

JAZZIT PACT – FEBRUARY 28, 2022 UPDATE

If you are installing Jazzit PACT or need help using the templates please refer to our [online documentation](#).

The modules listed below are dated February 28, 2022 in your PACT Compilation Resource Centre **PTUPDATE** RC update control.

Remember that Jazzit PACT updates are cumulative. Updating to this release will include all revisions made to the templates.

You must have *CaseWare Working papers 2020 or higher* installed if you wish to update from the Resource Centre update control in PACT Compilation KLIB.

FEATURES

PTT1ORG PERSONAL TAX ORGANIZER

- New checklist added to the tax services checklist folder. You can either complete this checklist in CaseView or send a printout to your client.

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Personal tax organizer

[Notes for the preparer](#)

Disclaimer: *This personal tax organizer is intended for Canadian resident taxpayers only. Information on provincial credits has been excluded.*

The purpose of this personal tax organizer is to assist you in gathering the information and supporting documents we need to complete your personal income tax return. Please complete the following sections to the best of your knowledge, and if you have any questions, please contact us.

Identification		Spouse or common-law partner's information	
Name:	<input type="text"/>	Name:	<input type="text"/>
SIN:	<input type="text"/>	SIN:	<input type="text"/>
Date of birth:	<input type="text"/>	Date of birth:	<input type="text"/>
Email address:	<input type="text"/>	Email address:	<input type="text"/>
Phone number:	<input type="text"/>	Phone number:	<input type="text"/>
Marital status:	<input type="text"/>		
Address:	<input type="text"/>		

Dependant's Name	Relationship	Date of Birth	SIN	Net Income	Prepare Return?
1. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PTST1 Personal tax checklist (2021)

- The personal tax checklist has been updated for the 2021 taxation year.

Jazzit Checklists (CPA Canada PACT) Masters Personal tax checklist (2021 T1)	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Prepared by</td> <td style="width: 50%;">Reviewed by</td> </tr> <tr> <td style="height: 30px;"></td> <td style="height: 30px;"></td> </tr> </table>	Prepared by	Reviewed by			PTST1 Pg 1 of 12
Prepared by	Reviewed by					
<p>Note: This checklist is applicable for 2021 T1 personal income tax returns. Frequent changes in tax legislation and prudent tax practice dictate that the practitioner must be vigilant to keep abreast of those changes by maintaining and using a current tax library and by participating in continuing education opportunities on tax topics. Any tax checklist must be used with caution, as it is not possible to include all issues that may be applicable in specific circumstances. This checklist is provided as a guide to identify many issues and information requirements commonly encountered by individuals, but it should not be assumed to include all such issues nor should the checklist items be assumed to be in agreement with current tax legislation that may have changed since publication. The intent of this checklist is to identify potential tax issues when completing tax returns for an individual; any action required to address such issues must be determined by the practitioner and may require the advice of a tax specialist.</p> <p>Please note that, as of the date of this update, there are various proposals that have not yet been enacted that might affect 2021 returns. For more information on the details of these proposals, see the CPA Canada blog post, 2022 Personal Tax Season: What's New for 2021 Tax Returns. If any of these proposals are enacted before the T1 filing deadline, updates will be provided on CPA Canada's Canadian Tax News and COVID-19 Updates page.</p>						
<table style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 45%;"></th> <th style="width: 10%; text-align: center;">Y/N N/A</th> <th style="width: 30%; text-align: center;">Comments</th> <th style="width: 15%; text-align: center;">W/P ref.</th> </tr> </table>				Y/N N/A	Comments	W/P ref.
	Y/N N/A	Comments	W/P ref.			
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 45%;">General Information</td> <td style="width: 10%;"></td> <td style="width: 30%;"></td> <td style="width: 15%;"></td> </tr> </table>			General Information			
General Information						

CORRECTIONS AND ENHANCEMENTS

GENERIC CHECKLISTS

- ✓ Added support for electronic signature when this section is set to on by the administrator. Also updated the functionality in the optional conclusion paragraph.

P&C with Y/N & checkmark

Draft stamp: FS set to Off | Draft for discussion purposes only

Page size: Print on letter size

[Administrator options](#)

Allow preparer to edit procedures? Edit procedure text - no access to edit mode options

[Edit mode options](#)

Right mouse click on procedure requirement numbering to select formatting (including blank and bullet for level 2 and 3). Right mouse click on the express button at the end of each procedure row to insert, sort, or delete procedures.

Summary of balances section at top: skip

Number of procedure sections required on this program: 30

Column selection:

<input checked="" type="checkbox"/> Assertions	Retain	<input checked="" type="checkbox"/> Yes / No / NA	Retain	<input checked="" type="checkbox"/> Comments	Retain
<input checked="" type="checkbox"/> Checkmark	Retain	<input checked="" type="checkbox"/> Date	Retain	<input checked="" type="checkbox"/> WP Ref	Retain

Include instructions before first procedure? No

Print conclusion paragraphs after last procedure? Yes

Include sign off area at bottom of this program & checklist? Yes

150.

Conclusion text area

Conclusion

I have completed the procedures outlined on this checklist.

Electronic signature

Steve Brown.

Signature on | Enter password:

☒ Mr. Brown, CPA, CA

☒ Engagement partner / practitioner

Date: