

# Instructions for Caorda's T4E/T4A Portal



Thank you for choosing Caorda Web Solutions for your T4E/T4A filing solution. Our process is simple and provides you with the two necessary components of your tax filing obligations: XML data file conversion and form generation. Using a supplied spreadsheet, your responsibility is to simply populate your data and provide it to Caorda via a secure login. Caorda Web Solutions will take care of the rest and put you in a position where you can submit your T4E/T4A XML files to CRA and print your slips for mailing.

## **The service includes:**

- a secure site, username, and password to upload your Excel data extract and retrieve your completed files
- creating the necessary XML data file as required by CRA
- validating the resulting XML file(s) against the supplied CRA schema
- creating a PDF file that contains all T4E/T4A slips pre-populated with the corresponding data

The benefits of this service to your organization are primarily found in the time and effort it will save. Caorda's process only requires you to provide the raw accounting data, which removes the challenges of dealing with the technical portion of the filing. The pdf file containing all form data will eliminate both the cost of producing blank forms and the frustration of aligning forms for printing.

The following instructions outline what must be done in order for Caorda Web Solutions to complete your T4E/T4A filings.

## Register

The first step in using our service is to sign-up and create your username and password for the secure area.

- Go to the secure login at <https://tsubmissions.caorda.com>
- Click the link on the right hand side under New Users to '[create one now](#)'
- Enter the information fields provided:
  - Please ensure you are providing the address for the business filing the forms
  - Click the 'Sign up' button to submit your information

## Verification

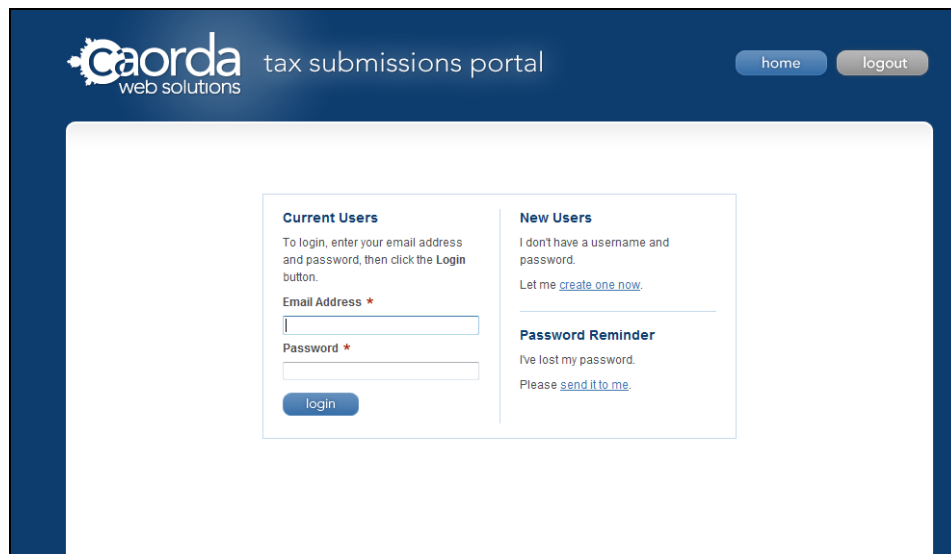
In order to validate registration for the T4 service, an email will be sent to the email address you provided to verify your registration.

- Check your email for the account you used to register for a new message
- Check your Junk Mail folder if an email from Caorda is not in your Inbox
- You may consider adding [t4@caorda.com](mailto:t4@caorda.com) to your 'safe senders list'
- Click the link in the email (or copy and paste it into your browser)
- You will be presented with a message confirming that you have been verified and are now able to use the system
- If there are issues, please email [t4@caorda.com](mailto:t4@caorda.com)

## Login

Once you have verified your registration you can log into the application to have your file processed.

- Return to <https://tsubmissions.caorda.com> to login securely
- Enter your email address
- Enter the password you setup when you registered



The screenshot shows the Caorda web solutions tax submissions portal. The header includes the Caorda logo, the text 'tax submissions portal', and 'home' and 'logout' buttons. The main content area is divided into three sections: 'Current Users' with a login form (Email Address and Password fields, and a login button), 'New Users' with a 'create one now' link, and 'Password Reminder' with a 'send it to me' link.

## Summary Screen

Upon successful login, you will be presented with the summary screen where you can manage your files and profile.



## Spreadsheet Template

In order to submit your tax data, please click the link to download the template that applies to you (T4A or T4E).

- Clicking the link will provide the option to Save or Open the spreadsheet
- Save it to your computer and you are then ready to start adding your data

## Please fill in all appropriate boxes for each record you require

- **Please make note of the comments** in the header row to provide guidance on the values
- **Please ensure all required fields have a value**
- **Please do not include special characters** (i.e. brackets, parentheses, quotes) in the name or address fields
- Please note that if you enter data that exceeds the field length provided, it will be truncated on the XML filing to CRA
- **If a T4A slip is being issued to an individual:**
  - Populate the First Name, Last Name and SIN columns
  - Leave the Business Name and Business Number columns empty
- **If a T4A slip is being issues to a business:**
  - Populate the Business Name and Business Number columns
  - Leave the First Name, Last Name and SIN columns empty
- After you are done adding your data, save the spreadsheet to your computer so it is available for uploading back to Caorda

# Upload

Now that your spreadsheet is complete, it is time to upload the file to Caorda for processing.

