



Thank you for choosing Caorda Web Solutions for your T4A/T4E 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 producing the necessary files for you to upload to CRA and distribute to recipients.

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 T4A/T4E 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 following instructions outline the process for Caorda Web Solutions to complete your T4A/T4E 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 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

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 Tax Submissions Portal interface. At the top left is the Caorda logo, and at the top right is the text 'Tax Submissions Portal' with a 'Home' link. The main content area is divided into two columns. The left column, titled 'Current Users', contains instructions to login with email and password, followed by input fields for 'Email Address' and 'Password', and a red 'login' button. The right column contains a 'New Users' section with a 'create one now' link, a 'Password Reminder' section with a 'Send me my Password' link, and an 'Instructions' section with a link to 'How to use the Caorda Tax Submissions Portal'. At the bottom left, there is copyright information for 2010-2018 Caorda Web Solutions and contact details. At the bottom right, there is a 'Secure Site' badge and a 'Search Site' link.

Summary Screen

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

Caorda Tax Submissions Portal

Welcome back Raavy Dalep. You are now logged in.

Account Manage [My Account](#)
Using the [Caorda Tax Submissions Portal](#)
Upload your XML files to [CRA](#)

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.

T4E Nov 25, 2016 4:31 PM	Raavy Dalep Caorda Solutions Inc 401 - 3795 Carey Road Victoria, BC, V8Z 6T8, CAN	Tax Year: 2016 Transmitter Number: MM123456 Business Number: 123456789RP0001 Date Processed: Nov 25, 2016	Excel File Summary Information XML File PDF Forms File PDF Page 2 File
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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
- Please note that for a T4A record, the Business Name and Business Number fields **should not** be populated with your business information. These fields are for recipient data only.
- **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 issued to a business:**
 - Populate the Business Name and Business Number columns
 - Leave the First Name, Last Name and SIN columns empty
- **The above points are very important.** A slip cannot be issued using an incorrect combination (i.e. you cannot leave the name fields blank and use the business name and SIN, nor can you use a first/last name with a business number)
- **Please ensure your data is correct before uploading or slips may not be produced accurately**
- After you are done adding your data, save the spreadsheet to your computer so it is available for uploading back to Caorda



Upload

With your spreadsheet complete, you are ready 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 or 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:
 - **Report Type** – indicate if the file contains Original, Amendment or Cancel records
 - **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 'Choose File' 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

Upload a T4A Submission

Create your new Tax Submission by updating the information below and choosing an Excel file to upload. Click the **Submit** button to proceed.

* First Name <input type="text" value="Rauvy"/>	* Last Name <input type="text" value="Dalep"/>	* Company <input type="text" value="Caorda"/>
* Country <input type="text" value="Canada"/>	* Address <input type="text" value="108-3550 Saanich Road"/>	
* City <input type="text" value="Victoria"/>	* Province/State <input type="text" value="British Columbia"/>	* Postal Code/ZIP Code <input type="text" value="V8X 1X2"/>
* Area Code <input type="text" value="250"/>	* Phone Number <input type="text" value="598-6772"/>	Extension <input type="text"/>
Email Address <input type="text" value="rdalep@caorda.com"/>	Report Type <input checked="" type="radio"/> Original <input type="radio"/> Amendment	
* Tax Year <input type="text" value="2018"/>	* Transmitter Number ? <input type="text" value="MM555555"/>	* Business Number ? <input type="text" value="123456789RP0001"/>
* Proprietor #1 SIN ? <input type="text" value="000000000"/>	Proprietor #2 SIN ? <input type="text" value="000000000"/>	* Tax Submission File <input type="text"/> <input type="button" value="browse"/>

Retrieve Files

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

- Return to <https://tsubmissions.caorda.com> to login
- On the right hand side of the Submissions list, you will see links for your XML file and pdf (if you have a large file, there may be more than one pdf); the source Excel sheet; and a Summary of your submission
- Click the link to open a given file and have the option to save it to your computer
- Review the files for accuracy
- If there are any concerns, email t4@caorda.com

Caorda Tax Submissions Portal

Welcome back Ravy Dalep. You are now logged in.

Account

- Manage [My Account](#)
- Using the [Caorda Tax Submissions Portal](#)
- Upload your XML files to [CRA](#)

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

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T4E Nov 25, 2016 4:31 PM	Ravy Dalep Caorda Solutions Inc 401 - 3795 Carey Road Victoria, BC, V8Z 6T8, CAN	Tax Year: 2016 Transmitter Number: MM123456 Business Number: 123456789RP0001 Date Processed: Nov 25, 2016	Excel File Summary Information XML File PDF Forms File PDF Page 2 File
T4A Nov 25, 2016 4:27 PM	Ravy Dalep Caorda 401 - 3795 Carey Road Victoria, BC, V8Z 6T8, CAN	Tax Year: 2016 Transmitter Number: MM123456 Business Number: 123456789RP0001 Date Processed: Nov 25, 2016	Excel File Summary Information XML File PDF Forms File PDF Page 2 File

Print and File to CRA

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

- Print your slips from the pdf for distribution to your recipients
- Upload your XML file to CRA via the electronic filing portal at CRA
- Please see <https://www.canada.ca/en/revenue-agency/services/e-services/filing-information-returns-electronically-t4-t5-other-types-returns-overview.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 2022 tax year is as follows:

- \$2.00 per record for 1–100 records (minimum charge of \$150)
- If your record count is 101 - 600, the price is \$1.50 per record to a maximum of \$650
- If you have 601+ 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
- 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