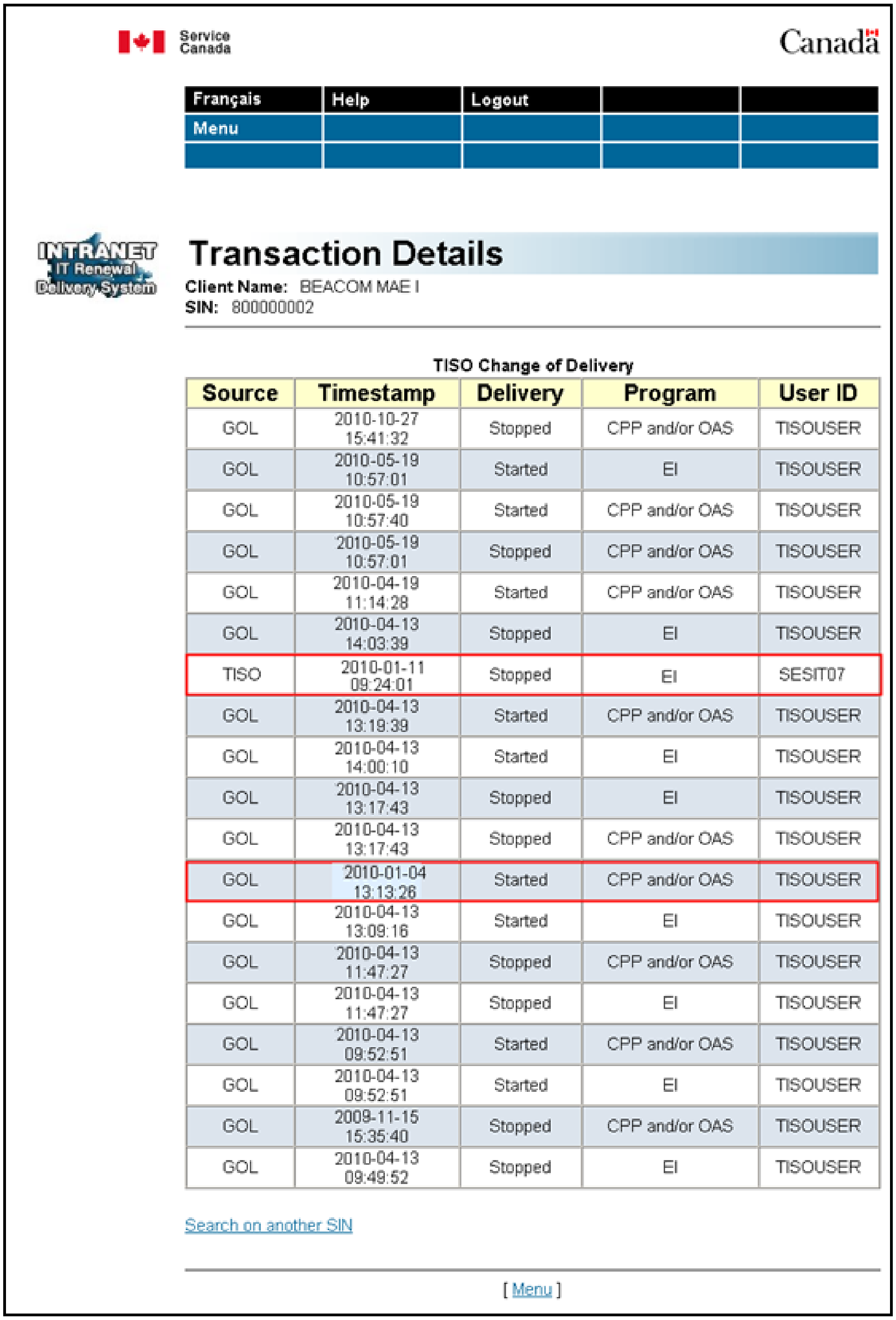
- Enter the client's SIN; and
- Select the **Search** button.



3.2.2 Transaction Details

The following transaction details are provided, along with the client's name and SIN:

1. **Source** column: code will be either **TISO** or **GOL**:
   - **TISO** indicates that a SCBO/CSO made the change on the ITRDS component of TISO, while
   - **GOL** indicates that the client made the change on the Internet component of TISO.
2. **Timestamp** column: indicates the date (yyyy mm dd) and hour (Eastern Standard Time) that the change was made;
3. **Delivery** column: indicates the delivery method – whether the client's mailing was stopped or started;
4. **Program** column: indicates the program to which the changes occurred; and
5. **User ID** column – '**TISOUSER**' indicates that the client made the change using the **TISO** system. Otherwise, the **user ID** of the **SCBO/CSO** who initiated the change is shown.



Service Canada | Canada

Français | Help | Logout

Menu

INTRANET IT Renewal Delivery System

Transaction Details

Client Name: BEACOM MAE I
SIN: 800000002

TISO Change of Delivery

Source	Timestamp	Delivery	Program	User ID
GOL	2010-10-27 15:41:32	Stopped	CPP and/or OAS	TISOUSER
GOL	2010-05-19 10:57:01	Started	EI	TISOUSER
GOL	2010-05-19 10:57:40	Started	CPP and/or OAS	TISOUSER
GOL	2010-05-19 10:57:01	Stopped	CPP and/or OAS	TISOUSER
GOL	2010-04-19 11:14:28	Started	CPP and/or OAS	TISOUSER
GOL	2010-04-13 14:03:39	Stopped	EI	TISOUSER
TISO	2010-01-11 09:24:01	Stopped	EI	SESIT07
GOL	2010-04-13 13:19:39	Started	CPP and/or OAS	TISOUSER
GOL	2010-04-13 14:00:10	Started	EI	TISOUSER
GOL	2010-04-13 13:17:43	Stopped	EI	TISOUSER
GOL	2010-04-13 13:17:43	Stopped	CPP and/or OAS	TISOUSER
GOL	2010-01-04 13:13:26	Started	CPP and/or OAS	TISOUSER
GOL	2010-04-13 13:09:16	Started	EI	TISOUSER
GOL	2010-04-13 11:47:27	Stopped	CPP and/or OAS	TISOUSER
GOL	2010-04-13 11:47:27	Stopped	EI	TISOUSER
GOL	2010-04-13 09:52:51	Started	CPP and/or OAS	TISOUSER
GOL	2010-04-13 09:52:51	Started	EI	TISOUSER
GOL	2009-11-15 15:35:40	Stopped	CPP and/or OAS	TISOUSER
GOL	2010-04-13 09:49:52	Stopped	EI	TISOUSER

Search on another SIN

[Menu]

Let's go through the two examples outlined in red on the page above.