- Return to <https://tsubmissions.caorda.com> and login
- Click the link to 'Upload' your relevant file type (T4A/T4E)
- You will be presented with a screen that defaults in all your company information, please ensure it is correct
- There are only a few fields you must complete:
  - Transmitter Number – if you do not have one, enter MM555555
  - Business Number – you must provide your CRA account number
  - T4A only - SIN for proprietor #1
  - T4A only - SIN for proprietor #2
  - If the SIN's are not applicable, enter 000000000
- Click the 'Browse' button to locate your spreadsheet with the data and select it
- Click the Submit button to upload your data
- You will receive a confirmation message when the file upload is complete
- You are now done until you are notified that the file has been processed and you may logout

The screenshot shows the 'Upload a T4A Submission' form on the Caorda tax submissions portal. The form is titled 'Upload a T4A Submission' and includes instructions: 'Create your new Tax Submission by updating the information below and choosing an Excel file to upload. Click the Submit button to proceed.' The form fields are organized into several sections:

- Contact Information:** Contact First Name (Rauy), Contact Last Name (Dalep), Company (Caorda), Country (Canada), Address (108-3550 Saanich Road), City (Victoria), Province/State (British Columbia), Postal Code/ZIP Code (V8X 1X2), Area Code (250), Phone Number (598-6772), and Extension.
- Report Type:** Radio buttons for 'Original' (selected) and 'Amendment'.
- Transmitter Number:** A text field with a note: 'ie. MM123456. If you do not have a Transmitter Number, use the generic number MM555555 to file your return, or call CRA at 1-800-865-5184 to obtain one.'
- Business Number:** A text field with a note: 'ie. 123456789R0001. This is your 15 character CRA account number, composed of 9 digits, 2 letters, and a 4 digit number.'
- Proprietor #1 SIN:** A text field with a note: 'If the proprietor SIN does not apply, enter 000000000.'
- Proprietor #2 SIN:** A text field with a note: 'If the proprietor SIN does not apply, enter 000000000.'
- Tax Year:** A dropdown menu set to '2016'.
- Tax Submission File:** A 'Choose file' button and the text 'No file chosen'.

At the bottom of the form is a 'submit' button. The footer of the page includes copyright information: '© 2010 - 2016 Caorda Web Solutions. View the Caorda Web Solutions Privacy Policy. For support, contact us at [info@caorda.com](mailto:info@caorda.com) or 1 877 9 CAORDA (1 877 922 6732).'

## Retrieve

You will be notified via email when your file has been successfully processed.

- Return to <https://tsubmissions.caorda.com> to login securely
- You will see links for your XML file and pdf (if you have a large file, there may be more than one pdf)
- Click the link to open the file.
- Once it is open, you can save it to your computer
- Review the files for accuracy. If there are any concerns, email [t4@caorda.com](mailto:t4@caorda.com)

**Caorda Web Solutions Tax Submissions Portal**

Welcome back Ravy Dalep. You are now logged in.

[Manage My Account](#)

**T4A** Upload a New [T4A Submission](#)  
Browse CRA's [T4 Web Site](#)  
Download a [T4A Template](#)

**T4E** Upload a New [T4E Submission](#)  
Browse CRA's [T4 Web Site](#)  
Download a [T4E Template](#)

**My Tax Submissions**

Your Tax Submissions appear below. To download the files associated with each upload, click the appropriate link.

<b>T4A</b> Dec 15, 2010 4:10 PM	Ravy Dalep Caorda 108-3550 Saanich Road Victoria, BC, V8X 1X2, CAN	<b>Tax Year:</b> 2010 <b>Transmitter Number:</b> MM000000 <b>Business Number:</b> 123456789RP0001 <b>Date Processed:</b> Dec 15, 2010 4:10 PM	<a href="#">Excel File</a> <a href="#">XML File</a> <a href="#">PDF Forms File</a> <a href="#">PDF Page 2 File</a>
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## Print and File to CRA

You now have all the information necessary to file your T4E/T4A data to CRA.

- Print your slips from the pdf for distribution to your recipients
- File your XML file to CRA which can be done via upload at the CRA site
- Please see <http://www.cra-arc.gc.ca/esrvc-srvce/rf/menu-eng.html> for more information on filing your XML file.

## Amendments

Please note that Caorda Web Solutions is responsible for ensuring the XML and forms accurately reflect the data provided in the spreadsheet. The accuracy of the data within the spreadsheet is the sole responsibility of the client. Please be careful to ensure you enter the correct amounts for all values and that the data is entered in the correct columns for each record.

Hopefully amendments to your XML and slips are not needed as all information originally provided will be correct. If changes are required however, Caorda will perform the necessary amendments on your behalf on a time and materials basis. The extent of the changes will determine the time involved (i.e. complete re-run versus a small number of corrections).

## Pricing

Pricing for T4A and T4E file processing for the 2016 tax year is as follows:

- \$2.00 per record for 1–99 records (minimum charge of \$125)
- If your record count is 100 - 750, the price is \$1.50 per record to a maximum of \$500
- If you have 750+ records, please contact us for custom pricing
- Applicable taxes

## Support

If you encounter any issues or have any questions, please do not hesitate to contact us at:

- Email: [t4@caorda.com](mailto:t4@caorda.com)
- Phone: 250.598.6772 or toll-free at 1.877.922.6732
- Please note we are located in Victoria, British Columbia and are open from 9:00am – 5:00pm PST