

TISO – View Tax Slip Information

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TISO – View Tax Slip Information

Details Screen

Field Explanations	
Category	
Original	Original tax slip. An original will always be present on a client file.
Replacement/ Duplicate	Replacement/duplicate tax slip.
Amendment	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	An action has been taken 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	An action has been taken and is currently being processed by the system. No changes or cancellations can be made.
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 SDO intervention is required.
Address and current address – CPP tax slips should always have two addresses listed.	
Address	This is the address where the Tax slip was mailed.
Current Address	This is the address that is current in the ITRDS system. If a duplicate or amendment is requested, it will go to the current address listed. If the current address is blank, 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. The SDO/CSO needs to manually create the tax slip.

Re-Issue and Amendment

- **Replacement/duplicate** – can be re-issued for the current and last taxation year.
- **Amendment** - can be done for the current taxation year only.
- **Amendment** for a previous year – need to issue a manual receipt.

Replacement/Duplicate	Amendments
<ol style="list-style-type: none"> 1. Status field must read issued 2. Verify accuracy of clients current address 3. Verify accuracy of clients name 4. Update address/name in ITRDS (if needed) 5. Select re-issue button 6. Verify Category field changed to Replacement/Duplicate 7. Verify Status field changed to Pending 	<ol style="list-style-type: none"> 1. Status field must read issued 2. Verify accuracy of clients current address 3. Verify accuracy of clients name 4. Update address/name in ITRDS (if needed) 5. Select Amend 6. Enter new amount(s) 7. Calculate the Total CPP Benefits or Grosse Income 8. Select Submit, Cancel or Reset (see definitions below) 9. Verify Category field changed to Amendment 10. Verify Status field changed to Pending <p>Submit: an amendment will be issued.</p> <p>Cancel: brings you back to the previous screen. No changes done and no amendment issued.</p> <p>Reset: resets all the fields to their original state.</p>