Example 1

1. **TISO** indicates that the action was performed on the Intranet component of TISO (ITRDS).

2. The date **2010-01-11** with the timestamp of **09:24:01** indicates the date and time that the action was performed.

3. The action that was performed was to 'stop' the mailing of the tax slips. (**Stopped**)

4. The tax slips in question are the **EI** tax slips.

5. The person who performed the action was a SCBO/CSO with the User ID of **SESIT07**.

Example 2

1. **GOL** indicates that the action was performed on the Internet.

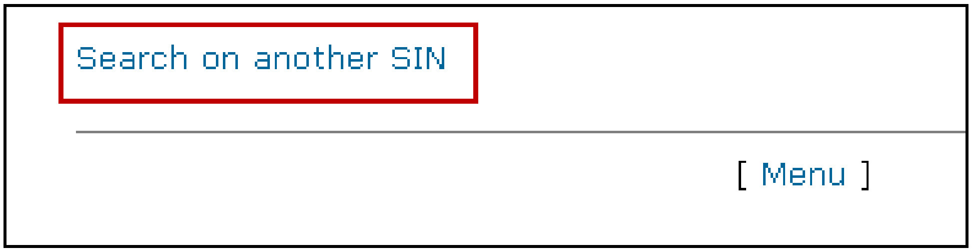
2. The date **2010 01 04** with the timestamp of **13:13:26** indicates the date and time that the action was performed.

3. The action that was performed was to 'start' the mailing of tax slips. (**Started**)

4. The tax slips in question are the **CPP and/or OAS** tax slips.

5. The person who performed the action was the client – it shows as **TISOUSER**.

You can search for another SIN by selecting the link at the bottom of the screen.



3.3 View Tax Slip Information

In May 2009, a new functionality was added to the **GOL Support Services** menu which allows you to access tax slip information for clients. The new ***View Tax Slip Information*** screens replace the ***1T1*** to ***1T6*** screen functions that were previously found in the CICS (Legacy) system.

This new functionality allows you to:

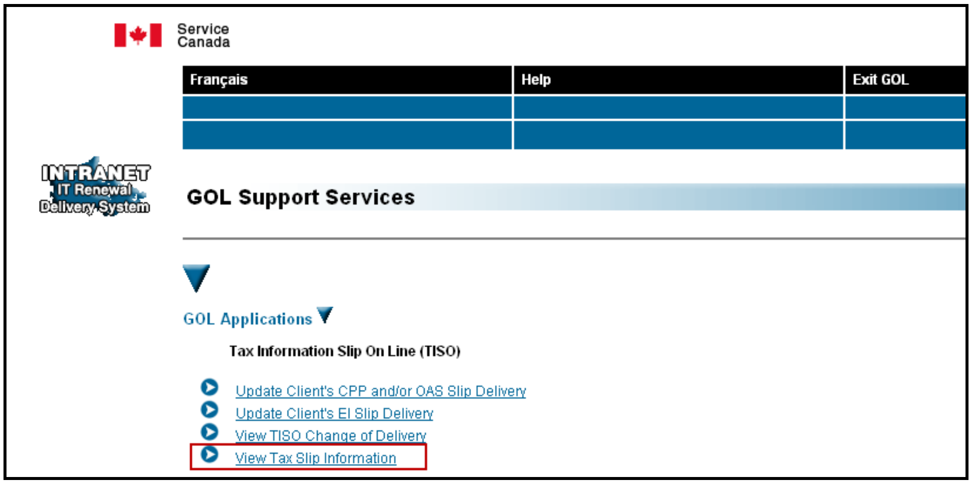
- View client tax slips from February 2003 to present;
- Issue a duplicate/replacement*for the current and last taxation year; and
- Amend and re issue*a tax slip for the current taxation year.

* **Note**: the **Re Issue** and **Amend** functionalities are available for CPP tax slips only as this replaces the functions of the CICS ***1T1*** to ***1T6*** screens only. Although you will be able to view OAS tax slip information, all actions for OAS tax slips will still be done through OAS Online.

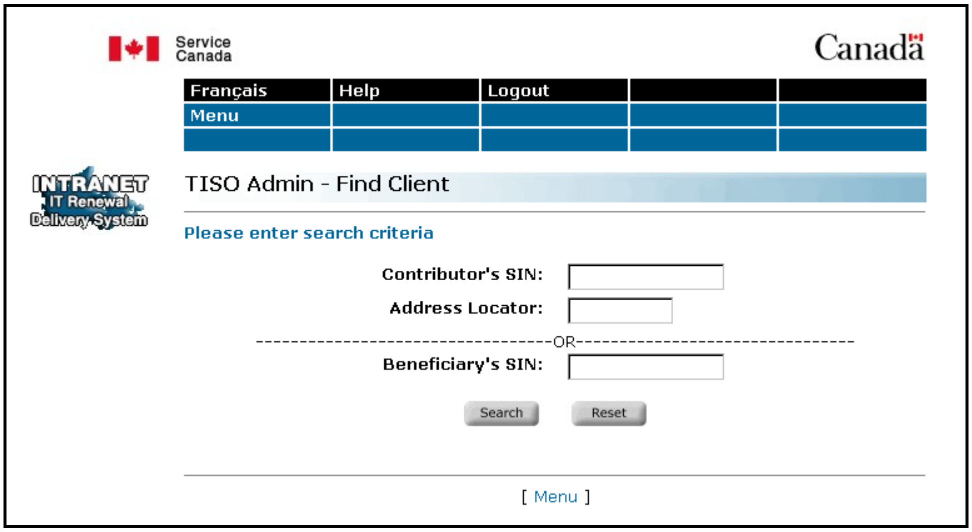
The next pages give you instructions on how to process different requests from clients about their tax slips.

