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Latest in CRA updates

Brenda Weeks

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Today’s speaker

Brenda Weeks
Manager

Business Returns Directorate
Assessment, Benefit, and Service Branch
Canada Revenue Agency

Agenda

1. Background
2. Transformation – Service Renewal
3. T1 updates
4. T2 updates
5. Digital services modernization: Updates for business
6. Serving You Better: Top 10 priorities
7. Questions

1. Background: Operational structure

Headquarters

Regions

Tax centres

Tax services offices

Contact centres

2. Transformation – Service renewal

What is service renewal?

Our changing environment

Doing things differently

Why change, why now?

More online filings

11.9 to 23.6 million

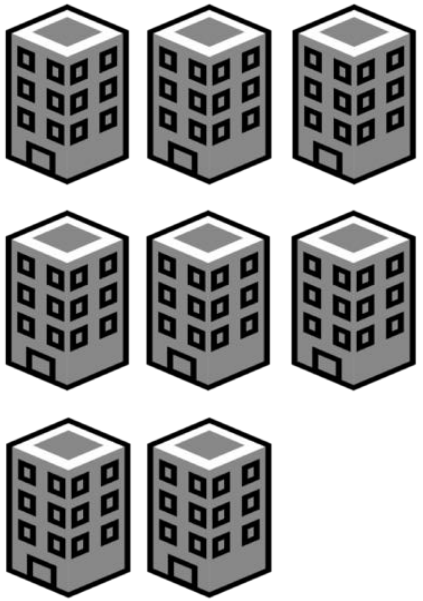
Increase in number of online filings since 2005

90% → Number of corporations who filed their corporate income tax return online this year.

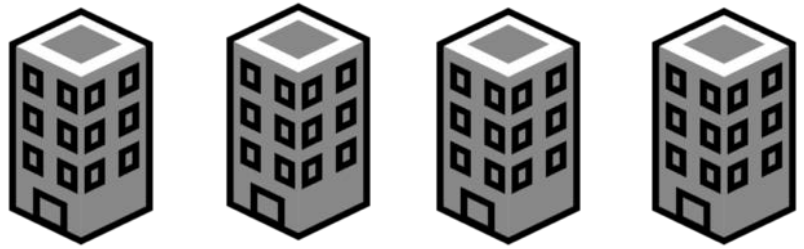
Digital services modernization: Increases the online service options available to individuals and businesses

