

## CCH Scan v.6 Document Classification and Extraction

CCH Scan creates PDF documents with two levels of bookmarks. The first level shows the document category while the second level identifies the scanned document type as classified by CCH Scan. The AutoFlow technology imports data from the scanned forms identified with the arrow icon ➡ into *Personal Taxprep*. Please see reference notes on the back page.

### Cover Sheet

#### Notes from Client

#### Organizer

#### Employment Income

- ➡ T4
- ➡ Relevé 1
- ➡ Relevé 22
- W2
- 1042S

#### Pension Income

- ➡ T4A
- ➡ T4A(P)
- ➡ T4RIF
- ➡ T4RSP
- ➡ Relevé 2
- ➡ T4A(OAS)
- ➡ T4PS
- ➡ Relevé 25
- ➡ T4A(RCA)
- T4A(NR)
- NR4(OAS)
- 1099R
- CARRA
- T1032
- SSA 1099
- ➡ SSA 1042S

#### EI, Workers Compensation, Social Assistance

- ➡ T4E
- ➡ Relevé 6
- ➡ T5007
- ➡ Relevé 5
- ➡ RC62
- RC66
- ➡ RC210

#### Investment Income and Capital Gains

- Bank statements <sup>1</sup>
- Capital gains <sup>1</sup>
- TFSA <sup>N</sup>
- 1099 OID
- 1099 INT
- 1099 DIV
- ➡ T3
- ➡ Relevé 16
- ➡ T5
- ➡ Relevé 3
- NR4
- ➡ T101
- ➡ Relevé 11
- T600
- Relevé 13
- T5003
- T5004
- Relevé 14
- ➡ T5008
- ➡ Relevé 18
- ➡ Relevé 7
- ➡ Relevé 9 <sup>N</sup>
- ➡ Relevé 26
- TP-671.9

#### Partnership Income

- Partnership income <sup>1</sup>
- ➡ T5013
- ➡ T5013A
- ➡ Relevé 15

#### Rental Income

- T776
- TP-128
- TP-1086.23.12

#### Self-Employment Income

- T1163
- T1273
- T2042
- T2121
- T2125
- TP-80
- T1204
- T5018 <sup>N</sup>
- AGR-1
- Relevé 21
- Relevé 27
- Relevé 28

#### Other Income

- 1099 MISC <sup>N</sup>

#### RRSP Contributions

- ➡ RRSP <sup>A R</sup>
- ➡ T10
- ➡ T215
- ➡ T5006
- ➡ Relevé 10
- RC267 <sup>N</sup>
- RC268 <sup>N</sup>
- RC269 <sup>N</sup>
- T1004
- T1006
- T1007
- T1043
- T1090
- T2019
- T3012A
- T746

#### Employment Expenses

- Professional Dues
- T2200
- T777
- TP-59
- TP-64.3
- TL2
- TP-66
- TP-75.2
- TP-78
- TP-78.4
- T1223
- TP-76

#### Student's Deductions for Self and Dependants

- ➡ T2202
- ➡ Relevé 8
- Interest Paid on a Student Loan

#### Foreign Income Additional Information

- 1040 NR
- T626
- ➡ Relevé 17

#### Child Care Expenses

- CARE <sup>R</sup>
- ➡ Relevé 24

#### Medical Expenses

- MED <sup>R</sup>
- TP-752.013.1 <sup>N</sup>

#### Donations

- Donations <sup>R</sup>

#### Political Contributions

- Political <sup>R</sup>

#### Other Deductions and Credits

- T2201
- TP-752.0.14
- TP-752.0.1.i
- ➡ Relevé 4
- ➡ Relevé 19
- ➡ Relevé 20
- ➡ Relevé 23

#### Tax returns, Payments & Notices of Assessment

- T1
- TP-1
- T1-ADJ
- TP-1.R
- Instalments
- Instalments (Quebec)
- T1162A <sup>N</sup>
- Notice of Assessment
- Notice of Assessment (Quebec)
- T7DR
- TPZ-1026

#### Consent and Authorization Forms

- T1013
- MR-69
- RC59

#### EFILE Information

- Access Code
- T183
- TP-1000
- 151
- Q151

#### Miscellaneous Documents

- Sales Tax Document
- Employment statement
- T1-DD
- LM-3
- 1272F <sup>N</sup>

#### Unused Documents

#### Unclassified Documents

- Unclassified Documents

## Update Notes for CCH Scan v.6

### New bookmarked forms

Forms identified with an <sup>N</sup> are additions to the existing list of classified forms. These include: TFSA, Relevé 9, T5018, 1099MISC, RC267, RC268, RC269, TP-752.013.1, T1162A, 1272F.

### Forms newly supported with AutoFlow data extraction

Forms identified with an <sup>A</sup> are now supported with the AutoFlow technology. This consists in RRSP receipts for *CCH Scan* v.6.

### Renamed bookmarks

Forms identified with an <sup>R</sup> have a new bookmark name. The name has been shortened for easier reclassification in the event these documents are unclassified. The renamed bookmarks include the following:

- RRSP Changed from: RRSP – Contribution Slips
- CARE Changed from: Child Care Expenses – Receipts
- MED Changed from: Medical Expenses – Receipts
- Donations Changed from: Donations – Contribution Slips
- Political Changed from: Political Contribution Slips



**IMPORTANT:** If you reuse forced classification target sheets for the above listed forms between tax seasons, make sure to reprint them to have the latest bookmark names.

### Forms reordered within the bookmark structure

The following forms have been slightly reordered within the structure of the Pension Income category: T4A(P), T4RIF and T4RSP.

## Additional Notes

<sup>1</sup> No automatic classification. Target sheets available for forced classification only.

<sup>2</sup> Due to the high variety of medical and donation receipts, some are unclassified. Use forced classification target sheets to ensure that bookmarks are properly created for these documents.

## Using Forced Classification Target Sheets

You can use forced classification target sheets to control the bookmarking of non-standard forms such as medical receipts, donations, or organizers. However, they should not be used with forms from which you want to import values (e.g. T4, T5, RRSP), as this prevents data from being extracted. On the other hand, generic single-page and multi-page target sheets are compatible with data extraction. For more information about target sheets, please refer to the product documentation.