Important: The ***View Tax Slip Information*** screens does not allow you to view enough information to properly identify your client, therefore, you must have first authenticated your client's identity and action any changes to the name and/or address in the ITRDS prior to accessing these screens.

To search for a client's tax slip, select the **View Tax Slip Information** link from the **GOL Support Services** menu, as seen below:



You will be directed to the ***TISO Admin – Find Client*** screen.



- Enter the contributor's SIN and address locator; or
- Enter the beneficiary's SIN.

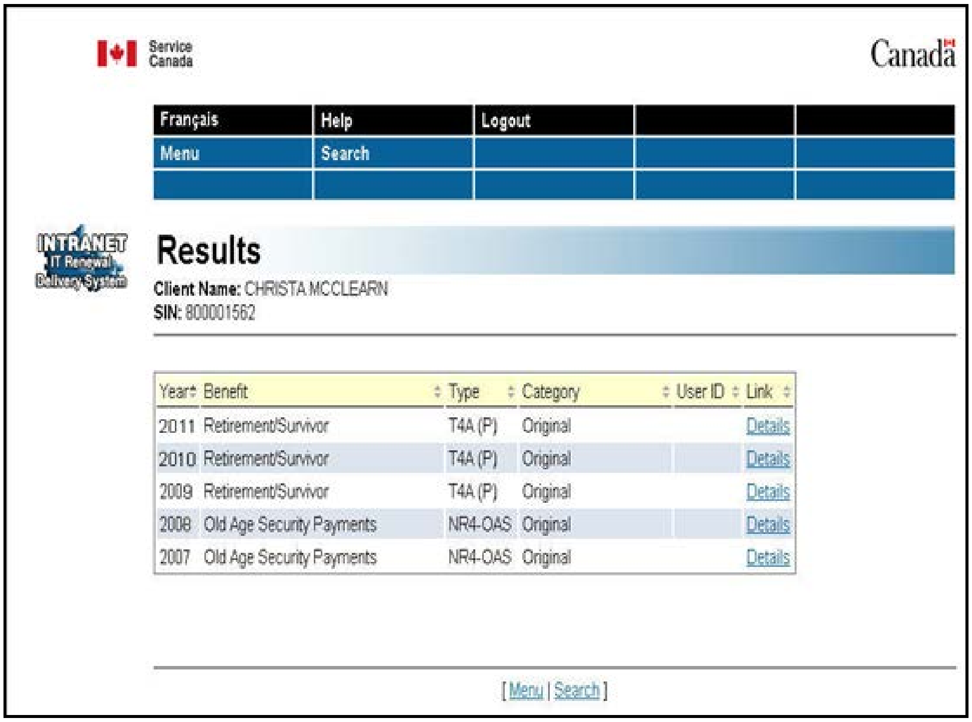
Then

- Select the **Search** button or press **Enter**.

The ***Results*** screen will then be displayed.

3.3.1 Results Screen

The ***Results*** screen displays all the Tax Slips available for the client you have requested.



This screen displays the following information:

Year: displays the taxation year;
Benefit: displays the benefit;
Type: identifies the type of tax slip, such as:

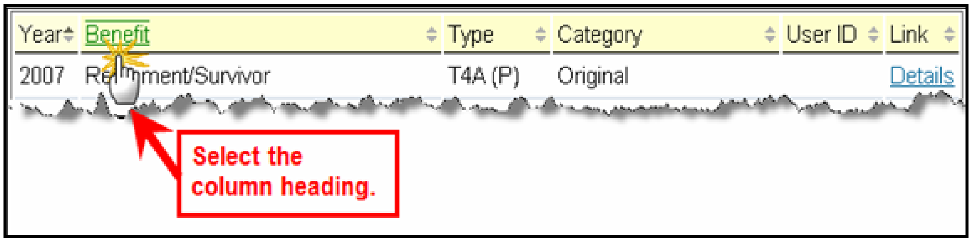
- T4A (P)/IA T4A(P);
- T4A (OAS)/IA T4A (OAS);
- T4E;
- NR4/IA NR4;
- NR4 – OAS/IA NR4 OAS; or
- CPP Credit Slips.

Category: describes the version of the Tax Slip being viewed (Original, Amendment or Replacement/Duplicate);

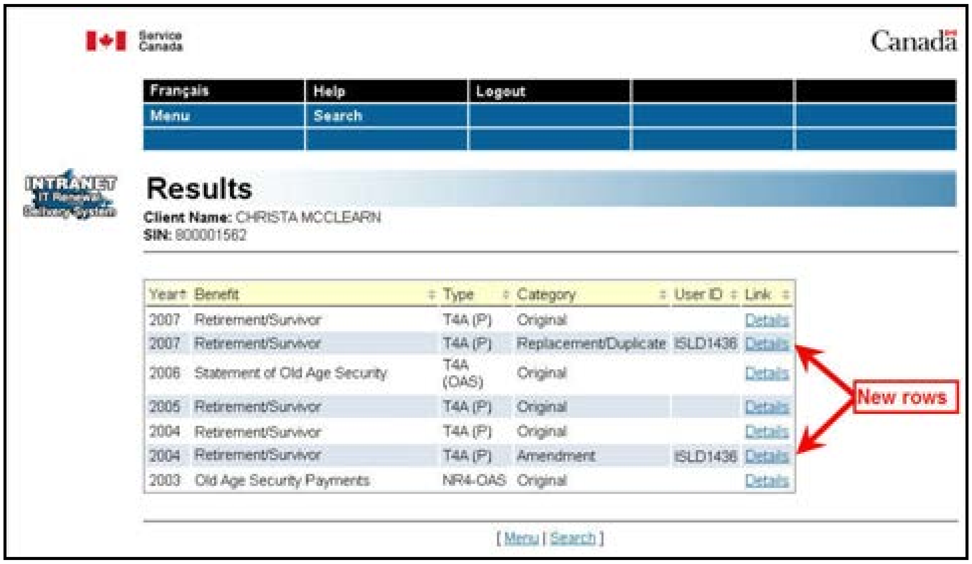
User ID: displays the user ID of the individual who created an action but remains blank if the action is generated by the system; and

Link: displays the ***Details*** screen of the Tax Slip when selected.