Modernizing processing

8 Processing Centres



4 Processing Centres

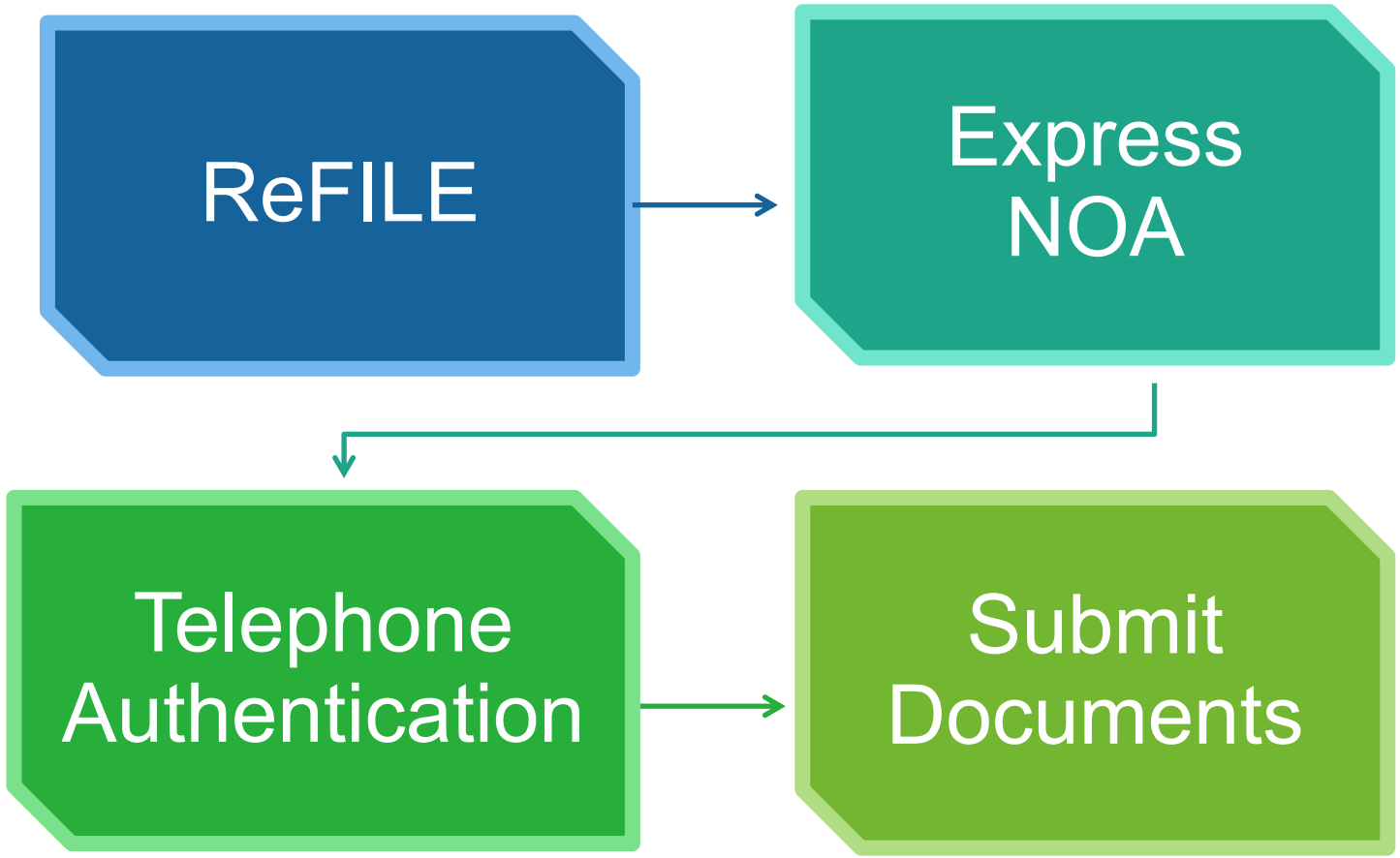


Benefits of organizational change

- Creates a more efficient organization
- Modernizes our internal operations
- Increases our capacity
- Continues our presence in all regions
- Better reflects our business processes
- Fully leverages our people and prepares for future growth

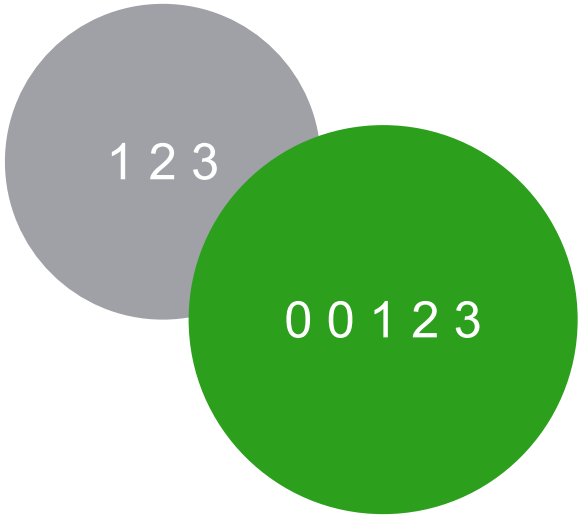
3. T1 Updates

T1 Updates


ReFILE
Express NOA
Telephone Authentication
Submit Documents

5-Digit field codes

- **2019 tax year**: Field codes to be updated from **3 digits** → **5 digits**
- 00 to be added at the end of field code
- Improving flow and data capture



4. T2 Updates

T2 Updates

Service standards

Statistics

Workload management

Audit referrals and reassessments

T2 Auto-fill

Owners and representatives can download assessed tax information from the CRA to tax software

Four components, or options, available for download:

1. T2 Return information
2. Return balances
3. Account balances
4. Business Number address, email, and return mail indicator (RMI) information

T2 filing pre-validation service for information required for the CRA to accept an electronically filed return.

