

Behind the Counter

CRA's My Account

Have you noticed that when you try to contact the Canada Revenue Service (CRA) on their 1-800 line -- that it is always busy? The CRA became aware of this some years ago and began developing a program called 'My Account' whereby you can access your information through the internet. Since this access is through the internet, a system of secure access was developed called EPass. So before you can access your information on-line, you will need to register for a Government of Canada EPass. One part of the registration process for the EPass is that you will need to have a CRA security code mailed out to you before you can complete the application. In order to receive that code, you will need to call CRA's phone service one last time. I have found that it is very easy to get lost while filling out the application for an EPass because, as with much of the CRA website, when you try to go back to a previous screen you end up somewhere else. So the key is to read everything on each screen and make sure that all requests for information have been answered before proceeding on to the next screen.

The My Account Service can be accessed from CRA's main menu at <http://www.cra-arc.gc.ca/menu-e.html>.

If you need more information before signing up for this service, the CRA provides a summary at <http://www.cra-arc.gc.ca/esrvc-srvce/tx/ndvdl/mycmt/hlp-eng.html#mao.a1-1> and an on-line tour in various formats is available at <http://www.cra-arc.gc.ca/esrvc-srvce/tx/ndvdl/mycmt/vrtltr/menu-eng.html> both of which are available through CRA's main menu under the my account option if you don't wish to key in long web page addresses.

For example, some of the things you can view through 'My Account' are whether your return has been received or has been processed and the amount of tax refund or balance owing. You can see a running statement of your account as well as the status of your Child Tax Benefits and your GST credits. You are able to view your carry forward information such as your RRSP contribution limits, home buyers plan balance and your capital gains or losses carried forward as well as the history of these items. You can also interact with the system and update information about yourself such as your address, your

tax return, direct deposit, apply for child tax benefits and also allow someone to represent you when dealing with CRA. The last function is very useful for accountants.

Historically, you may have had to sign a form T1013 in order for your accountant to have access to your account with CRA and to speak with them on your behalf. When the CRA received this form, it was an additional 5 days of processing time for the form, before your accountant was 'registered' as being approved for access. Currently, you can ask your accountant for their representative ID (RepID) and you can key that into the 'My Account' system directly and they will then automatically have access – or at least within 24 hours.

There is also a 'Business Account' service. On the business account service you can view your account information such as corporate returns, GST returns, account balance and you can also submit a GST return or a Corporate return. You can also make on-line requests using this service, manage your business profile and authorize representative access. If you would like an employee to have access to this information, you are also able to set this up. Since payroll is such a complex area, only limited payroll information is accessible. The CRA form that allowed access to your business account that you may have had to sign in the past was an RC59 and as with the personal taxes, there would have been at least a 5 day wait for the form to be processed after it had been received by CRA.

In all cases you can access your information electronically before you receive the information in the mail. Our office has experienced a reduction in calls from clients asking us to check on the status of their return and other common questions. We don't normally charge for this service, but I know that some accounting offices do, **so the use of this service may reduce your accounting bill.**

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