Each column can be sorted to allow you to retrieve information more efficiently. To do this, place your cursor on the column heading and select it. The information is then sorted by date or alphabetically, depending on which column you have selected. By default, the system sorts the tax slips by Year and by Benefit.



The ***Results*** screen displays all the actions that have been taken for a Tax Slip. When an action is taken, a new row is created for the action. Therefore, if several actions were taken for the same Tax Slip, you are able to view each action individually by selecting the **Details** link.

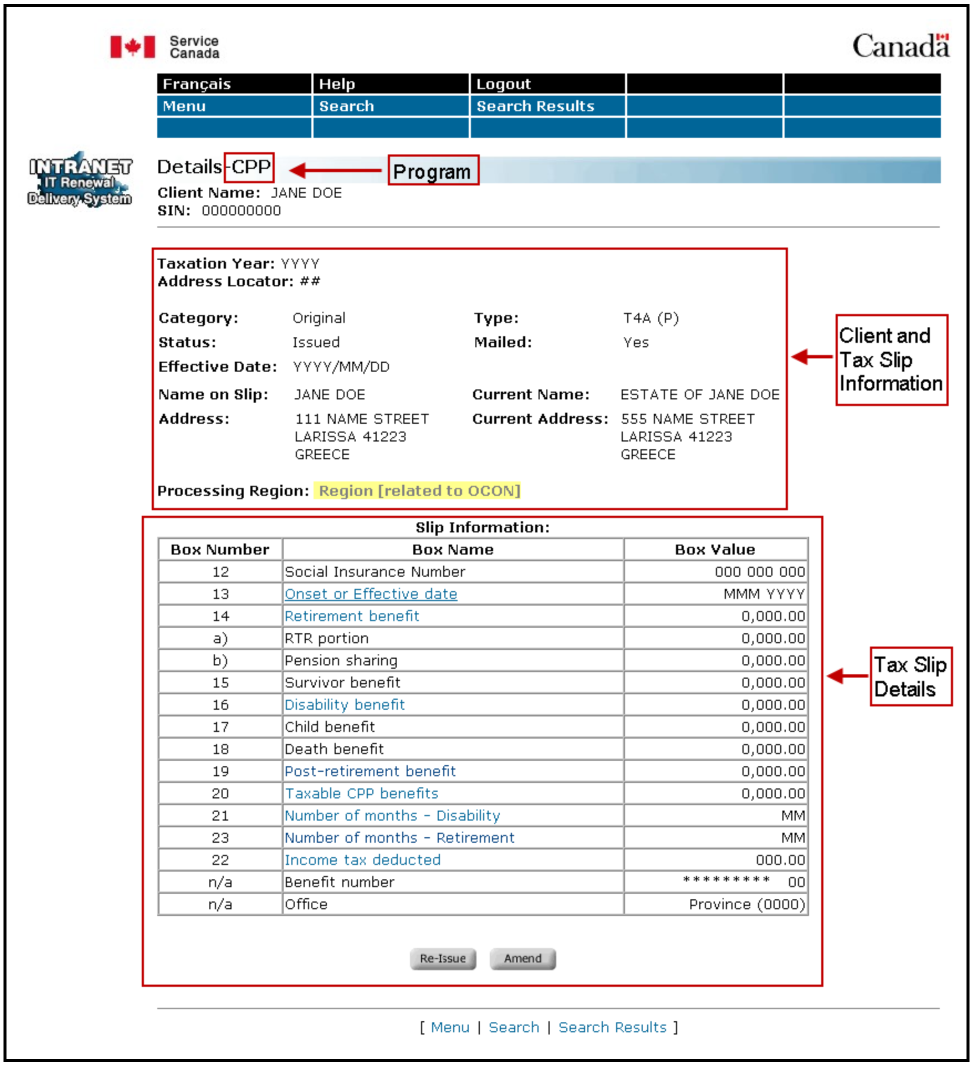


Now, let's view the information found on the Tax Slip.

3.3.2 Details Screen

To view the details of the tax slip, select the **Details** link.

This screen provides you with all the details of the tax information slip.



The top half of the screen displays the client and tax slip information, such as the taxation year, type of tax slip, processing region and other details pertaining to the client and the benefit. Some of the information might vary depending on the Tax Slip you are viewing.

Here are explanations for the **Category**, **Status**, **Mailed** and **Address** fields:

Category

Original – you are viewing the original tax slip. An original tax slip is always present on the clients file.

Replacement/Duplicate – you are viewing a replacement/duplicate tax slip.

Amendment – you are viewing an amended tax slip. Some dollar values will be different from the original tax slip.

Status

Issued – tax slip has been sent to the client.

Pending – indicates an action has been taken on the tax slip and is waiting for the system to process it. You are able to cancel a request while it is in Pending status only.

In progress – indicates that the action taken on a tax slip is currently being processed. No changes or cancellations can be made to a tax slip with an **In Progress** status.

Cancelled – an action has been cancelled before the system could process it.

Error – an error occurred, no tax slip has been issued or mailed and SCBO/CSO intervention will be required on the account.

Mailed

This field will vary based on the **Status** field.

If the **Status** field displays **Pending** or **In Progress**, then the **Mailed** field will indicate **No**, because the tax slip has not yet been sent to the client.

Once the **Status** field is updated to **Issued**, the **Mailed** field will then be updated to **Yes**.

If the **Status** field is updated to **Cancelled** or **Error**, the **Mailed** field will remain **No**, as the tax slip will not have been issued.

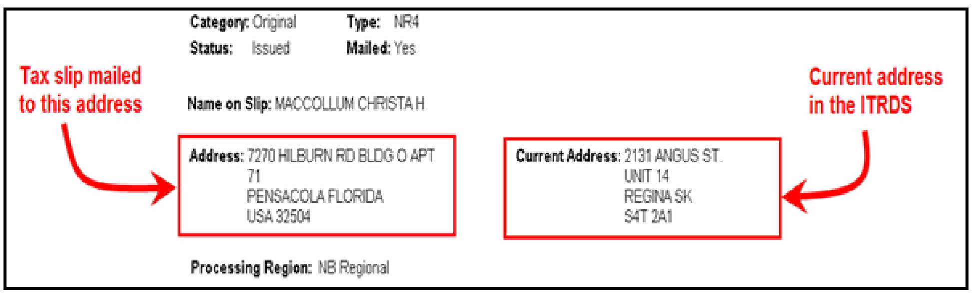
If a client chose to stop the mailing of their tax slip, the original tax slip will still show up as **Yes** in the **Mailed** field even if the tax slip was not mailed to the client. This is a system malfunction that is scheduled to be fixed in a future release.

Address and current address

CPP tax slips should always have two addresses listed.

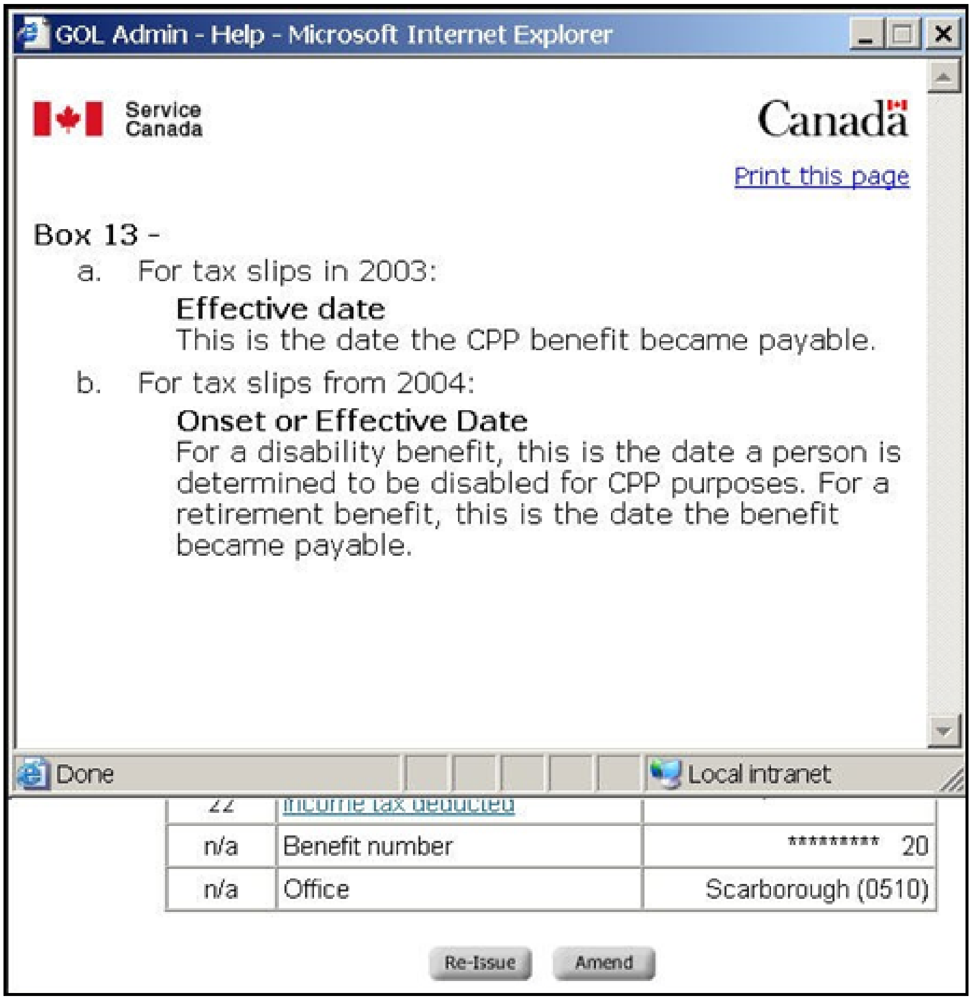
The information found next to the **Address** title is the address where the Tax slip was mailed. The information found next to the **Current Address** title is the address that is current in the ITRDS system.

Therefore, if a client changed their address after their tax slip was issued, you will see 2 different addresses listed.



Take Note: if the **Current Address** is blank, this indicates that there could be a potential problem on the account. A tax slip will not be mailed to the client if there is no current address. In this case, the SCBO/CSO will need to manually create the tax slip.

The bottom half of the screen contains the tax slip details. It displays the yearly amounts for each benefit and other information. Hyperlinks are included to view additional information. If you select a link, another window will open with additional information for that box. Here is an example of the window that will open:



To close the hyperlink screen, select the X on the top right hand corner of the screen. That will bring you back to the tax slip ***Details*** screen.

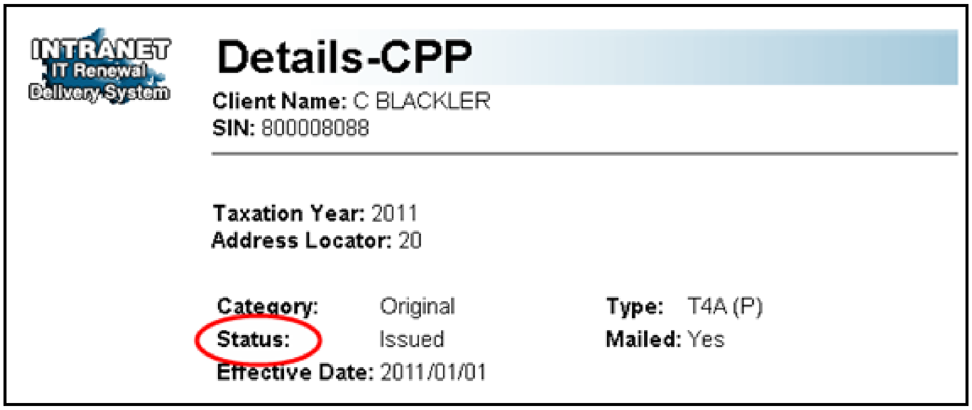
3.3.3 Replacement/Duplicate

Tax slips can be re issued based on the current business rules and your user profile. Therefore, you may or may not have access to some of the screens described in this training guide.

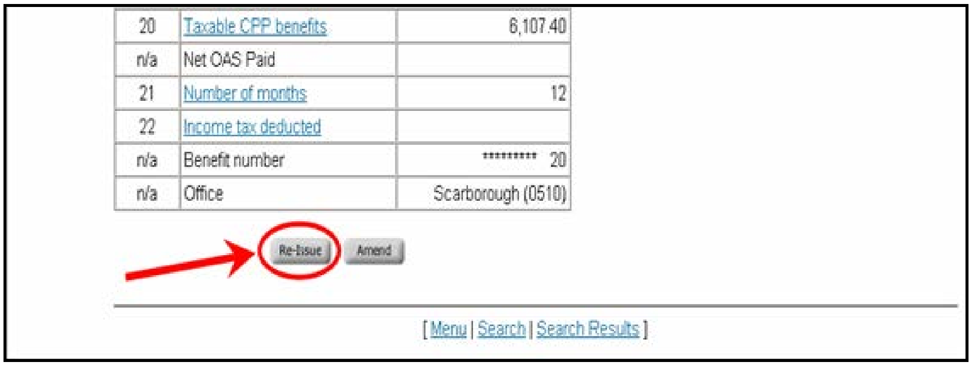
You can issue a **replacement/duplicate** of a T4A(P), NR4 and/or credit slip for the current and last taxation year.

Let's look at how to re issue a replacement/duplicate tax slip.

You can ask for a replacement/duplicate tax slip if the current status of the tax slip is **Issued** in the **Status** field of the ***Detail*** screen.



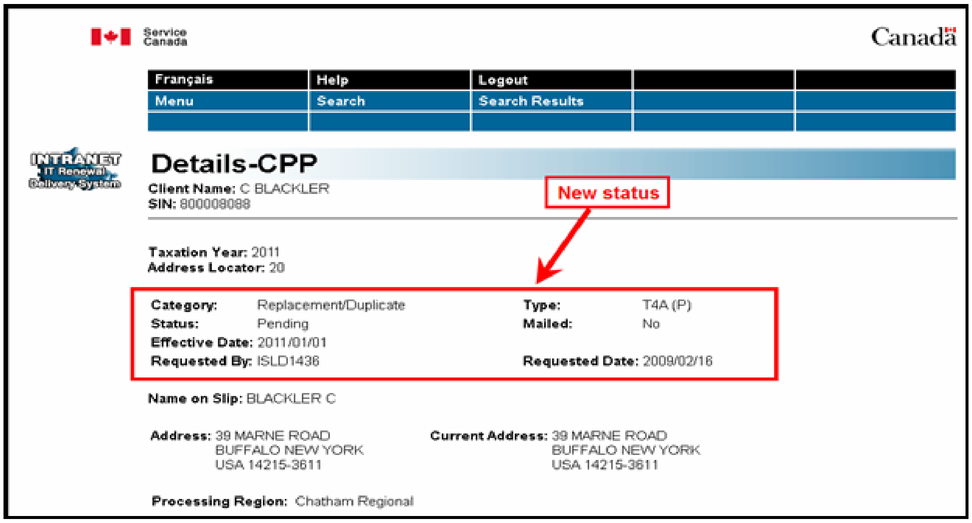
To issue a replacement/duplicate tax slip, select the **Re Issue** button located at the bottom of the ***Details*** screen.



As soon as you select the **Re Issue** button, a duplicate tax slip is requested.

Therefore, it is important to have verified the client's current address and the correct name spelling in the ITRDS prior to accessing the **GOL Support Services** menu. As previously mentioned, changes to the name and/or address can only be done from the ITRDS.

After selecting **Re Issue**, new information appears on the ***Details*** screen based on the action you have just taken.



The fields to verify in this screen are:

- **Category**: will change from **Original** to **Replacement/Duplicate**
- **Status**: will change from **Issued** to **Pending**
- **Effective Date**: displays the effective date of the tax slip
- **Requested by**: displays your User ID
- **Type**: displays the type of tax slip
- **Mailed**: will indicate **No** because the Tax Slip has not yet been mailed to the client
- **Requested Date**: displays the date the replacement/duplicate was requested

While an action is in **Pending** status, you can still cancel this action by selecting the **Cancel** button at the bottom of the screen. The status would then be changed to **Cancelled**.

If all the information is correct, simply return to the ***Results*** screen by selecting **Search Results** in the bottom menu or the top navigation bar.

The status will go from **Pending** to **In Progress** at the next weekly system update. Once the update is complete, the status will go from **In Progress** to **Issued**.

If an action to issue a replacement fails, the status will go from **In Progress** to **Error**. A SCBO/CSO intervention would then be needed.

***Take Note**: If the clients address is changed in ITRDS while the status of the tax slip is still showing **Pending**, then the tax slip will be mailed to the updated address. In other word, TISO will capture the address that is current in ITRDS at the moment the status changes to **In Progress**.*

If the client wants their tax slip mailed to a temporary address, a manual tax slip will need to be created with the temporary address.

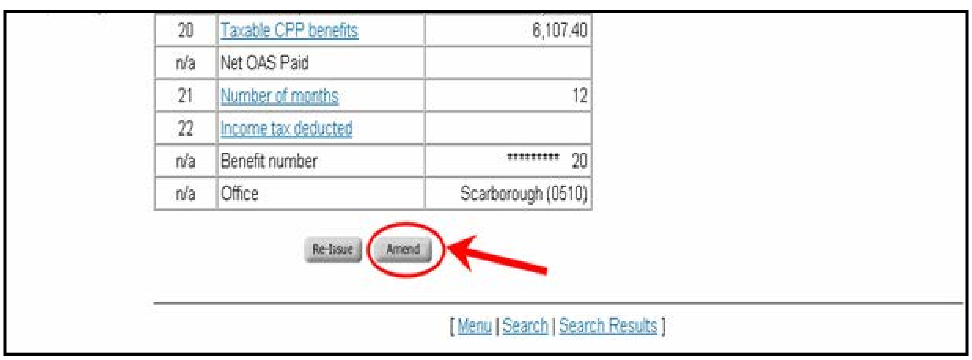
3.3.4 Amendments

Tax slips can be amended based on the current business rules and your user profile. Therefore, you may or may not have access to some of the screens described in this training guide.

You can issue an **amended** T4A(P), NR4 and/or credit slip for the current taxation year only. If you need to amend a tax slip for a previous year, you will need to issue a manual receipt.

You can amend a client's tax slip if the current status is **Issued** in the **Status** field of the ***Details*** screen.

To amend a tax slip, select the **Amend** button located at the bottom of the ***Details*** screen.



After selecting **Amend**, new information appears on the ***Details*** screen.

