

## JAZZIT PACT – ONLINE DOCUMENTATION

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

## JAZZIT PACT – MARCH 6, 2023 UPDATE

The modules listed below are dated March 6, 2023 in your PACT Compilation Resource Centre **PTUPDATE** RC update control.

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

You must have *CaseWare Working papers 2022 or higher* installed if you wish to update from the Resource Centre update control in PACT Compilation KLIB.

## REVISIONS

### PTT10RG PERSONAL TAX ORGANIZER

- Updated for 2022 T1 tax year. This “Relevant Documents / Slips” column was added.

Income	Self	Spouse	Dependents	Relevant Documents / Slips
Employment income or commission income				T4 / T4PS and details of other benefits or employment income not on T4 slip
Scholarship or research grants				T4A
Employer profit sharing programs				T4PS
Stock option benefit from public companies				Statements as applicable
Severance package				T4 / T4A
Old age security pension				T4A (OAS)
Canada or Quebec Pension Plan benefits				T4A (P)
Other pensions or superannuation/RRSP Income and RRIF				T4A / T4RSP / T4RIF / T4A-RCA

## TST1 PERSONAL TAX CHECKLIST (T1)

- Content and links updated for the 2022 T1 tax year.

Open document 
Sign off
Adjusting entries
Trial Balance
Save & Exit

© Jazzit / CPA Canada PACT 02.28.22 PTKEY FTST1 Connected

Reload from Resource Centre 
Status: 
Document : February 24, 2023
Resource Centre : February 24, 2023

[Notes for the preparer](#)

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**Note:** This checklist is applicable for 2022 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.

For more information on the details of key tax changes to consider for 2022 T1 Income Tax Returns, see the CPA Canada blog post, [2023 Personal Tax Season: Key Changes to Consider](#). Any additional legislative or CRA administrative updates provided between the publication date of this checklist and the end of T1 Personal Income Tax filing season will be provided on CPA Canada's [Canadian Tax News and COVID-19 Updates](#) page.

## TSTL1 AND TSTL2 STANDARD TRANSMITTAL LETTERS FOR T1 (EFILE AND PAPER FILE)

- Contents updated for the 2022 T1 tax year.

Re: Transmittal letter

[Introduction](#)

We have enclosed your 2022 T1 federal personal income tax return ("federal income tax return"), including all supporting documentation and schedules, which we have prepared, without audit, from information supplied by you. According to the CRA, you are required to keep all supporting documentation and schedules used to prepare this return for a period of six years.

Please review your federal income tax return carefully to ensure it is accurate and complete. Upon completion of your review, you will need to sign Form T183 – Information Return for Electronic Filing of an Individual's Income Tax and Benefit Return ("T183") and send it back to us. Your signature is required in Part G - Declaration and Authorization. Signing this section provides confirmation that the federal income tax return is complete and accurate and authorizes us to electronically file it on your behalf. We will submit your federal income tax return to the CRA once we have received the original signed T183.