90% of T2s are filed electronically using certified software

79% of T2 returns go through system without manual intervention.

T2 Attach-a-doc:

Phase 1

- Insurance corporations

Phase 2

- All corporations
- Very specific documents

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T2 Filing Pre-validation

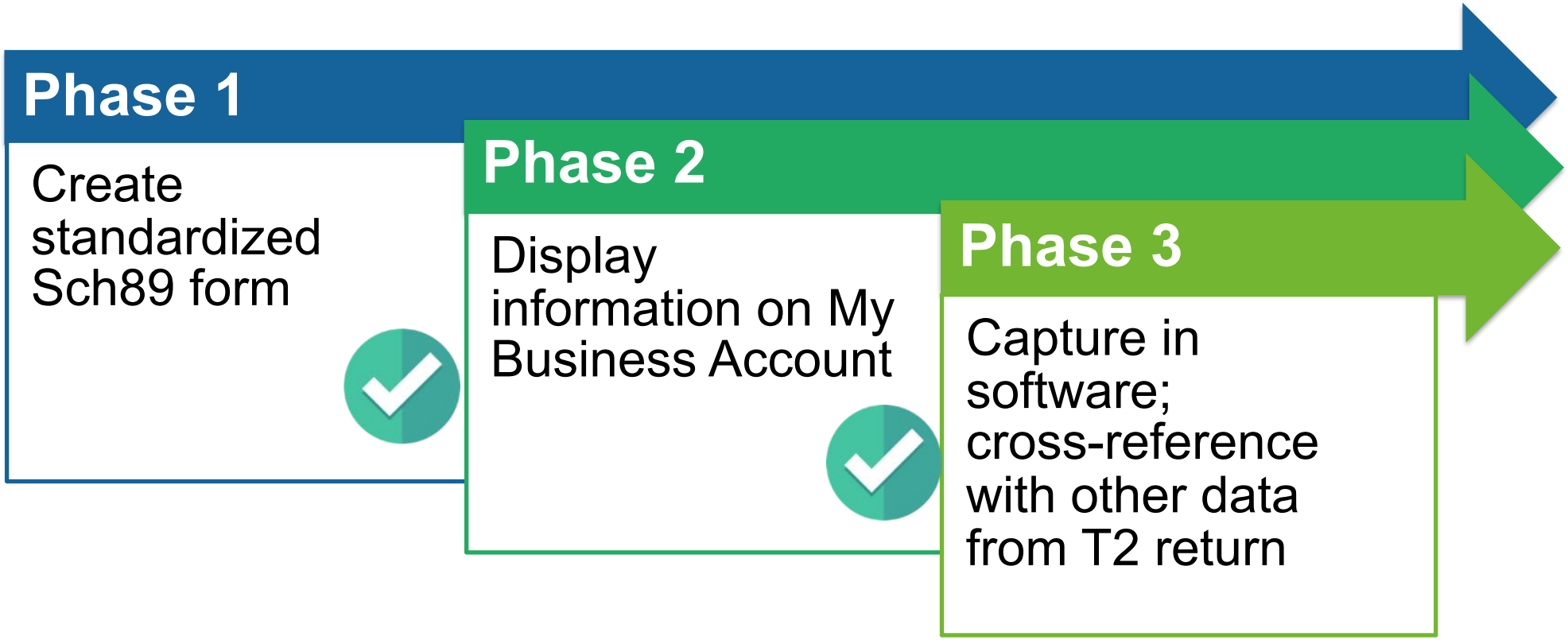
October 2018

T2 filing pre-validation service for information required for the CRA to accept an electronically filed return

