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Canada

# CRA Service to Business

## Developments in digital services

Heather Daniels



Canada Revenue  
Agency

Agence du revenu  
du Canada

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# Today's speaker



**Heather Daniels**

**Director General**

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Business Returns Directorate

Assessment, Benefit, and Service Branch

Canada Revenue Agency

# Overview

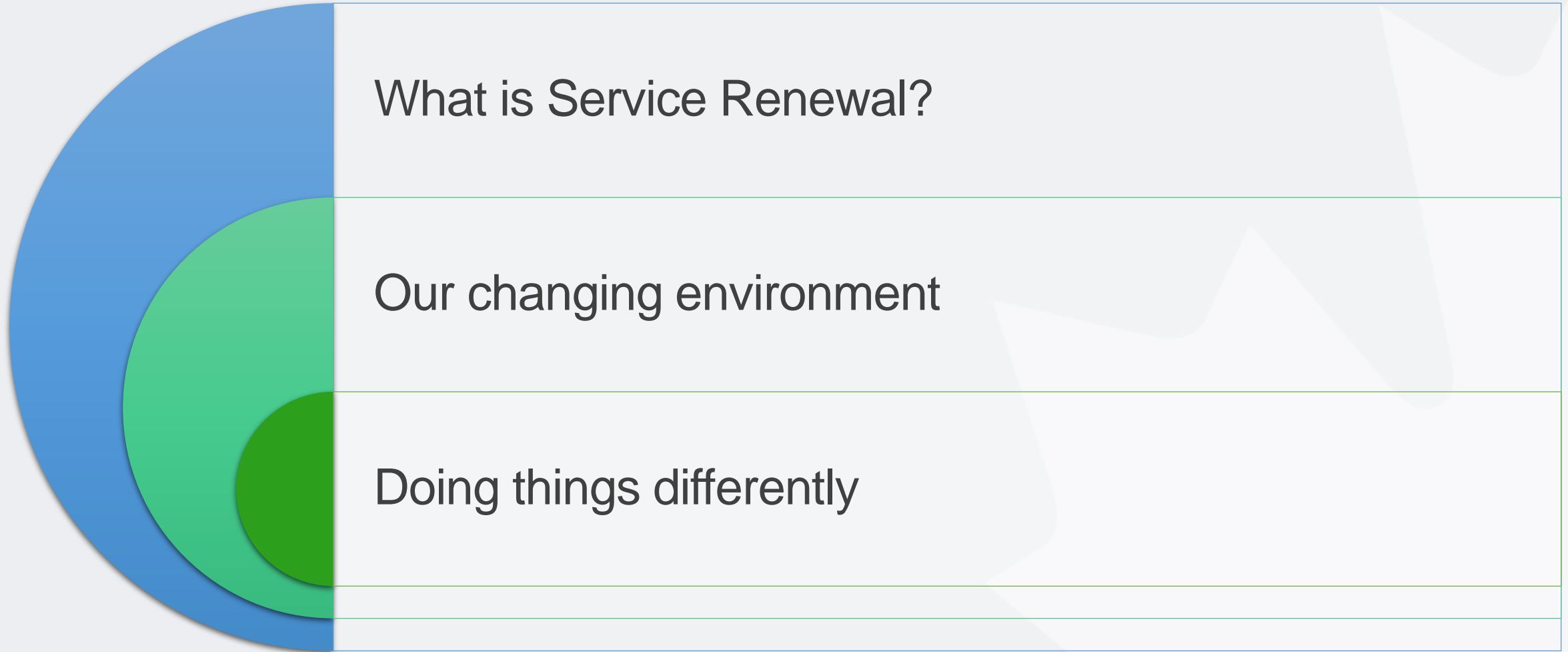
1. Transformation - Service Renewal
2. T1 updates
3. T2 updates
4. Digital services modernization: Updates for business
5. Serving You Better: Top 10 priorities
6. Questions

# Background: Operational structure

- Headquarters
- Regions
- Tax Centres
- Tax Services Offices
- Contact Centres



# Service Renewal



# Why change, why now?

More online filings  
**11.9 to 23.6 million**

Increase in number of online filings since 2005



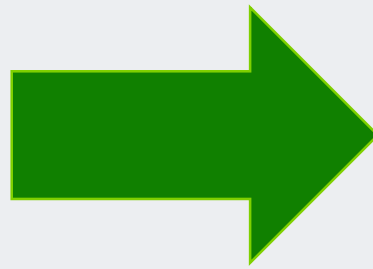
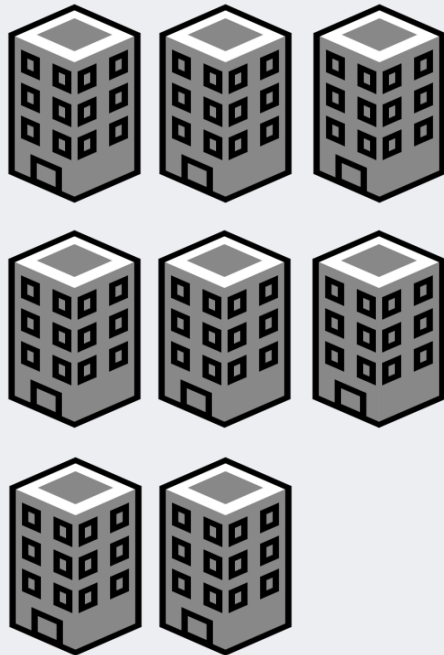
**90%**

Number of corporations who filed  
their corporation 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



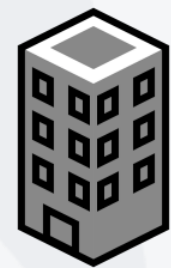
Winnipeg



Sudbury



Summerside



Jonquière

# Benefits of organizational change

Creates a more efficient organization

Modernizes our internal operations

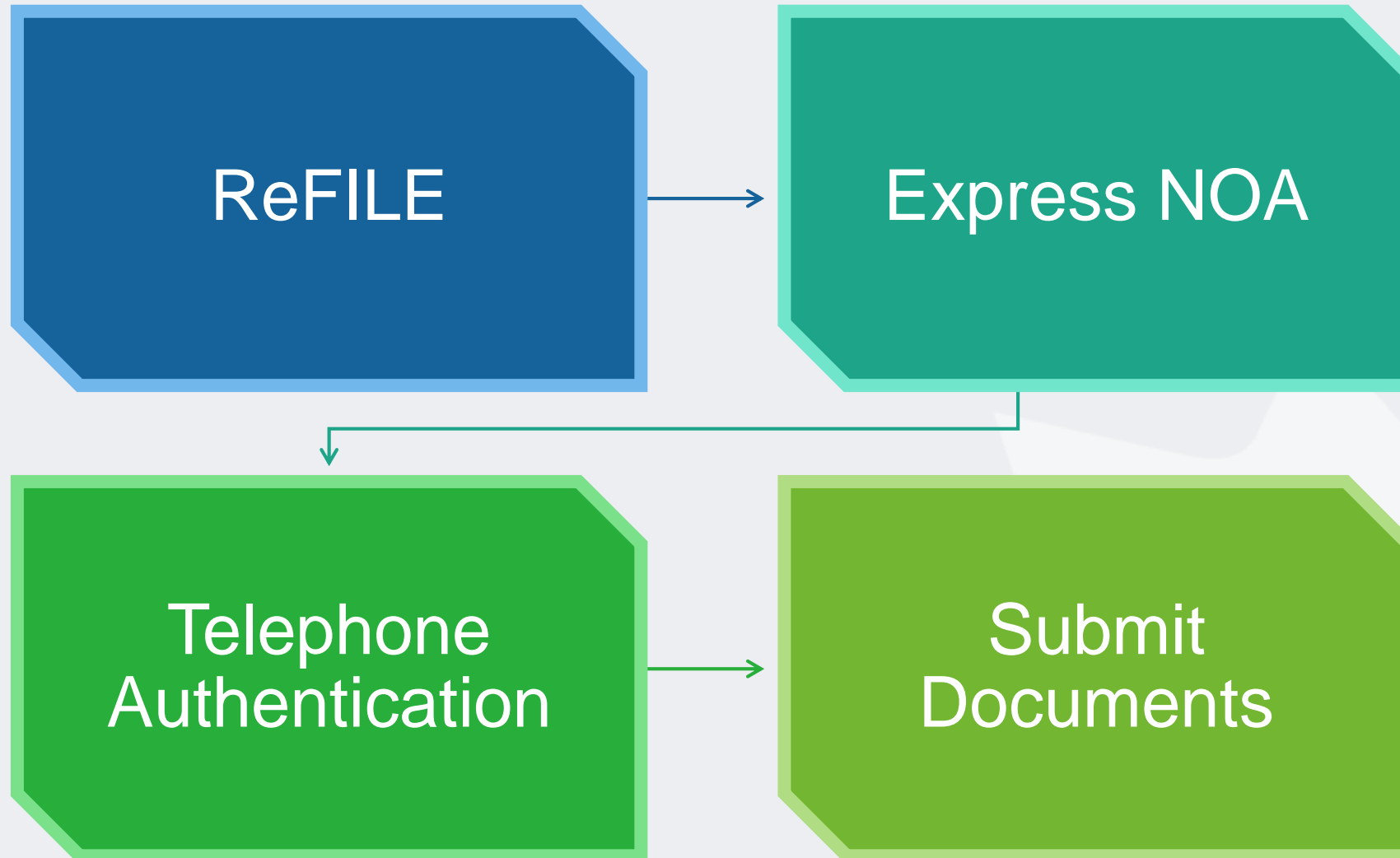
Increases our capacity

Continues our presence in all regions

Better reflects our business processes

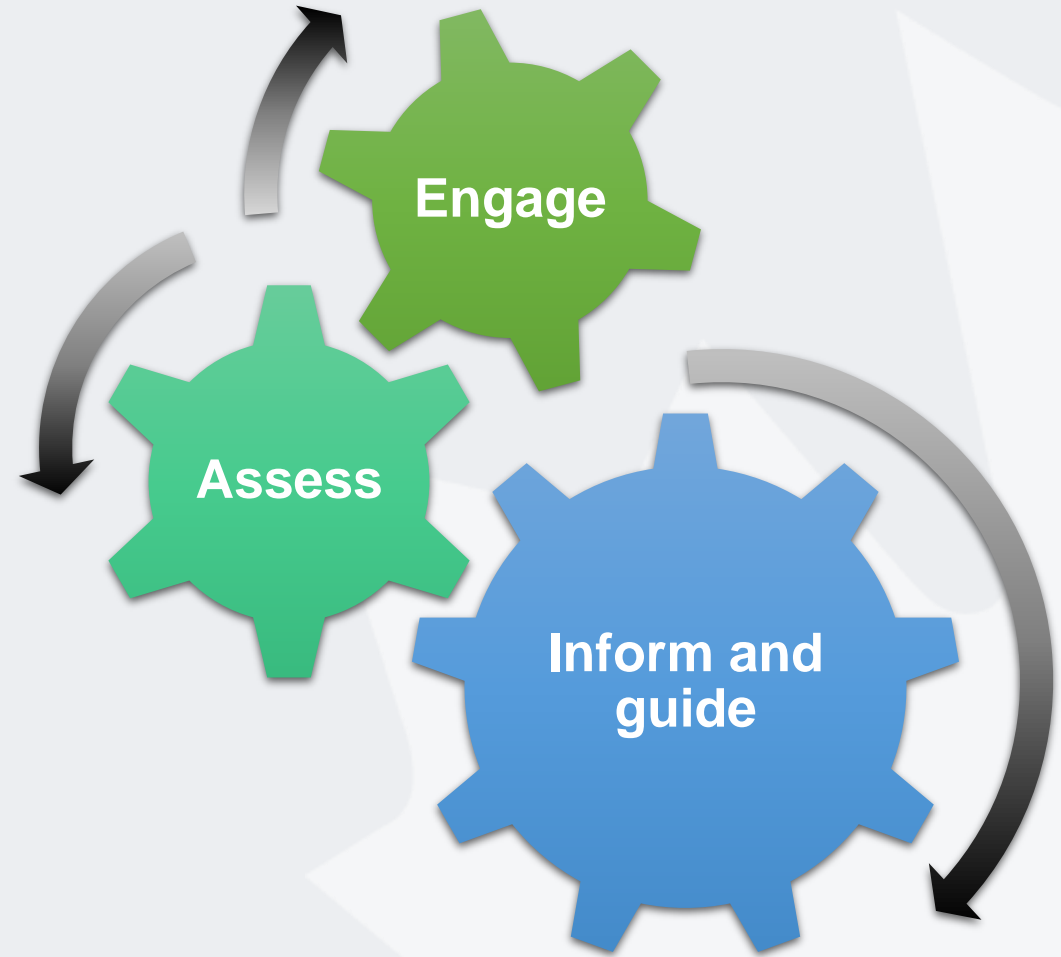
Fully leverages our people and prepares for future growth

