

# CRA Data Import

## What is CRA Data Import?

## What data can you download using CRA Data Import?

The CRA Data Import feature lets you securely download relevant information from the Client Summary Page within the CRA's **Represent a Client** website. ProFile automatically carries that data to the appropriate fields in the return, saving you time.

The CRA has made available the following data for download:

Assessment and reassessment details for past tax returns (past 12 years)

Account balance and instalments:

- Account balance
- Amount under appeal
- Payments made on filing
- Instalments available to claim

RRSP, HBP, LLP, and TFSA:

- RRSP deduction limit
- Unused RRSP contributions
- Required HBP repayments
- Required LLP repayments
- TFSA contribution room

Disability tax credits:

- Specifies if credit may be claimed by the taxpayer, taxpayer's spouse, or a dependant

## What do you need to do before using CRA Data Import?

Carryover Amounts:

- Investment tax credit
- Capital gains and losses
- Capital gains deduction
- Allowable business investment losses
- Non-capital losses
- Federal and provincial tuition, education, and textbook amounts

You must have the same credentials and authorization that you need when accessing the **Represent a Client** service on the CRA website.

1. You will need a **CRA user ID** and **password**.
2. Register with the service to get a **representative identifier** (RepID) or a **group identifier** (GroupID).
3. You need to receive **authorization from your client**. You can get authorization in two ways:
  - Ask your client to go to the CRA's **My Account** service. Ask them to enter your **RepID** to authorize you as an individual, a **GroupID** to authorize a group of representatives, or your business's Business Number (**BN**) to authorize all employees of a business.
  - Ask your client to authorize you by filing a form **T1013** - Authorizing or Cancelling a Representative. Before your client submits the T1013 form, you must register your Business Number (BN) with the **Represent a Client** service. Your client must then fill in your **RepID**, **GroupID**, or **BN** on form T1013.

Note that the CRA says: "The business name you register with the **Represent a Client** service must match the business name on Form T1013 to prevent delays in processing" and "The CRA has to receive your client's Form T1013 no later than six months after it is signed".

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Tip: You can create and file a T1013 form directly from ProFile. To do so, open the client's return and fill in the T1013 form. Then, go to the **EFILE** menu, and click **EFILE the T1013 for this taxpayer**.

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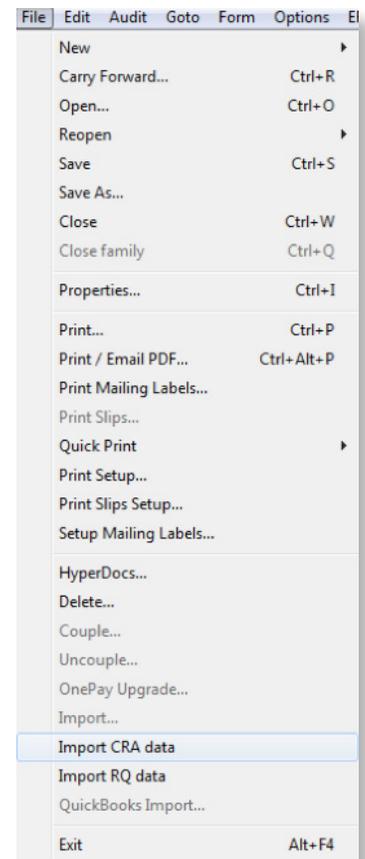
Please visit the **CRA website** for more information.

# How do you use CRA Data Import?

1. Open the 2013 T1/TP1 return into which you want to import the amounts.
2. If you haven't already done so, on the Info worksheet, in the **Residency** section, ensure that the **Province of residence** is selected.
3. Go to the **File** menu and click **Import CRA data**.

ProFile opens an embedded web browser and connects to the CRA website.

4. In the embedded browser window, click **Represent a Client** and sign in to your account.
5. On the **Access Client Information** page, enter the client's SIN and click **Access SIN**.
6. Click the **Client Summary** tab to open the Client Summary page.



7. To import the displayed amounts into the current return, click the **Import** button within the embedded browser window.
8. When ProFile finishes importing the information, you are automatically signed out of the **Represent a Client** website. Note that this process is a CRA requirement.
9. Close the embedded browser window. To see the fields that were imported into the return, open the **Auditor** (press **CTRL+F9**) and click the **Carry Forwards** tab. Imported data also appears in purple within the appropriate forms.

## 1. How do I check that the data imported?

You can see the fields that were imported in the **Carry Forwards** tab of the Auditor tool (press **CTRL+F9**). The imported data also appears in purple within the appropriate forms and slips.

## 2. What data is imported by CRA Data Import?

We looked at what the CRA made available and import only data that is relevant to tax preparation. As the CRA makes more data available in the future, we will include it in the imported information. Currently, we import the following information:

Instalments

- Instalments available to claim (Other Credits worksheet, line 476)

RRSP, HBP and LLP (RRSP/PRPP worksheet):

- RRSP deduction limit
- Unused RRSP contributions
- Required HBP repayments
- Required LLP repayments

Carryover Amounts:

- Eligible taxable capital gains (T657)
- Capital gains deduction (T657)
- Federal and provincial tuition, education, and textbook amounts (Schedule 11)

## 3. Do you import any other government data?

We do! The **RQ Data Import** feature is similar to **CRA Data Import**. RQ allows the following information to be imported:

- Information on the following slips: RL slips (RL-1, RL-2, RL-3, RL-5, RL-6, RL-7, RL-8, RL-10, RL-16, RL-19, RL-22, RL-24, RL-25, RL-26, and RL-29), T4, T4A, T4A(P), T4A(RCA), T4RIF, T4RSP, T4E, T4A(OAS), T4PS, T3, T5006, T5007, T5008, T101, T5013, and T2202A
- Instalment amounts
- Interest paid by Revenu Québec
- Some personal information on the T1 Info worksheet
- RC62 form: (Box 10 UCCB[0] and Box 12 UCCB[1])