Available through CRA-certified T2 tax preparation software

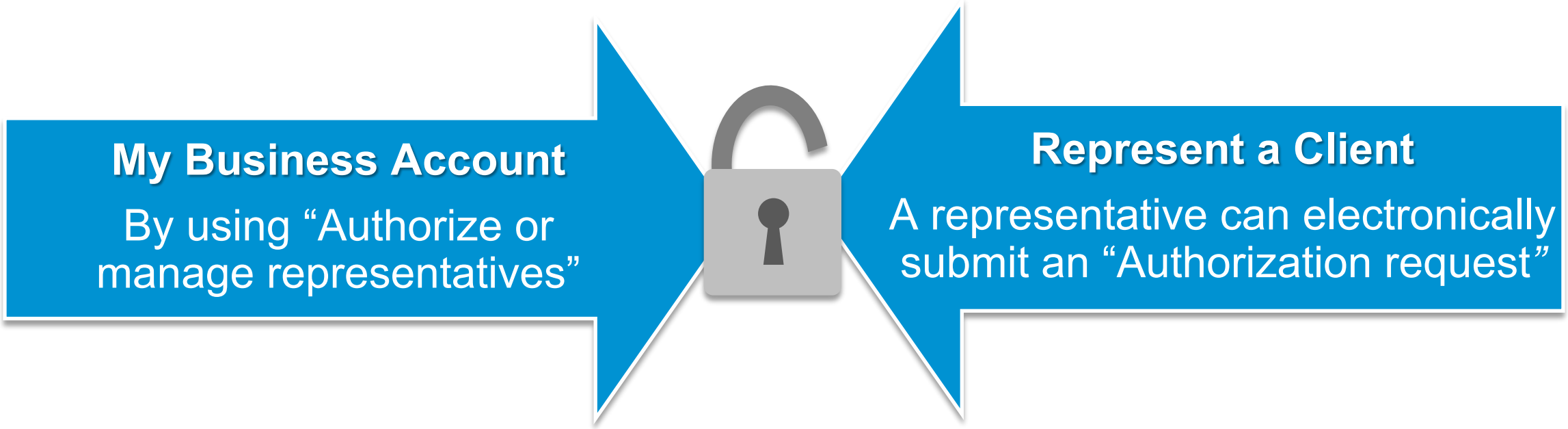
Capital dividend account

Full system automation of CDA



Representative action

A representative can be given online access through



As of May 2017, Form RC59 sent to tax centres provides offline access only, that is, by phone and paper.