# T1 Updates



# Corporation income tax program

- Service standards
- Statistics
- Workload management
- Audit referrals and reassessments



# Digital services modernization:

## 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



# Attach-a-doc:

## Phase 1

- Insurance corporations



## Phase 2

- All corporations
- Very specific documents



# Capital Dividend Account:

## Full system automation of CDA

### Phase 1

Create  
standardized  
Sch89 form



### Phase 2

Display  
information on My  
Business Account

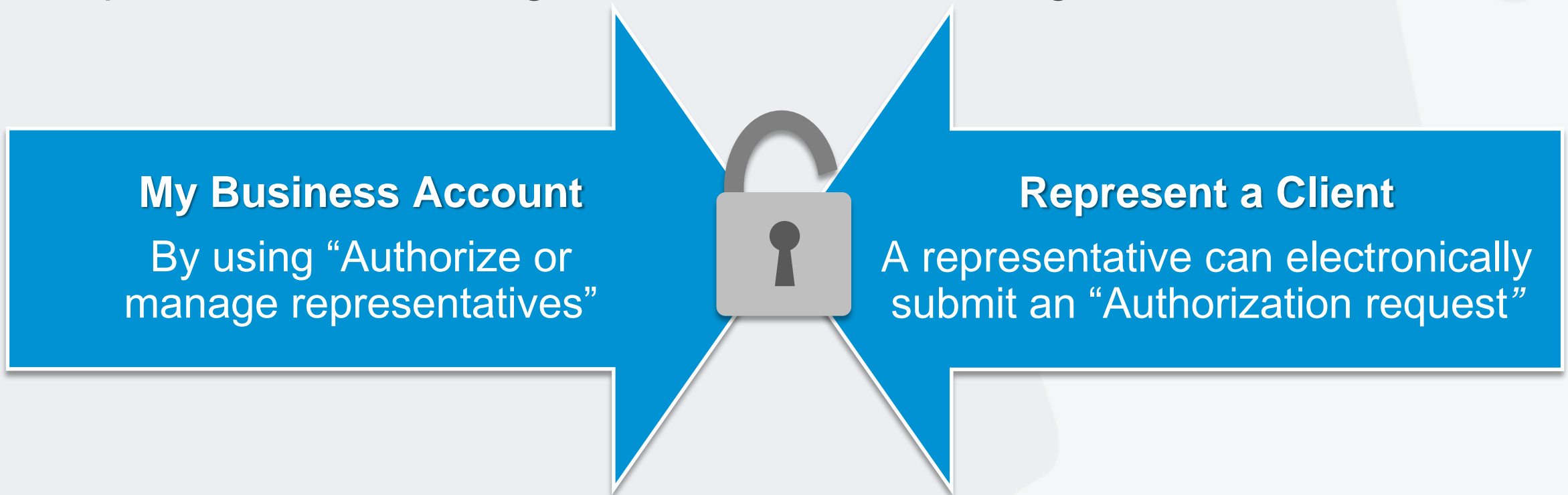


### Phase 3

Capture in  
software;  
cross-reference  
with other data  
from T2 return

# Representative Authorization:

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



# Services for GST/HST

**Spring 2017**

**New GST/HST  
return filing  
shortcut if you  
have nil/no  
amounts to  
report**



**Fall 2017**

**Returned Mail  
Indicator in  
GST/HST  
NETFILE**



**Spring 2018**

**Addition of  
Account Alerts  
in MyBA**



**Fall 2018  
(tentative)**

**Capturing an  
email address  
via GST/HST  
Internet File  
Transfer (GIFT)**

# Filing and Balance Confirmation Letter

Gives business owners and their authorized representatives the opportunity to self-generate an accessible digital "Filing and balance confirmation letter" for their business accounts



