

## Verbatim PROD-5 Tax Data Download

1. This presentation describes Revenu Québec's **Tax Data Download** service—the TDD service.
2. Let's start by answering this question: What is the TDD service?  
TDD is a secure service that lets you:
  - automatically complete parts of the Québec income tax return filed with software, using information that Revenu Québec holds and that is entered on RL slips
  - improve support for taxpayers who do not have all the necessary RL slips or who cannot get them because they are unable to prove their identity over the phone
3. For more information about the service, see guide COM-1076.TD-V, *Downloading Québec Tax Data*.

The TDD service only gives access to certain provincial data. You can download certain data for federal slips using the CRA's **Auto-fill my return** service. See the *Auto-Fill My Return* training module for more information.

4. Let's look at how to use the service.  
It's easy to use Revenu Québec's TDD service. You must meet the following requirements:
  - You are a volunteer whose registration for the income tax assistance program has been approved.
  - You get an EFILE number and a NetFile Québec access code to download Revenu Québec tax data.
  - You get taxpayers' download codes from them.

A download code is an eight-digit code that is unique to each taxpayer. It lets you download a taxpayer's tax data using UFile CVITP.

5. Now let's look at ways taxpayers can get their download code.
  - They can use the **Get Your Download Code** online service in one of two ways:
    - They enter their social insurance number (SIN), date of birth and the number of one of their notices of assessment of the last two years.
    - They use clicSÉCUR, the Québec government's authentication service.
  - They can also use the interactive voice response system by:
    - calling
      - 418 654-9754 if they live in the Québec City area
      - 514 864-3689 if they live in the Montréal area
      - 1 888 811-7362 (toll-free) if they live elsewhere in Québec

- giving their social insurance number (SIN), date of birth and the number of one of their notices of assessment of the last two years
6. Taxpayers can also get their download code in My Account for individuals, by going to [revenuquebec.ca/en/citizens/my-account-for-individuals](http://revenuquebec.ca/en/citizens/my-account-for-individuals).

And they can get their code (verbally or by mail) by calling client services at:

- 418 659-6299 if they live in the Québec City area
  - 514 864-6299 if they live in the Montréal area
  - 1 800 267-6299 (toll-free) if they live elsewhere in Canada or the United States
7. You can help taxpayers get their download code. You can call one of the numbers from the previous slide based on where the taxpayer lives and press 8 for the phone line for volunteers. When a representative answers, they will follow these steps:
- Verify the taxpayer's identity
  - After authentication, ask for the taxpayer's authorization to continue the call with you and ensure that the taxpayer consents to the release of their download code
  - Give you the code after authorization and consent from the taxpayer
8. Keep in mind:
- TDD can only be used for the current year.
  - A download code is required to access the service.
  - Taxpayers need to get the download code themselves. You can also get one for them by calling the phone line for volunteers while with them.
  - The RL-31 slip cannot be downloaded using this service. You must ask the taxpayer to get it.
9. Also keep in mind:
- You must manually enter information on identity and from the RL-24 and RL-27 slips, since the software only reminds you to do so (in a memo).
  - You do not have to complete form MR-69-V, *Authorization to Communicate Information or Power of Attorney*, to use the TDD service.

Even though the TDD service lets you automatically complete parts of the Québec income tax return, you must verify the downloaded data, as duplicates may appear on the return when the TDD service is used at the same time as the CRA's **Auto-fill my return** service. If this happens, you must correct the duplicates. However, this type of situation is rare.

10. Now let's see what you have to do before beginning to use the TDD service.

- You have to: Wait for the service to be available for the online income tax return filing season, which begins near the end of February 2022.
- Make sure you registered as a volunteer for the income tax assistance program.
- Make sure you registered for the EFILE and NetFile Québec services, or you won't be able to use TDD.
- Make sure the taxpayer gave you their download code.

11. Let's see how to make the service work smoothly.

Proceed as usual and complete the following sections under the **Interview** tab in the software:

- Identification
- Current address
- Spouse interview type (this option will only appear if the person is married or living in a common-law partnership)
- Revenu Québec questions

12. To access the download service, follow these steps:

A. Click **Revenu Québec tax data download** in the left-hand menu of the screen.

13. After clicking **Revenu Québec tax data download**, the following page will appear.

14. B. On the same page, under **Use Tax Data Download in this file?**, check **Yes, Use Tax Data Download in this file**.

C. Then click **Next** in the lower right corner.

15. After clicking **Next**, the following page will appear. Read the information at the top of the page.

16. Next, under **Retrieve the tax information**, enter the taxpayer's social insurance number and download code.

17. Then to retrieve the tax information, follow these steps:

D. Under **Retrieve the tax information**, check **I have read the terms and conditions above and agree to retrieve my tax information**.

E. At the bottom of the page, click **Download**.

18. F. You should now be on the **Accept my information** page. All the boxes for slips are checked and the items will therefore be included by default. Uncheck boxes with data that should not be included on the income tax return. Leave only the items you're including **checked**.

19. Here's an example of downloaded tax data. As stated previously, you must manually enter information on identity and from the taxpayer's RL-24 slip, since the software only reminds you to do so (in a memo).
20. Here's another example of what you should see after downloading tax data.
21. G. To accept the downloaded information, scroll down the page and click **Accept**. The data will be added to the appropriate sections of the **Interview** page.

If you click **Refuse**, you will not be able to use the data that you've just downloaded, and none of the information in the software will be changed.
22. You may have to update a taxpayer's data, for example, if a new RL slip is added to Revenu Québec's systems. If so, here's what you have to do:
  - A. On the Interview page, in the left-hand menu, click **Download my information** (directly under **Revenu Québec tax data download**).
23. B. Under **Retrieve the tax information**, enter the download code, check **Update from Revenu Québec again** and then click **Download**.
24. Error or success messages may appear when using the TDD service. If you need help, please call Revenu Québec's phone line for volunteers.
  - Error messages sent by the software are specifically for professional representatives, not volunteers. Keep that in mind when reading the messages.
  - For example, a message saying you should have a power of attorney may appear. As mentioned before, you do not have to complete form MR-69-V, *Authorization to Communicate Information or Power of Attorney*, to use the TDD service.

Note that error messages only occur in rare situations.

25. Error messages and the ways to remedy them are explained in detail in guide COM-1076.TD-V, *Downloading Québec Tax Data*. Remember that error messages only occur in rare situations.

There are various categories of messages:

- User authentication error messages concern information about the volunteer's identity.
- Service availability error messages appear when the online service is not available.
- Error messages from the Revenu Québec application signal a problem in the systems.
- Other types of messages are about unauthorized software, only downloading tax data for the current year, a failure to update RL slips, etc.

Client service representatives for the phone line for volunteers are available to answer questions about these messages.