EFILE Business Authorization Requests

Representatives complete business authorization questions

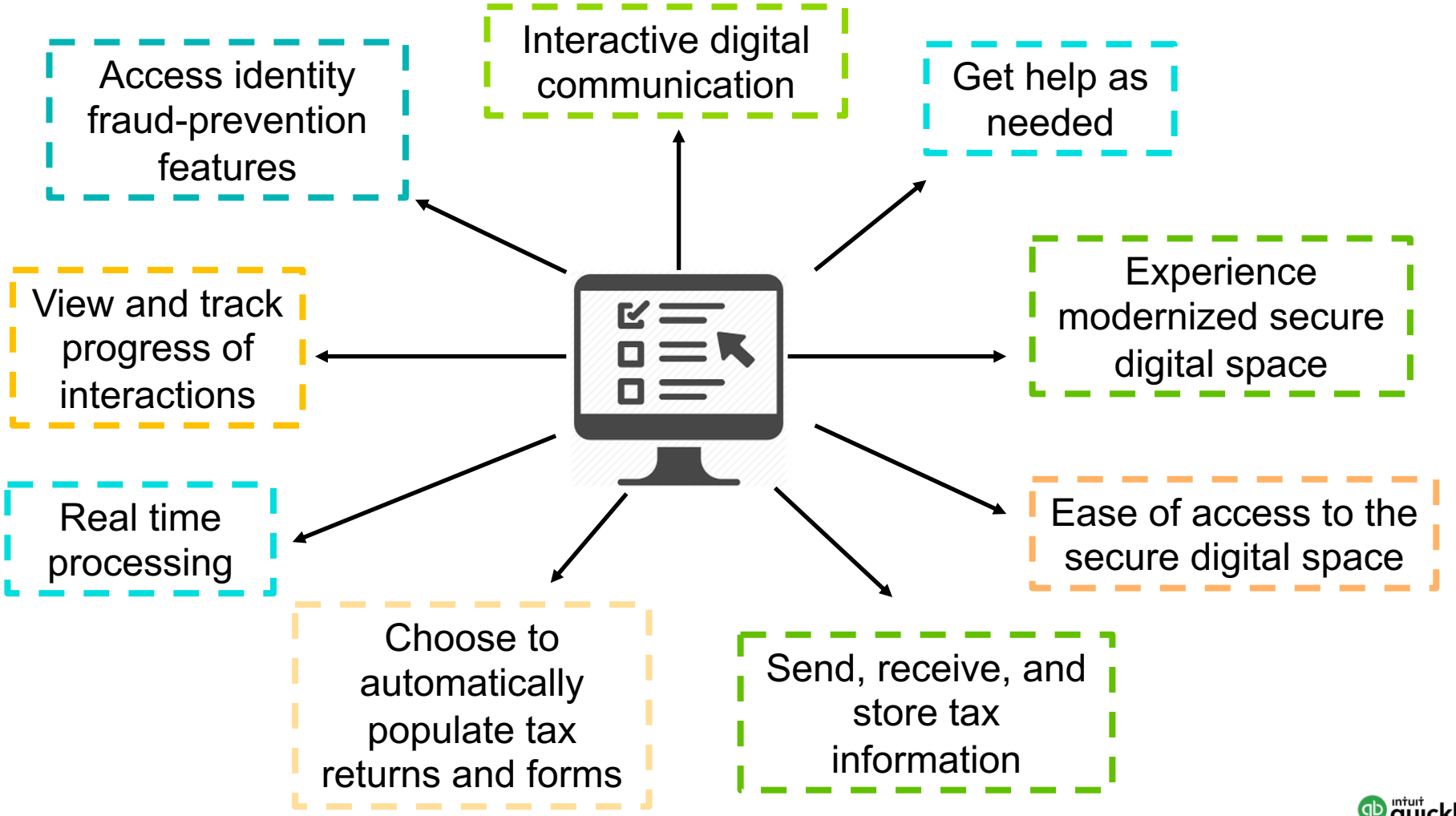
Client signs

Transmit authorization to CRA using EFILE

CRA calls the various signing authorities to confirm

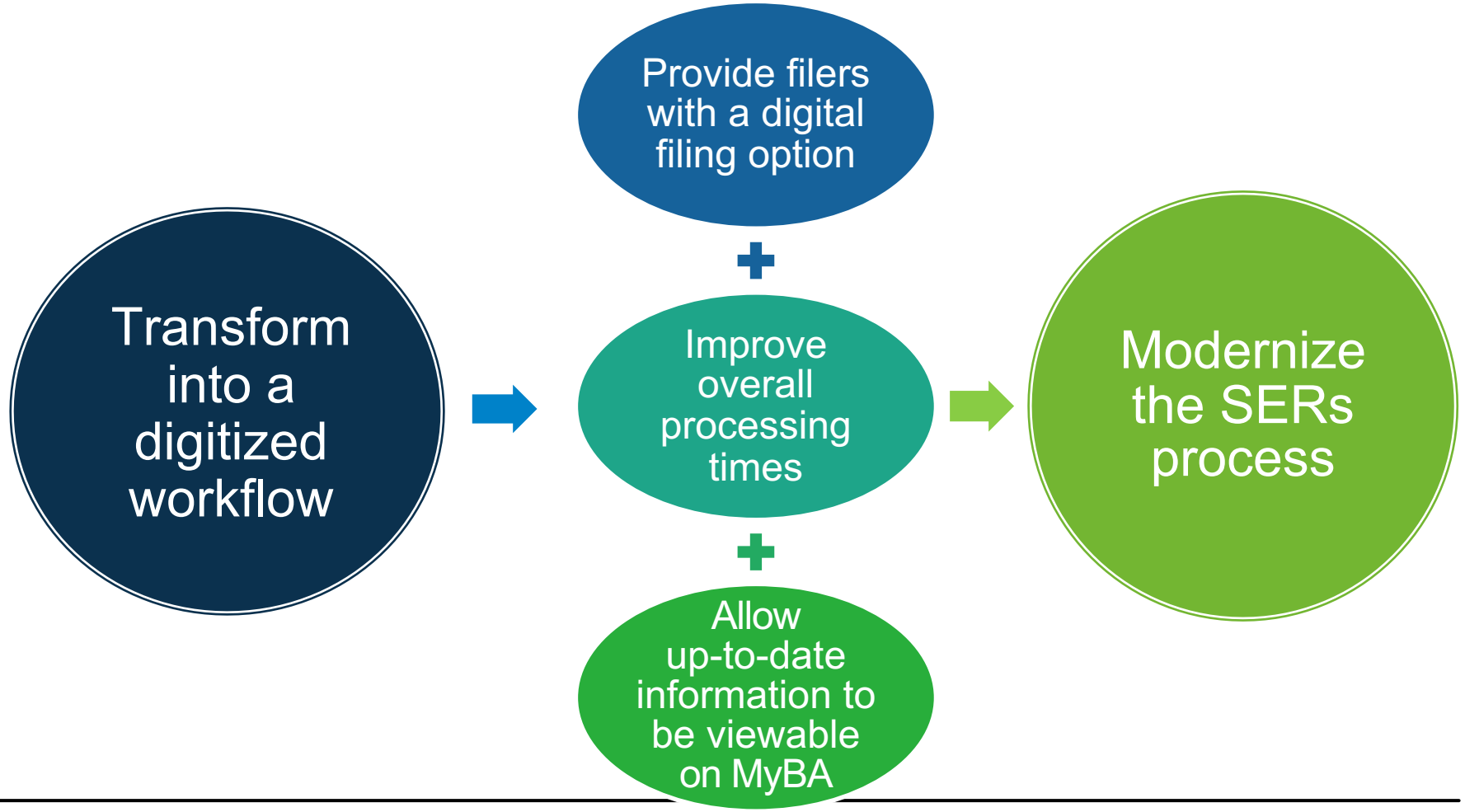
5. Digital Services Modernization

Digital Services Modernization



Digital services modernization

Special Elections and Returns (SERs)



Digital services modernization

The CRA BizApp

Services offered in the CRA BizApp:

- Check balances owing
- Make payments by PADs
- View account transactions
- View expected GST/HST returns and corporation income tax returns

NEW

- Two new payment methods (My Payment, Cash or debit via user-generated QR Code)
- Pay instalments for GST/HST and corporation tax
- Make payroll remittances (including nil remittances)
- View payroll return status
- Returned mail notification

6. Serving You Better

Top 10 Priorities

2018 Consultations

Serving you better: Top 10 priorities

1. Receive a CRA security code by email. ☑
2. Call a new dedicated telephone service for tax preparers that helps with more complex technical issues. ☑
3. Request a Liaison Officer visit. ☑
4. Provide T4 information slips to their employees in electronic format (certain conditions apply). ☑
5. Use T2 Auto-fill through commercial software. ☑

Serving you better: Top 10 priorities

6. Ability to create their own filing and balance confirmation letters online. ☑
7. View short ‘how-to’ videos that explain the services on My Business Account. ☑
8. Experience telephone service improvements as we transition to the Government of Canada telephony platform over the next four years. ☑
9. Share feedback about their audit experience in a new post-audit survey. ☑
10. Resolve objections faster. ☐

The 2018 consultations are underway…

Questions?