Slip Information:

Box Number	Box Name	Box Value
12	Social Insurance Number	000 000 000
13	Onset or Effective date	MMM YYYY
14	Retirement benefit	0,000.00
a)	RTR portion	0,000.00
b)	Pension sharing	0,000.00
15	Survivor benefit	0,000.00
16	Disability benefit	0,000.00
17	Child benefit	0,000.00
18	Death benefit	0,000.00
19	Post-retirement benefit	0,000.00
20	Taxable CPP benefits	0,000.00
21	Number of months - Disability	MM
23	Number of months - Retirement	MM
22	Income tax deducted	000.00
n/a	Benefit number	********* 00
n/a	Office	Province (0000)

New Information

Submit Cancel Reset

View a (PDF version) of this tax slip.

[Menu | Search | Search Results]

To amend the amount found on the tax slip, select the box that needs to be amended and type in the new amount.

Important

The CPP T4 tax slip and the NR4 Tax slip have a field that shows the total amount of benefits, either "Total CPP Benefits" or "Gross Income". If changes to these amounts are done within these tax slips, the system will not automatically calculate the total and update the total field.

- On a T4 Tax Slip
  - Box 14 – **Retirement benefit** – includes any benefits shown in boxes a) (RTR portion) and b) (Pension sharing).
  - Box 20 – **Taxable CPP benefits** – includes any benefits shown in boxes 14 (Retirement benefit), 15 (Survivor benefit), 16 (Disability benefit), 17 (Child benefit), 18 (Death benefit) and 19 (Post-retirement benefit).
- On a NR4 Tax slip
  - Boxes 16 and 26 – **Gross Income** – must reflect the benefit amounts of the income code in Boxes 14 and 24 respectively.

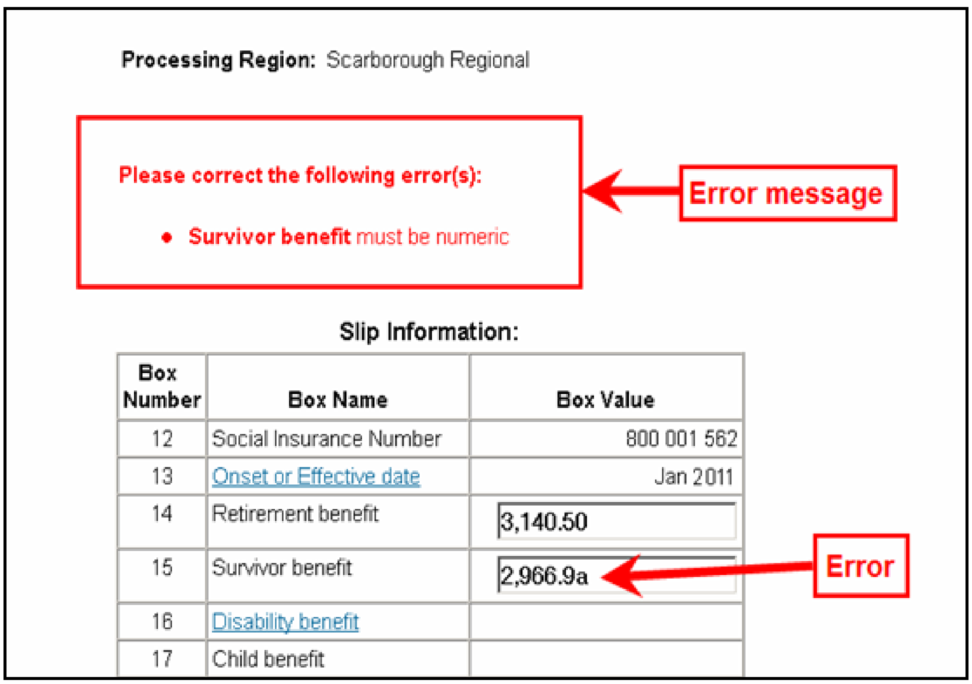
Submit, **Cancel** and **Reset** buttons appear at the bottom of this screen. Here is how each button works:

SUBMIT: once you have changed the amounts and calculated the total (if necessary), you select **Submit** and the amendment will be issued.

CANCEL: brings you back to the previous screen. No changes have been made and no amendment is issued.

RESET: resets all the fields to their original state.

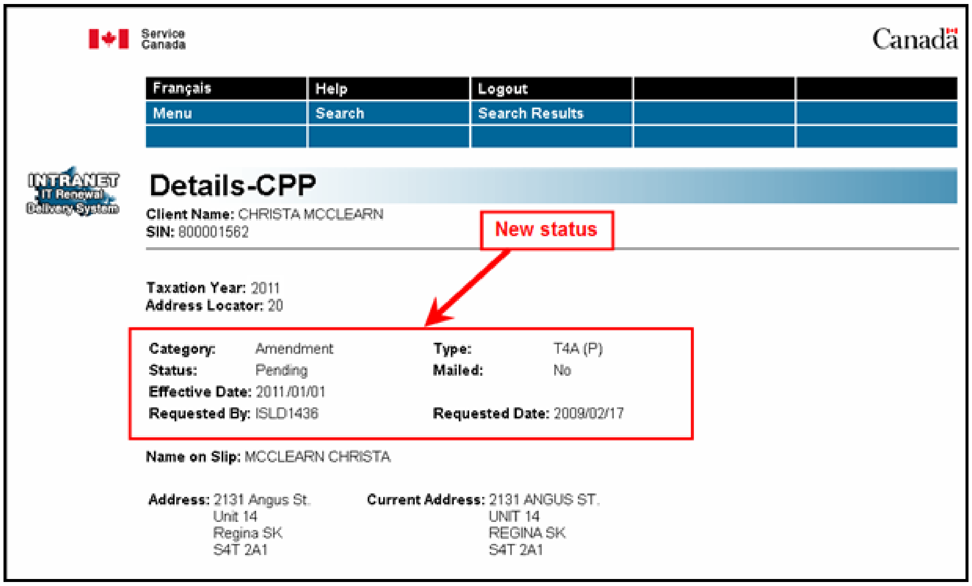
After selecting **Submit**, you may receive an error message if you have entered a value that conflicts with the preset values.