RT

RC

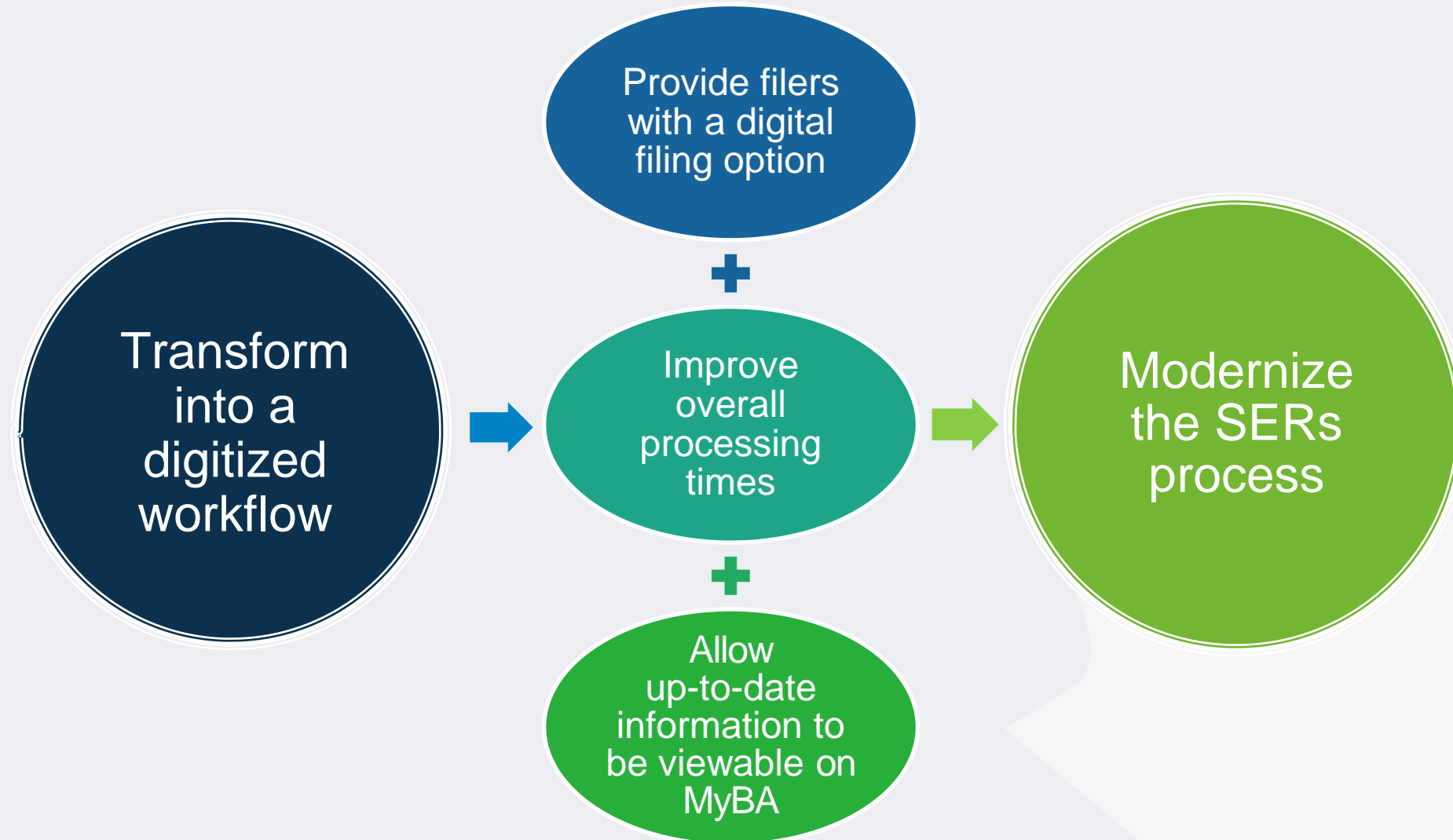
RP

OL

May  
2018



# Special Elections and Returns (SERs)



# The CRA BizApp

## Services offered in the BizApp:

Pay arrears balance via Pre-Authorized Debits (PADs)

View arrears balance






View transaction details

View GST/HST expected returns and filed returns status

View corporation income tax returns status



# 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.

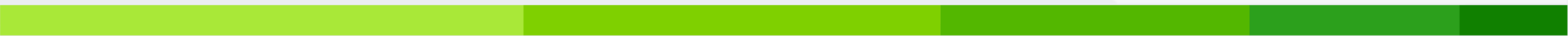


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Resolve objections faster.



# Questions & Input?



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