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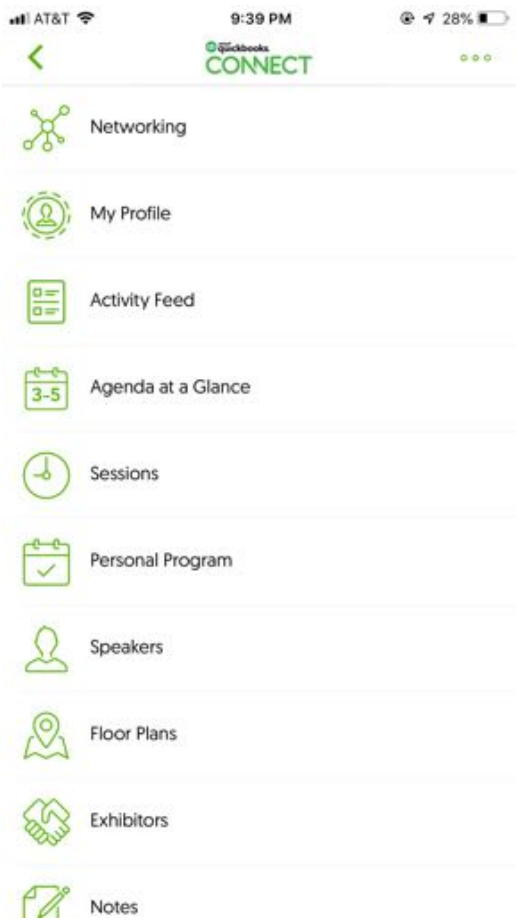

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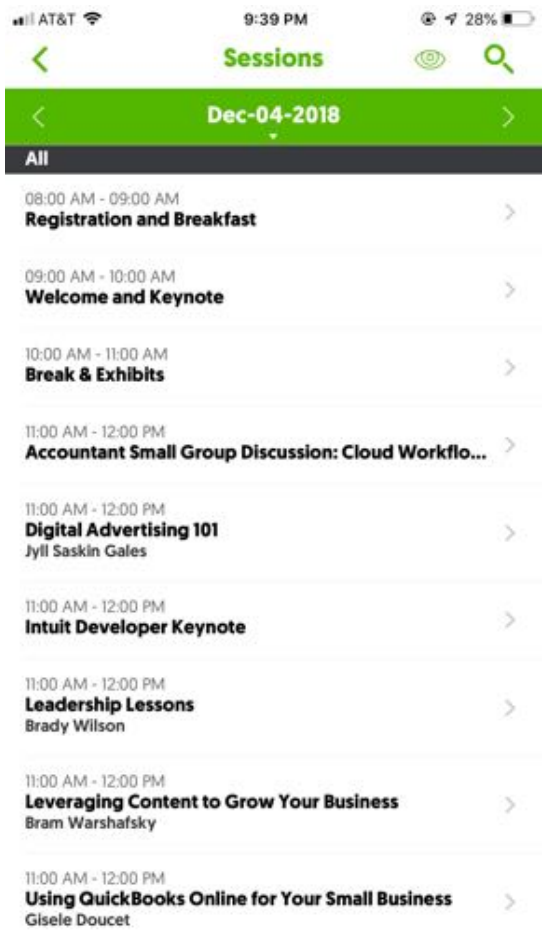

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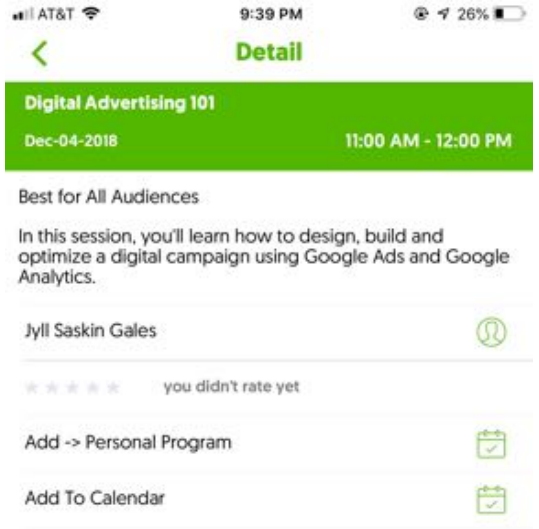

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