Here are the possible error reasons:

- must have a value or be set to 0.00
- must be numeric
- must have a value less than 99999.99

After issuing an amended tax slip, new information appears on the ***Details*** screen based on the action you have just taken.



The fields to verify in this screen are:

- **Category**: will change from **Original** to **Amendment**
- **Status**: will change from **Issued** to **Pending**
- **Effective Date**: displays the effective date of the tax slip
- **Requested by**: displays your User ID
- **Type**: displays the type of tax slip
- **Mailed**: will indicate **No** because the Tax Slip has not yet been mailed to the client
- **Requested Date**: displays the date the amendment was requested

At this point you can still cancel this action by selecting the **Cancel** button at the bottom of the screen. The Status is then changed to **Cancelled**.

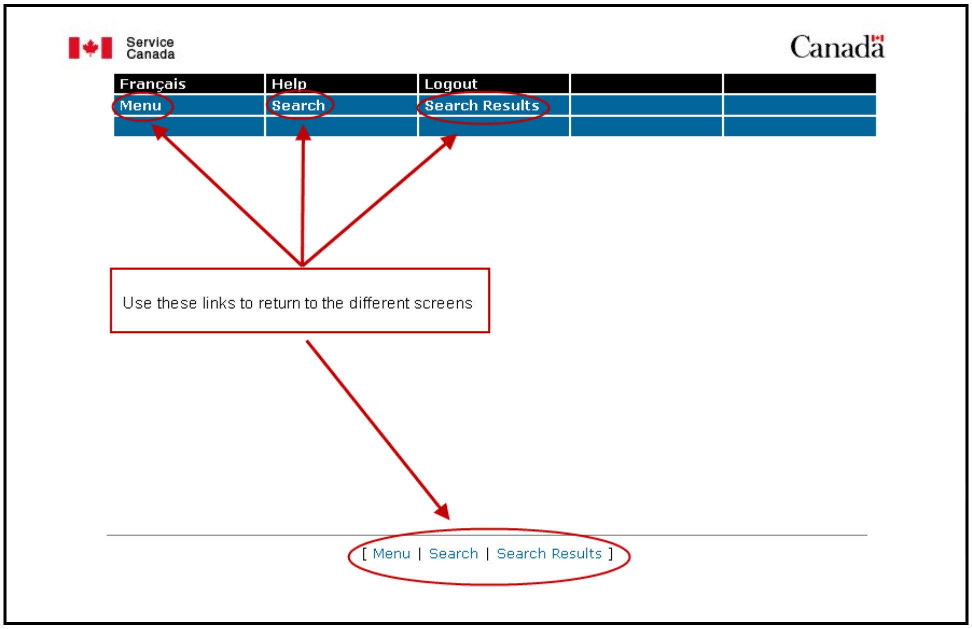
If all the information is correct, simply return to the ***Results*** screen by selecting **Search Results** in the bottom menu or the top navigation bar.

The status will go from **Pending** to **In Progress** at the next system update. Once the update is complete, the status will go from **In Progress** to **Issued**.

If an action to amend a tax slip fails, the status will go from **In Progress** to **Error**. A SCBO/CSO intervention would then be needed.

3.3.5 Navigation links

You can use the links that are located on the top navigation bar or the bottom of the screen to move from one screen to another while you are in the **View Tax Slip Information** functionality.



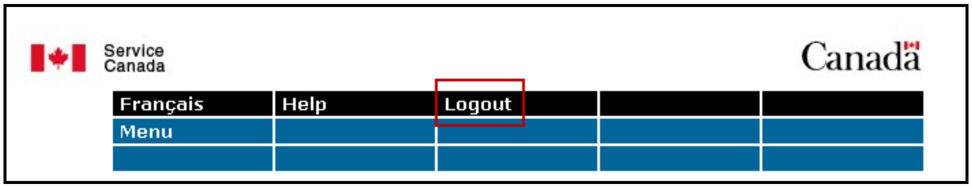
The **Search** link will bring you back to the ***TISO Admin – Find Client*** screen where you can do a search under another SIN.

The **Search Results** link will bring you back to the ***Results*** screen where you can view the details of another tax slip.

The **Menu** link will bring you back to the **GOL Support Services** menu.

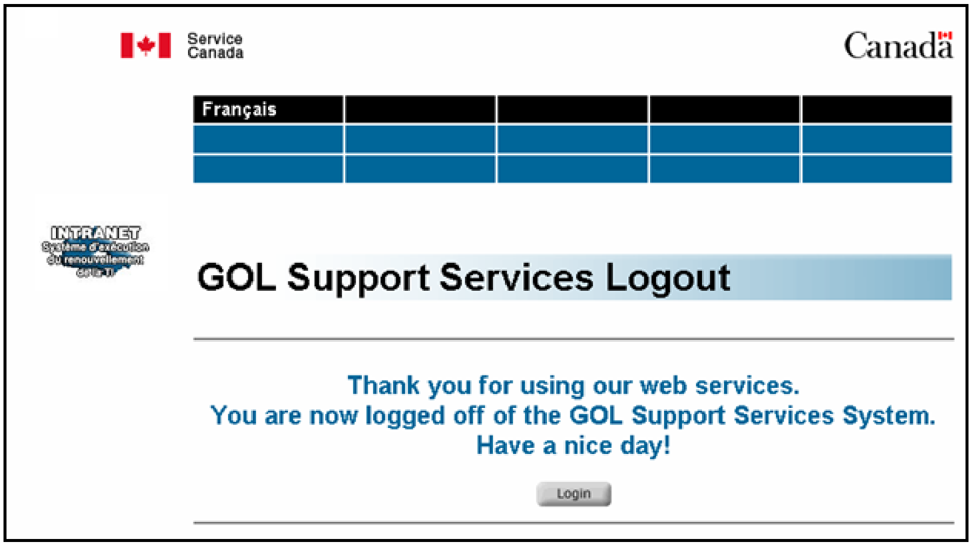
Section 4 – Logout

For security reasons, you are required to log out of the application at the end of each session. The link to **Logout** is located at the top of each page.



Select the **Logout** link when you are ready to exit the system.

When you have successfully logged out, the following confirmation page will be displayed:



You can return to the **GOL Support Services** menu at any time you are in the TISO application by selecting the **Menu** link.